BPA Platform

Maximizer CRM Integration

Integrating Maximizer CRM with business software

codeless PLATFORMS

Maximizer CRM Integration

Maximizer CRM is a popular CRM system that enables businesses to manage the full sales and marketing mix in one platform. Integrating Maximizer CRM with on-premises or cloud-based business software will help eradicate repetitive, bi directional data entry, remove the risk of costly errors and significantly improve the visibility of critical data.
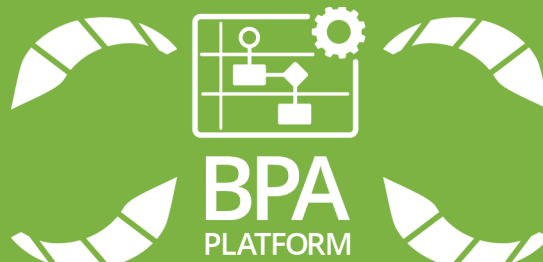
The Problem

Maximizer CRM is a powerful customer relationship management software package providing the majority of requirements that businesses need. However, to ensure that everyone has full visibility of essential data it needs to be integrated with other business solutions.

The Solution & Commercial Benefits

Codeless Platforms' Maximizer CRM Connector can quickly and simply integrate your ERP or industry specific software with Maximizer CRM through its drag and drop integration, workflow and process automation capabilities to improve business performance.

- Eradicate the manual rekeying of data between your ERP and Maximizer CRM system

- Improve the visibility of and access to important information

- Include Maximizer CRM users in workflow decisions that start outside of the system e.g. Account placed on hold within an ERP solution

Maximizer CRM Integration

Integrating Maximizer CRM with other software and services

Maximizer CRM is an extremely comprehensive product, providing a range of functionality that companies require. However, if you are using additional third-party software, such as accounting, eCommerce, ERP or warehouse management systems, then Codeless Platforms' Maximizer CRM Connector can quickly and easily provide the integration between them.

The Connector can also be used to integrate with tertiary software and web-based services such as courier and dispatch companies, payment services, communication tools (email, SMS, marketing), supplier databases, credit checking services and data suppliers etc.

Business process automation across multiple systems

Once your business systems are integrated, Codeless Platforms' Maximizer CRM Connector can automate a wide-range of repetitive business processes that are unique to your business.

Data can be automatically transferred between systems, such as customer data, orders, payments and reports, providing Maximizer CRM with the most relevant, up-to-date information required. This helps to improve business efficiency and reduce costs. Automated notifications, via email and SMS, can also be added to the system, providing the ability to automate the distribution of order status updates, stock level warnings and delivery alerts etc.

Extending Maximizer CRM workflow processes

Maximizer CRM provides powerful 'in application' workflow processes, but how can a CRM user influence a decision if the workflow starts outside of Maximizer CRM?

Codeless Platforms' multi system, bi-directional workflow capabilities enables company's using Maximizer CRM to quickly create workflows that start or end outside of Maximizer CRM. It ensures users have the ability to contribute to decisions if a workflow starts outside of Maximizer CRM. For example, an account placed on hold in an ERP solution is sent to a CRM user for review.

BPA Platform Capabilities

Discover how our **Business Process Automation Platform** can help your business

BPA Platform capability used	BPA Platform capability used	BPA Platform capability used	BPA Platform capability used
Notifications & Alerts	Reports & Document Automation	Data Integration & Synchronisation	Workflow & Human Interaction

Click the button to learn more about the BPA Platform

View BPA Platform

Want to learn more?

Discover how Codeless Platforms can help your business by improving performance, boosting efficiency and cutting costs

📱 **+44 (0) 330 99 88 700**

✉ **enquiries@codelessplatforms.com**

◉ **www.codelessplatforms.com**

codeless PLATFORMS