



# Maximizer™ CRM11



## Getting Started Guide

**Maximizer Software**  
Simply Successful CRM



# Maximizer™ CRM 11

Maximizer is a contact manager designed to help individuals, home offices, and small businesses succeed by helping them maximize their time, create satisfied customers, and increase sales.

With Maximizer, users can easily manage and profile customers and prospects, track every sale from lead to close and maintain long-lasting relationships well after the initial sale has been made. Maximizer is a solution that incorporates contact management with sales opportunity management, scheduling, communication, Outlook integration, BlackBerry integration, Accounting Link Designed for use with QuickBooks®, a company library, and more.

## Installing Maximizer CRM

You can install Maximizer on one or more computers. If you have a previous version of Maximizer installed on your system, you should uninstall the older version and then install Maximizer CRM 11.

### > To install Maximizer

1. Insert the Maximizer CRM disc. The server and workstation versions are on separate discs.
2. If the Setup window does not appear automatically, double-click the Autorun.exe file on the Maximizer CRM disc.
3. The Maximizer CRM Setup window appears. Select **Install Maximizer CRM**. The Maximizer CRM Setup program starts.
4. Follow the on-screen instructions to complete the installation.

For detailed instructions on various installation configurations for the different editions of the product, refer to the *Maximizer CRM Administrator's Guide*. You can access the guide from Maximizer or Administrator.

# Working with Address Books

“Address Book” is the term used to describe a Maximizer database. The Address Book contains all of your contacts, sales opportunities, appointments, tasks, notes, orders, and any other information recorded in the various Maximizer windows. You can set up as many Address Books as you need.

## > To open an Address Book

1. In the top-left corner of any of the main windows, click the **Maximizer** button, and select **Open Address Book**.
2. Double-click on an **Address Book** name in the Open Address Book dialog box or select the **Address Book** and click **Open**.

When you are ready to create your own Address Book, you can open the Administrator module and select File > New Address Book.

# Sample Address Book - Escona Tutorial

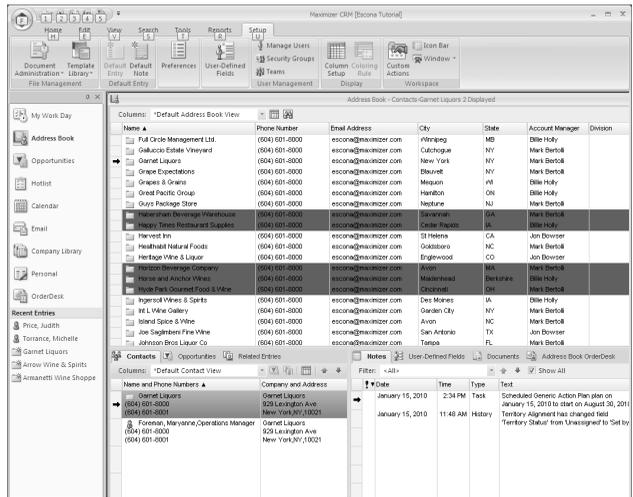
After installing Maximizer, you can run the application from the Windows Start menu (Start > Program Files > Maximizer CRM > Maximizer CRM) or by double-clicking on the desktop icon. You can then explore Maximizer by opening the Escona Tutorial sample Address Book that is installed with the software by default. The Escona Tutorial Address Book includes several different pre-configured users with different security rights. It also includes sample data such as Address Book entries, opportunities, user-defined fields, notes, and documents allowing you to see how the software lets you to manage your customer relationships.

To log into the sample Address Book, use one of the following user IDs and passwords:

User ID - **JNAPOLI**  
Password - **maximizer**

User ID - **MASTER**  
Password - **control**

Note that “control” is the default password for the Master user of all Address Books. You should change this password when you create your own Address Books. Also, “maximizer” is the default password for all sample users in the Escona Tutorial database.



# Maximizer CRM Basics

The main component in Maximizer is the Address Book window, which lists the companies and organizations that you have recorded as Address Book entries.

There are other main windows and following windows that comprise all your sales information. Main windows are known as controlling windows and include the Address Book and Opportunities windows. Following windows, such as the Notes and User-Defined fields windows, appear under the main window and contain information related to the selected entry in the controlling window. When you select a different entry in the controlling window, the following window changes to display information on the selected entry.

## Creating Companies, Individuals, and Contacts

You can create an Address Book entry as one of these three types:

- **Company** – Represents a group of people such as an organization, association, or business. A Company often has associated Contact entries.
- **Individual** – Represents a person who may not be associated with a company or organization. Like a Company entry, an Individual entry can have associated Contact entries.
- **Contact** – Represents people associated with a Company entry or, less frequently, an Individual entry.

### ➤ To create an Address Book entry

With the Address Book window open, here are a few ways to add a new Address Book entry:

- From the **Home** tab, select **Address Book Entry** from the **Create** group, and select one of the options. For example, choose New Company and New Contact.
- Right-click, choose **Add**, and select one of the **Address Book** entry options.
- Press the **Insert** key in the Address Book window to add a new Company.

After you create the new Company or Individual entry, you can create additional Contact entries for the Company or Individual entry.

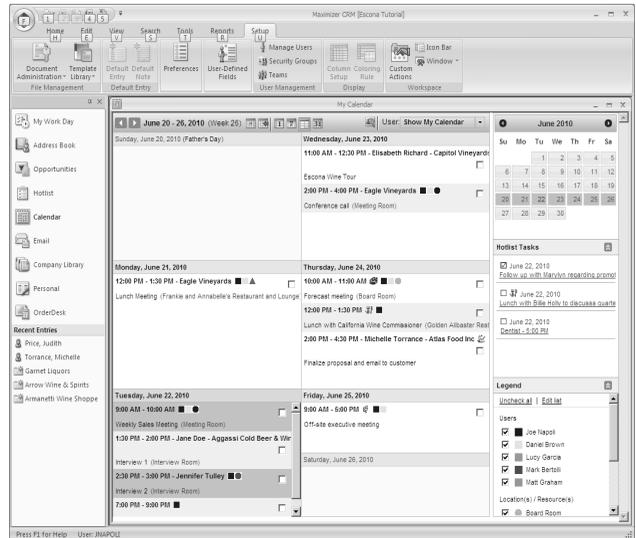
The screenshot shows the 'Through the Grape Vine Distributors' window with the following data:

| Name and address  |                                     | Other information          |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
|---|-------------------------------------|----------------------------|-----------------------|-------------|--|---------------|--------------|-------------------|--|---------|----------------|-----------|--|-----------------|--|-----------------------|--|--|--|-----------------|--|-----------|----------------------|------------------|------------|--------------|--------|--------------|--------|
| *Company:   | Through the Grape Vine Distributors | Phone numbers:             |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Dept.:  |                                     | Main:                      | (770) 555 4790        |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Division:   |                                     | Fax:                       | (770) 555 4791        |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Address 1:  | 5214 Michaels Way                   | Call:                      |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Address 2:  | Suite 714                           | Email addresses / Website: |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| City/Town:  | Atlanta                             | State/Country/Prov:        | GA USA                |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Zip/Postal:   | 30000                               | Email:                     | escsone@maximizer.com |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Key Fields for: General Customer  |                                     | Email 2:                   |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
|   |                                     | Email 3:                   |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
|   |                                     | Website:                   |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| <table border="1"> <tr><td>Primary Interest:</td><td></td></tr> <tr><td>Last Visit:</td><td></td></tr> <tr><td>Annual Sales:</td><td>8,000,000.00</td></tr> <tr><td>Retail Wine Cost:</td><td></td></tr> <tr><td>Region:</td><td>US - Southeast</td></tr> <tr><td>Industry:</td><td></td></tr> <tr><td>Size of Client:</td><td></td></tr> <tr><td>First Contacted Date:</td><td></td></tr> </table> |                                     | Primary Interest:          |                       | Last Visit: |  | Annual Sales: | 8,000,000.00 | Retail Wine Cost: |  | Region: | US - Southeast | Industry: |  | Size of Client: |  | First Contacted Date: |  | <table border="1"> <tr><td colspan="2">Company details</td></tr> <tr><td>Category:</td><td>Distributor, Partner</td></tr> <tr><td>Account Manager:</td><td>Joe Napoli</td></tr> <tr><td>Full Access:</td><td>Public</td></tr> <tr><td>Read Access:</td><td>Public</td></tr> </table> |  | Company details |  | Category: | Distributor, Partner | Account Manager: | Joe Napoli | Full Access: | Public | Read Access: | Public |
| Primary Interest:   |                                     |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Last Visit:   |                                     |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Annual Sales:   | 8,000,000.00                        |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Retail Wine Cost:   |                                     |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Region:   | US - Southeast                      |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Industry:   |                                     |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Size of Client:   |                                     |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| First Contacted Date:   |                                     |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Company details   |                                     |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Category:   | Distributor, Partner                |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Account Manager:  | Joe Napoli                          |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Full Access:  | Public                              |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |
| Read Access:  | Public                              |                            |                       |             |  |               |              |                   |  |         |                |           |  |                 |  |                       |  |  |  |                 |  |           |                      |                  |            |              |        |              |        |

\*Denotes required field

## Calendar

The Calendar window allows you to schedule and view your appointments. You can see when others are unavailable, as well as view other users' calendars. Creating appointments is easy—just right-click in the **Calendar** window and choose **Add Appointment** or from the **Home** tab, select **Appointment** from the **Create** group. Also, you can easily create an appointment from the **Address Book** window by dragging the entry to the **Calendar** window icon.



## Email

The Email window provides you with the ability to send and receive email within Maximizer using your existing email system. To send an email, click the **Compose** icon in the **Email** window. Or, in the **Address Book** window, right-click on an entry and choose **Send Email**. You can also drag an entry from the **Address Book** list to the **Email** window.

## Hotlist Tasks

The Hotlist window is a to-do list of tasks and reminders. You can create a Hotlist task—which can be associated with an Address Book entry or personal—by right-clicking in the **Hotlist** window and choosing **Add Task** or from the **Home** tab, selecting **To-Do** from the **Schedule** group. Hotlist tasks can also be part of an Action Plan for an Address Book entry or opportunity.

## Notes

The Notes following window displays notes associated with the selected Address Book entry or opportunity. To add a note, on the **Home** tab, select **Note** from the **Write** group in any of the controlling windows. Or right-click and choose **Add Note** in the **Notes** following window.

## User-Defined Fields

The User-Defined Fields following window displays custom fields you create and associate with the selected Address Book entry, opportunity, or user. If you have the necessary security rights, you can create and modify user-defined fields. To access user-defined fields, select **Set Up User-Defined Fields** on the **Setup** tab.

## Documents

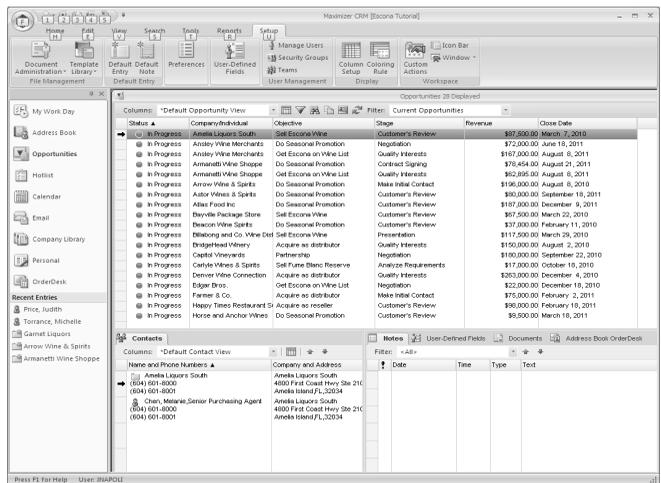
The Documents following window displays the document entries associated with the selected Address Book entry or opportunity in the controlling window. You can insert documents like invoices, sales sheets, letters, and faxes created with popular desktop products like Microsoft® Word and Excel. To insert a file, right-click in the **Documents** following window and choose **Insert File**. You can then browse to the location of the file to select it.

# Sales

## Working with Opportunities

Opportunity management helps you and your colleagues manage your sales processes. Sales prospects may range from single businesses to multiple corporations or governments. Opportunities help you define and strengthen your selling methodology.

Refer to the Escona Tutorial sample Address Book for examples of opportunities that use strategies (in the **Opportunities** window). Refer to the *Maximizer CRM User's Guide* for details on how the probability of close for an opportunity is calculated.

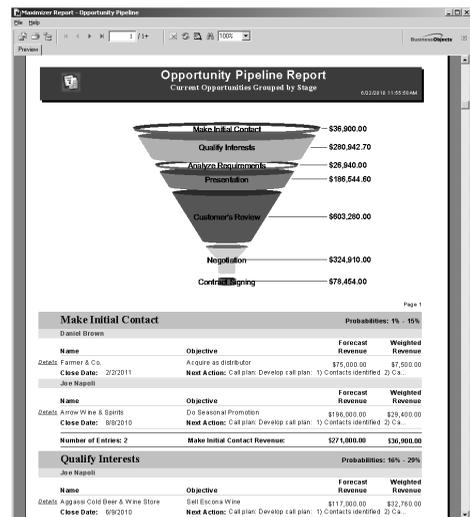


## ➤ To add an opportunity

1. Select the **Address Book** entry to which you want to add an opportunity. If you select a Contact, Maximizer adds the opportunity to the Company.
2. Drag and drop the Address Book entry or Contact to the **Opportunities** icon. Or, from the **Home** tab, select **Opportunity** from the **Create** group.
3. Enter the **opportunity details** working through the tabs from left to right. Press F1 in any of the tabs for detailed help on each field and tab.
4. Click **OK** to save the opportunity.

## The Sales Pipeline

With a single click, you can view the current opportunities in the pipeline. The Opportunity Pipeline report graphically displays all opportunities that you select to include grouped by opportunity stage. The Opportunity Pipeline report can also be modified using Crystal Reports. To view the Opportunity Pipeline report, select the Display Opportunity Pipeline Report icon in the View bar of the Opportunities window. You can select to generate the report for all opportunities in the Address Book or for only selected opportunities in the current list.



## Reporting

Use the reporting features in Maximizer to keep track of your company's progress. Maximizer comes with a number of built-in reports that you can access from the Reports tab. You can also create your own reports to integrate any Maximizer Address Book information into custom reports using Crystal Reports. The Export to Excel and Advanced Export to Excel commands let you export Address Book information from the current list in Maximizer to Microsoft Excel.

## Administrator Module

Administrator is the administrative center of Maximizer. It is used to configure and manage the entire Maximizer application. To install Administrator on a workstation, you must select the custom installation option and select Administrator as an installed component.

### Manage Users

You use Administrator to manage users. Users are displayed in a list format with contact details and module access rights. From the Manage Users dialog box, you can set passwords, user preferences, and access rights. This is also where you can set up Windows Authentication for users.

### Manage Security Groups, and Teams

You use Administrator to manage security groups and teams. As with users, security groups and teams are displayed in a list format. The properties for security groups and teams can be easily accessed and modified from the Security Groups and Teams dialog box.

### Importing and Upgrading Data

You can use Administrator to import Address Book entries from other sources, such as ACT!, GoldMine, or Outlook. You can also import Address Book entries in XML format or MXI (Maximizer XML Interface) format using the Advanced Import feature, which is available from the **File > Import** menu.

Administrator is also used to upgrade your Address Books from a previous version of Maximizer. You should always perform a backup before upgrading your data.

### Document Administration

You can use the Document Administration functionality to reduce the size of your documents in an Address Book as part of regular maintenance.

### Time Zone Alignment

The Time Zone Alignment dialog box allows you to align users to time zones so that their appointments, Hotlist tasks, and opportunity activities reflect the time zone in which they were created.

See the *Maximizer CRM Administrator's Guide* for information on Administrator procedures. The online guide is available in PDF format in both Maximizer and Administrator.

# Additional Products

## MaxMobile

MaxMobile for BlackBerry provides you with a way to take your customer information on the road. You can take notes, track sales opportunities, as well as check your schedule and make follow-up tasks for yourself. MaxMobile for BlackBerry is also integrated with the BlackBerry native applications and its Address Book so you can easily create contacts from calls and emails you receive on your BlackBerry. You can even quickly draw maps to client locations.

## Accounting Link

Accounting Link is an add-on application designed for use with QuickBooks®. It enables you to connect to your accounting database from any Maximizer computer and add or update invoices, estimates, or purchase orders. For more information on how to install, configure, and use Accounting Link, refer to the online manual provided on the installation disc.

## Learn More About Maximizer CRM

- **Maximizer CRM Administrator's Guide & User's Guide** - The Maximizer CRM manuals are available in Adobe® PDF format. You need to have the Adobe Acrobat Reader installed to be able to read the online guides. To download the reader free of charge, go to [www.adobe.com](http://www.adobe.com).
- **Local and Online Contents Help** - How-to help is available in both Maximizer and Administrator providing you with step-by-step instructions for all areas of both applications.
- **Interactive Command Reference** - An interactive menu/ribbon bar command reference is available from the Local and Online Contents Help. To access the command reference, you must have the Adobe® Flash Player installed. To download the player free of charge, go to [www.adobe.com](http://www.adobe.com).
- **Context Sensitive Help (F1 Help)** - Detailed help that pertains specifically to each window, dialog box, and tab is available by pressing the F1 key when the window, dialog box, or tab is open.
- **Online Training** - <http://www.maximizer.com/onlinetraining>
- **Professional Services** - <http://www.maximizer.com/professional-services>
- **Maximizer Website** - <http://www.maximizer.com>
- **Knowledge Base** - <http://www.maximizer.com/knowledgebase>
- **Online Demonstration** - <http://www.maximizer.com/solutions/maxcrm/online-demo.html>
- **Supported Products** - <http://www.maximizer.com/supported-products>

# Copyright and Applicability Information

## Notice of Copyright

Published by Maximizer Software Inc.

Copyright ©1988-2010

All rights reserved.

## Registered Trademarks and Proprietary Names

Product names mentioned in this document may be trademarks or registered trademarks of Maximizer Software Inc. or other hardware, software, or service providers and are used herein for identification purposes only.

## Applicability

This document applies to Maximizer CRM 11 Entrepreneur/Team Editions.

## Printing History

First printing - July 2010

# Maximizer Software Address Information

## Corporate Headquarters

### Americas

Maximizer Software Inc.  
1090 West Pender Street – 10th Floor  
Vancouver, BC, Canada V6E 2N7  
+1 604 601 8000 phone  
+1 604 601 8001 fax  
+1 888 745 4645 support  
info@maximizer.com  
www.maximizer.com  
Knowledge Base: [www.maximizer.com/knowledgebase](http://www.maximizer.com/knowledgebase)

### Europe, Middle East, and Africa

Maximizer Software Ltd  
Apex House, London Road  
Bracknell, Berkshire  
RG12 2XH United Kingdom  
+44 (0) 1344 766900 phone  
+44 (0) 1344 766901 fax  
info@maximizer.co.uk  
www.maximizer.co.uk

### Asia

Maximizer Asia Limited  
17/F, Regent Centre  
88 Queen's Road Central  
Central, Hong Kong  
+(852) 2598 2811 phone  
+(852) 2598 2000 fax  
info@maximizer.com.hk  
www.maximizer.com.hk

### Australia

Maximizer Software Solutions Pty. Ltd.  
Level 10, 815 Pacific Highway  
Chatswood, NSW 2067  
Australia  
+61 (0)2 9957 2011 phone  
+61 (0)2 9957 2711 fax  
info@maximizer.com.au  
www.maximizer.com.au