

Exact MAX

## EXACT SYNERGY FOR EXACT MAX: CUSTOMER RELATIONSHIP MANAGEMENT

Bringing together people, processes  
and knowledge.

**Integrate customer relationship management (CRM) with ERP to achieve a far more complete understanding of your business. The right CRM solution puts actionable customer and prospect information into the hands of the right people at the right time, allowing you to take advantage of new opportunities and ensure your sales and marketing efforts are optimized and effective.**

### With Exact Synergy for Exact MAX you can:

1. Improve communication between your company, your customers, partners, suppliers and vendors through integrated portals.
2. Recognize customer problems and/or issues before they happen.
3. Access detailed customer information (workflow, financial transactions, support issues, etc.) from a centralized location.
4. Enable customers and partners to manage their own accounts.

#### Centralized Database

Taking the CRM+ERP equation to the next level, Exact Synergy for Exact MAX incorporates several core data elements already in Exact MAX, including customers, suppliers, items, ship history, sales orders, quotes and more to ensure your customer service and sales staff have all the tools they need to quickly and accurately capture critical information about your customers and store those details in a central database instead of spreadsheets or emails owned by different departments.

#### Exact Synergy CRM Highlights

- Capture critical information about your customers, suppliers, and partners so you can keep your relationships strong.
- Create quotes, sales orders, and RMAs in Exact Synergy and know that the information will flow directly into Exact MAX so your sales and customer service teams are working hand-in-hand with your production team.

- Unlock the power of a sales funnel to quickly evaluate the health and quality of your sales process.
- Access Exact Synergy via the Internet from anywhere, including from your favorite wireless handheld device.

#### A Complete CRM Toolset

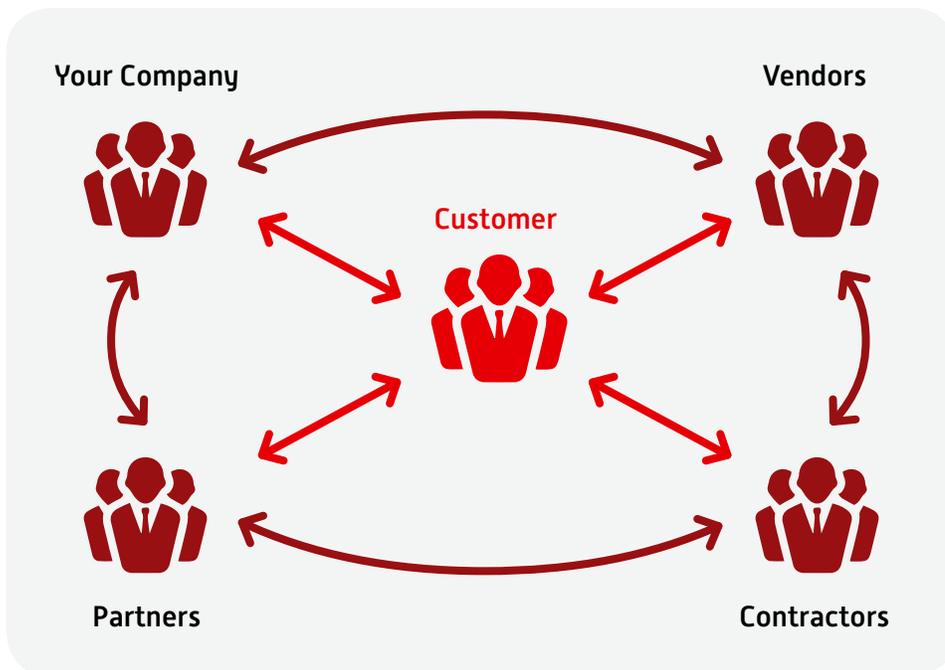
With Exact Synergy, nothing is left on the table when it comes to your corporate relationships. Exact Synergy's complete CRM toolset provides both broad-based views and specific information about everything from product updates, sales standings, customer support issues and any related documents, to enhance decision-making, analysis, scenario planning, and ongoing management across your entire business.

#### Two-Way Workflow Management

With Exact Synergy, real-time views of the issues and actions by both you and your clients enable consistent, up to the minute insight into both the details as well as the big picture—an open, transaction-based system.

#### Customer-Specific Reports & Statistics

Built-in analytics help you identify what your customers are thinking, so you can respond to their issues quickly and effectively. Exact Synergy's native realtime analysis tools, reports and ad hoc querying can help you recognize issues before your customer does.



> Exact Synergy for Exact MAX manages and associates all relationships that affect your client base.

#### Financial Management

All customer-related financial transactions are automatically associated with account information, including outstanding payments or marketing co-op amounts, making them easily accessible to your sales reps and remote offices when needed.

#### Document Management

By electronically storing all documents, Exact Synergy provides an automatic, accessible audit trail of all paperwork associated with your customer.

#### Integrated Portal Technology

Built-in web portals provide ongoing and active conversations with all of your customers, partners and vendors. Secure private logins allow for one-to-one client interactions, all without having to add IT staff to maintain extra websites or pages.

#### Empower Your Customers Through Self-Service

Exact Synergy for Exact MAX fortifies your customer and partner base by allowing them to access and act on information that pertains to them, at every step of every business process. Financial, sales and customer service intelligence is centralized in one database, providing knowledge that is traditionally inaccessible or spread across the organization. This integration allows your company to realize significant and immediate return on investment while fostering investment in your customers. Exact Synergy puts your customers at the center of your business, turning them into an interactive force.

Exact develops both Exact MAX and Exact Synergy and offers them together as an integrated solution through a single point of contact for implementation, maintenance, and support. Upgrade your business today by integrating Exact Synergy with Exact MAX. Contact an Exact MAX Expert at 1.855.EXACTMAX (1.855.392.2862) to discuss how Exact Synergy can improve your business.

**For further information call 1.855.392.2862**

Or visit | [max.exactamerica.com](http://max.exactamerica.com)