



Customization Suite

Key Benefits

- Customize for right-fit CRM that models proven best practices for your industry
- Adapt screens and actions to be as relevant and useful to individual users
- Easily integrate to leverage information from other front and back-end systems

“We wanted a system that was intuitive and as easy to use as possible. Maximizer CRM appealed to us because we could easily customize an array of screens. We like it because we can modify it down the road as our team becomes more confident with the system. This bottom up design is essential to the success of our CRM roll out because it gets the users involved in future customizations.”

Jack Guidry
VP & National Sales Manager
W&O Supply

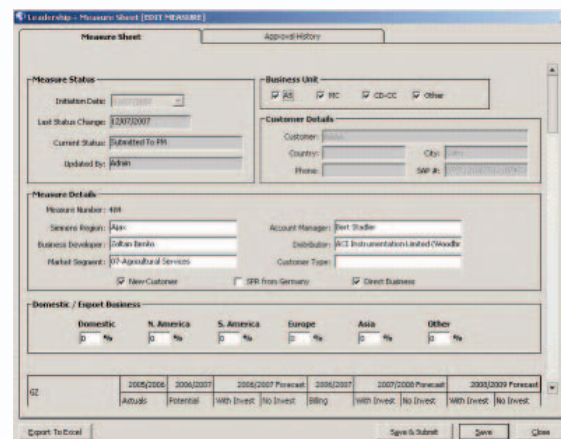
Customize CRM to Support & Accelerate Your Business

Maximizer CRM delivers exactly the CRM that fits to your organization’s processes and people by supporting customization at every level. Alter the software and interface to mirror business processes as they evolve.

Using familiar programming languages and industry standards to integrate with your front- and back-office applications, IT professionals, Maximizer experts and certified solution providers can easily tailor Maximizer CRM to suit your requirements.

Designed from the ground up for customization

Through an easy-to-use interface, developers and IT professionals have everything they need to integrate, customize and extend the power of Maximizer CRM.



The screenshot shows a 'Measure Sheet' window with the following sections:

- Measure Status:** Includes 'Initiation Date' (dropdown), 'Last Status Change' (2/20/2007), 'Current Status' (Submitted To PR), and 'Updated By' (John).
- Business Unit:** Includes radio buttons for AS, PC, CD-CC, and Other.
- Customer Details:** Includes fields for Customer, Country, City, and ZIP #.
- Measure Details:** Includes 'Measure Number' (488), 'Service Region' (Asia), 'Business Developer' (Julian Banks), 'Market Segment' (Agricultural Services), 'Account Manager' (Joni Stadler), 'Distributor' (ACI Instrumentation Limited Company), and 'Customer Type'.
- Domestic / Export Business:** Includes radio buttons for Domestic, N. America, S. America, Europe, Asia, and Other.
- Table:** A table with columns for years (2005/2006, 2006/2007, 2008/2007 Forecast, 2008/2007, 2007/2008 Forecast, 2008/2009 Forecast) and rows for 'Actuals', 'Potential', 'With Invest', and 'No Invest'.

Customize your Processes: This real-life example showcases the customization suite’s capabilities to create a unique screen for the financial services industry.

- Maximizer Web Service allows the easier exchange of information with Maximizer CRM over HTTP for standardized, faster integration with other web services ready applications.
- With access to the meta data layer through an easy-to-use interface customization utility, easily create alternate captions for field labels on dialogs, windows and menus to customize to your industry.
- Code examples in VB.NET and C# for creating custom program behaviors, windows and alerts, and integrating Maximizer Enterprise with other applications.
- Create custom windows and tabs and implement them for both the Windows client and Web Access.
- Enable integration and customized windows to work for both desktop and disconnected remote users with automatic third-party data synchronization.
- Connect to address book, calendar, customer service, notes, opportunities, phone and user-defined fields.
- Access detailed documentation including Maximizer CRM data and table structures.

Model business best practices

Increase productivity by giving staff a centralized view of information from across multiple applications. Create additional windows from accounting or other applications to answer customer inquiries, issues and concerns immediately — without having to switch applications or check with other departments.

Maximizer CRM 10.5 Features

- Account and contact management
- Time management
- Task management and automation
- Sales force automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronization
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: Mobile devices, web, Windows desktop, remote synchronization

Technology Partners



Certified Solution Provider



- Customize Partner and Customer Web Access to fit your business.
- Customize menu items, toolbar and window captions to personalize process interfaces.
- Add custom tabs and action menu items to the existing address book, opportunities, service cases and marketing campaigns.
- Give each department the flexibility to gather critical data with wizards to create custom fields and unique data entry forms.
- Set up customized actions and notifications to staff and partners for email updates on case status.

Integrate with other front and back-office applications

- Connect Maximizer CRM with other systems such as inventory management or ERP programs.
- Take advantage of the Accounting API programming interface to integrate with accounting programs. Create an additional window for customer-facing staff to see the financial details of customer accounts, including past estimates & invoices, credit balance and limit.
- Transfer data seamlessly between applications using XML.
- Synchronize data from other applications into Maximizer CRM in real-time or at regularly scheduled intervals, such as nightly or weekly.
- Schedule triggered data transfers to monitor applications for critical activities such as processed orders or late shipments.

Extend the functionality of Maximizer CRM with third-party products already available from Technology Alliance Partners (TAP), including:

- Add-on applications for specific industries
- Quote software
- Shipping software
- Address verification software
- And more...visit www.maximizer.com/partners/find_tap.html for a full list of products.

Take advantage of industry standards

- Visual Studio.NET
- Visual Basic® and Visual Basic .NET
- ASP.NET, Java, Java Script, C#
- Access, Delphi and Visual C++®
- XML for seamless data transfer
- Use direct, native SQL updates for industry-standard coding and faster customization
- COM library with over 35 objects, 900 functions, and data streams that open up the full power of Maximizer Enterprise to other applications
- .NET Assembly
- OLE and ActiveX®
- DDE to transfer data to applications such as Microsoft® Word, Excel® or WinFax

Why Maximizer CRM 10.5

1. **Simple** and quick to deploy, learn, use and maintain.
2. **Access** to critical information through mobile devices, the web and Windows desktop options.
3. **Best value** in its class for full-featured CRM.

Maximizer CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimization of limited resources.

Visit www.maximizer.com for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on CRM and Contact Management
- An overview of features and technology
- Online demos and free trial software
- White papers and webinars on CRM best practices

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