



Altimum IMS

Customer relationship management (CRM)
Business Intelligence



Altimum IMS - Documentation Center

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On Demand CRM for Today's Mobile Workforce

Allow staff to work when and where they want.

Key Benefits

- Visualize crucial performance metrics at a glance to optimize your business
- Make effective, timely decisions based on rapid analysis of relevant information
- Empower managers with the ability to easily identify problem areas
- Spend less time reporting, more time managing

"We wouldn't have been able to develop our field force without Maximizer Enterprise and its remote synchronization capabilities. In order to have functional field reps, we needed a way for them to report in, provide updates and get information from us. Maximizer Enterprise gave us a way to work live remotely."

*- Andrew Knowles,
Assistant Sales Manager,
StemCell Technologies Inc.*

Today's workforce is truly mobile. People work from home, at the office and on the road. Maximizer Enterprise gives your workforce on demand access to critical customer information from anywhere. Whether you are working using a remote desktop or laptop, or accessing Maximizer Enterprise through the Internet, or on a wireless handheld device, the information and functionality you rely on will be there.

Get on the Same Page with Remote Synchronization

Collaborate with everyone on your team and stay up to date while working remotely by synchronizing your remote Maximizer Enterprise™ CRM users with the main database using MaxExchange.

How MaxExchange Works

Because remote workers use a copy of Maximizer Enterprise on their machine, they must regularly synchronize with the central database to keep all the information up-to-date. Conversely as others enter new information into central database, remote workers synchronize to receive the latest information.

- As soon as a remote worker starts their workstation (or at pre-scheduled times) MaxExchange automatically sends any changes to the central database and receives new, updated information back.

Get the Right Information to the Right People

- Distribute information relating to specific opportunities to the appropriate team members. Keep track of time zones to determine which changes took place first, in case of conflict, so you always have the most up-to-date information.
- Let remote users synchronize data seamlessly with user profiles and simplified criteria for filtering records.
- Build a web-services based application to administer MaxExchange remotely.

Reduce Downtime

- Seamless, one-button synchronization allows mobile workers to easily stay up to date, and even pause and resume at any time.
- Save time by synchronizing only the data that has changed instead of overwriting every record every time.
- Enjoy the benefits of powerful data compression and integrity checking features
- Specify whether to send Notes, Documents, Knowledge Base Articles and Company Library documents to a remote user based on the age and size to reduce the amount of information you need to synchronize.



Ensure Reliability & Security

- MaxExchange detects out-of-sequence and lost data packets, then automatically generates email alerts to the system administrator and requests a resend in order to maintain data integrity and completeness.
- MaxExchange keeps track of processing status so it can recover from possible server shut downs or lost connections, and start up at the exact point where it left off.
- While synchronizing, information is secured using 128-bit encryption so you don't have to worry about data theft.

Choose the Way You Sync

- Share a networked database or work remotely with a copy of the database.
- Synchronize information over the Internet via FTP, using a WAN connection, or over your existing email system.

Easy to Use. Easy to Run.

- To enhance productivity, keep MaxExchange running in the background with automatic servicing, communicate with the server automatically at pre-scheduled times, or manually synchronize.
- Reports from the server help administrators see data transfer information such as server configurations, site numbers, and transport mechanisms so that you can easily uncover and resolve potential connection failures.
- With Maximizer Enterprise Workflow Automation, configure MaxExchange to send automatic real-time alerts via email or pager when data connections fail. Or send your sales manager an email alert when a remote sales rep hasn't synchronized in several days.

Provide Anywhere Access through the Internet with Employee Portal

Maximizer Enterprise 9 web-based Employee Portal presents the same user interface as the desktop software, so the user experience is continuous and familiar.

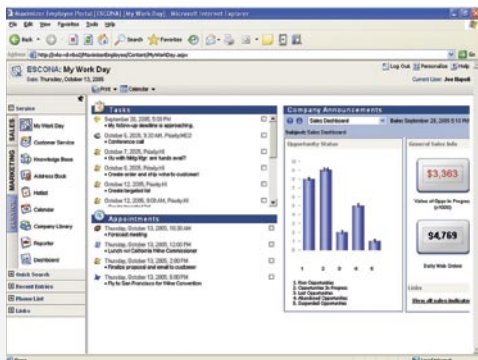
- Log-in from anywhere to access the CRM database and carry out your typical daily tasks using a Microsoft® Internet Explorer web browser. The secure portal is based on the Microsoft .Net framework for user authentication, secure database access and session management.
- Check and update appointments and tasks, search and update customer records, send emails, view outstanding customer support cases, and resolve incidents online; use different column setups to tailor the view to your needs.
- Collaborate to make sales by implementing strategy-based opportunity management.
- Use the Activities Tab to review tasks and appointments for an associated customer, lead, sales opportunity or customer service case.

Customize for Your Organization

- Based on the .NET framework, you can easily customize the Employee Portal to make it work for your organization, including custom windows and tabs.
- Brand your Employee Portal with your corporate logo. Integrate it with your corporate intranet, including internal documents and policies, plus external links to give users quick access to information related to your company and industry.

Visualize Key Performance Indicators

- Gain greater visibility into your customers and business by enabling managers to access reports wherever they are. The Employee Portal enables access to more reports through the web-based Reporter, powered by Crystal Reports®.
- Sales, marketing and customer service managers can view and print graphical real-time status reports of 30 and 60-day funnels, forecasts by quarter, pipeline by sales team, and more.
- With the Executive Dashboard, executives can instantly visualize which areas are doing well and which areas need attention.
 - ✓ See a high-level snapshot of real-time information on the company's performance in a single view so you don't have to flip through pages of reports.
 - ✓ See the status and value of the sales pipeline, number of abandoned deals, status of marketing campaigns or other critical business indicators.
 - ✓ Even set-up alarms to be notified when an indicator reaches a critical level.



On Demand Web Access: Get real-time CRM information, including the Executive Dashboard and reports, through a web browser – no software to install!



Take it to the Street with Handheld, Mobile Solutions

Access customer information, take notes at meetings, or check your task list and schedule whether you're at a client location or in transit. Whether employees are using Palm® devices or web-enabled BlackBerry® or Pocket PC handheld devices, Maximizer Enterprise has solutions to keep your staff productive—wherever they are.

Maximizer Enterprise Link for Palm®

With Maximizer Enterprise Link, synchronize the information from Maximizer Enterprise with your Palm® device. Update contact information and take notes while at client meetings and synchronize it back at the office.

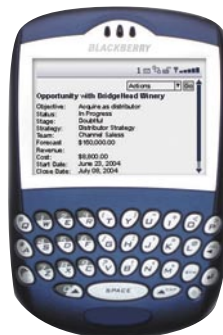
- Maximizer Enterprise Link automatically matches the information in your Maximizer Enterprise Address Book, Calendar, Hotlist, Notes, Journal and User-Defined Fields with the modules already on your Palm device: Phone List, Date Book, To Do's, Memo Pad and four custom fields. This means there's no retyping and no extra software to install on your PDA.
- Just press the HotSync® button on your Palm or Handspring device to synchronize critical data.
- Accurate two-way synchronization ensures that information on both your PDA and your desktop is always the most current.
- Synchronize only the information you need without compromising your personal data.
- Synchronize multiple Address Books directly from Maximizer Enterprise and select which modules to synchronize - either overwrite the Address Book entries, synchronize the entire Address Book, or add the new changes only.
- Specify the date range for transferring so you can synchronize data from a specific time.

Wireless Employee Portal for PDAs

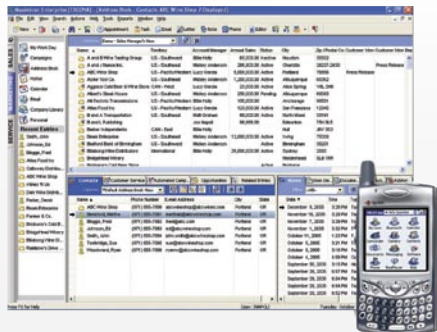
Get real-time information while you're on the move without having to synchronize or install extra software on your handheld device so you're always up-to-date.



- Access CRM information using the web browser on your Palm®, Treo™, BlackBerry®, or Pocket PC device.
- Retrieve your customers and leads to get critical contact information while you're on the road, including all the associated profile information and notes.
- Remain productive by sending emails and saving them to customer records.
- Add notes from meetings directly associated with the contact record so you don't forget any of the important details that were discussed.
- Access your day's calendar and tasks to ensure you're following up on leads and meeting deadlines, then create follow-up appointments and tasks for yourself right on the spot.
- Access your sales opportunities to stay focused on deals in your pipeline that are ready to close, and update the forecast notes and fields.



Wireless Employee Portal: Access CRM information in real-time through the wireless browser on your BlackBerry, Treo, or Pocket PC device.



Maximizer Enterprise Link: Synchronize your customer information to your Palm device to take information on the go – no extra software to install on your Palm!

“Having customer information available at our fingertips, whether it be through a laptop computer or a BlackBerry device, provides our people with the information they need exactly when they need it. The BlackBerry interface with Maximizer Enterprise works flawlessly giving us immediate access when we are out in the field to our important customer data.

*- Faron G. Thompson, Managing Director,
Income Property Finance Division,
Primary Capital Advisors*

*For system requirements of various access options, see www.maximizer.com/solutions/maxent/system.html

*For a list of supported handheld devices, see www.maximizer.com/support/products.html



For More Information

Contact Maximizer Software
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Locate a Certified Solution Provider

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What Makes Maximizer Enterprise Better?

- One fully integrated product that's easy to use
- Superior flexibility, easy to configure & customize
- Rapid implementation, simple to administer
- On demand access: Desktop, PDA & Web-Ready
- Integrates with Microsoft® Office and Outlook®, plus leading accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Low total cost of ownership

Maximizer Enterprise 9

Designed for small and medium-sized businesses, Maximizer Enterprise 9 rapidly helps companies gain strategic insights and implement winning strategies that will outperform competitors. This proven, affordable CRM solution gives sales, marketing and service professionals the tools they need to attract prospects, win new customers and increase repeat business.

About Maximizer Software

Maximizer Software has helped over 7,000 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

For more on Maximizer Enterprise 9, go to www.maximizer.com for access to:

- More product details
- Online demonstrations
- Live webinars
- CRM best practices white papers
- 30-day trial software
- Pre-recorded webcasts
- System requirements

Maximizer Enterprise works with technology from the following partners



Awards



Certified Solution Provider



Maximizer™
The CRM Company www.maximizer.com

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Altimum IMS

Customer relationship management (CRM)
Business Intelligence



Specialists at Altimum IMS work closely with your key personnel to build customer loyalty and optimize your company's business processes and growth.

Consultation

Evaluation of your needs and identification of your goals. Analysis of your unique service offer and business processes.

- Sales
- Marketing
- Customer Service
- Business Intelligence

Integration

Selection and customization of a CRM solution to meet your corporate goals.

Training/Coaching

Customized training of your personnel to link technology and processes.

- CRM application functions
- Business processes
- Corporate culture

Altimum IMS provides solutions which strengthen the relationship between your company and your customers.

For further information about Altimum IMS services,
Please call (514) 593-0085 or visit our Website:

www.altimumims.com