

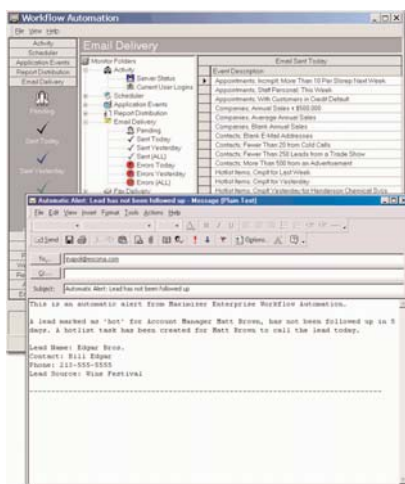
Workflow Automation | Monitor and respond automatically powered by KnowledgeSync | to critical business activities



Your business contains rich amounts of information on your customers, prospects, partners and suppliers. Within all this data, how do you identify critical information which requires immediate attention?

Maximizer Enterprise Workflow Automation powered by KnowledgeSync monitors your business systems and automatically assigns the appropriate people to take action. This saves everyone time and makes sure no lead or customer slips through the net.

Perhaps your sales manager needs to be alerted to customers with pending sales opportunities which have just been put on credit hold. Or your customer support manager wants to receive a report automatically every Friday morning with information on the team's phone logs and account activities. Or you want web visitors who've just downloaded your report to receive a series of automatic e-mails, and alert the account manager in their territory for a follow-up phone call.



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

Just apply business context and logic to your data to give yourself the power to respond proactively. Configure Workflow Automation with rules to process the information and the logic of who to send alerts and reports to. You don't have to waste time searching for these instances and you can be confident that you're not missing any more opportunities to build successful customer relationships.

Respond immediately with real-time alert messaging.

- ▶ Receive alerts on critical business activities via e-mail, fax, pager, PDA or phone so you can respond to time-sensitive information wherever you are.
- ▶ Monitor information in Maximizer Enterprise as well as other database applications such as your accounting or inventory systems¹ for greater visibility into your business's important daily activities.
- ▶ Examples:
 - ▶ If a hot lead has not been contacted in five days, send an alert

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

automatically to the sales manager and schedule a follow-up call for the client by the appropriate account manager.

- ▶ When more than four customer service cases are entered for one customer in a given week, send an alert to the customer support manager and the appropriate account manager.
- ▶ Monitor web leads, import them automatically into Maximizer Enterprise and subscribe them to a one-on-one follow-up e-mail campaign and alert the appropriate account manager.
- ▶ Send an automatic e-mail alert to a business partner or reseller when their client calls for customer support.
- ▶ Send alerts to the sales manager when customers are placed on back-order and the inventory arrives in stock.
- ▶ Send reminders to remote sales reps who haven't synchronised in three days.
- ▶ Receive exception reports only when exceptions occur. For example, receive alerts when employees enter inconsistent data such as missing contact information, or provide unauthorised discounts on products.
- ▶ Check for new or updated marketing collateral and distribute alerts to business partners, resellers and employees.

Put critical information into the hands of decision makers on time.

- ▶ Automatically generate and distribute Crystal Reports on your schedule. For example, every Monday morning at 9:00 am, generate and distribute sales forecast reports to sales managers and last week's service statistics reports to the customer support manager.
- ▶ Generate dynamically and distribute Crystal Reports based on the occurrence of an action within Maximizer Enterprise or another application. For example, if an account manager abandons or loses more than five opportunities in one week, send a sales territory forecast and phone log activity report to the sales manager.
- ▶ Save time on generating reports by enabling a Crystal Report auto-fulfillment request system. When an employee submits a request for information such as sales figures to the IT department, generate and return the report via e-mail automatically.

Monitor and take action automatically on incoming e-mail.

- ▶ Respond quickly and create higher customer satisfaction by monitoring the incoming e-mail to your sales@, customerservice@ or other generic e-mail address. Don't let genuine enquiries and leads slip through the net. With the E-mail Response System, simply apply rules based on message content or sender and take action to respond immediately.
- ▶ Monitor incoming e-mail messages, identify the customer's record in Maximizer Enterprise and route the e-mail to the appropriate account manager while appending the e-mail to the customer's record.
- ▶ Schedule tasks, phone calls or appointments automatically in Maximizer Enterprise based on details of an incoming e-mail message, such as a customer complaint or a product quote request.



- ▶ Send an automatic response to the sender based on the message content so they know that you're actively investigating their enquiry. For example, create a customer service case automatically when an e-mail is received and send receipt confirmation with case number back to the sender.

Monitor your operating environments to minimise downtime.

- ▶ Configure Workflow Automation to monitor all your critical business applications 24 hours a day, seven days a week to ensure your systems are up and running. If anything goes down, send an alert to your network administrator's pager.
- ▶ Maintain a high level of network security by checking log file contents for priority messages and alert the appropriate IT staff to take immediate action.
- ▶ Monitor disk space, network availability, and any part of your system which is quantifiable and critical - deal with issues before they create problems.

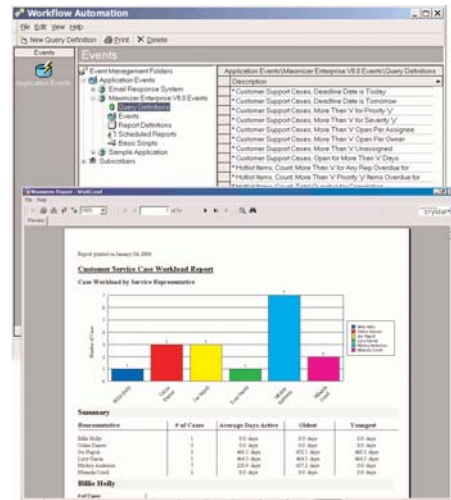
All the activities and information coming and going in your business every day may seem overwhelming. Identify the critical events which key people need to respond to, and ensure no customer enquiry or opportunity slips through the net. Maximizer Enterprise Workflow Automation will give you an edge on your competition and make building successful customer relationships seem so much easier.

System Requirements

Workflow Automation, powered by KnowledgeSync, is a server-driven application; servers perform all tasks including checking applications for triggered events, sending out alert messages and generating reports. System resources can be optimised by disabling specific message delivery servers which will not be used.

- ▶ Operating System: Microsoft Windows 95, 98, NT, 2000, ME, XP
- ▶ Memory: 128 MB of RAM
- ▶ Processor: Pentium 290 (or higher)
- ▶ Hard disk space: 64 MB for installation; 32 MB for the application
- ▶ 5 kb maximum per event, including event, query, subscribers and all message text

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Scheduled and Triggered Reports: Generate and distribute reports automatically on a weekly schedule, or based on an action taken in Maximizer Enterprise

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