

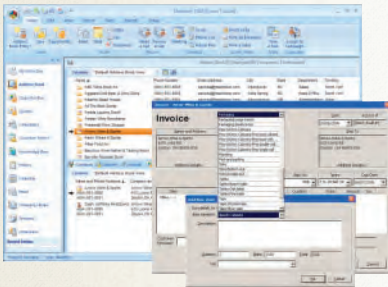
# Accounting Link

Designed for use with QuickBooks®



## Key Benefits

- Link directly to QuickBooks accounting system
- Generate new quotes and invoices
- Access complete financial history of customer



**QuickBooks Quotes and Invoices:** Generate accurate, timely quotes and invoices within Maximizer CRM.

## Get a full 360° view. Maximize customer satisfaction.

Leverage the wealth of information stored in your QuickBooks® accounting system and optimize the productivity of your sales and service staff with access to customer financial data directly through the Maximizer CRM interface. Accounting Link enables the integration of QuickBooks with Maximizer CRM. It pulls key accounting information directly into your customer records, to reduce redundancy and provide a 360° view of the customer. With immediate access to information, you and your staff can deliver the highest level of customer satisfaction and build relationships and drive repeat business.

## Service customers efficiently and effectively

- Empower your frontline staff with immediate access to customer financial data to answer questions faster. Look up a customer's credit limit, balance, quotes and past invoices—without having to contact the accounting department or install another application.

## Deliver accurate quotes

- Provide customers with accurate, timely quotes by retrieving up-to-date prices and inventory levels from QuickBooks.
- View the status of a customer's unpaid invoices before quoting on a new order.
- Save time creating quotes and entering invoices by working from one screen in a customer's Maximizer CRM record.
- Automatically save a complete history of transactions to the customer's record.
- View and create purchase orders for your suppliers.

## Monitor critical business activities and respond to opportunities

Respond to critical business activities and follow up on every opportunity. Save time by monitoring business in QuickBooks and Maximizer CRM with Workflow Automation.<sup>1</sup>

Examples:

- Automatically send a "Thank you" email to a customer when their order ships.
- Send an email to the account manager when a customer with a pending sale is put on credit hold.

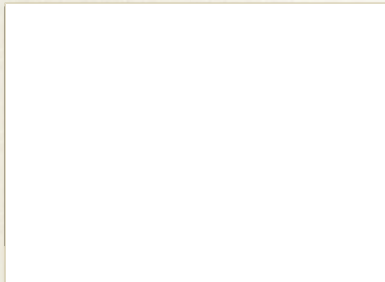
# Maximizer CRM 11 Features

- 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
- Access options: mobile devices, web, Windows desktop, remote synchronization

## Technology Partners



## Certified Solution Provider



## Deploy and link quickly

- Match and link Maximizer CRM customer records to your QuickBooks database with one click.
- Maintain accuracy and quality of your data by setting up security rights for individual users that allow them to view or edit transactions without creating new ones.
- Show information at a glance by linking QuickBooks fields with Maximizer CRM custom fields using the Customization Suite.<sup>ii</sup>

Contact Maximizer Software to learn how you can mobilize your workforce with Maximizer CRM 11 All Access.

i. Workflow Automation powered by KnowledgeSync is an add-on product with additional license fees.

ii. Customization Suite is an add-on product with additional license fees.

### Why Maximizer CRM 11?

1. **Simple & quick** to deploy, learn, use and maintain
2. **Access options** through the Web, desktop and mobile smartphones
3. **Value.** Best value for a full-featured CRM, low total cost of ownership.
4. **Expertise.** More than 20 years as a pioneer and leader in CRM.

### Visit [www.maximizer.com](http://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.

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

**Maximizer Software**  
Simply Successful CRM

Call: 1-800-804-6299

Email: [sales@maximizer.com](mailto:sales@maximizer.com)

Web: [www.maximizer.com](http://www.maximizer.com)

Americas  
604-601-8000 PH  
604-601-8001 FAX

[info@maximizer.com](mailto:info@maximizer.com)  
[www.maximizer.com](http://www.maximizer.com)

Europe, Middle East  
+44 (0) 1344 766900 PH  
+44 (0) 1344 766901 FAX

[info@max.co.uk](mailto:info@max.co.uk)  
[www.max.co.uk](http://www.max.co.uk)

Australia, New Zealand  
+61 (0) 2 9957 2011 PH  
+61 (0) 2 9957 2711 FAX

[info@maximizer.com.au](mailto:info@maximizer.com.au)  
[www.maximizer.com.au](http://www.maximizer.com.au)

Asia  
+(852) 2598 2888 PH  
+(852) 2598 2000 FAX

[info@maximizer.com.hk](mailto:info@maximizer.com.hk)  
[www.maximizer.com.hk](http://www.maximizer.com.hk)  
[www.maximizer.com.cn](http://www.maximizer.com.cn)