All access options

Access Maximizer CRM when and where you need it

Optimise productivity and increase profitability

To work effectively and stay ahead of your competitors in today's demanding business environment requires a flexible and convenient CRM solution that delivers essential information and tools to suit where and how your staff work. Whether working in the office, from home, remote offices or on the road, Maximizer CRM All Access licencing provides a variety of options in one all-inclusive licence. All Access enables you and your team to work productively and effectively, to deliver the levels of sales, marketing and customer service required to build relationships that drive revenue.

Available in Your Cloud - internally on your cloud server, hosted by a third party data centre or by one of Maximizer's Global Certified Solution Providers, or alternatively in Our Cloud, via our Maximizer CRMLive solution, accessible on your mobile on your mobile smartphone or tablet, Maximizer CRM offers unparalleled access in one value-packed solution and brings critical information to you – wherever, whenever and however you do business with no need to install software on each user's desktop!

Powerful and intuitive cloud CRM

Maximizer CRM installed on your cloud or in our cloud provides your customer-facing staff with the critical information and tools they need to provide excellent service for customers and prospects to close more deals. With your central corporate CRM database of customer information available via a secure web access link maintained on-premise, the powerful suite of built-in tools provided by Maximizer CRM are enabled on your desktops through wired or wireless network access, laptop, mobile, any web-enabled device, empowering your teams to:

- Empower your remote workforce and enable strategic collaboration with access to critical information by logging into a secure web interface, anywhere, anytime
- Provide full access to accounts, leads, sales opportunities, notes, custom fields, calendars, tasks, and customer service cases
- Manage appointments, tasks and a series of standard processes with action plans to organise projects and systematically schedule follow-up activities
- Manage data quality: find and combine duplicate records
- Manage security using the new Auditing tool, which logs all information about data changes to help track internal security breaches and intrusions, creating a trail of information over time, showing what changes have been made, when and by whom for maximum cloud security
- Modify and create User Defined Fields (UDFs) customised to your business processes for easy search functionality
- Access and update customer and lead information, sales opportunities, customer service cases, marketing campaigns, documents, calendar appointments,

Key Features:

- Account and contact management
- LinkedIn integration
- Time management iCalendar® integration
- Task management and automation
- Sales force automation & forecasting
- Marketing campaign automation & manage ment
- Customer service management
- Microsoft Office® integration
- Outlook & Exchange synchronisation
- Business intelligence
- Workflow automation
- Partner relationship management
- Access options: mobile devices, Web, Windows desktop, remote synchronisation.

Mobile access: Work productively and effectively... anywhere, anytime, with intuitive and easy to use touch screens, optimised for the latest technology.

tasks, and more

- Maintain strategic thinking with sales opportunity management and reports
- Create marketing campaigns and access essential tools and company documents through the new, enhanced web access platform, now including full marketing campaign management, action plans and document library
- Merge Maximizer held data directly with Microsoft Office including:

  - Microsoft Word® with mail merge for creating personalised letters, personalised email templates for standard professional communications and Excel export of customer and sales data while automatically updating Maximizer entries when sending a Word document to print

  - Save Word documents merged with Maximizer entries to customers' timeline and documents library

  - Microsoft Outlook, saving emails to customer Service case, avoiding duplicate email note and saved

- Depend on wizard-driven dashboards for real-time insight into your business at a glance
- Export and manipulate business data via new built-in Excel reports, or build your own reports in Excel, that will update in real-time for enhanced business intelligence
- Collaborate with colleagues and communicate effectively with customers

- Deploy web access with ease by customising the .NET framework- to make it work for your organisation, including custom windows and tabs
- Integrate with your corporate intranet, including internal documents and policies, plus external links to give users quick access to other critical information.

Mobile CRM for on-the-fly response

Whether you're in sales, on a field service team, or a frequent-flyer executive, Maximizer Mobile CRM[1] keeps you on top of the critical customer and prospect information essential to your success. Mobile devices, including BlackBerry®, Windows Mobile®, iPhone®, iPad® and other popular smart phones and tablets have become critical tools to compete effectively. Now, with Maximizer on your mobile device, you can go beyond reading and reacting to email and be proactive about managing your customers and winning more deals. Leverage the power of CRM with the convenience of mobility to build customer relationships, boost productivity, collaborate with colleagues and provide real-time updates for forecasting and planning — anytime, anywhere.

- Get the edge on your competitors to win more deals
- Skip the logon page,with automatic logon to access Maximizer more quickly via mobile devices
- Respond regardless of time or

location to engage prospects, build customer loyalty and close more deals

- Get real-time online access to the entire Maximizer CRM database content
- View address book entry contact information in appointment email/ remainders, with integration to Google Maps® for directions. Plus, "Find Free Time" function for easy appointment setting
- Monitor the status of your business and team performance at a glance, with real-time dashboards and reports and make timely decisions to drive revenue
- Track each customer's history, including conversations, transactions and service cases to deliver value, build loyalty and increase repeat business
- Optimised Address Book search, with auto-typing prompt and search by case number in Customer Service screen
- Make real-time updates from the field on lead status and qualification, forecasted revenue and sales opportunity details
- Minimise administration work back at the office and stay on top of follow-up activities while on the road
- Prepare for your next meeting or call with a complete view of the customer's information — including activity, account status and financial history
- Tap into valuable corporate

1. Functionality and offerings vary across smartphone devices. Contact Maximizer Software for details. For a complete list of supported devices, visit www.max.co.uk.
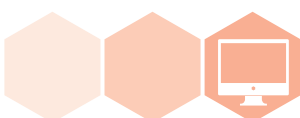
resources through the Company Library to send NDAs, brochures, quotes and other documents to customers and prospects

- Conduct timely follow-ups and keep deals moving, with access to updated details of sales opportunities
- Maximise customer satisfaction by resolving and updating service cases in the field.

Supported devices and browsers

Access your Maximizer CRM via any web-enabled mobile device, including smartphones and tables, via wireless web access for mobile devices and smartphones, iPhone®, HTC, Google Android® and Nokia® Windows Mobile.

iPhone® and iPad® and smartphones and tablets from HTC, Google Android, Nokia and more...

- Mobile access for Maximizer CRM allows you to view and update critical customer information in your Maximizer CRM database in real-time, through your iPhone's wireless web browser. Expand the capabilities of your iPhone smartphone with Mobile CRM and turn yours into a valuable business toool when you're on the road
- Real-time access and updates to your Maximizer CRM contacts, tasks, calendar, sales opportunities and customer service cases on-the-fly through your mobile smartphone's

wireless web browser

- Monitor key business KPIs in real-time from any location with Mobile Dashboards and take immediate action
- One-click access to maps and directions from customer records
- No synchronisation, local data or extra software to install on your device
- Wireless access is included when you purchase Maximizer CRM.

Visit our website for a list of all supported wireless devices and internet browsers.

MAXIMIZER
APPROVED
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Camsoft
CRM Solutions

Maximizer™
Simply Successful **CRM**

About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large enterprises.

Simple, easy to use and affordable, Maximizer CRM enables companies to mobilise their workforces through all-access web, smart phone, tablet and desktop delivery methods. Easily configurable for organisations in any industry, Maximizer CRM optimises sales processes, enhances marketing initiatives and improves customer service to ultimately boost productivity and revenue.

With headquarters in Canada and offices and business partners worldwide, Maximizer Software has sold over one million licences to more than 120,000 customers since 1987.

Certified Solution Provider

Camsoft CRM Solutions

T: +27 (0)21 797 4804
F: +27 (0)21 797 4744
E: info@camsoft.co.za
W: www.camsoft.co.za

Technology Partners

Powered by Windows Azure | Microsoft GOLD CERTIFIED Partner | SAP BusinessObjects | BlackBerry Alliance Member | Bell | Vineyardsoft

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Maximizer CRM

Maximizer CRM helps small and medium-sized businesses maximize their marketing, sales, customer satisfaction capabilities and enhance their productivity and efficiency through the optimisation of what resources they have.

Why Maximizer CRM?

- Simple & quick to deploy, use and maintain
- Flexible access options through web, desktop and mobile devices
- Value for money with low total cost of ownership and monthly subscription models
- Expertise as a leader in pioneering CRM development, with more than 20 years experience.

Visit www.max.co.uk for:

- A trial of the latest release
- Information on how CRM can support your role
- Tools and eBooks
- Resources and information on Cloud based CRM
- An overview of technology and features
- Online demos and features
- White papers and webinars on CRM best practices.

UK & Eire

T: +44 (0)845 555 99 56
F: +44 (0)845 555 99 66
E: info@max.co.uk
W: www.max.co.uk

France

T: +33 (0)1 70 75 81 10
E: info@maximizercrm.fr
W: www.maximizercrm.fr

Europe, Middle East, India

T: +44 (0)845 555 99 57
F: +44 (0)845 555 99 66
E: info@maximizer.eu
W: www.maximizer.eu

South Africa

T: +27 (0) 11 275 0116
F: +44 (0)845 555 99 66
E: info@maximizer.co.za
W: www.maximizer.co.za

Rest of the world

Americas
T: +1 604-601-8000
E: info@maximizer.com

Australia, New Zealand
T: +61 (0) 2 9957 2011
E: info@maximizer.co.au

Social

@MaximizerCRM
facebook.com/maximizerCRM
youtube.com/maximizer
linkedin.com/maximizer

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