Innovate - Connect - Transform
your business by joining your technologies

A data feed from Sage accounting into Maximizer CRM
Works within Maximizer

Your sales people's priority is to keep their customers happy. They also need to be sure they are settling their invoices, but should they be spending valuable time trying to find out what the status of each account is? Imagine how useful it would be for them to be able to access key accounts information via your Maximizer CRM system.

This is just one of the things our new Sage Financials Data Connector for Maximizer is designed for. Better still, it will provide a 360-degree view of all your customers by taking a feed of high level information from your Sage accounts package, including: **Account Status** - **Account Balance** - **Account on hold** - **Revenue YTD** - **Revenue MTD** - **Last Invoice** and **Payment Date** - **Credit Limit** - **Overdue Payments**.

Our connector also adds a new tab to Maximizer, showing: Sales Orders, Invoices and Sales Transactions, alongside Sage Summary key fields.

So, at last, thanks to the unrivalled power of Maximizer CRM, your management team and account managers, whether in the office or on the road, will be able to view, search and analyse all your key financial data, as well as all other customer information, quickly and efficiently.

- Brings customer financial data in from Sage accounting into Maximizer
- Dashboards showing true financial information
- Provides 360-degree view on customer financials in CRM
- Generate reports for analysis and account reviews

Sage Financials for Sales and Marketing

- Profile customers
- Check financial information without needing access to accounts systems
- Check credit worthiness/overdue balances
- To amalgamate financial and CRM data for analysis, trends, campaigns etc.
- Profile customers and target high/low spend customers using finance data

Sage Financials for Management

- Customer spend information
- True financial figures and analysis
- Ability to dashboard financial information
- Analyse financial information with the Advanced Search CRM function

Sage Financials Data Connector for Maximizer CRM
Find out more: +44 (0)1992 661244