



Web and Remote Access CRM

Key Benefits

- Implement quickly with unprecedented easy configuration
- Get web access while protecting valuable data on in-house servers
- Synchronize with remote and home office workers

“We wouldn’t have been able to develop our field force without Maximizer CRM and its remote access capabilities. In order to have functional field reps, we needed a way for them to report in, provide updates and get information from us. Maximizer CRM gave us a way to work live remotely.”

Andrew Knowles, Assistant Sales Manager
StemCell Technologies Inc

Work when and where you want

Today’s workforce is more remote and mobile than ever before. Maximizer™ CRM gives your workforce the options they want for access to critical information. Whether working from home, in a remote office, or on the road, the anytime, anywhere design of Maximizer CRM delivers reliable customer and prospect insight when and where it’s most needed. Maximize productivity: choose from a Windows desktop using remote synchronization, or Web Access to get sales and customer information where and when you need it.

Synchronize to remote contributors for company-wide empowerment

MaxExchange, the conduit for remote access to all data within Maximizer CRM, brings remote office team members into the fold for real-time collaboration.

From the moment a remote team member logs in using Windows desktop software, MaxExchange automatically uploads that individual’s data updates to the main database, and synchronizes the most recent information from the team at headquarters.

Get the right information to the right person—with no downtime

- Distribute opportunities and action items to appropriate team members, chronologically adjusted to account for worldwide locations and time zones.
- Save time by synchronizing only the data that has changed, with powerful data compression and integrity checking.
- Send notes and documents to remote users based on creation date and size to reduce the volume of synchronized information.

Keep productivity high with ease-of-use

- Runs in the background, communicating with the server automatically or manually. End users need never worry about the process of synchronization, instead focusing on the tasks at hand.
- Reports from the server show administrators data transfer progress including server configurations, site numbers, and transport mechanisms for easier discovery and resolution of potential connection failures.
- Configure to send automatic, real-time alerts when data connections fail.¹
- Synchronize via FTP, using a WAN connection, or over your email system.

Ensure reliability, security

- Automatically detect out-of-sequence and lost data packets and generate alerts to the administrator, requesting a resend in order to maintain data integrity.
- Secures information with 128-bit encryption to protect against data theft.

Maximizer CRM 10 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: Windows desktop, web, mobile devices, remote synchronization

Technology Partners



Certified Solution Provider



Web Access for real-time convenience

Maximizer CRM's Web Accessⁱⁱ option presents the same user interface as the desktop software, so the user experience is continuous and familiar. Employees log-in from anywhere to access the CRM database and carry out daily tasks using a secure, standard web browser.

Business users maintain continuity

- Check and update appointments and tasks, search and update customer records and opportunities in your pipeline, send emails, view outstanding customer support cases, and resolve incidents online—all via whatever view best meets individual needs.
- Collaborate to close sales with strategy-based opportunity management.
- Review tasks and appointments for an associated customer, lead, sales opportunity or service issue.
- View the bigger picture of sales progress of territories and teams, viewed in whichever format best suits your needs
- Access reports and dashboards for real-time business visibility

Ease of deployment for IT

- Based on the .NET framework, easily customize Web Access view to make it work for your organization, 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.

i. Requires Workflow Automation, which is an add-on product with additional license fees.

ii. Please inquire with sales for details on pricing of Web Access options.

Why Maximizer CRM 10

1. **Simple** and quick to deploy, learn, use and maintain.
2. Secure **access** to critical information that makes business move forward.
3. **Best value** in its class for full-featured CRM.
4. Built on a technology foundation that is **fast-deploying** as well as fast-performing.
5. Access the Maximizer team of deeply experienced **CRM experts** dedicated to creating rapid results.

Visit www.maximizer.com for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on features and technology
- Online demonstrations, trial software
- White papers on CRM best practices
- Webinars

Maximizer CRM helps small and medium-sized businesses maximize revenue, maximize satisfaction, and maximize every single day.

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