



**Altimum IMS**

Customer relationship management (CRM)  
Business Intelligence



## Altimum IMS - Documentation Center

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# What's New

## Raising the bar for high-performance sales, marketing, and service

Here's what's new in Maximizer Enterprise 9 to help you get more from your CRM system.

- Business Intelligence and Process Management Improvements for Managers
- Productivity Enhancements for Sales, Marketing, and Customer Service & Support
- Administration Advancements for IT Administrators
- Security Advancements for your company

### Manage Business Performance & Create Predictable Success

Maximizer Enterprise™ 9 now makes it easier for managers and executives to gain accurate insights into their company's operational performance: Maximizer Enterprise 9 integrates the industry-standard Business Objects® Crystal Reports® XI Professional and provides over 175 standard report templates out of the box.

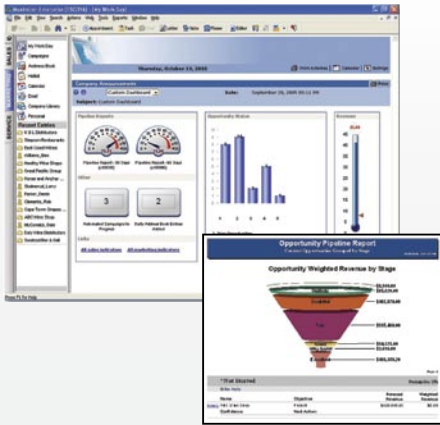
- Transform customer data into meaningful business information.
- Visualize business drivers and make better decisions faster with an improved Executive Dashboard fully integrated with Crystal Reports with drill-down access to detailed information.
- Take advantage of pre-formatted, standard reports to save time and reduce the effort it takes to compile detailed operational data – includes sales pipeline funnel, campaign ROI, lead status, case monitoring and more!
- Instantly export data from reports or column views to Microsoft® Excel® for further manipulation and analysis.

Maximizer Enterprise 9 helps non-technical people rapidly model successful business processes. Easily configure Workflow Automations without time-consuming customization: manage performance metrics, operational policies and business processes. Now speed up process automation with NEW out-of-the-box Workflow Automation Alerts & Processes, including automatic campaign removal and lead process alerts (for leads not followed up in a timely manner, leads created with no account manager, hot leads without associated opportunities). These are in addition to automation and alerts already included, such as general email inbox monitoring, real-time lost/suspended opportunity alerts, changed sales forecast alerts, case overload and follow-up alerts – giving managers the insight needed to effectively monitor the things that are important to your business.

### Promote Productivity

Maximizer Enterprise 9 includes many incremental usability improvements—from user interface re-engineering to additional third-party software integrations—resulting in improved productivity throughout your company.

- With on demand access, get up-to-the-minute information, including customer details, sales forecasts, marketing reports, your lead list—whatever you need from Maximizer Enterprise—from anywhere. Use any number of methods to connect with your information: directly on your desktop in the office, remotely on your laptop, another computer using a web browser, or on your handheld or smartphone device (Palm®, Treo™, BlackBerry®, or Pocket PC). Experience the same look and feel of Maximizer Enterprise through the web or through the desktop client with increased flexibility and functionality through the web.



**Business Intelligence & CRM:** Transform customer data into meaningful information with improved Executive Dashboards and more Crystal Reports.

- Use Maximizer Enterprise with the products you already use in your business with improved integration with Microsoft®, Word and Excel®.
- Take advantage of NEW automatic two-way synchronization of contacts and calendars with Outlook®
- Now collaborate and book meetings with non-Maximizer Enterprise users with the NEW integration with Microsoft Exchange.
- Personalize “My Work Day” for user groups based on role so people in your organization automatically get information that’s important to them—including key performance measurements—delivered to their home page.
- With NEW centralized user-defined fields, easily view and update Address Book entry fields through the Contacts, Opportunities and Cases for one-click access to the information you really need. This enables you to view company profile and lead qualification details when working on a sales opportunity.
- Edit user-defined fields on the fly with NEW in-line editing for faster data entry.
- Other time-saving productivity enhancements include more spell-checking options and printing directly from within a Note.

#### Productivity Improvements for Sales

- Exploit the most flexible and powerful Opportunity Manager on the market today to implement sophisticated sales methodologies, or use Action Plans for straightforward sales and marketing tasks and projects.
- Take advantage of many NEW, out-of-the-box reports—from the Opportunity Pipeline Funnel and Lead Summary to Case Resolution—to track sales performance and identify areas for improvement.
- Designate a key decision-maker and other influencers and identify their roles in the sale.
- Allow partners and employees to collaborate more effectively with improved Portals. Partners can now update leads and sales forecasts in real-time, to give you greater insight into partner activities.
- Create a default, pre-populated form for rapid entry of NEW Opportunities.
- Search opportunities by partner or competitor to find information faster.
- Plan your travel days more effectively using NEW integration with Microsoft MapPoint for global maps.

#### Productivity Improvements for Marketing

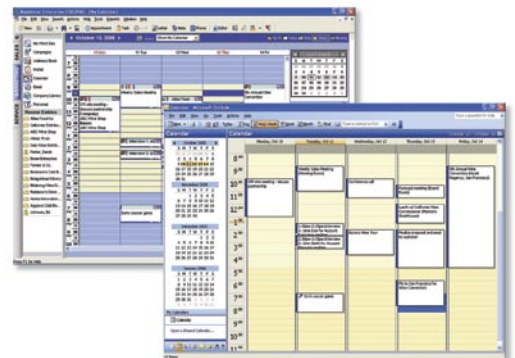
- Gain insight into where dollars are best spent with the NEW automatic Campaign ROI Calculator.
- Manage marketing projects and ensure the team is on track to meet deadlines with NEW Action Plans: assign tasks and link project resources and personnel through a central interface.
- Take advantage of the improved interface for setting up automated emails, faxes and print campaigns.
- Enjoy greater flexibility and improve communications by using Microsoft Word for formatting, color and font enhancements for your rich text and HTML print, fax and email campaigns.

#### Productivity Improvements for Customer Service & Support

- Save time and increase call productivity with enhanced Computer Telephony Integration (CTI) configuration to enable automatic caller identification and dialing.
- Let your service representatives benefit from a streamlined interface that includes tabs for Customer Service Case details, key fields, and the ability to perform global editing for mass updating or re-assigning.
- Use the NEW, out-of-the-box Case Billing and Case Monitoring reports to ensure every case is promptly handled.
- Decrease the time it takes to resolve cases with improved access to solution notes and article details stored in the Knowledge Base.

#### Microsoft Outlook & Exchange Server

**Integration:** Share contacts and calendars with two-way Outlook synchronization and collaborate with non-Maximizer Enterprise users with Exchange Server integration.





## Deploy Quickly & Manage Easily

System administrators will appreciate the many NEW time-saving features built into Maximizer Enterprise 9.

### Deployment & Set-Up

- Noted for being the fastest to deploy in its class, Maximizer Enterprise now makes deployment and upgrades even faster and easier with improved support for the Microsoft Systems Management Server (SMS).
- Administrator-controlled Live Update enables IT administrators to download service releases and fixes and control the automatic installation to workstations.
- Easily create and distribute unique data entry windows by assigning key user-defined fields for different groups without any programming.
- Expanded role-based security permits faster set-up and easier group administration for departmental settings and views for areas such as "My Work Day" home page, key fields, document templates, and Favorite Lists.
- Industry Packs help you get up and running faster with built-in process automation based on best practices specific to your industry, including fields, data views, Action Plans, sales processes, document templates, and macros.
- Maximizer Enterprise 9 supports Microsoft SQL 2005.

### Customization

- Create custom windows and tabs once and then implement them on both desktop and web-based clients to serve the needs of all users.
- Integrate Maximizer Enterprise with accounting applications with the Improved accounting API that includes built-in functions for creating and viewing invoices, estimates, and credit limits.
- Use industry-standard coding and do customizations faster with direct native SQL updates.
- Create custom windows and applications to extend the power of Maximizer Enterprise with more VB.NET samples.

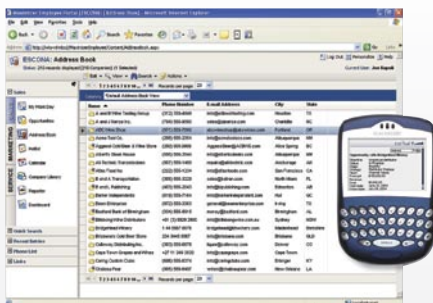
### Synchronization

- Let your remote users synchronize data seamlessly with improved MaxExchange set-up: more filters for configuring user profiles, simplified criteria for filtering records to users.
- Reduce synchronization loads by filtering size and age of documents to be synchronized.
- Administer MaxExchange remotely by building a web services based application for web browser access.

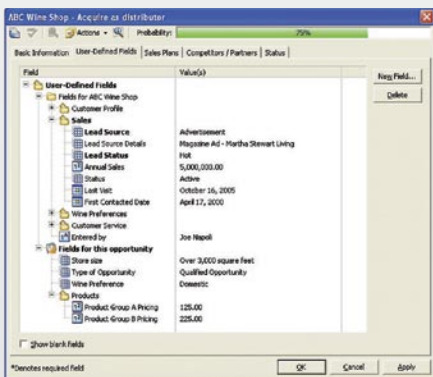
## Security

No matter how users access the system—whether through a browser, a PDA or the client desktop software—Maximizer Enterprise 9 keeps your important business assets in-house and under your control.

- Web-based Employee Portal works with Microsoft .NET framework for user authentication, secure database access, session management, and system logging.
- Desktop client (SQL) supports Microsoft Windows single sign-on for user authentication.
- Industry-standard security with public key encryption using advanced 128-bit cipher.
- Be sure your data is protected from all access points (such as custom reports, integration, and SQL queries) with expanded role-based security at the database level.
- Expanded security enables you to assign record and field-level full and read-only access throughout the Address Book and Notes, so you can share information and protect it at the same time.



**On Demand Access:** Get up-to-date CRM information from your desk, through the web, or on your handheld or smart phone device.

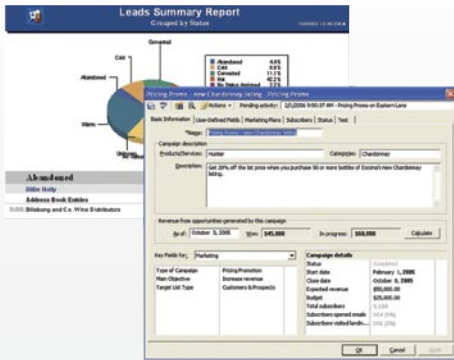


**Centralized User-Defined Fields:** Now view company and contact user-defined fields directly from Opportunities and Cases for one-click access to information.

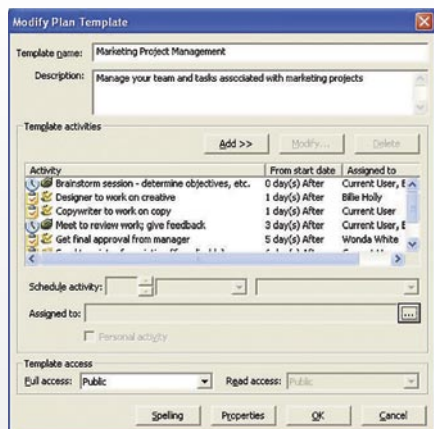


## Maximizer Enterprise Continuously Makes Improvements

USER FEATURES	Maximizer Enterprise 9	Maximizer Enterprise 8	Maximizer Enterprise 7/7.5	Maximizer Enterprise 6.0	Maximizer Enterprise 5.x
<b>Sales</b>					
Sales Executive Dashboard	NEW				
Sales funnel reports	NEW				
Lead Summary reports	NEW				
Opportunity analysis & pipeline reports	Improved	✓			
Sales Action Plans	NEW				
Opportunity management	Improved	✓	✓	✓	✓
Sales process methodology	Improved	✓	✓	✓	✓
Real-time alerts (out-of-the-box) include lead status alerts, changed forecast, and won/lost deals**	Improved	✓			
Account management	Improved	✓	✓	✓	✓
Partner Relationship Management*	Improved	✓	✓		
Lead management and routing	✓	✓			
Sales forecasting	✓	✓	✓	✓	✓
<b>Marketing</b>					
Campaign ROI calculator	NEW				
Lead Summary reports	NEW				
Marketing Action Plans (project management)	NEW				
Automatic campaign subscriber removal**	NEW				
Real-time alerts (out-of-the-box) include lead status alerts, suspended & late campaigns.**	Improved	✓			
Automated email campaigns	Improved	✓	✓		
Automated fax and print campaigns	Improved	✓	✓		
Campaign management	Improved	✓	✓		
Campaign response metrics	✓	✓			
Do-not-solicit enforced by system	✓	✓			
Email monitoring and automatic replies**	✓	✓			
Campaign failure alerts	✓	✓			
Lead capture from website	✓	✓	✓		
Customer segmenting with user fields	✓	✓	✓	✓	✓
List management	✓	✓	✓	✓	✓
<b>Customer Service &amp; Support</b>					
Customer Service Executive Dashboard	NEW				
Overdue case, case billing, other reports	Improved				
Case creation based on incoming email**	NEW				
Case management (routing, queuing)	Improved	✓	v7.5 only		
Case resolution	Improved	✓	v7.5 only		
Knowledge Base	Improved	✓	v7.5 only		
Real-time alerts (out-of-the-box) include case overload, overdue cases, and status changes **	✓	✓			
Email monitoring and automatic replies**	✓	✓			
Service billing	✓	✓			
Customer self-service*	✓	✓	✓		
<b>General</b>					
Customer & Prospect Action Plans	NEW				
Key user-defined fields	Improved	✓			
Categorized and multi-level user-defined fields	Improved	✓			
Mandatory fields	Improved	✓	✓		
My Work Day (customizable home page)	Improved	✓			
Email & Calendar integration with Outlook	Improved	✓	✓		
Email & Calendar integration with Exchange	NEW				



**Campaign ROI Calculator:** With Sales opportunities tied to marketing campaigns, automatically calculate the return on investment of your programs.



**Action Plans:** Whether you use a sophisticated sales methodology or a straightforward sales process, use Strategies and Action Plans to implement sales best practices.

USER FEATURES	v9	v8	v7/7.5	v6.0	v5.
Import/export in standard formats	Improved	✓	✓	✓	✓
Support for HTML email	Improved	✓			
Industry Packs for High-Tech, Legal, Financial, Real Estate	Improved	✓	✓	✓	✓
Accounting Link for QuickBooks	✓	✓			
Database searching with multiple criteria	✓	✓			
Calendar for multi-user viewing	✓	✓			
Calendar with resource & location management	✓	✓			
Task management	✓	✓	✓	✓	✓
Company Library for document sharing	✓	✓	✓	✓	✓
Letters, faxes with merge fields	✓	✓	✓	✓	✓
Extensive customization of views	✓	✓	✓	✓	✓
<b>Business Intelligence</b>					
Advanced report customization with Crystal Reports	Improved (XI Professional)	✓			
Executive Dashboard	Improved	✓	✓		
Out-of-the box, pre-formatted reports for Marketing, Sales, Support, Executives	Improved	✓	✓	✓	✓
Support for Crystal Analysis®	✓	✓			
<b>Workflow Automation</b>					
Business process automation**	Improved	✓			
Business activity monitoring & alerting**	Improved	✓			
Automatic report distribution**	✓	✓			
Email monitoring and response**	✓	✓			
<b>On Demand Access</b>					
Employee Portal (Web Access)*	Improved	✓	✓		
Wireless Portal (Wireless Web Access)*	Improved	✓	✓		
BlackBerry access (synchronize through Outlook or access through wireless web*)	✓	✓			
Pocket PC access (synchronize through Outlook or access through wireless web*)	✓	✓			
Palm synchronization	✓	✓	✓	✓	✓
Remote synchronization	Improved	✓	✓	✓	✓
<b>eCommerce, Order Management</b>					
Order management	✓	✓			
Customer online order tracking	✓	✓	✓		
eCommerce site creation	✓	✓	✓	✓	
Credit card processing	✓	✓	✓	✓	
Product catalog	✓	✓	✓	✓	
<b>Administration</b>					
Support for Microsoft SMS for installation	NEW				
Administrator-controlled Live Update	NEW				
128-bit cipher public key encryption	Improved	✓	✓		
Full & Read-Only access settings	Improved	✓			
Role-based security groups	Improved	✓	✓	✓	✓
Customization Suite	Improved	✓	✓	✓	✓
Choice of database: Microsoft SQL or Pervasive.SQL®	Support for SQL 2005	✓	✓		✓
Administration reports	Improved				
Version Support	✓	✓	✓		
<b>Microsoft® Technology Support &amp; Integration</b>					
Works with Exchange	NEW				
Works with Excel	NEW				
Works with Word	Improved	✓	✓	✓	✓
Works with Outlook	Improved	✓	✓	✓	✓
Support for SMS for installation	NEW				
Built for .NET framework	Improved	✓			
Uses MapPoint Technology	NEW				
Support for SQL Database	✓	✓	✓		Only 5.1

\* Features available through eCRM suite only \*\* Capability requires Workflow Automation suite



## 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](http://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](http://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](http://www.altimumims.com)