



MaxAttach

Customer Relationship Management (CRM) systems usually include such good information as names, addresses, phone numbers, notes and documents, like emails. They even allow businesses to track sales opportunities, do email marketing campaigns and track service requirements.

However, a key part of the businesses intellectual property is tied up in the accounting system.

Wouldn't it be handy to include accounting data in your CRM system?

Well, now you can, with MaxAttach ... middleware that integrates Maximizer CRM and Attaché . By including key accounting information in Maximizer CRM, your sales, marketing, accounting and management people can all see vital information at a glance.

Field	Value(s)
<DATAplan2007>	
Dob	15 January 2008
seminar location	cvbxv
Financial	
LastUpdateDate	16 November 2006
SalesYTD	3,683.25
OpeningBal	0.00
Balance1	0.00
Balance2	0.00
Balance3	0.00
DateLastPaid	25 May 2006
DrKey	88ABGLIN
CreditLimit	0.00
OnCreditHold	N
BalanceCurr	0.00
Cat	1
Rep	BW
Terms	14
Customers	
Maximizer	
Sales	
ABNumber	78 033 6

- Sales staff see if customers are on stop, immediately, and take corrective action. Notes from Accounting are seen instantly in Maximizer Notes.
- Accounting staff can search on all accounts on 30 days with outstanding payments beyond terms.
- Marketing staff can search on all accounts that haven't spent in the last 6 months, or target those customers with a YTD spend above \$10,000.

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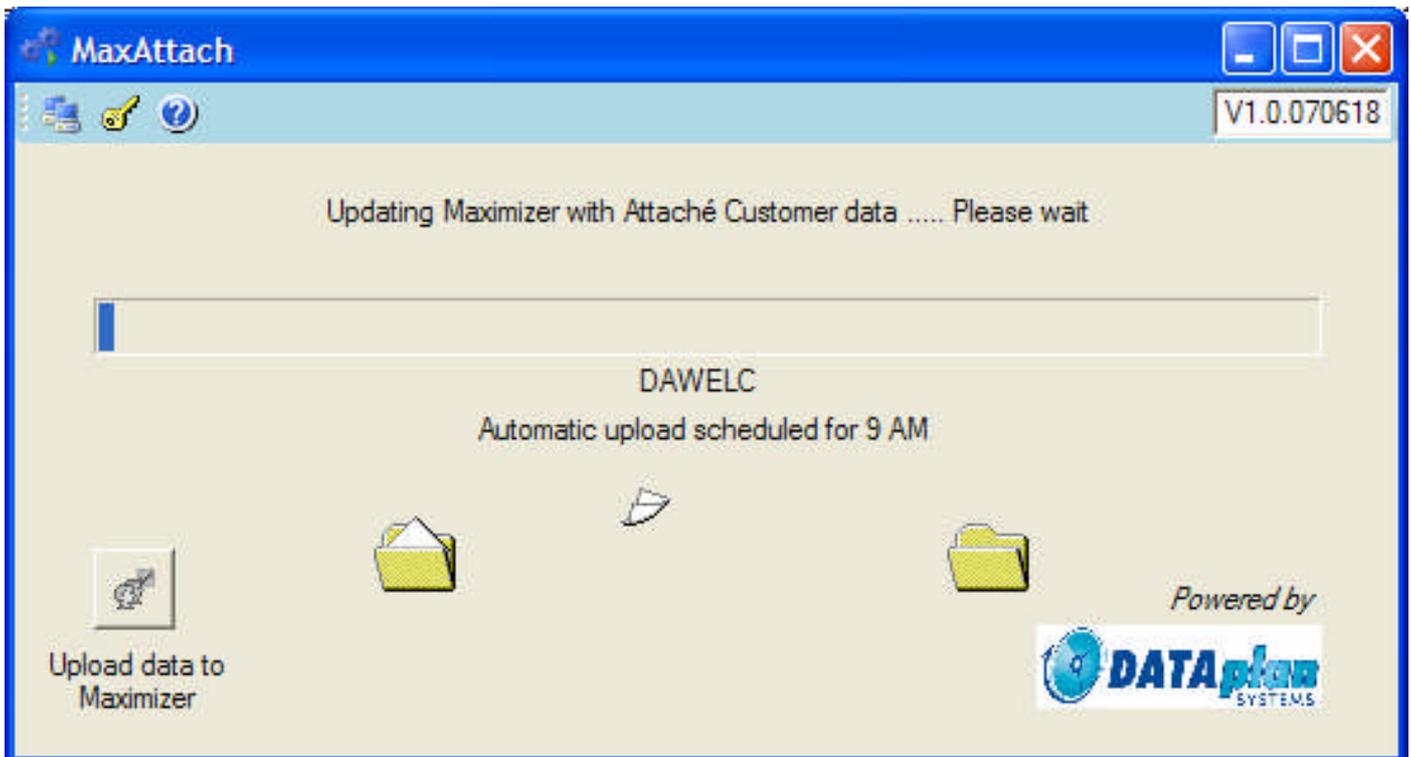




MaxAttach

MaxAttach seamlessly integrates Attaché customer, supplier and payroll data directly into Maximizer databases, in both Pervasive and SQL formats. It can be scheduled to run automatically at a time that suits your business.

For initial data import, this means the process of populating Maximizer with contact and accounting data is quick and simple. On a daily basis, account balances are updated, meaning debtor information and automated letters, faxes and emails to customers are all kept in one place ... both easily created and retrieved.



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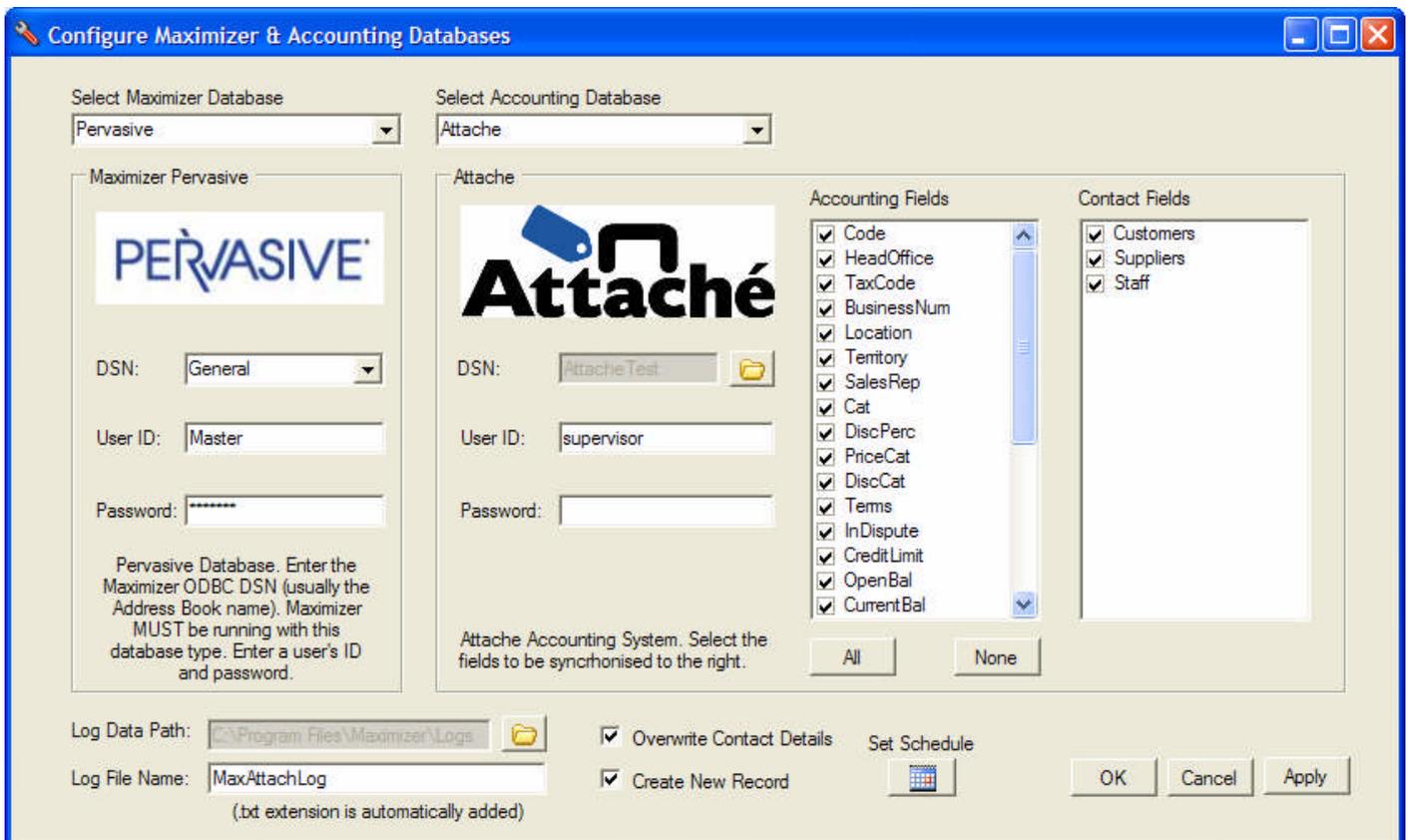
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Attaché data integrity is assured, as no data is written back to your accounting database. Any changes made occur in Attaché first, which then updates Maximizer records, only.

MaxAttach makes a number of checks to see what records need to be updated: If no match is found for the Attaché code MaxAttach first checks for a matching Company name and address. If one is found, the Attaché code is automatically applied for future reference. If not, a new address book entry is added to Maximizer to make the next upload quicker. All matching codes have all standard address book details like name, address and phone number and accounting UDFs updated during each upload session.



All configuration is achieved in one place, with database sources, required source files and UDFs, log file locations and schedules being selected and set according to your requirements. You do need the Attaché ODBC driver, so you can link via that.

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Call **DATAPlan Systems**, now, for more information.