Maximizer Enterprise™ 8

Simply Successful CRM

Reasons to upgrade

Workflow Automation to monitor data.

Monitor your business systems and respond automatically to critical business activities with new Workflow Automation powered by KnowledgeSync[1]. Save everyone time and make sure no opportunities slip through the net.

Simply apply your business context and logic to configure Workflow Automation to monitor the massive amounts of information coming into your business every day and alert people or assign tasks automatically.

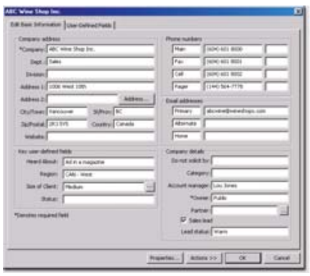
Automatic E-mail Alerts: Monitor your business and configure real-time alerts to ensure no opportunity slips through the net

- Examples:
- Automatically send an alert to the sales manager and schedule a follow-up call for a client if a hot lead has not been contacted in five days.
- Automatically schedule a report to be sent to the customer service manager every Friday morning with information on the team's phone logs and account activities.
- Configure your system to monitor web leads or incoming e-mails and schedule a series of automatic e-mails back to the prospect, and alert the account manager in their territory for a follow-up phone call.

Maximizer Enterprise Workflow Automation gives you an edge on your competition and makes building successful relationships seem so much easier.

Sales lead and account management.

- Identify and manage leads and convert them easily to customers.

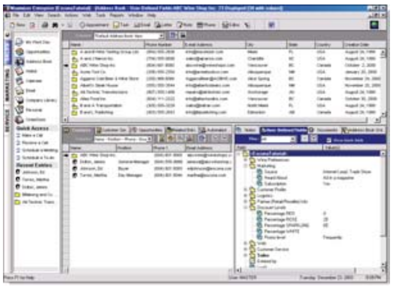


Lead and Account Management: Identify and manage leads and convert them to customers

- Assign leads to business partners and resellers, then automatically send an e-mail alert to ensure no leads slip through the net.
- Track lead status and source to monitor the sales funnel and success of marketing programmes.
- Assign account managers to take ownership of leads and customers, then report on the sales funnel, forecast, or phone logs, by account manager.
- Understand your clients influencers and decision makers your clients by tracking the reporting relationships within their organisations.
- Show important information upfront when a customer record is opened by assigning key user-defined fields.

Improved list and campaign management for more effective direct marketing.

- Automatically measure campaign response statistics such as e-mail open rates and landing page click-throughs so you see your campaign ROI and maximise your marketing pounds.
- Effectively manage opt-in and opt-out lists for targeted direct marketing and newsletter lists. New do-not-solicit function and enhanced data security ensures you comply with new privacy, anti-spam and do-not-call legislations which protect your customer from unwanted solicitations and you from costly penalties.



Categorised and Multi-Level User-Defined Fields: Profile your customers and sort the information for easy searching

- Increase the reach to your customer base with automated multi-phase e-mail, fax, and print campaigns too.
- New categorised and multi-level user-defined fields give you more control of how you organise and sort customer profile information. Help sales and service staff find information faster to accurately enter information and better service customers when they're on the phone. Plus you can maintain data integrity by including descriptions and 'requested by' information for each user-defined field.
- Easily perform searches under multiple criteria, such as purchase date, country and product interest, with improved complex searching.
- Ensure campaigns are running smoothly and hitting customers on schedule by sending automatic alerts to the marketing manager and system administrator when there's an issue with an e-mail or fax campaign.
- With tighter integration between account information and marketing campaigns, know which promotions or newsletters your customer or prospect is receiving so you can tailor your sales message effectively.

Advanced integration with Microsoft Outlook.

With Outlook integration, users who are accustomed to this interface can read Outlook e-mail inside Maximizer Enterprise and also save messages to customer records. This way, you don't have to look through the Inbox, Sent Items, and other folders when you and your colleagues need quick access to customer communications history. You can now compose HTML e-mails and access your Outlook contacts from Maximizer Enterprise so you can include colleagues in customer e-mail communications. If you prefer to use Outlook for all your e-mail, you can synchronise your customer list from Maximizer Enterprise into the Outlook address book - no re-formatting or re-typing required.

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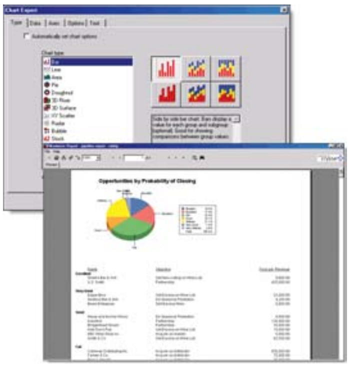
Gain visibility into customers with Crystal Reports.



Crystal Reports: Edit and customise your own Crystal Reports

Create, edit and produce customised reports to gain further visibility into your customers using best-of-breed business intelligence reporting tool, Crystal Reports, now included with every Maximizer Enterprise user. With Crystal Reports, use the Expert and Wizard tools to quickly and easily produce cross-tab, drill-down, summary reports and more. Highlight the information you need by grouping and sorting data, then add charts. Further analyse data in a familiar Excel environment, and publish reports to colleagues in PDF, Word, HTML and other standard formats.Even analyse data in other database applications[1], such as your accounting or ERP systems, against the customer data in Maximizer Enterprise to get a complete view of your customer history, transactions and relationships. Then automatically have reports delivered directly to key stakeholders that need to see critical information either on a regular schedule or dependent on critical customer activities, using Maximizer Enterprise Workflow Automation. Maximizer Enterprise 8 now also supports Crystal Analysis for multi-dimensional analytical views.

Improved Customer Service and Support module.

- Effectively and efficiently manage, track, escalate and resolve customer service cases to keep customers satisfied.
- Manage service level agreements and track resources effectively through billable hours and rates.
- Ensure customer service enquiries are resolved in a timely manner and customers are satisfied, by seeing how long a case has elapsed.
- Personalise communications with customers throughout the sales cycle by including customer service details in merge fields.
- Import and export documents in the Knowledge Base in XML format so you can convert your existing documents and share them with others.

Powerful Web Portals for employees, partners, customers.

- The web-based Employee Portal, Partner Portal and Customer Portal are now built on .NET technology so it's easier to manage and integrate with other applications.

Web Access: Employee Portal built on .NET

- Through the Employee Portal, enable remote and mobile staff to access important customer, schedule and sales information through a web browser.
- With the Partner Portal, manage communications, leads and sales forecasting with third-party resellers.
- With the Customer Portal, create unique online experiences for customers, including customer self-service.

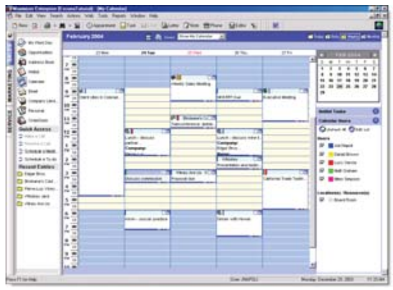
Easier to install. Stronger and faster remote synchronisation with MaxExchange.

With the fastest deployment in its class, Maximizer Enterprise is now even faster and easier with an installation wizard which helps you get up and running quickly. MaxExchange is now even easier to configure and manage remote users. Transfer data faster and automatically be alerted of data transfer errors to ensure remote users have the most up-to-date information.

Calendar for better time management and collaboration.

My Work Day: See a snapshot of the dayís important activities and tasks

The brand new 'My Work Day' home page helps staff manage their day by seeing a quick summary of the day's appointments and tasks, plus important company announcements from managers.



Improved Time Management: Collaborate with co-workers and manage schedules

The brand new calendar helps you collaborate with team members by seeing multiple users' calendars in one view. You can also book board rooms, meeting rooms and other resources such as projectors.

[1] Monitoring applications in addition to Maximizer Enterprise requires the purchase of a Workflow Automation DB Connection Upgrade for every additional application.

[2] Using Crystal Reports with other databases requires an upgraded license, available from Business Objects or its resellers.

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