



## What's New in Maximizer CRM 10.5

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# Maximizer Software

Simply Successful **CRM**

# Top 10 Advancements in Mobile CRM



## NEW in Mobile CRM:

1. Support for NEW BlackBerry Bold and iPhone
2. One-click access to maps and directions from customer records
3. Log calls, SMS text messages & emails to client records in Maximizer CRM from BlackBerry
4. Extend storage of customer data onto BlackBerry SD cards

# Top 10 Advancements in Mobile CRM



## NEW in Mobile CRM:

5. Access to online document library to send brochures, quotes and other documents to customers & prospects
6. Customer service case management available through Wireless Web Access
7. Improved BlackBerry-like experience and single-click access to information

# Top 10 Advancements in Mobile CRM



## IMPROVED in Mobile CRM:

8. Integration with BlackBerry built-in Address Book to create opportunities, cases, and link to the Maximizer CRM record
9. Seamless, real-time online access to entire corporate CRM database from device (Wireless Web Access integration)
10. Improved synchronization performance and preferences

# Other NEW Features



1. Improved Business Intelligence
  - a. Drag-and-drop dashboards
  - b. Advanced export to Excel to support on-the-fly trend analysis through graphical conditional formatting
  
2. Improved Workflow Automation
  - a. Alert dashboards
  - b. Improved workflow interface featuring new Event Manager Navigator
  - c. Workflow process visual flow charts

## Other NEW Features



### 3. More Features in Web Access:

- a. Word integration
- b. Excel export
- c. Action Plans
- d. Personal email templates
- e. Call logging
- f. Global editing
- g. Improved email integration
- h. Improved calendar
- i. Faster performance

## Other NEW Features



### 4. Social Networking Integration

- a. Access from “Web” menu item at top of CRM interface
- b. Jigsaw & LinkedIn for searching, data importing

### 5. Marketing Campaigns

- a. Track multiple landing pages linked within email campaigns (up to 5 URLs)
- b. Stats shown for total and unique clicks on each link

## Skill Testing Question



Q: What advantage does MaxMobile for BlackBerry have over access to CRM data through an iPhone?

A: In addition to Wireless Web Access (real-time access), MaxMobile enables the storage of data directly on the device so you can work offline. Our current support for iPhone consists of Wireless Web Access only.