

Conferenceware

Integration with Maximizer



Tele-efficiency)))

Tele-efficiency is committed to helping our clients save their time, improve their synergy, and lower their traveling expenses. We offer superior WEBconference services at a fixed price under the trademark *Conferenceware*, integrated with most CRM applications and with Skype. Its interface is personalizable to the company. What's more, you can enjoy a free 30-day trial! Thereafter, you can continue enjoying the benefits of *Conferenceware* with a quarterly or an annual service contract.



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Maximizer > Solutions > Maximizer Enterprise CRM Outlook Integration



Synchronize with Outlook and Exchange

A lot of your staff members already use Microsoft Outlook for email correspondence and schedules. Now it's easy for users to use Outlook and Maximizer Enterprise simultaneously.

✓ **Synchronize Calendars:** Be alerted of all scheduled meetings and recurring appointments even if you only have one of the programs running with two-way synchronization of Maximizer Enterprise & Outlook calendars.



✓ **Integrate Email:** View your Outlook messages inside Maximizer Enterprise and automatically see which customer or prospect sent you the message.

✓ **CRM Access in Outlook:** Use the Maximizer Toolbar inside Outlook for one-click saving of relevant emails sent and received to customers' records in Maximizer Enterprise - with automatic record matching, there's no cutting & pasting required.



✓ **Access Contacts:** Grab email addresses from both Maximizer Enterprise & Outlook address books for your email distribution. Synchronize contacts to Outlook and vice-versa to store a subset of customer records. Even import contacts from Outlook to Maximizer Enterprise without reformatting or re-typing.

✓ **Synchronize to Handheld Devices:** With Outlook 2-way synchronization, you can access your contacts and appointments through your handheld device, such as BlackBerry®, Palm® or Windows Mobile device using Outlook Mobile.

✓ **MaxSync for Microsoft Exchange:** Set-up meetings and keep track of appointments in a mixed environment where some people



NEXT STEPS

- Live CRM Webinars
- Archived Webcasts
- White Papers
- View CRM Demo
- Free 30-day Trial

CONTACT US

- Call 1-800-804-6299
- Business Partners

AWARDS



"I train hundreds of business owners every year to be massively successful and accelerate the profitability of their incomes 10 – 100 times what they currently earn. I recommend Maximizer Enterprise to all businesses that I work with. It has been

work in Maximizer Enterprise and others work in Microsoft Outlook & Exchange.⁴

one of the best business investments I have made in the last 10 years."

Garry Kewish,
President,
Brian Tracy International

Contact us at **1-800-804-6299** or [e-mail](#) us to request further information or a demonstration.

[More Customer Successes](#) →

1. Web-based Employee, Partner, Customer Portals, Wireless Portal, Dashboards, available only in eCRM Suite.
2. MaxLink for Palm included with regular licenses; MaxMobile & MaxMobile CRM for Windows Mobile devices is an add-product with additional fees; Wireless Portal for BlackBerry and other web-enabled PDAs available only in eCRM Suite.
3. Workflow Automation powered by KnowledgeSync is an add-on product with additional fees.
4. Integration with Microsoft Exchange Server requires MaxSync add-on product (additional fees apply).
5. Integration with QuickBooks requires Accounting Link add-on product (additional fees apply).
6. Crystal Reports Server is an add-on product with additional fees.
7. Customization Suite is an add-on product with additional fees.

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Microsoft® Technologies

Invest Wisely with the Microsoft Platform

“Microsoft recognizes Maximizer Software as a new Gold Certified Partner for demonstrating its ability to serve its customers and help drive their business success.”

*- Lora Gernon, Director,
Partner Sales Group, Microsoft Canada*

Microsoft®
GOLD CERTIFIED
Partner

Small to mid-sized businesses that currently use Microsoft® technologies can leverage the platforms and applications from the world's leading technology vendor, while using the proven, adaptable Maximizer Enterprise™ Customer Relationship Management (CRM) solution. Maximizer Enterprise is built for the Microsoft Windows platform and leverages the .NET framework and MS SQL database. Plus, Maximizer Enterprise enables you to use the Microsoft front and back-end programs you already use in your business like Outlook®, Word, and Excel®.

As a Microsoft Gold Certified Partner, Maximizer Software works with Microsoft to stay on the leading edge of new technologies and receive direct training, technical support and additional services that will help your company manage communications effectively, increase productivity, and collaborate online. Rely on Maximizer Software's outstanding product performance and integration capabilities for your long-term initiatives.

Leverage Outlook as your interface into CRM

Use Outlook as your interface to Maximizer Enterprise:

- ✓ Save contact details and emails from Outlook directly into the corporate CRM database
- ✓ Do quick look-ups with one click from an Outlook email directly into Maximizer Enterprise.
- View your Outlook messages inside Maximizer Enterprise and automatically see which customer or prospect sent you the message. Then access both Maximizer Enterprise & Outlook address books for your distribution list.
- Share critical communications company-wide and avoid email overload. Give everyone access to relevant emails sent and received through Outlook by saving them to customers' records in Maximizer Enterprise with automatic record matching – no cutting & pasting required.
- Manage your time wisely by synchronizing Maximizer Enterprise appointments and tasks with Outlook. With two-way synchronization, you'll be alerted of all scheduled meetings even if you only have one application running.
- With MaxSync for Microsoft Exchange, set-up meetings and tasks in a mixed environment where some people work in Maximizer Enterprise and others work in Microsoft Outlook & Exchange.
- Synchronize your contacts to Outlook and vice-versa to Maximizer Enterprise to store a subset of customer records. Import contacts from Outlook to Maximizer Enterprise without reformatting or re-typing.
- With Outlook synchronization, you can then access your contacts and appointments through your handheld device.