

The highlights of what's new in Maximizer CRM 12 Summer 2013

Group and Enterprise Editions



The Summer 2013 release of Maximizer CRM 12 continues our commitment to deliver simple to use CRM to ensure your business can attract, engage, succeed... anywhere, anytime.

To be successful, your sales, customer service and marketing teams need access to critical customer information anywhere at anytime.

Maximizer CRM 12 Summer 2013 provides enhancements and new features to improve the overall usability and productivity, while making it easier to access all your information via your mobile devices - because in today's business world, you simply cannot afford to be disconnected from customer requests or potential sales opportunities because of limited access to your Customer Relationship Management (CRM) system. With access via mobile devices, the web or your Windows® desktop, Maximizer CRM 12 Summer 2013 gives you choice of access — whether in the office, at home or on the road, it is adaptable to your business processes to ensure the growth of the business' profitability.

The improvements and new features introduced are designed to enhance your business productivity and business intelligence, specifically the ability to view, organise and retrieve customer data, increase social profile building with LinkedIn® integration and one click access to social media accounts.

Maximizer CRM 12 Summer 2013 provides a holistic view of your customers empowering you to attract, engage and succeed wherever you are.

Social networking

Build dynamic social profiles of customers and prospects by linking directly to relevant social networks and contacts' LinkedIn profiles¹.

LinkedIn integration

- Prospect and generate new sales opportunities with the ability to search, view and link directly to a contact's or company's LinkedIn profile from Maximizer
- Enhance the level of customer engagement with access to a contact's LinkedIn profile and shared connections within a company
- Determine key contacts within a company to target those with the greatest influence in the purchase decision
- Improve customer service and build customer loyalty with an additional channel of communication
- Use new User Defined Fields to capture web links to social media profiles.

Social profile building

- Build complete customer and prospect profiles by capturing links to all relevant social networks in one place
- Obtain up-to-date information on your contacts with direct links to external websites and social media profiles (blogs, Twitter®, Facebook®, LinkedIn).

Key Features:

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

1. Requires Premium LinkedIn Account

Access your CRM system via almost any mobile device and benefit from comprehensive CRM functionality on the move.



Mobile access

Intuitive user interface

With an intuitive user interface – optimised for the latest technology – mobile access enables you and your team to work productively and effectively, without boundaries. Just some of the benefits include:

- Provide teams throughout your organisation the freedom to choose between different browsers and devices
- Save money by removing the need to purchase and manage different applications based on mobile devices: Maximizer CRM 12 Summer 2013 is fully accessible on popular mobile devices and tablets, including: BlackBerry®, iPhone®, Android®, iPad®, BlackBerry® (incl. Z10 & Q10) and many more
- View and update your contacts, tasks, appointments, sales opportunities and customer service cases while on the road
- Search with auto-typing prompt and filter by company, contact, opportunity, case number or saved list or search
- Monitor critical business Key Performance Indicators (KPIs) in real-time from any location with mobile dashboards and take immediate action
- Plan your day of appointments and activities by mapping multiple customers with one-click access to maps and directions from customer records
- Improved usability on larger

screens, to make access via tablet highly intuitive

- Enhanced column display, enabling you to view more information on a smaller screen, ideal for smartphone use
- Find contacts more rapidly whilst on the move with the quick search capability from the home screen and more comprehensive search options in Address Book
- Persistent filters for notes and documents, including date range, type and category are saved for easy retrieval
- Save time by opening documents associated with Address Book entries, calling or emailing a contact with one touch using a 'swipe' action, directly accessing Google Maps® via an address book entry and using the 'find free time' function
- Use the automatic login option to gain instant access without delays
- Complete appointments and tasks quickly in the calendar/hotlist screen, simply by swiping the row.

Web access

View, organise and retrieve key customer information easier and faster with improved web access performance and navigation tools.

Enhanced web access user interface

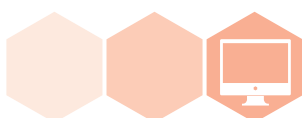
- Target only the key information you need in one consolidated window and customisable views
- Increase user adoption with the

modern and intuitive interface that is easy to navigate

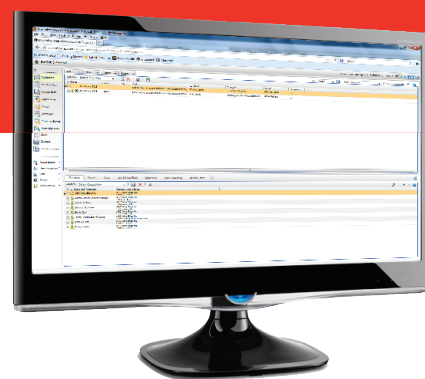
- View and organise customer information quickly and easily with the new 2-pane window and filter options.

Improved performance and usability

- Enhance the level of communications and reporting with Microsoft Office, Word® and Excel® integration
- Ensure data entry and automated workflow consistency throughout the organisation with improved web administrator rights
- Increase convenience and flexibility by accessing Maximizer CRM through internet browsers while retaining control of your data stored within your premises
- Enhance customer service with the ability to upload a photo to a contact, or company address book entry
- Execute campaigns from the convenience of the web with access to full marketing campaign functionality
- Manage and combine duplicate records
- Create and modify User Defined Fields, customised to your business processes for easy search functionality
- Maximizer CRM web access Word add-in supports sending a Microsoft Word document, including labels and envelopes, to the printer, automatically merging the document with entries in Maximizer - and then saving the Word document to the relevant Maximizer entries.



Achieve more on the web than ever before with comprehensive upgrades to Maximizer's web access in Summer 2013.



Improved speed and navigation

- Save time and increase productivity with improved navigation and faster response time to commands
- Improve the level of customer service with the ability to retrieve contacts, customer service cases and opportunities directly from a company record
- Increase efficiency by performing actions and printing notes directly from a contact's record
- The "Previous" and "Next" buttons now allow navigation between Address Book entries in the Maximizer CRM web access list, when previewing a merged document.

Improved functionality

Save time and money by inserting or updating Address Book entries via wizard driven HTML web-to-lead forms.

- Enhance contact understanding with a history following window which features a 'Facebook' style feed that combines notes and documents into one chronological view
- Keep your CRM up to date with the latest tips, news and free documentation by connecting with Maximizer Software's LinkedIn, Twitter and Facebook sites via your Maximizer CRM
- Seamless synchronisation between your Outlook and Maximizer, add contacts and track and save email correspondence automatically²
- Improved printing functionality: Maximizer CRM web access Word add-in supports sending a

Microsoft Word document, including labels and envelopes, to the printer, automatically merging the document with entries in Maximizer - and then saving the Word document to the relevant Maximizer entries.

Sales

Increase sales & close more deals

Gain an edge over competitors and equip your team with the most impactful sales force automation solution that provides access to customer and sales information.

- Update customer, lead and sales information anywhere, anytime with multiple access options - through web browsers or mobile devices and tablets
- Increase leads and close more deals by viewing and focusing on opportunities with the greatest potential (i.e. shortest lead time, highest revenue, highest probability)
- Document the entire history of each customer's lifecycle - tracking conversations, transactions and incidents to help deliver greater value over time
- Manage unlimited companies and contacts, profiled using custom fields, such as lead source, industry, company size and products.

Measure performance and potential

With wizard-driven dashboards, managers begin each day with a visual health check on leads, opportunities

and deals in progress.

- Stay updated on team, territory and individual performance, ensuring accountability and the required level of motivation within your sales organisation
- Keep tabs on your biggest deals by staying alerted to important changes in their status²
- Analyse opportunities and adjust strategy accordingly with instantaneous reports that deliver insight through sales pipeline funnels, lead summaries and forecast analysis
- Manage products, quotes and orders linked to sales opportunities to accurately track the entire sales and purchase cycle.

Optimise sales resources

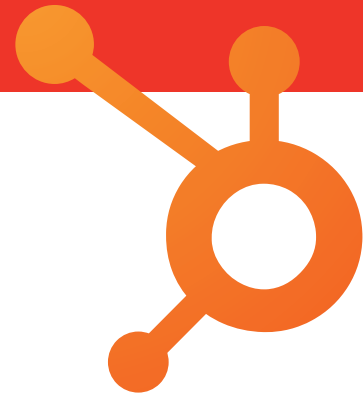
Increase close ratios by modelling best sales practices that guide sales people through a proven process.

- Apply sophisticated, custom methodologies to better manage unique opportunities, or take advantage of simple Action Plans and improved built-in templates that keep straightforward deals moving ahead
- Drive more sales through channel partners with Partner Relationship Management³ lead assignment and forecasting
- Automatically assign leads and accounts based on territory rules ensuring that high potential opportunities flow to the appropriate teams and representatives

2. Requires Workflow Automation powered by KnowledgeSync. Additional licence fees apply.

3. Partner Relationship Management is an add-on product. Additional licence fees apply.

Integrate with leading online marketing software Hubspot.⁴



- Track the progress of deals in the pipeline with territory reports
- Make the most of your day, thanks to the details tab view optimised for web access and Google Maps® integration.

Marketing

Target precisely to maximize response & return on investment (ROI)

- With the powerful, built-in campaign manager and email marketing engine, you can validate and execute more targeted, cost-effective campaigns
- Spend your marketing budget wisely by measuring results and redirecting resources to initiatives that generate proven returns
- Create and manage dynamic email templates with additional security permissions to promote safe sharing
- Introducing the HubSpot Connector.

Fill the sales pipeline with targeted leads

Make the most of every outreach and ensure solid follow-up every time, by tightening up the tactics of your email-based marketing.

- Target customers and prospects quickly with relevant content, using easy profiling and list management
- Comply with privacy, do-not-call and anti-spam legislation with out-of-the box, system enforced safeguards.

Identify what works by tracking campaign results

Automatically calculate campaign ROI — instantly see conversion rates, evaluate the cost of customer acquisition and interpret response rates to focus on what's working.

- Track the progression and outcome of opportunities by campaign to determine the link between targeted marketing and closed deals
- View campaign response rates at-a-glance to identify which tactics are most successful.

Improve marketing productivity

Effectively manage marketing resources to optimise time and budget on high-yield projects that contribute to the bottom line.

- Keep track of important campaign details and deadlines by assigning step-by-step action plans to team members
- Share marketing collateral and documents across your organisation to ensure consistent branding and communications
- Save time and money by inserting or updating address book entries via wizard driven HTML web-to-lead forms.

HubSpot Connector

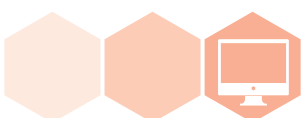
The Maximizer CRM: HubSpot Connector⁴ is a powerful tool that

bridges the gap between Maximizer CRM and sales pipeline management and HubSpot, the all-in-one inbound marketing software. With HubSpot, you can amplify your online lead generation and conversion efforts, including: measuring the effectiveness of your website, develop responsive landing pages, create informative blogs and schedule your social media activities across Twitter, LinkedIn, Facebook, Google+®, Pinterest®, YouTube® and Xing®.

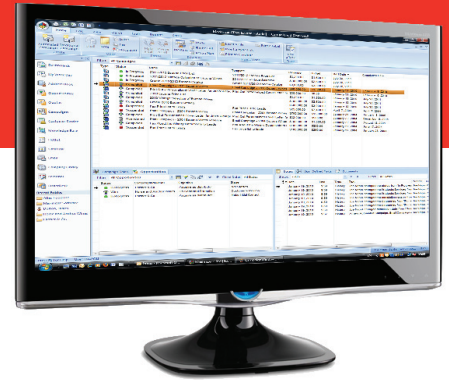
All leads generated will seamlessly flow into your Maximizer CRM, putting HubSpot's lead intelligence and prospect profile information into the hands of the Sales team, thus improving the quality of marketing leads generated, shortening the sales cycle for improved sales conversion and closing the loop between marketing effort and sales revenue.

- Lead integration: new leads and enquiries captured in HubSpot flow seamlessly to your account managers in Maximizer
- Prospect intelligence: put HubSpot's rich marketing intelligence into Maximizer to learn more about every prospect and customer
- Bi-directional sync: new records that originate in one system (Maximizer or HubSpot) can be instantly passed to the other system
- Closed loop reporting: see the connection between your marketing efforts and won opportunities in Maximizer to enhance decision making
- Customer lead scoring: control

4. Maximizer CRM: Hubspot Connector is an add-on product at extra cost



Monitor opportunities and sales metrics to effectively manage and trigger next steps seamlessly.



which leads are sent to Maximizer and when, based on any HubSpot activity or criteria, including customer lead scoring

- Customise contact profiles: Maximizer basic or customised fields can be mapped to HubSpot to keep contact profiles current and ensure effective segmentation
- Sales team notifications: send customer notification emails to sales representatives when leads take key actions on your website
- Track lead sources: see which sources are producing customers, down to the keywords they search and individual pages they came from
- Lead nurturing: use online behaviour tracking to get the ideal email message or sales offer to the right prospect at the right time.

Business intelligence

Make swift, effective business decisions, seize opportunities and refine processes with real time key performance metrics and status reports.

Dashboards

- Quicker, more comprehensive and more customisable dashboards than ever before
- Gain instant views of business metrics with an automated dashboard template that you can use right out of the box or customise to capture your own unique key performance indicators

- Share key metrics, save time and improve visibility across the organisation with the ability to email dashboards
- Maximize rolling date options for greater dashboard configuration.

Reporting

- Save money and time by utilising built-in SQL Server Reporting Services (SRSS)
- Quickly and easily retrieve the reports you need with access to built-in reports for each of the main CRM modules (i.e. Sales Opportunities, Marketing Campaign ROI, Customer Service cases).

Customer Service & support

Resolve issues faster to maximize your customer satisfaction

Shape your customer's experience by providing your service and support teams with the information and tools to interact and resolve issues quickly and efficiently. Satisfy customers by delivering exactly what they need, when they need it, helping them to become self-sufficient. Leverage new found customer confidence to cross-sell, up-sell and promote repeat business.

Navigate service issues to rapid resolution

With timely access to product and customer information, service representatives deliver greater value on every call.

- Track, escalate and resolve customer service issues received through any incoming channel (phone, email or web) to ensure follow-through on every interaction
- Resolve issues faster with a central repository of critical customer case details and a knowledge base of common incident resolutions
- Enhance contact understanding with a history following window which features a 'Facebook' style feed that combines notes and documents into one chronological view
- Manage resource allocation to ensure your team's profitability
- Give service representatives access to the big-picture view of where to focus their efforts for success and the tools they need to be more efficient on every interaction
- Make the best use of specialised knowledge by assigning and escalating cases based on expertise
- Get clarity on interaction volume and assign staff to match demand on products, service lines or channels
- Ensure service agreements are renewed on a timely basis by tracking contract expiry dates
- Save time by saving multiple emails to a contact with one click.

Measure and improve service quality

Automate internal processes to prompt reps at every step and track team performance.

- Deliver timely service by

Build your own custom key performance indicators with Maximizer CRM dashboards, to gain instant insight into what matters to your business.



automatically notifying reps of new case assignments and overdue cases

- Analyse case queues to ensure customer satisfaction and retention remain high
- Gain a clear view of your overall service record with real-time access to critical customer service metrics through the dashboard.

Microsoft Office® integrations and add-ins

Improved workflow between Maximizer and Microsoft Office

Continued efforts have been made to greatly improve and enhance workflow between Maximizer CRM 12 Summer 2013 and Microsoft Office, particularly with Microsoft Word® and Microsoft Outlook®.

- The Microsoft Word add-in for Maximizer CRM supports creating envelopes and mailing labels for the current entry in Maximizer or for multiple selected entries; the envelopes and labels are automatically formatted with the name and address of the Maximizer contact
- The commands for the add-in are located in the Maximizer tab in the Microsoft Word ribbon to make them easier to identify
- The insert merge field dialog allows insertion of multiple merge fields at once, with no need to re-open the dialog for each merge field, thus speeding up the process of

authoring documents containing many merge fields.

64-bit Office add-in for Maximizer CRM

- Microsoft Word add-in (64-bit) works for both Windows and web access
- Microsoft Outlook add-in (64-bit) works for Maximizer CRM web access

Usability and productivity enhancements

Seamless Microsoft Office & Outlook integration

Communicate easily and work more effectively with seamless integration with popular applications.

- Create documents, letters, faxes and emails with ease, including personalising with merge fields in Microsoft Word®, storing customer communications under each contact record for easy reference
- Access and synchronise calendars and tasks between Maximizer CRM 12 Summer 2013, Outlook and your smartphone and tablet
- Instantly export data (customers, opportunity lists and reports) to Excel® with one-click for further analysis in a familiar environment
- Direct links to SharePoint® documents
- Save time and access the most-up-to date information with hyperlinks to SharePoint documents, directly from the Company Library

- iCalendar integration and appointment management
- Set-up and manage appointments seamlessly with internal colleagues and external customers using the most popular calendar applications
- Stay on track with two-way synchronisation of appointments between Maximizer CRM & Outlook calendar and any mobile device.

Dependent tasks

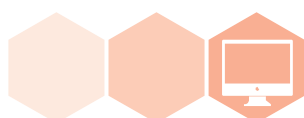
- Ensure compliance regulations are met by setting up an action plan whereby each task is dependent on the previous one being completed
- Deliver a consistent customer experience by ensuring set processes are followed.

Form customisation and display options

- View and navigate with ease through a customisable layout of all of the key information required based on specific business needs
- Save time and target only the information you need with customisable views.

Quick Address Book access

- View contact information of an associated address book entry from the appointment, hotlist task and alarm dialogs, view a map of the entry's address or perform commonly used actions like creating a customer service case or scheduling a meeting
- View address book entry contact information in appointment email



reminders

- Select multiple opportunities or service cases and retrieve all the associated address book entries at once in the address book page
- Select multi-value fields, with a drop-down list to select items, and filter the entries displayed in the list to make it quicker and easier to find specific entries in long lists.

Search and view filter options

- Details tab view displays contact information instantly, without requiring the extra click by the user
- Details tab view in the Hotlist module allows quick access to contact information
- The action links in the details tab provide quick access to commonly used functions
- New ability to print appointments and improved print appointment details report
- Built-in reports: gain instant views of business metrics wherever you are, with an automated dashboard
- Filter communications, lists, searches, and opportunities based on most commonly used date ranges, ascending/descending order and/or only those created by the user
- Increase efficiency with quick access to and categorisation of information based on selected criteria
- Maximise productivity by sending personalised, tailored messages to an number of contacts by merging customer information from opportunities, customer service or

address book modules

- Search, print and export (in your preferred format) the most relevant information in using the date filter option in notes and documents
- Conduct faster searches with the ability to choose only your own column setups, favorite lists, or saved searches
- Place shortcuts on the icon bar to quickly access your commonly used favourite lists or saved searches.

Maximizer CRM web Application Programming Interface (API)

Maximizer CRM web data access API

The Maximizer CRM web data access API is a web service API that allows third party developers to access Maximizer CRM address book data across a network over Hyper Text Transfer Protocol (HTTP). The API methods are accessible via both Simple Object Access Protocol (SOAP)/ Extensible Markup Language (XML) and Javascript Object Notation (JSON) endpoints allowing developers to access the API from server-side applications, client-side Javascript applications using Asynchronous Javascript and XML (AJAX), or even lightweight mobile applications via XML HTTP Request (XHR).

The web data access API currently supports the following⁵:

- Search for Address Book entries, notes, and documents

- Create, read, modify, and delete Address Book entries, including access to both basic and user-defined fields
- Create, read, modify, and delete notes
- View and download documents.

Maximizer CRM web following grid integration framework

The Maximizer CRM web following grid integration framework allows application developers and business partners to create custom integrations within Maximizer CRM web access. Using the following grid integration framework, developers can create their own custom following tabs to be displayed in the address book, opportunities, customer service, campaigns, or hotlist pages in web access.

The grid integration framework currently supports the following:

- Display a grid populated with data supplied by a custom web service created by the developer
- Display a view bar menu containing custom widgets that trigger events defined by the developer
- Display dialogs and perform other actions in response to user input
- Integrate with the Maximizer CRM web data access API to use Maximizer data in the custom tab.

5. Additional functionality will be added progressively in future releases



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



T: +353 (1) 297 3322
F: +353 (1) 295 7049
E: info@software-support.ie
W: www.software-support.ie

Technology Partners



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 test drive of the latest release
- Information on how CRM can support your role
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UK & Eire

T: +44 (0)845 555 99 55
F: +44 (0)845 555 99 66
E: info@max.co.uk
W: www.max.co.uk

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

Social

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

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

Asia

T: +(852) 2598 2888
E: info@maximizer.com.hk



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