

# Maximizer CRM: Customisation Suite



## Customise CRM to support & accelerate your business

Maximizer Customer Relationship Management (CRM) software supports customisation at every level, to deliver the specific user interface and information required by your organisation to streamline processes and effectively leverage the skills of your staff. The Customisation Suite provides the flexibility you need to alter the software and interface to mirror your business processes as they evolve.

Using familiar programming languages and industry standards to integrate with your front and back-office applications, you can easily tailor Maximizer CRM to suit your requirements.

### Designed from the ground up for customisation

Through an easy-to-use interface, developers and IT professionals have everything they need to integrate, customise and extend the power of Maximizer CRM.

- Maximizer Web Service allows the easier exchange of information with Maximizer CRM over HTTP for standardised, faster integration with other web-ready applications
- With access to the meta data layer through an easy-to-use customisation utility interface create alternate captions for field labels

on dialogs, windows and menus to tailor these to your industry.

- Code examples in VB.NET and C# for creating custom program behaviors, windows and alerts, and integrating Maximizer CRM with other applications
- Create custom windows and tabs and implement them for both the Windows desktop client and Web Access
- Enable integration and customised windows to work for both desktop and disconnected remote users with automatic third-party data synchronisation
- Connect to address book, calendar, customer service, notes, opportunities, phone and user-defined fields
- Access detailed documentation including Maximizer CRM data and table structures.

### Model business best practices

Increase productivity by giving staff a centralised view of information from across multiple applications. Create additional windows from accounting or other applications to answer customer enquiries, issues and concerns immediately — without having to switch applications or check with other departments.

- Customise Partner and Customer Web Access to fit your business
- Customise menu items, toolbar and window captions to personalize

### Key Benefits:

- Customise Maximizer CRM to model proven best practices for your industry
- Adapt fields, screens and actions so they are specific to your business
- Easily integrate to leverage information from other front and back-end systems.

process interfaces

- Add custom tabs and action menu items to the existing address book, opportunities, service cases and marketing campaigns
- Give each department the flexibility to gather critical data with wizards to create custom fields and unique data entry forms
- Set up customised actions and notifications to staff and partners for email updates on case status.

### Integrate with other front and back-office applications

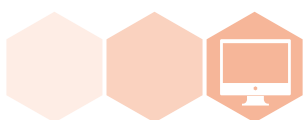
- Connect Maximizer CRM with other systems such as inventory management or ERP programs
- Create an additional window for customer-facing staff to see the financial details of customer accounts, including past estimates & invoices, credit balance and limit
- Transfer data seamlessly between applications using XML.

- Synchronise data from other applications into Maximizer CRM in real-time or at regularly scheduled intervals, such as nightly or weekly
- Schedule triggered data transfers to monitor applications for critical activities such as processed orders or late shipments.

Extend the functionality of Maximizer CRM with third-party add-on products already available from MaxApp Partners, including:

- Applications for specific industries
- Data management
- Document management
- Reporting
- Quoting
- Shipping
- Address verification
- Mobile applications

Visit MaxApp World for a full list of applications to help customise your Maximizer CRM at <http://www.max.co.uk/our-software/maximizer-crm-editions/maxapp-world>





## 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.

### Maximizer Approved Partner



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### 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](http://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
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- Online demos and features
- White papers and webinars on CRM best practices.

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