

Maximizer Synergy

Adafi Software is een samenwerking gestart met **Advoco Solutions**, een Maximizer Business Partner uit Groot-Brittannië.

Advoco Solutions heeft een technologie ontwikkeld, genaamd Synergy, die ons gemakkelijker toelaat extra modules toe te voegen in Maximizer. Synergy maakt het mogelijk om snel additionele basismodules te creëren en biedt ook een platform ter ondersteuning van meer uitgebreide en complexere customisaties op een kost-efficiënte wijze.

Voor veel gebruikers biedt Synergy dezelfde flexibiliteit die komt met een Maximizer customisatie-project, maar men boekt sneller resultaat en het biedt minder risico's aan lagere ontwikkelingskosten.



Kortom, **Maximizer Synergy is de snelste en goedkoopste manier voor het toevoegen van extra modules in Maximizer**. Voorbeelden hiervan worden besproken op de volgende pagina's (in het Engels). Uiteraard is Synergy niet beperkt tot de gegeven voorbeelden, maar kan het ook voor andere customisatieprojecten aangewend worden.

Met Synergy's technologie krijg je:

- Extra velden van de types: pick list, numerisch, datum, hyperlink en alfanumerisch
- Aanpasbare schermen, kolommen en filters
- Conditionele velden (e.g. wanneer het item 'Maximizer' geselecteerd wordt uit een pick list wordt het veld 'aantal gebruikers' verplicht in te vullen)
- De mogelijkheid om lijsten te bouwen, gebaseerd op één of meer zoekcriteria (gebruik makend van 'Search All Fields', vergelijkbaar met Maximizer)
- De mogelijkheid om records te linken aan meer dan één adresboek entry (bvb. Offerte-informatie is zichtbaar zowel bij het eindgebruikersrecord als bij het resellersrecord)
- Beveiliging op veld-, record- en moduleniveau laat je toe de toegang en gebruik te beheren voor individuele gebruikers of security-groepen

Voor de technicus

- Velden kunnen verplicht gemaakt worden en kunnen data-validatie-controles bevatten
- Elk veld of record kan met een ingebouwd script een proces automatiseren of meer functionaliteit toevoegen (bvb. wanneer een contractstartdatum wordt ingevoerd kan de contracteinddatum automatisch één jaar verder gezet worden)
- Meerdere modules kunnen met Maximizer gelinkt worden
- Modules kunnen onafhankelijk van (bvb Een prijslijst) of gelinkt aan Maximizer werken
- Synergy-data synchroniseren via MaxExchange remote synchronisatie
- Synergy creëert automatisch de nodige SQL-views voor data-import en -export, rapportering en integratie

Maximizer Synergy is een heel flexibele technologie en helpt customisatiekosten reduceren bij traditionele Maximizer customisatieprojecten. Contact **Adafi Software** voor meer informatie over Maximizer Synergy of met vragen, betreffende uw eigen Maximizer customisatieproject.



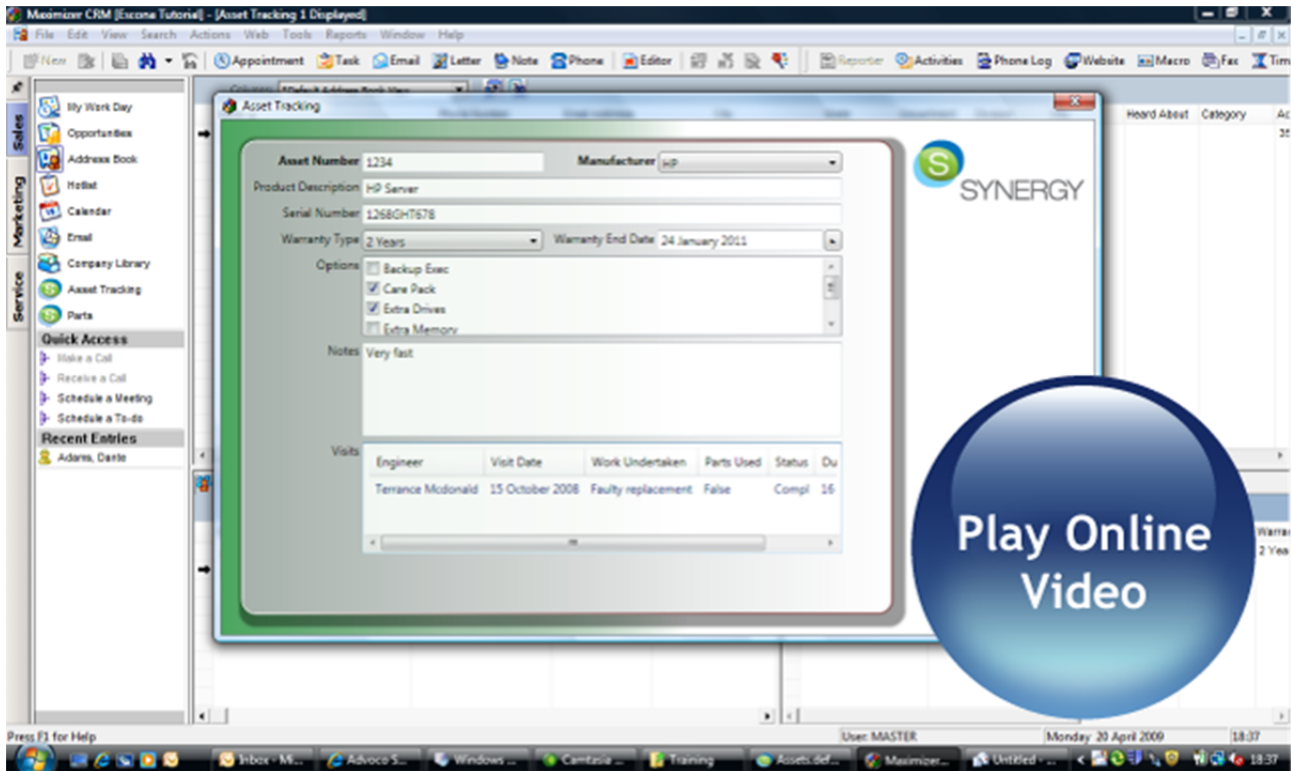
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Maximizer Synergy Asset Tracking & Management

Synergy can be used to manage your Asset Tracking requirements (equipment, machinery, hardware, property, etc.).



Synergy allows you to:

- ✓ Record the location of your own Assets and Assets that have been sold or assigned to your clients.
- ✓ Maintain details of warranties, contracts, renewals, relating to those assets.
- ✓ Keep a record of maintenance and repair work carried out on those assets.
- ✓ Issue warranty, contract, and renewal reminders to your clients.
- ✓ Build lists in the Address book based on assets details, warranty dates, etc.
- ✓ Set up alerts for Warranties/Contracts/Renewals due to expire.

Standard Synergy Functionality

The following standard features would be available to any Quotes/Orders & Pricelist Management system, deployed with Synergy:

- ✓ Customisable screen, column layout (including Application or Company branding, fields, etc.).
- ✓ Build lists based on single or multiple search criteria.
- ✓ Field and record level security to control how the module is used, allowing you to control what users can amend and view.
- ✓ Custom filters to make popular searches one click away (e.g. supplier or product/category filters).
- ✓ Conditional fields/Data validation that helps ensure the correct information is captured (e.g. when Ford is selected from a list, only Ford Cars can be selected).

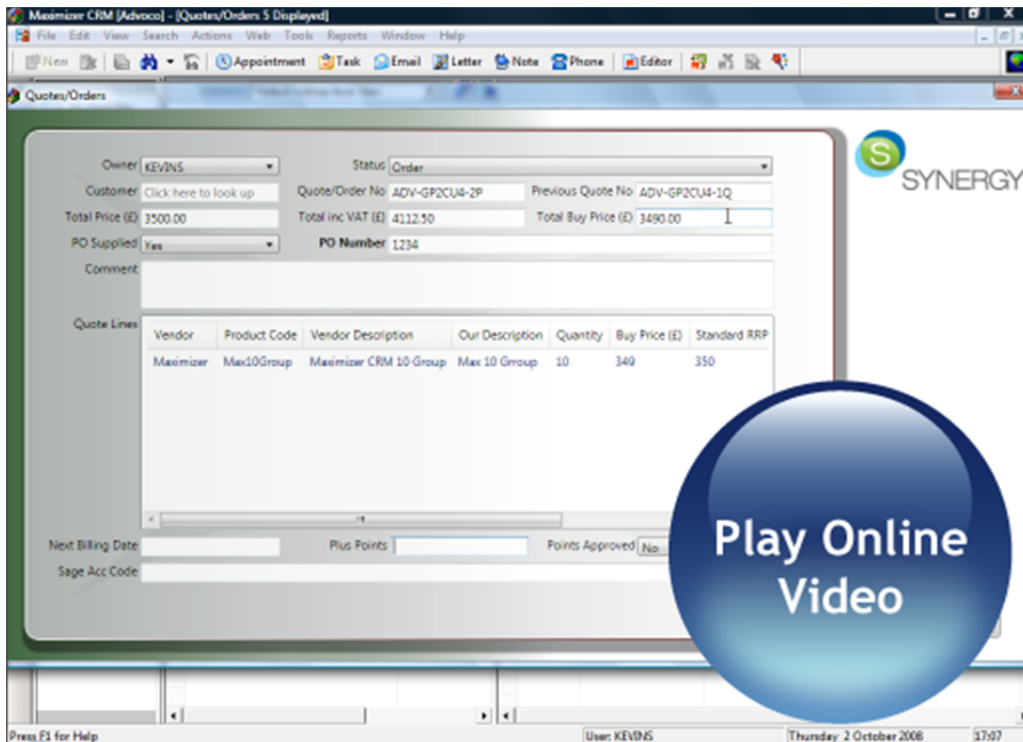
Reports & Analysis

Using the data in Maximizer and the Synergy Asset management system you can:

- ✓ See reports by Asset, Warranty End Date, Client.
- ✓ Analyse maintenance costs by Asset manufacturer & model.
- ✓ Analyse warranty/contract renewal rates.
- ✓ Use this information to understand which assets will require maintenance work in the next 30, 60, 90 days.

Maximizer Synergy Quotes & Order Management

Synergy can be used to manage your Quotes/Orders & Price list Management requirements.



Synergy allows you to:

- ✓ Manage a pricelist to be used in the quotes/orders area (including batch changes).
- ✓ Allow users to create quotes that pull through line items from the pricelist, as well as capturing any other information they need for quoting purposes.
- ✓ Link quotes to multiple organisations (e.g. an agent or referrer).
- ✓ Raise quotation documents to send to your customer.
- ✓ Capture different versions of the quotation (version control).
- ✓ Promote quote to order with extra fields and functionality available (e.g. Purchase Order capture).
- ✓ Build lists, based on quotation content, values or status.

Standard Synergy Functionality

The following standard features would be available to any Quotes/Orders & Pricelist Management system, deployed with Synergy:

- ✓ Customisable screen, column layout (including Application or Company branding, fields etc.).
- ✓ Build lists, based on single or multiple search criteria.
- ✓ Field and record level security to control how the module is used, allowing you to control what users can amend and view.
- ✓ Custom filters to make popular searches one click away.
- ✓ Conditional fields/Data validation that helps ensure the correct information is captured (e.g. when Ford is selected from a list, only Ford Cars can be selected).

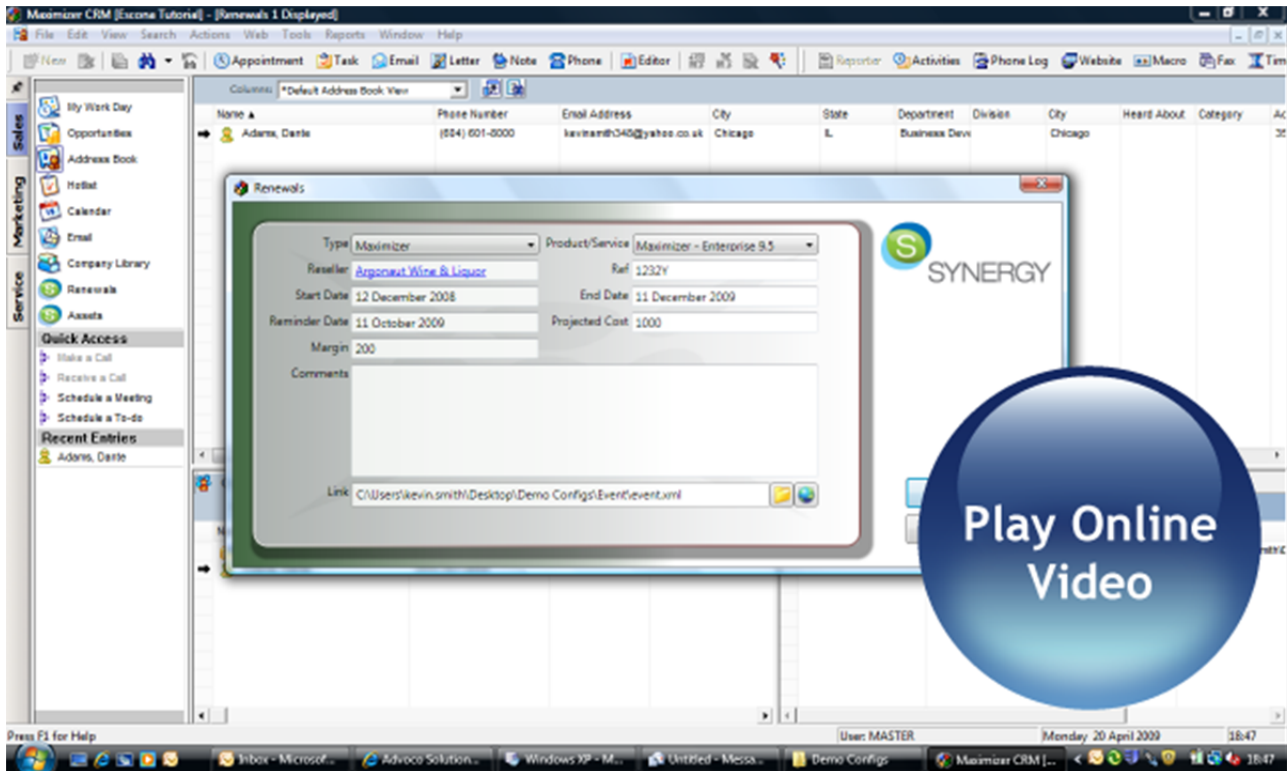
Reports & Analysis

Using the data in Maximizer and Quotes/Orders & Pricelist Management system, you can:

- ✓ See reports by item, vendor, product type, etc.
- ✓ Analyse quotation and order values and success rates.
- ✓ Analyse what quotes/orders have been abandoned, what is outstanding or overdue.
- ✓ Use this information to understand what stock/resources will be required in the next 30, 60, 90 days.

Maximizer Synergy Subscription & Renewals Management

Synergy can be used to manage your Subscription & Renewals management requirements.



Synergy allows you to:

- ✓ Track each of your customers' renewals and subscriptions, across each of your products and services.
- ✓ Create alerts, informing you of renewals and/or subscriptions, due for renewal.
- ✓ Build mailing lists of subscribers to specific products or services.
- ✓ Issue customers with renewal notices and/or subscription invoices.

Standard Synergy Functionality

The following standard features would be available to any Quotes/Orders & Pricelist Management system, deployed with Synergy:

- ✓ Customisable screen, column layout (including Application or Company branding, fields etc.).
- ✓ Build lists based on single or multiple search criteria.
- ✓ Field and record level security to control how the module is used, allowing you to control what users can amend and view.
- ✓ Custom filters to make popular searches one click away (e.g. supplier or product/category filters).
- ✓ Conditional fields/Data validation that helps ensure the correct information is captured (e.g. when Ford is selected from a list, only Ford Cars can be selected).

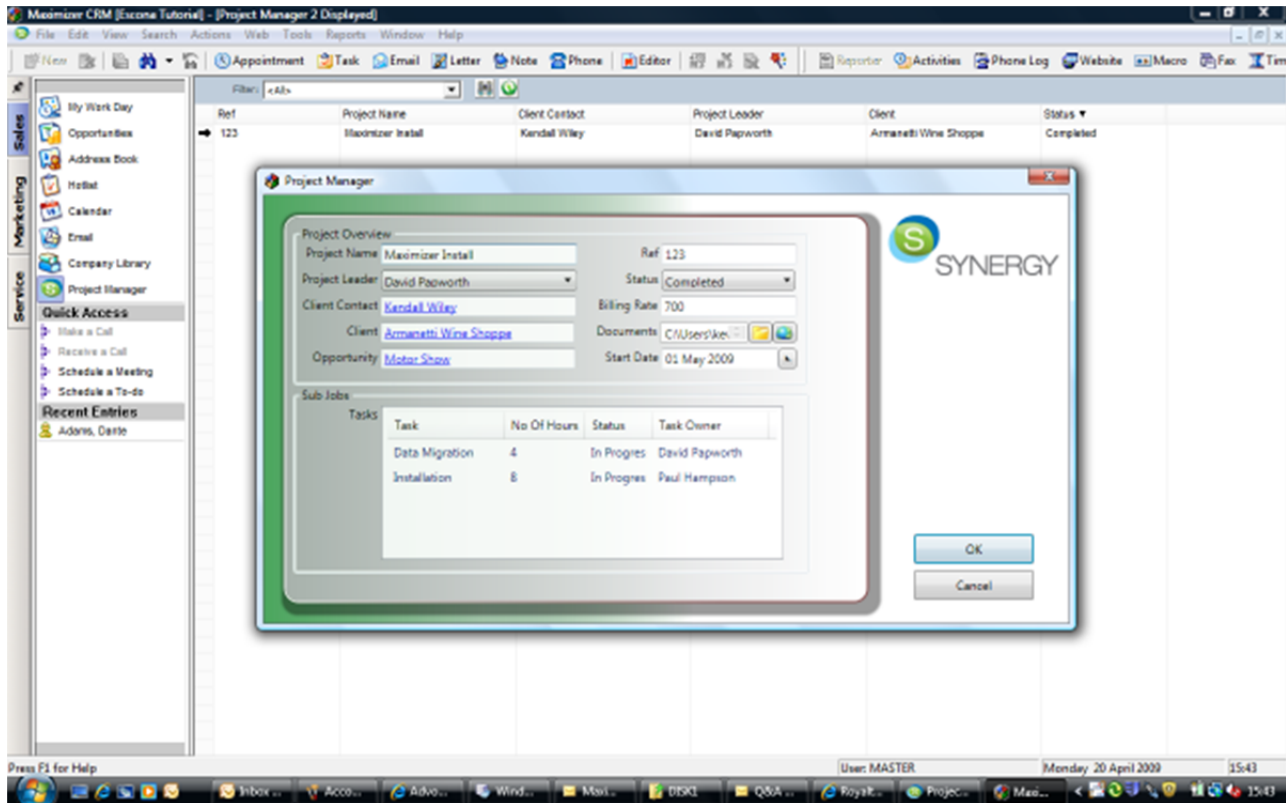
Reports & Analysis

Using the data in Maximizer and Subscription & Renewals Management system, you can:

- ✓ Report on renewal rates by Product, Region, Customer Profile, etc.
- ✓ Analyse forthcoming subscription revenue by month/quarter/year.
- ✓ Analyse renewals not taken, outstanding or overdue.
- ✓ Understand what staff & resources will be required to service renewals, taken in the next 30, 60, 90 days.

Maximizer Synergy Project Management

Synergy can be used to manage your Projects within Maximizer.



Synergy allows you to:

- ✓ Capture Project Management Overview/Status information.
- ✓ Link Projects to multiple organisations or people (e.g. Customer Project Manager or Project Partners).
- ✓ Add and edit tasks quickly.
- ✓ Link to Project Document Folders.
- ✓ Link to the Sales Opportunity.
- ✓ Assign Projects and tasks to the appropriate personnel.
- ✓ Assign security permissions to either a project or a task.

Standard Synergy Functionality

The following standard features would be available to any Quotes/Orders & Pricelist Management system, deployed with Synergy:

- ✓ Customisable screen, column layout (including Application or Company branding, fields, etc.).
- ✓ Build lists based on single or multiple search criteria.
- ✓ Field and record level security to control how the module is used, allowing you to control what users can amend and view.
- ✓ Custom filters to make popular searches one click away (e.g. Supplier filters, product category filters).
- ✓ Conditional fields/Data validation that helps ensure the correct information is captured (e.g. when Ford is selected from a list, only Ford Cars can be selected).

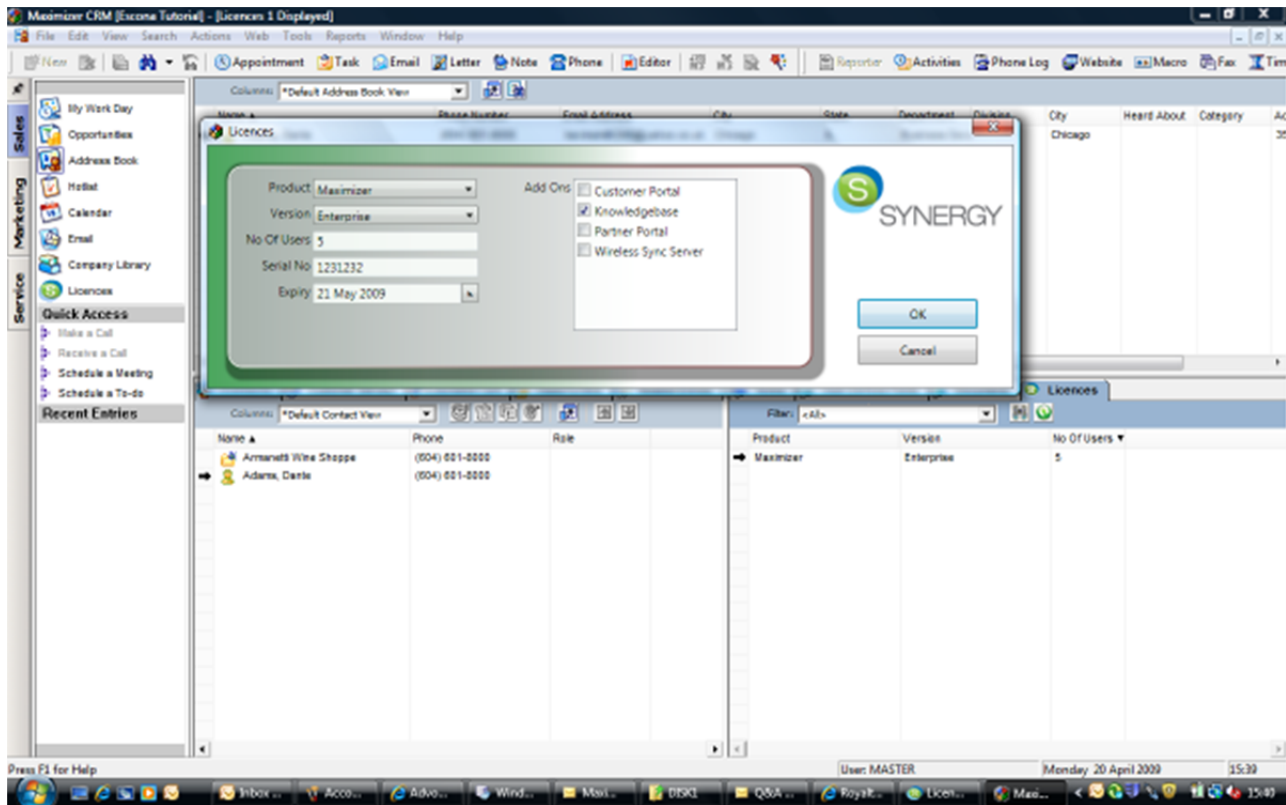
Reports & Analysis

Using the data in Maximizer and the Project Management system, you can:

- ✓ Create Gant Charts.
- ✓ Export Project Information To Excel .
- ✓ Analyse live, outstanding and overdue Projects and tasks.
- ✓ Compare Project costs to Sales revenue.

Maximizer Synergy License Manager

Synergy can be used to manage your Software License Management requirements.



Synergy allows you to:

- ✓ Record Serial & License numbers, issued to your clients and/or resellers.
- ✓ Manage the relationship between license, reseller and end user.
- ✓ Maintain a record of end user support levels for each product.
- ✓ Maintain a history of version upgrades by product & customer.
- ✓ Manage subscription based licenses and support contracts.
- ✓ Build lists in the Address book based on product details, support level, support end dates, etc.
- ✓ Set up alerts for Licenses, Subscriptions and Support Contracts, due to expire.

Standard Synergy Functionality

The following standard features would be available to any Quotes/Orders & Pricelist Management system, deployed with Synergy:

- ✓ Customisable screen, column layout (including Application or Company branding, fields, etc.).
- ✓ Build lists based on single or multiple search criteria.
- ✓ Field and record level security to control how the module is used, allowing you to control what users can amend and view.
- ✓ Custom filters to make popular searches one click away (e.g. supplier or product/category filters).
- ✓ Conditional fields/Data validation that helps ensure the correct information is captured (e.g. when Ford is selected from a list, only Ford Cars can be selected).

Reports & Analysis

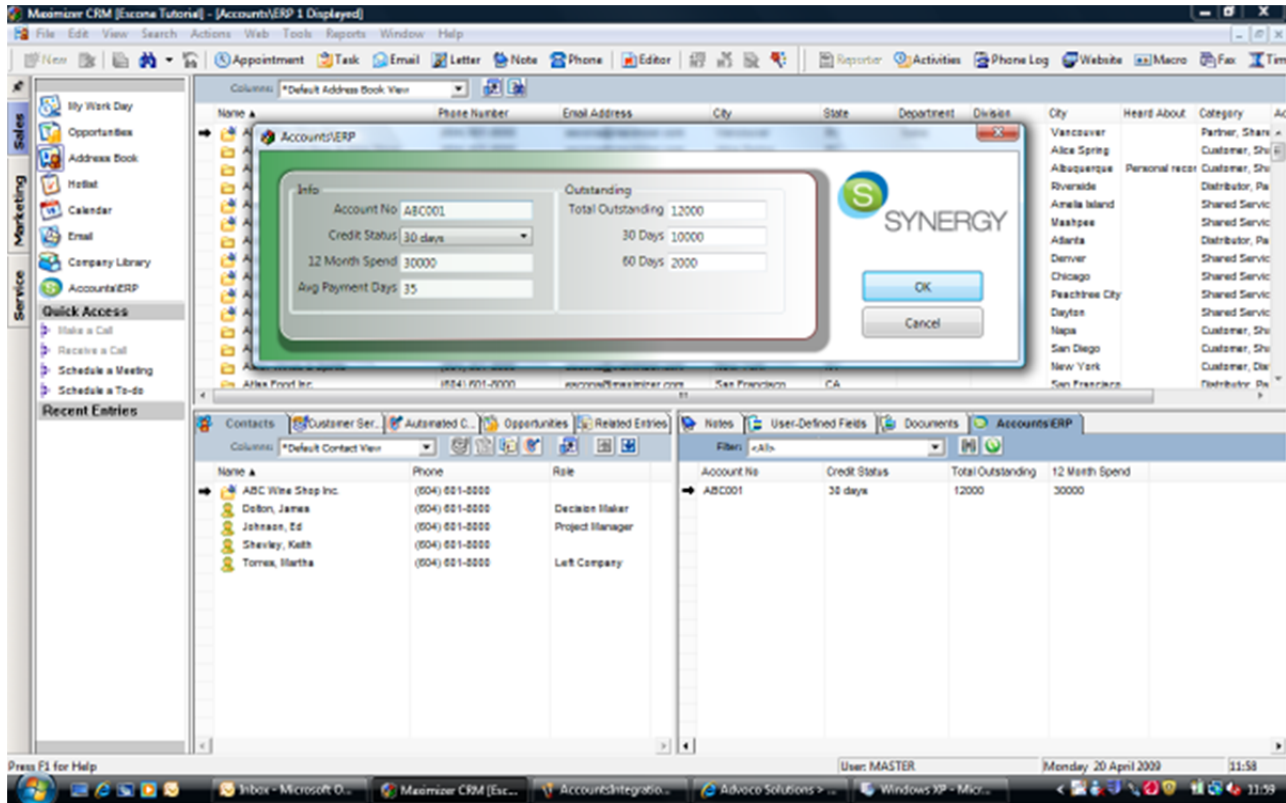
Using the data in Maximizer and the License Management system, you can:

- ✓ Report on the number of licenses of each product sold/upgraded in any given time period.
- ✓ Analyse support & maintenance costs by customer and by product.
- ✓ Analyse support contract and license subscription renewal rates.
- ✓ Report on license revenue by product/region/customer profile, etc.

Maximizer Synergy Accounts/ERP Integration

Synergy can be implemented as part of an integration project with any Microsoft SQL based Accounts/ERP application. Depending on the implementation, the integration could be writable or read-only (as appropriate to your requirements and budget).

This example below shows you a generic screen that is aimed at integrating with an Accounts package.



Popular Uses for Accounts/ERP Integration

Once deployed, we find that customers will use their Accounts/ERP integration to:

- ✓ Easily see accounts status against their Maximizer record (e.g. annual spend, credit limit/status).
- ✓ View Invoice/Order history per customer.
- ✓ Build a list in Maximizer of customers with unpaid/overdue invoices.
- ✓ Search on accounts line items within Maximizer.
- ✓ Complete the picture of enquiry - opportunity - sale - invoice in one place.

Standard Synergy Functionality

The following standard features would be available to any application, integrated with Synergy:

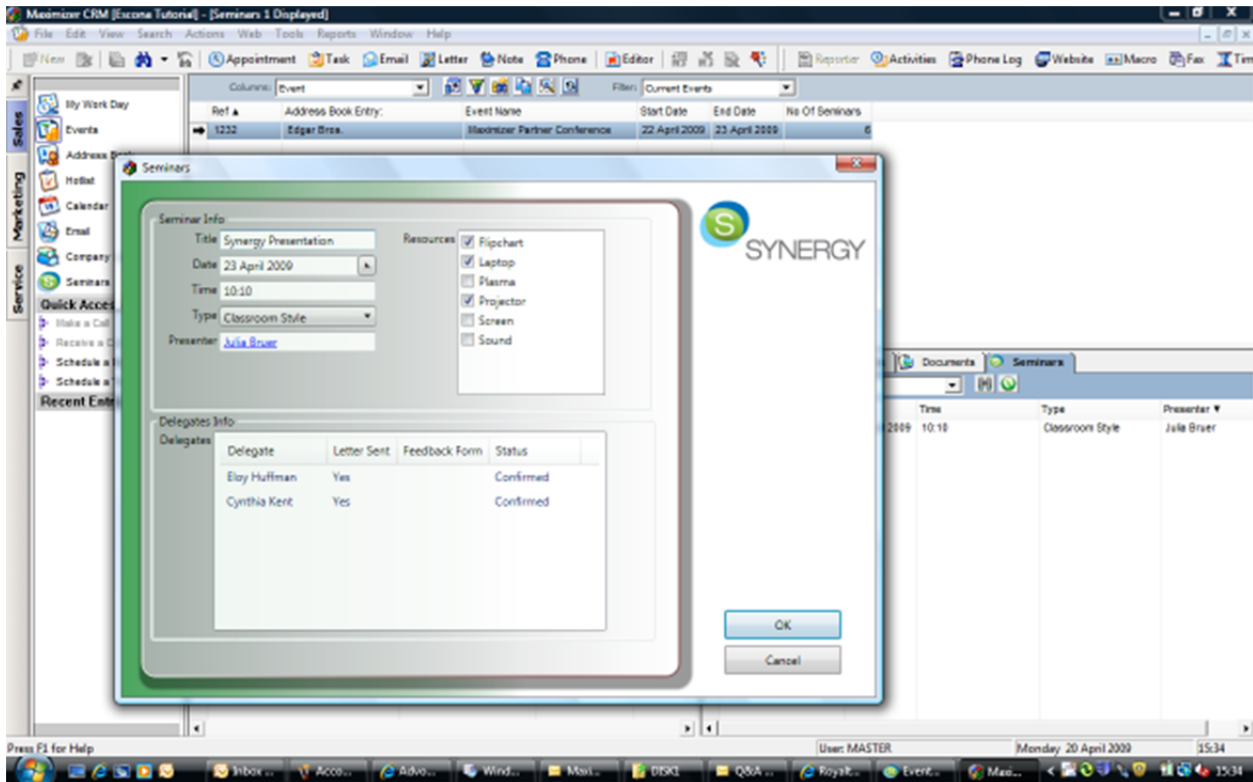
- ✓ Customisable screen, column layout (including Application or Company branding, fields, etc.).
- ✓ Custom filters in the summary tab (e.g. invoices, purchase orders).
- ✓ Validated/Mandatory fields, that help keep the same data standards upheld in your integrated application (e.g. a Purchase Order number is required, when adding a PO).
- ✓ Build lists, based on single or multiple search criteria
- ✓ Field and record level security to control how the module is used, allowing you to control what users can amend and view.

Reporting & Analysis

Any data that you have integrated with Maximizer, can be used in a report, possibly with comparative Maximizer data as well. Any necessary reports can be created as part of implementing your Accounts/ERP integration.

Maximizer Synergy Event/Seminar Manager

Synergy can be used to manage your Event/Seminar Management requirements.



Synergy allows you to:

- ✓ Capture Event Overview/Status information.
- ✓ Event/Delegate Registration.
- ✓ Send delegates letters/information prior and after the event.
- ✓ Resource Scheduling (Rooms, Projector).
- ✓ Maintain a history of attendance or cancellations.
- ✓ Build lists in the Address book, based on event/seminar details, delegate attendance, upcoming events, etc.

Standard Synergy Functionality

The following standard features would be available to any Event/Seminar Management system, deployed with Synergy:

- ✓ Customisable screen, column layout (including Application or Company branding, fields, etc.).
- ✓ Build lists, based on single or multiple search criteria.
- ✓ Field and record level security to control how the module is used, allowing you to control what users can amend and view.
- ✓ Custom filters to make popular searches one click away (e.g. supplier or product/category filters).
- ✓ Conditional fields/Data validation that helps ensure the correct information is captured (e.g. when Ford is selected from a list, only Ford Cars can be selected).

Reports & Analysis

Using the data in Maximizer and the Event/Seminar Management system, you can:

- ✓ Report on the number delegates per event.
- ✓ Analyse how successful seminars have been.
- ✓ Review cancellation statistics.
- ✓ Analyse follow-up statistics.