

# **Maximizer<sup>TM</sup>** **CRM11**



## **Administrator's Guide** for Team Edition

**Maximizer Software**  
Simply Successful **CRM**



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## Applicability

This document applies to Maximizer CRM 11 software.

# 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  
+44-1344-766900 phone  
+44-1344-766901 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

# Contents

<b>Chapter 1</b>	<b>Welcome to Maximizer.....</b>	<b>1</b>
	Grow Your Business with Maximizer.....	2
	Day-to-day Contact Management with Maximizer .....	2
	Administrator .....	5
	Maximizer Companion Applications.....	6
	Maximizer System Requirements .....	7
<b>Chapter 2</b>	<b>Installing Maximizer.....</b>	<b>9</b>
	Third-party Components Installed with Maximizer CRM.....	10
	Windows Login Account Rights Required for Installation.....	11
	Upgrading from a Previous Version of Maximizer .....	12
	Installing Maximizer CRM .....	13
	Adding and Removing Maximizer CRM Components.....	20
	Installing Licenses.....	21
	Installing a License .....	21
	Applying a License .....	22
	Viewing Applied and In-use Licenses.....	22
	Updating Maximizer Installations with Live Update.....	23
	Where to Go from Here.....	25
<b>Chapter 3</b>	<b>Creating or Upgrading an Address Book .....</b>	<b>27</b>
	What is Administrator? .....	28
	Creating Address Books .....	29
	Checklist: Setting up a New Address Book .....	30
	Creating an Address Book .....	31
	Connecting to an Address Book .....	32
	Maximizer System Login Accounts .....	33
	Changing the MASTER User Password .....	34
	Upgrading or Converting an Address Book.....	35
	Time Zone Alignment .....	36
	Importing Vertical Templates .....	37
<b>Chapter 4</b>	<b>Setting Up Users, Groups, and Teams .....</b>	<b>39</b>
	Adding a User to an Address Book .....	40
	Changing a User's Password .....	43
	User and Group Security .....	44

User Access Rights and User/Group Access Settings.....	45
Modifying User Access Settings.....	48
Security Groups .....	50
Default Security Groups in all New Address Books.....	51
Creating a New Security Group.....	52
Modifying Group Access Settings.....	54
Record Ownership .....	55
Sales Teams .....	57
User Preferences .....	60

## **Chapter 5**

<b>Configuring an Address Book.....</b>	<b>61</b>
Address Book Preferences.....	62
Using Passwords .....	64
Preventing Duplicate Address Book Entries.....	65
Partial Matching.....	67
Permission to Create Duplicate Entries.....	67
Configuring Duplicate Address Book Entry Checking.....	68
Setting Up User-Defined Fields for an Address Book.....	69
Types of User-Defined Fields.....	69
User Access Rights for User-Defined Fields .....	70
About the Set Up User-Defined Fields Dialog Box.....	71
Creating a New Folder for User-Defined Fields.....	72
Creating a New User-Defined Field.....	73
Adding Items to a Table User-Defined Field.....	75
Transferring User-Defined Fields between Address Books .....	77
Creating Key Fields Lists.....	79
Specifying Key Fields by Entry Type .....	79
Restricting Key Fields to Specific Users .....	80
Creating a Key Fields List.....	81
Recording Holidays in the Holiday Editor.....	83

## **Chapter 6**

<b>Configuring Email, Phone, and Synchronization .....</b>	<b>85</b>
Configuring Microsoft Outlook Synchronization .....	86
Appointment and Task Synchronization.....	87
Synchronization from Outlook to Your PDA .....	88
Configuring Outlook Synchronization.....	88
Configuring MaxMobile Wireless Server.....	91
Enabling TAPI.....	93
Requirements for Caller ID .....	93
Phone Number Matching with TAPI .....	94
Configuring Maximizer to Use TAPI.....	95
Phone Masks .....	97
Using Fax Software with Maximizer.....	98

**Chapter 7****Managing Address Book Data .....99**

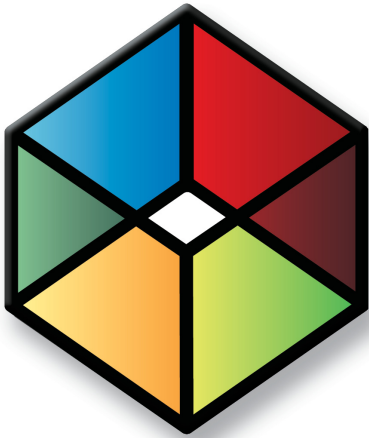
Backing Up and Restoring Address Book Data.....	100
Backing Up an Address Book .....	100
Restoring an Address Book from a Backup .....	103
Moving an Address Book to a Different Server .....	105
Backing Up the Dictionary and Holiday Files .....	105
Converting Embedded Documents to Linked Documents.....	106
Verifying and Recovering Address Book Data.....	108
Exporting Data from Maximizer .....	111
Exporting Address Book Entries in XML Format .....	111
Exporting Address Book Entries in Text Format.....	113
Selecting Fields for Export.....	115
Importing Address Book Data from MXI or XML Files.....	117
Importing MXI or XML Files Using Advanced Import .....	117
Unattended Import of MXI or XML Files .....	119
Importing Data from Other File Formats.....	120
Field Mapping .....	122
Two-Tier Import.....	122
Importing from Other Contact Managers .....	125
Importing Data from ACT! and GoldMine .....	128
Field Mapping for Outlook .....	137
Transferring Entries between Address Books .....	139
What Happens During a Transfer?.....	139
Transferring Address Book Entries.....	140
Transfer Summary Reports and Logging .....	141
Adjusting Address Book Transfer Settings.....	142
Purging Outdated Notes and Documents.....	143
Using Log Files for Diagnosis.....	145
System Reports .....	147

**Appendix A****Administrator's Reference .....149**

Recreating the Maximizer_Default User.....	150
MaConfig Table (Server and Address Book Configuration).....	151
Editing the MaConfig Settings.....	151
Four-letter Module Codes.....	151
MaConfig Table: Entries and their Meanings.....	152
Maximizer File Types .....	159
Maximizer XML Interface (MXI) .....	160
Top-Level Elements .....	161
ImportOptions Element .....	161
DetailDef Element.....	164
Individual Element .....	165
Company Element.....	166
Contact Element.....	167
Address Element .....	168

Note Element.....	168
Document Element .....	168
Element Details .....	169
<b>Index .....</b>	<b>175</b>





# CHAPTER 1 **Welcome to Maximizer**

*Introducing Maximizer*

In this chapter...

"Grow Your Business with Maximizer" on page 2

"Administrator" on page 5

"Maximizer Companion Applications" on page 6

"Maximizer System Requirements" on page 7

## Grow Your Business with Maximizer

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.

### Key Benefits of Maximizer

- Manage customers better than your competitors by recording details of every relationship.
- Effectively track prospects to close more sales.
- Schedule your time and others.
- Manage an unlimited number of contacts.
- Integrate with Microsoft Outlook's email and calendar.
- Manage your business and free up valuable time with automatic reporting and analysis.
- Send personal letters and announcements linked to your contact's record with mail-merged letters, faxes, and emails.

## Day-to-day Contact Management with Maximizer

### Contact Management

- Manage an unlimited number of contacts.
- Record and view a complete history of all customer interactions, including faxes, emails, and calls.
- Tailor to your own needs by creating unlimited user-defined fields.
- Ensure accurate customer information through mandatory user-defined fields and duplicate record checking.
- Create and save your own custom views and layouts.
- Save and retrieve Favorite Lists of Address Book entries.

## Opportunity Management

- Manage a pipeline of opportunities from lead to close.
- Easily forecast revenue and cash flow using one of the many standard reports.

## Calendars and Scheduling

- Quickly schedule appointments, activities, and tasks related to contacts.
- View and print graphical calendars.
- Integrate with the Microsoft Outlook calendar.
- Schedule pop-up alarms and create prioritized task lists for yourself and others.
- Use the Peg Board to check other users' whereabouts.

## Word Processing, Fax, and Email

- Create letters, faxes, memos, and email messages stored under each contact for easy reference.
- Mail-merge contact information using built-in or custom templates for letters, faxes, and email.
- Create documents using the built-in Maximizer Word Processor, or using Microsoft Word or Corel WordPerfect.
- Send email messages instantly using a VIM- or MAPI-compliant email client.

## Marketing

- Share documents, collateral, and marketing projects in the central Company Library.
- Profile customers using your unique user-defined fields to identify trends and similarities.
- Monitor market information to achieve and maintain a competitive advantage.
- Create targeted and personalized announcements by letter, fax, or email, linked to your contacts' records.

## BlackBerry Access

- Easily access and update your Maximizer CRM information using a BlackBerry device.
- Integrate information from Maximizer with the native applications on your BlackBerry device.

## Website Integration

- Capture customer information with your own web forms using the Web Inquiry Form wizard.
- Provide your customers with peace of mind by automatically encrypting all credit card transactions with SSL transaction security.

## Reporting and Analysis

- Use advanced reporting to view consolidated activity and history information for each account.
- Create, view, and print pre-formatted and custom reports, including revenue forecasts, sales pipeline analysis, account activity, customer profiles, and more.
- Enhance your reports with charts, numerical calculations, and full-color graphics.

## Database and Administration

- Add new users to an Address Book.
- Add new user-defined fields at any time.
- Generate weekly activity reports for a particular group or contact.
- Coordinate group activities and information with security groups.
- Import data from other programs, including ACT!, GoldMine, and Outlook.
- Import data from a wide variety of databases, including ASCII, dBASE, Access, and XML.
- Back up and restore Address Books.

# Administrator

In addition to Maximizer, Administrator is a separate component used for managing administrative tasks. Typically, this component is handled by a technically proficient staff member to configure and manage the entire Maximizer application. For example, Administrator is used to create and manage Maximizer users, apply licensing, and create new Address Books.

You can also do tasks that are common to both Maximizer and Administrator such as backing up data, importing and exporting data, and producing reports.

Administrator can be accessed from the Maximizer program menu (Start > Programs > Maximizer > Administrator) or directly from Maximizer (Click the Maximizer button, and select Administrator).

## Maximizer Companion Applications

There's more to Maximizer than just the main modules. See the following descriptions of our Maximizer companion applications.

### MaxMobile

Combined with Maximizer, MaxMobile for BlackBerry forms a powerful suite of tools offering you all of the contact management features of Maximizer with the portability and convenience of a mobile device.

Whether at work or on the road, you always have access to current information about your clients or customers—names, addresses, appointments, tasks, and notes. Simply use either application to view, add, change, and delete records.


For information on using MaxMobile, see the *MaxMobile for BlackBerry Getting Started Guide*. For information on configuring MaxMobile, see the *MaxMobile Wireless Server Getting Started Guide*.

### MaxAlarm

MaxAlarm is a Maximizer companion application that automatically monitors appointments for one or more people in any number of Address Books. MaxAlarm automatically starts when you start your computer, and you can leave it running with or without running Maximizer and still be notified of appointments. You'll know if MaxAlarm is running because its icon appears in your Windows System Tray, which is in the lower right corner of your screen.

MaxAlarm is easy to use. Simply add one or more Address Books to MaxAlarm, minimize it, and then forget about it—until the Alarm dialog box pops up to remind you of an appointment. With MaxAlarm's Review feature, you can review today's appointments without opening an Address Book in Maximizer.

# Maximizer System Requirements

 Visit our website at [www.maximizer.com](http://www.maximizer.com) for the most up-to-date product compatibility information.

The hardware and software requirements for each type of Maximizer installation are listed in the following tables. Please refer to the Maximizer website at [www.maximizer.com](http://www.maximizer.com) for updated information.

Note that these are the minimum system requirements for Maximizer, and your operating system may have higher requirements for some components, such as processor speed and RAM. Refer to your operating system documentation for its specific requirements.

## Maximizer CRM Team Edition System Requirements

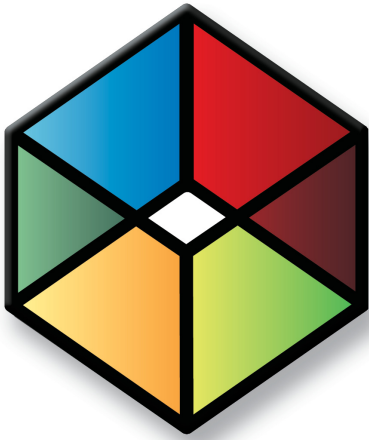
The following table lists the system requirements for Maximizer CRM Team Edition. For more information visit the Maximizer website at [www.maximizer.com](http://www.maximizer.com).

Minimum Processor Speed	1.0 GHz (minimum) 2.0 GHz or faster (recommended)
Available RAM	512 MB (minimum); 1 GB (minimum for Windows Vista or Windows 7) 1 GB or more (recommended); 2 GB or more (recommended for Windows Vista or Windows 7)
Available hard disk space	1 GB (minimum) 2 GB or more (recommended)
Minimum video resolution	SVGA (800x600) or higher-resolution video adapter and monitor
Operating system	Microsoft Windows 7, 2008, Small Business Server 2008, Vista, XP, or 2003 (updated to their latest service packs) <sup>a</sup>
Email system	32-bit MAPI- or VIM-compliant
Internet browser	Microsoft Internet Explorer 8.0 or 7.0

- a. Microsoft Windows 7 Home Premium, Vista Home/Home Premium, XP Home, and XP Media Center are not supported in a network environment when logging in to a domain is required. Refer to your Microsoft documentation for details on how to set up networking in a workgroup environment.







## CHAPTER 2 **Installing Maximizer** 2

### In this chapter...

- "Third-party Components Installed with Maximizer CRM" on page 10
- "Windows Login Account Rights Required for Installation" on page 11
- "Upgrading from a Previous Version of Maximizer" on page 12
- "Installing Maximizer CRM" on page 13
- "Adding and Removing Maximizer CRM Components" on page 20
- "Installing Licenses" on page 21
- "Updating Maximizer Installations with Live Update" on page 23
- "Where to Go from Here..." on page 25

## Third-party Components Installed with Maximizer CRM

The Maximizer CRM installation includes the following third-party products:

- Microsoft SQL Server Express Database Engine
- Crystal Reports Viewer
- Microsoft Data Access Components (MDAC)

The type of Maximizer installation determines which of these components are installed.

### Microsoft SQL Server Express Database Engine

Microsoft SQL Server Express is the database engine Maximizer uses to read and write data from the Address Book. You may also use the full version of Microsoft SQL Server as the Maximizer database engine, in which case SQL Server Express is not installed with Maximizer.

If you will be running in a workgroup environment, designate one machine as the Maximizer Application Server, which is the machine where the Maximizer Address Book(s) are stored. Keep in mind that this computer must always be on. If it is turned off, other machines will not be able to access the Address Book files. SQL Server Express installs automatically as part of the Maximizer CRM installation.

### Crystal Reports

Maximizer CRM includes a report reader for Crystal Reports. You must install the full version of Crystal Reports to create reports for Maximizer, but you can view Crystal Reports in Maximizer without installing the full version. These reports are accessible through the Reports menu in Maximizer.

The Maximizer CRM installation creates the following folder for your personal reports:

- ...\\My Documents\\MaximizerReports

This folder is the default location for personal report templates, which can be created from the Reports > Crystal Reports > Personal Custom Report menu in Maximizer. Users must belong to the Crystal Reports Users security group to use this function.

## Microsoft Data Access Components (MDAC)

MDAC is required by Maximizer. The Maximizer CRM installation determines if MDAC is already installed on the machine and installs it if necessary.

MDAC includes the following components:

- ActiveX Data Objects (ADO)
- OLE DB
- Open Database Connectivity (ODBC)

## Windows Login Account Rights Required for Installation

To install Maximizer CRM, you must be logged into Windows using an account with Windows Administrator privileges. During installation, you may be required to reboot the computer, and then you must log into Windows using an account with Windows Administrator privileges again so the installation can continue.

## Upgrading from a Previous Version of Maximizer

**i** ALWAYS back up the Address Book before upgrading Maximizer. For instructions on backing up, refer to "Backing Up and Restoring Address Book Data" on page 100. If you have customized the dictionary and holidays, also back up those files separately before upgrading.

If you are currently running an earlier version of Maximizer and want to upgrade, it is strongly recommended that you uninstall the previous version before proceeding with the upgrade.

However, if you absolutely require your Maximizer settings, such as Window layout, colors, fonts, etc., to be carried over to the new version, you can install the new version without uninstalling the previous version. The setup then prompts you to uninstall the previous version automatically, but this method does not overwrite your Maximizer settings.

### ➤ To upgrade to the new version of Maximizer

- 1** Back up your Maximizer Address Book. Refer to "Backing Up and Restoring Address Book Data" on page 100 for instructions.
- 2** If you have customized the dictionary and holidays, also back up those files separately before upgrading. For instructions, refer to "Backing Up the Dictionary and Holiday Files" on page 105.
- 3** Uninstall Maximizer CRM, and any additional Maximizer components, on all computers.  
  
You can find instructions for uninstalling Maximizer after this procedure.
- 4** Install the new version of Maximizer, as described in this chapter.
- 5** Upgrade your Maximizer Address Book database to the new version, as described in "Upgrading or Converting an Address Book" on page 35.

### ➤ To uninstall Maximizer

**i** Uninstalling Maximizer does not uninstall your Address Book data. However, you should always back up your Address Book before uninstalling.

- 1** Click **Start > Settings > Control Panel > Add/Remove Programs**. In Windows Vista, click **Start > Control Panel > Programs and Features**.
- 2** In the list of currently installed programs, select **Maximizer CRM**.
- 3** Click **Change/Remove**. In Windows Vista, select **Uninstall/Change**.
- 4** Click **Yes** to confirm.  
  
The Remove Programs From Your Computer dialog box displays the uninstall progress.
- 5** If the Remove Shared File? dialog box opens, click **No To All**.

- 6** When the uninstall is complete, click **OK** to close the dialog box.
- 7** Reboot the computer.

## Installing Maximizer CRM

**i** You must be logged into Windows as an administrator to install Maximizer. After installation, it prompts you to restart the computer, and then you must log in as an administrator again to complete the installation.

An installation wizard steps you through the process of installing the software on the computer. The instructions in this section complement the wizard to provide additional information.

You can install Maximizer on a computer in one of the following database configurations:

- Maximizer is installed on the same computer as Microsoft SQL Server Express. In this configuration, a new instance of SQL Server Express is installed during the Maximizer installation. The computer may act as a server to which other computers running Maximizer connect.
- Maximizer is installed without any database components. In this configuration, the computer acts like a workstation and must connect to an existing Maximizer installation on another computer.
- Maximizer is installed on a computer with an existing instance of Microsoft SQL Server. In this configuration, the Maximizer installation connects to the existing instance of SQL Server. The computer acts as a server to which other computers running Maximizer connect.

If the configuration in your office includes servers and workstations, you must install Maximizer on the server computer before installing Maximizer on the workstation computers. You can select the database configuration for the installation in Step 7 of the following procedure.

### ➤ To install Maximizer

- 1** Close all programs running on the computer.
- 2** Insert the Maximizer CRM disc.

The setup starts automatically.

- 3** Select **Install Maximizer CRM**.

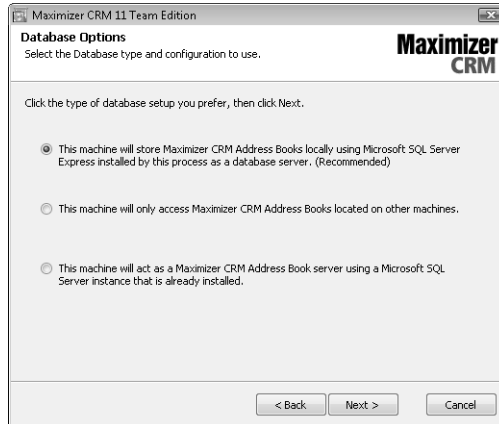
The InstallShield Wizard starts.

- 4** Click **Next** to begin the installation.
- 5** Read the license agreement, and click **Yes** to continue.

**i** If the setup doesn't start automatically, you can start it manually by running setup.exe from the Max folder of the disc (e.g., \Max\setup.exe).

**6** Enter your **Product Serial Number**, **First name**, and **Last name** into the required fields, and click **Next**.

**7** Select the database configuration for the installation, and click **Next**.



**This machine will store CRM Address Books locally using Microsoft SQL Server Express installed by this process as a database server** – This option installs Maximizer and Microsoft SQL Server Express on the current computer. The computer can store Address Books and may act as a server to other computers using Maximizer.

**This machine will only access Maximizer CRM Address Books located on other machines** – This option installs only Maximizer on the current computer. The computer acts as a workstation and must connect to Address Books on other computers.

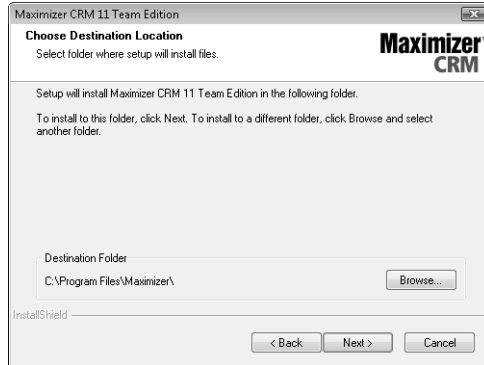
**This machine will act as a Maximizer CRM Address Book server using a Microsoft SQL Server instance that is already installed** – This option installs Maximizer on the computer and connects to an existing Microsoft SQL Server database on the computer. The computer is a server that other computers running Maximizer may connect to.

**i** Do not change any default share names, file names, file locations, folder names, or folder locations after installing Maximizer. If you want to use names and locations other than the defaults, change them during the installation.

**8** Click **Next** to install Maximizer components to the default location.

– or –

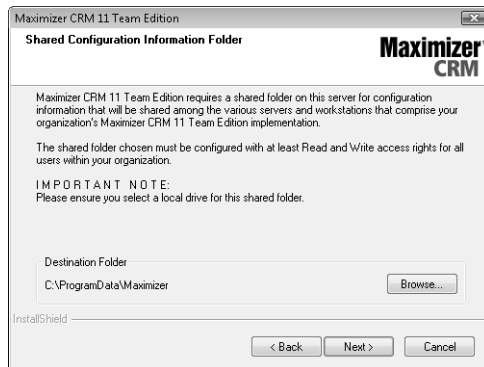
Click **Browse**, select a destination folder, and click **Next**.



**9** (This step does not apply to workstation installations where the database is installed on a different computer.) Click **Next** to use the default folder for shared configuration information.

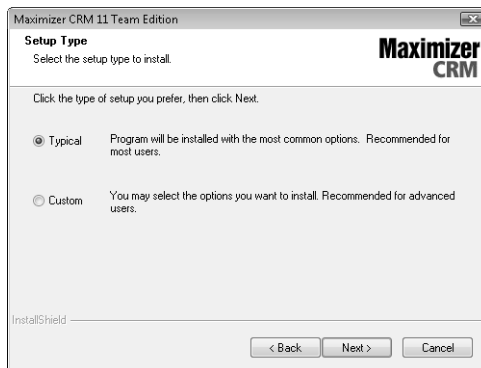
– or –

Click **Browse**, select a local shared folder, and click **Next**.



By default, Maximizer setup creates the folder **...All Users\Application Data\Maximizer**, and it creates a shared subfolder called **AddrBks**.

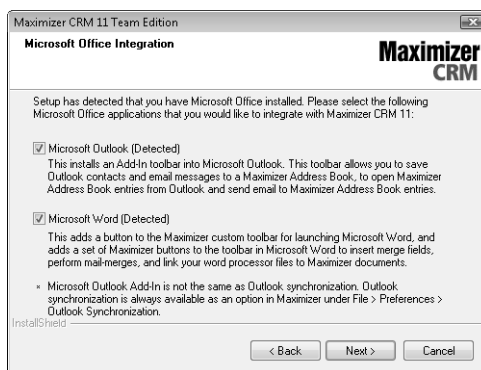
**1 0** Select a setup type, and click **Next**.



**Typical** installs a default set of software, such as drivers. It also installs a default set of Maximizer applications. Maximizer recommends that you select the Typical installation, unless you have a specific reason not to.

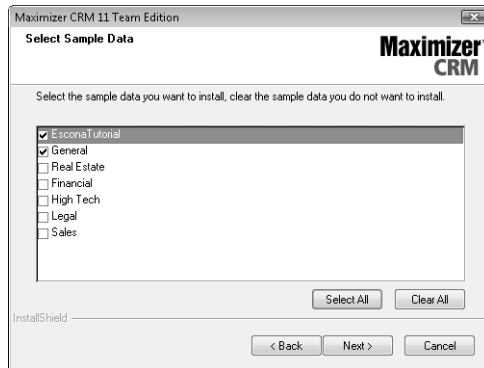
**Custom** enables you to select specific Maximizer modules to install. Select this option only if you have a specific reason to alter the default Maximizer installation provided by the Typical installation. If you would like to install additional components, click the + to expand the selection.

**1 1** If you have Microsoft Outlook or Microsoft Word installed on this computer, the wizard prompts you to integrate either or both of those applications with Maximizer. Select which applications to integrate, and click **Next**.

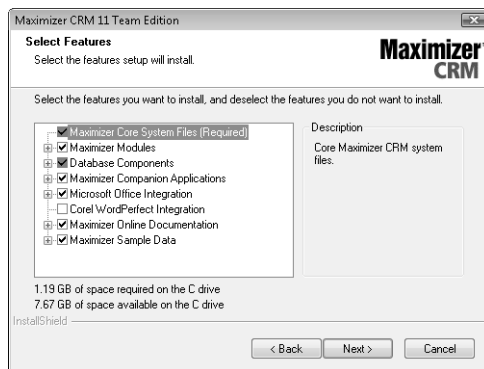




- 1 2** (This step applies to Typical installations only.) Select which sample Address Books to install.

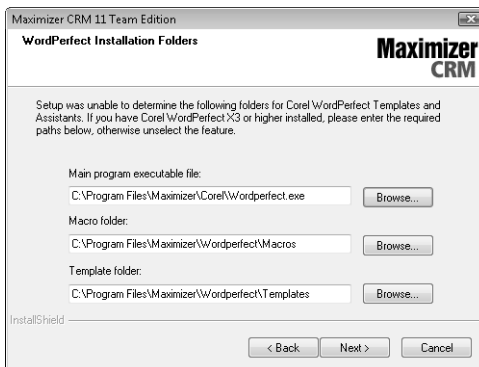


- 1 3** (This step applies to Custom Installations only.) Select which features to install, and click **Next**.



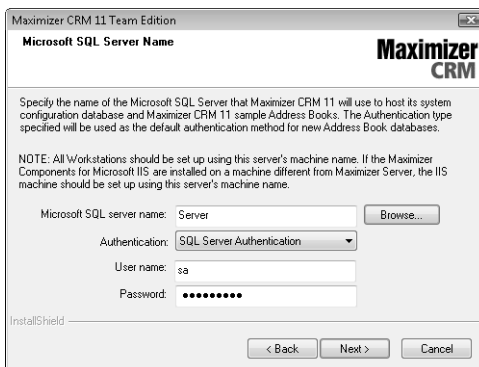
- 1 4** (This step applies to the Core WordPerfect Integration option only.) If the setup cannot locate Core WordPerfect Office on the computer, it prompts you to provide the path to

these files and folders. Click **Browse** to select the correct paths, and click **Next**.



**1 5** (This step applies to server installations where an existing instance of SQL server is installed only.) Enter or select the SQL Server name.

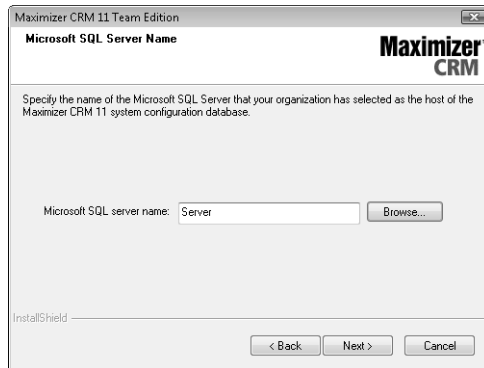
Enter the SQL administrator **User name** and **Password**, and click **Next**.



This step prompts the installation to create the MaConfig database on the SQL Server that Maximizer CRM uses for its configuration settings.

**1 6** (This step applies to workstation installations where the database is installed on a separate computer only.)

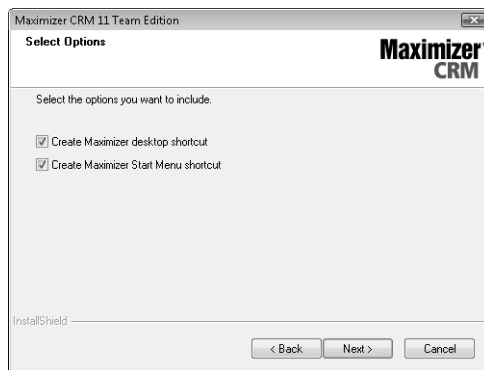
Enter the name of the Maximizer server to which this computer will connect, and click **Next**.



**17** Select any of the following options, and then click **Next**:

**Create Maximizer desktop shortcut** – This option creates an icon on the Windows desktop that runs Maximizer when you double-click it.

**Create Maximizer Start Menu shortcut** – This option creates a shortcut to Maximizer on the Windows Start menu.



**18** Review the installation settings, and click **Next**.

**19** The wizard displays an installation progress indicator. After the installation is complete, click **OK** to close the message box.

The installation prompts you to restart your computer.

**20** Click **Finish** to close the wizard and restart the computer.

- 2 1 After the computer restarts, log into Windows using an administrator account. This step is required to complete the installation.

Maximizer CRM is now installed.

## Adding and Removing Maximizer CRM Components

Maximizer enables you to add and remove specific components of the software without having to reinstall Maximizer itself.

### ➤ To add or remove Maximizer CRM components

- 1 Close all programs running on the computer
- 2 Insert the Maximizer disc.
- 3 On the Setup disc Autorun screen, select **Install Maximizer CRM**.

If the setup doesn't start automatically, you can start it manually by running setup.exe from the Max folder of the disc (e.g., \Max\setup.exe).

- 4 Select **Modify**, and click **Next**.

Checkboxes are automatically selected for any currently installed components.

- 5 Select the checkbox beside any components to add.
- 6 Clear the checkbox beside any components to remove.

If a component is already installed, and you want to keep it, do not clear the checkbox beside that component.

- 7 Click **Next**.

Maximizer begins the update.

 Expand the branches to add or remove sub-components.

# Installing Licenses

When you purchase licenses from Maximizer Software, you receive a Product License Number (PLN), which includes licenses for a specified number of users. Maximizer comes with a default single-user license. Because Maximizer licenses are stackable, any additional licenses applied to Maximizer will be added to your current license count. For example, if you have the default single-user license and want to upgrade to eight licenses, you need a new PLN for seven users only, and you can apply it in addition to the original single-user PLN.

Note that the MASTER user account is always enabled, and it consumes a license only if you are logged into Maximizer using the MASTER user account.

The following sections contain information on installing Maximizer licenses:

- “Installing a License” on page 21
- “Applying a License” on page 22
- “Viewing Applied and In-use Licenses” on page 22

## Installing a License

After you install Maximizer or purchase additional licenses, you must install the PLN(s).

### ➤ To install a product license number (PLN)

- 1** Run Administrator.
- 2** Select **Utilities > Install Multi-User License**.
- 3** Enter the PLN.
- 4** Click **Install License**.
- 5** Repeat steps 3 and 4 to install any additional licenses.
- 6** Click **Close**.

Administrator closes automatically.

The next step is to apply the PLN(s) to the Address Books.

## Applying a License

After you have installed a PLN, you must apply it to the Maximizer Address Book(s).

### ➤ **To apply a product license number (PLN)**

- 1** After installing the license as described above, start Administrator.
- 2** Open and close each Address Book that you are applying licenses to.

The license has now been applied to the Address Book(s).

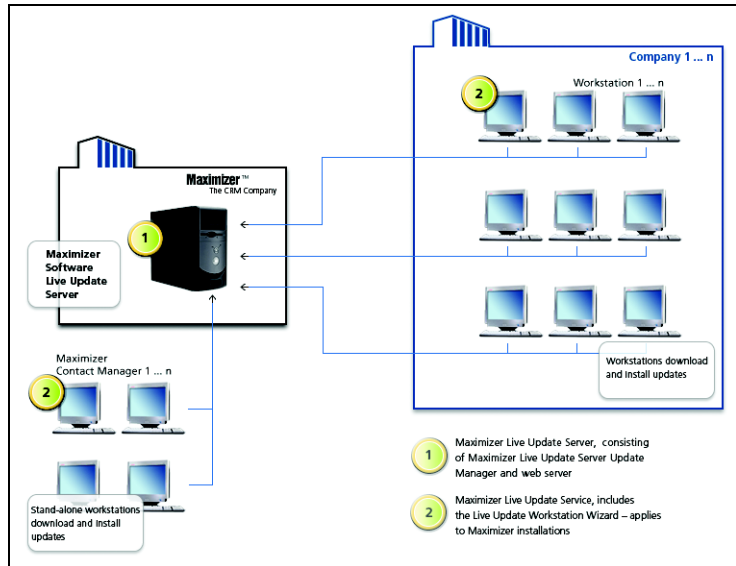
## Viewing Applied and In-use Licenses

### ➤ **To view the number of applied and in-use licenses**

- In Administrator, select **Reports > Current Users**.

# Updating Maximizer Installations with Live Update

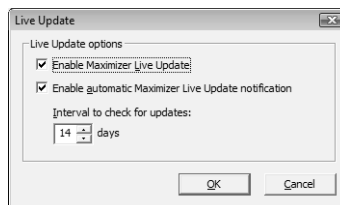
The Live Update Wizard connects to the Maximizer Live Update Server and downloads any available updates for your local Maximizer installation.



By default, Live Update is enabled, automatic notifications are enabled, and the interval to check for updates is set to 1 day. You can modify these preferences as required in Administrator.

## ➤ To configure Live Update preferences

- 3** In Administrator, select **File > Preferences**.
- 4** On the System Options tab, click **Live Update**.
- 5** Update any of the preferences as desired, and click **OK**.



**i** Live Update options in Administrator are accessible through the Live Update button on the System Options tab in File > Preferences.

## ➤ To start the Live Update Wizard

- If the **Enable automatic Maximizer Live Update notification** option is selected in the Live Update options in Administrator, a message box (shown below) notifies you when new updates are available. Click **OK** to start the Live Update Wizard.  
– or –
- In Administrator, select **Help > Maximizer Live Update**. In Maximizer, click the **Maximizer** button, and select **Help > Maximizer Live Update**.

## ➤ To download software updates from the server

- 1** Start the **Live Update Wizard** as described above.



- 2** Click **Next**.

The Live Update Wizard connects to the Live Update Server to check for any available updates.

- 3** Select the update(s) to download.
- 4** Click **Next** to download the selected updates.
- 5** Click **Finish** to close the wizard.

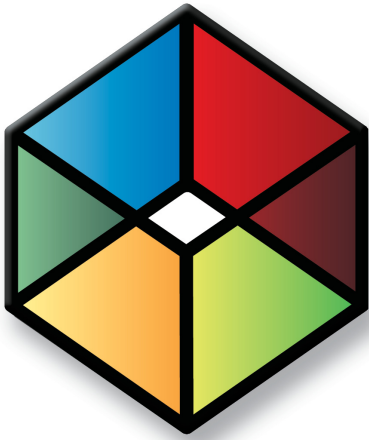
The downloaded executable file should launch immediately to start the installation.



## Where to Go from Here...

- Create a new Address Book or upgrade an existing Address Book to the latest version of Maximizer, as described in chapter 3 “Creating or Upgrading an Address Book” on page 27.
- Create login accounts for Maximizer users and assign users to security groups and sales teams, as described in chapter 4 “Setting Up Users, Groups, and Teams” on page 39.
- Configure Address Book preferences, including duplicate Address Book entry handling, user-defined fields, and key fields, as described in chapter 5 “Configuring an Address Book” on page 61.
- For more information on converting a database, please refer to chapter 7 “Managing Address Book Data” on page 99.





# CHAPTER 3 **Creating or Upgrading an Address Book**

In this chapter...

- "What is Administrator?" on page 28
- "Creating Address Books" on page 29
- "Connecting to an Address Book" on page 32
- "Maximizer System Login Accounts" on page 33
- "Changing the MASTER User Password" on page 34
- "Upgrading or Converting an Address Book" on page 35
- "Time Zone Alignment" on page 36
- "Importing Vertical Templates" on page 37

## What is Administrator?

Administrator is the administrative center of Maximizer. Use it to complete the following tasks:

- Manage users, sales teams, and security groups.
- Create and configure Address Books.
- Manage Maximizer application settings.

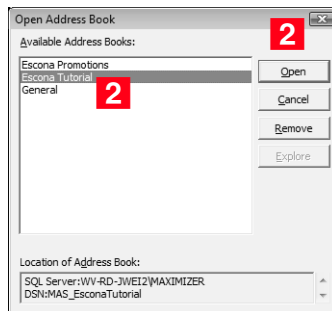
Once Administrator is running, you can open any Address Book and perform administrative tasks. There will be no database conflicts if you open an Address Book while it is in use by another user. (However, you should ensure all users have logged out before backing up or restoring the Address Book.) Also, changes to the user's settings require the corresponding logged-in user to log into the Address Book again before the settings will take effect.

### ➤ To start Administrator

- Click **Start > Programs > Maximizer CRM > Administrator**.

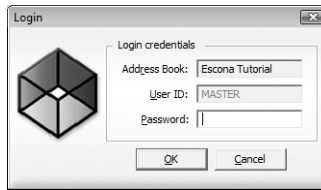
### ➤ To open an Address Book in Administrator

- 1** Start Administrator.
- 2** Select an Address Book, and click **Open**.



**i** The default MASTER user password is “control”, unless it has already been changed to another password in any Maximizer Address Book.

**3** Type the **Password**, and click **OK**.



The selected Address Book opens in Administrator.

## Creating Address Books

**i** Sample Address Books are installed with Maximizer and demonstrate how a company would use Maximizer. Do not use the sample Address Book for your own data.

**i** For information about transferring Address Book information, refer to “Importing Address Book Data from MXI or XML Files” on page 117 and “Transferring Entries between Address Books” on page 139.

Once you have familiarized yourself with Maximizer by using a sample Address Book, such as Escona Tutorial, your first administrative task is to set up a new Address Book.

Administrator makes it easy to create your Address Book in a few steps, and even enables you to create it using some of the settings from an existing Address Book, such as preferences, templates, user-defined fields, and macros.

Once you’ve created the Address Book, set up user accounts and configure security and preferences. If you need to add entries from another Address Book, Maximizer can transfer those entries to the new Address Book. Any user can transfer Address Book information, provided that they have sufficient security privileges in their account.

The following sections contain information on creating Address Books in Maximizer:

- “Checklist: Setting up a New Address Book” on page 30
- “Creating an Address Book” on page 31

## Checklist: Setting up a New Address Book

 These steps highlight the major tasks involved in creating a new Address Book.

Use this list to help you set up a new Maximizer Address Book. Perform these steps in the order shown here.

- 1 Create the new Address Book.** Refer to “Creating an Address Book” on page 31.
- 2 Change the MASTER user password.** Refer to “Changing the MASTER User Password” on page 34.
- 3 Enable security for an Address Book.** This applies only if there are multiple users in your Address Book. To enable security, select the **Enable security** option on the **System Options** tab in Administrator preferences. Refer to “Address Book Preferences” on page 62.
- 4 Add users to the Address Book.** When you create a new Address Book, it contains only the MASTER user account. Create an account for each Maximizer user. Refer to “Adding a User to an Address Book” on page 40.  
  
Note that if you are not running Maximizer in a multi-user environment, you do not need to add user accounts or set up user and group security.
- 5 Set up security for users and security groups.** You may want some users to have more access to your Address Book data than other users. Administrator lets you restrict access to specific users and groups of users. Refer to “User and Group Security” on page 44.
- 6 Test the Address Book.** In Maximizer, log into the new Address Book with one or more of the new user accounts, or as the MASTER user if you did not create any new user accounts.

## Creating an Address Book

**i** The location of this folder may be different if you specified a different folder during the Maximizer installation.

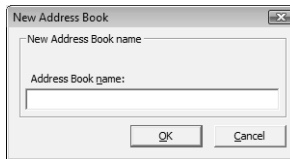
Use Administrator or Maximizer to create new Address Books.

Maximizer Address Book files are stored in the ...\\Documents and Settings\\All Users\\Application Data\\Maximizer\\AddrBks folder. If other users should be able to access these files, you must grant those users access permissions to the folder.

After the new Address Book is created and added to the list of Address Books in Maximizer, each networked computer receives the updated Address Book list when logging in.

### ➤ To create a new Address Book

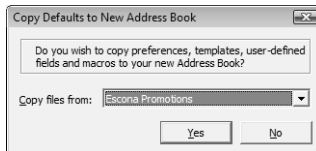
- 1** Select **File > New Address Book**.



- 2** Type the name of the new Address Book in the **Address Book name** field, and click **OK**.

- 3** Click **OK**.

Maximizer prompts you to copy defaults from an existing Address Book to the new Address Book.



- 4** Click **Yes** to copy the default settings, or click **No** to create a blank Address Book.

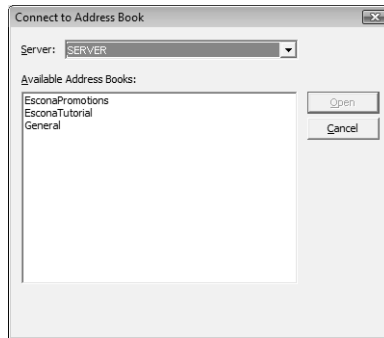
Maximizer creates the new Address Book.

## Connecting to an Address Book

Maximizer allows you to connect to any Address Book on a computer running SQL Server Express.

### ► To connect to an Address Book

- 1** From Administrator or Maximizer, select **File > Connect to Address Book**.
- 2** In the **Connect to Address Book** dialog box, select the computer that hosts the Address Book to which you would like to connect.
- 3** Choose an Address Book from the **Available Address Books** list and click **Open**.



- 4** When you are connected to the Address Book, you are prompted with a message saying the connection was successful. Click **OK** to close the message dialog box.

Once the connection to an Address Book is established, it appears in the Open Address Book window. You can use the Remove button in the Open Address Book dialog to remove it from the available Address Book list.



# Maximizer System Login Accounts

When you create a new Maximizer Address Book, the following login accounts are created automatically:

- **MASTER** is required to log into the Administrator module of Maximizer.
- **COMPANY** is used for the company calendar, which displays company events in the Maximizer calendar. Company calendar events are created under the COMPANY user account. This user account provides read-only access of its calendar to all users.
- **maximizer\_default** is a system login created in the Maximizer instance of Microsoft SQL. It is only used by Maximizer and cannot be used to login to Maximizer or Microsoft SQL. If this user is missing see “Recreating the Maximizer\_Default User” on page 150.

When you create a new Maximizer Address Book, the MASTER user account is created automatically. This account is required to log into the Administrator module of Maximizer and to perform administrative tasks.

It is important to leave the MASTER user account enabled and with its default settings. Maximizer requires this account to function correctly. Note that the MASTER user account consumes a license only if you are logged into Maximizer with the MASTER user account.

It is important to change the password for this system login account from its default immediately after creating an Address Book. For instructions on changing the account password, refer to “Changing the MASTER User Password” on page 34.

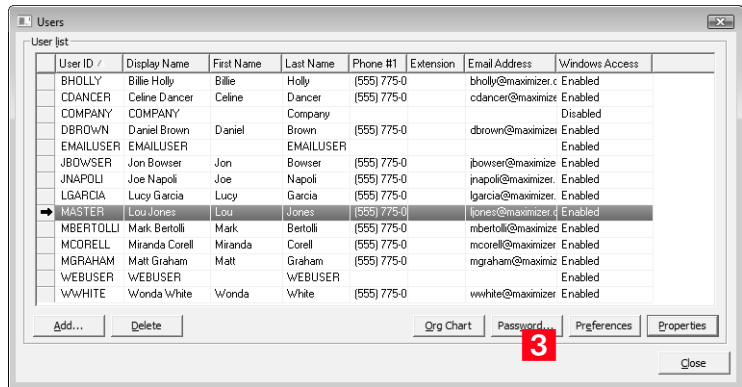
## Changing the MASTER User Password

**i** If the MASTER password for an existing Address Book has been changed, and then you create a new Address Book, the new Address Book will have the same password as the existing Address Book, and not "control".

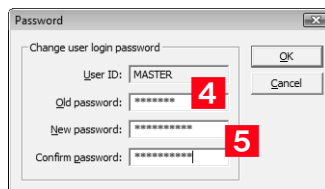
The default password for the MASTER user is **control**. For security reasons, you should change this password immediately after creating a new Address Book.

### ➤ To change the MASTER user password

- 1** Run Administrator and log in to the Address Book as MASTER.
- 2** Select **File > Manage Users**.
- 3** Select **MASTER** from the user list and click **Password**.



- 4** In the **Old password** field, type **control** (or the current password if you have changed the MASTER password before).
- 5** In the **New password** and **Confirm password** fields, type the new MASTER user password, and click **OK**.



The MASTER user password has now been changed.

# Upgrading or Converting an Address Book

You can upgrade an Address Book by opening it in Administrator or Maximizer. Administrator also has a built-in utility to convert existing Maximizer databases from older versions to the current version, and to convert Maximizer Pervasive databases to Maximizer SQL databases.

You should always back up the Address Book before upgrading. For instructions on backing up, refer to “Backing Up and Restoring Address Book Data” on page 100. For older databases, refer to the User’s Guide for your previous version of the software. If you have customized the dictionary and holidays, also back up those files separately before upgrading.

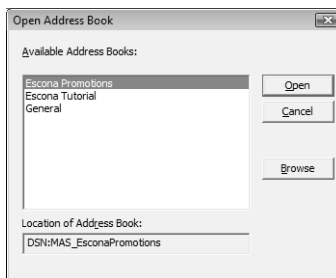
After upgrading a database, you should always perform an Address Book validation and recovery. For further information, refer to “Verifying and Recovering Address Book Data” on page 108.

**i** If you are upgrading Maximizer Pervasive databases, do not uninstall Pervasive until you have successfully upgraded all of the Pervasive databases.

**i** Note that the Browse button is used to locate Maximizer files that are in a Pervasive (Btrieve) database format. It is not applicable to a SQL Server Address Book.

## ➤ To upgrade a Maximizer Address Book

- 1** Ensure Maximizer is closed before proceeding with the upgrade.
- 2** If you have an Address Book open in Administrator, select **File > Close Address Book**.
- 3** Select **Utilities > Upgrade Maximizer Address Book**.
- 4** Select **Yes** when prompted to continue.
- 5** If the Address Book does not appear in the list, click the **Browse** button to browse to the location of your Pervasive (Btrieve) Address Book files and click **OK**. Then, enter an Address Book name and click **OK**.
- 6** Select the Address Book from the available Address Book list, and click **Open**.



The upgrade process begins.

## Time Zone Alignment

After upgrading your database, use the Time Zone Alignment utility to align users' appointment, Hotlist task, and opportunity activity times with the time zone in which these records were created. This step is necessary only for users that have created appointments, Hotlist tasks, or opportunity activities from a time zone that is different than the Maximizer CRM Server.

**i** Users can only be aligned once.

### ► To align time zones

- 1** Select **Utilities > Time Zone Alignment**.
- 2** Select all users that belong to a specific time zone.
- 3** Select the time zone the users are in from the Time Zone drop-down list.
- 4** Select the **Adjust for daylight saving time** option if the selected users are in a time zone or region that observes daylight saving time.
- 5** Click **Align**.
- 6** Repeat steps 2 to 5, as necessary, for all applicable users and time zones.



# Importing Vertical Templates

Maximizer provides vertical templates for several industries. You can import any of these vertical templates into your Address Book. A vertical template creates industry-specific user-defined fields, action plans, search catalogs, column setups, document templates, etc. in your Maximizer Address Book.

## ➤ To import a vertical template

- 1 Log into the Address Book in Administrator or Maximizer.

You must be logged in as MASTER to import a vertical template.

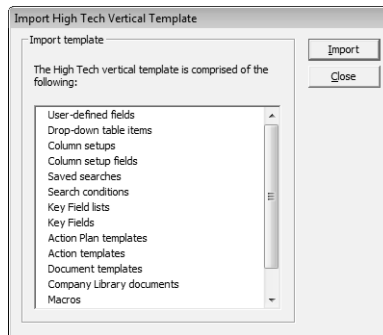
- 2 Select **File > Import > Vertical Templates > [industry]**.

The Import [industry] Vertical Template dialog box opens, displaying the items included in the template.

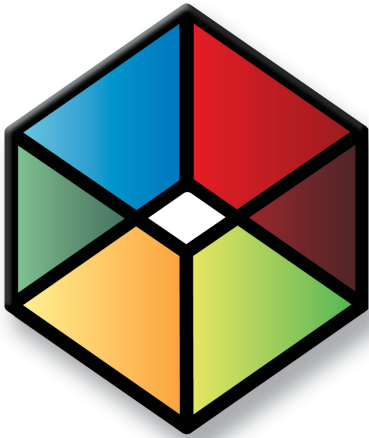
- 3 Click **Import**.

Items in the list are highlighted as the import process advances.

When the import process is complete, an Import Summary displays the number of items imported with the vertical template.







# CHAPTER 4 **Setting Up Users, Groups, and Teams**

In this chapter...

"Adding a User to an Address Book" on page 40

"Changing a User's Password" on page 43

"User and Group Security" on page 44

"Security Groups" on page 50

"Record Ownership" on page 55

"Sales Teams" on page 57

"User Preferences" on page 60

# Adding a User to an Address Book

Log in as the MASTER user in Administrator to perform setup or administrative tasks. The default password for MASTER is “control”, but it may be different if it has already been changed in any Address Book. To use Maximizer, you should create a personal user ID for yourself.

- i** If you are using Maximizer in a single-user environment and do not want to use user security, simply use the MASTER user account.

**i** The user’s name and contact information can be inserted as merge fields in the word processor.

Before a user can log into Maximizer, you must assign that person a Maximizer user ID. All security in Maximizer is based on user IDs and the rights you assign to them. You should also assign a user Display Name, which easily identifies the user throughout Maximizer. When you fill in the First name and Last name fields in the Add User dialog box, the Display name field is completed automatically to include the user’s first and last name together. You can change this display name.

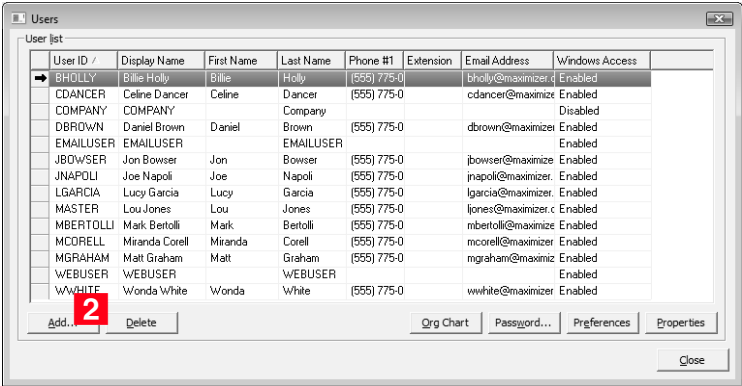
Use the User Properties dialog box to enter a user’s name and contact information, assign user-defined fields, specify access rights, and add a user to security groups and sales teams. Note that you can also add users to security groups and sales teams using the Groups/Teams tab.

## ➤ To add a new user to the Address Book

- 1** Select **File > Manage Users**.

The Manage Users dialog box opens.

- 2** Click **Add**.



The Copy Selected User’s Settings dialog box opens.



- 3** Click **Yes** to copy the settings from the selected user, or **No** to start with the default settings.



The Add User dialog box opens.

- 4** Fill in the information for this user in the **General** tab.

The User ID and Last name fields are the only required fields, and the User ID is needed to log into the Address Book.

Save time by filling in only the **User ID**, **First name**, and **Last name** fields, and let the user fill out the rest of the information.

The **Display name** field fills in automatically with the user's first and last names. You can change the display name.

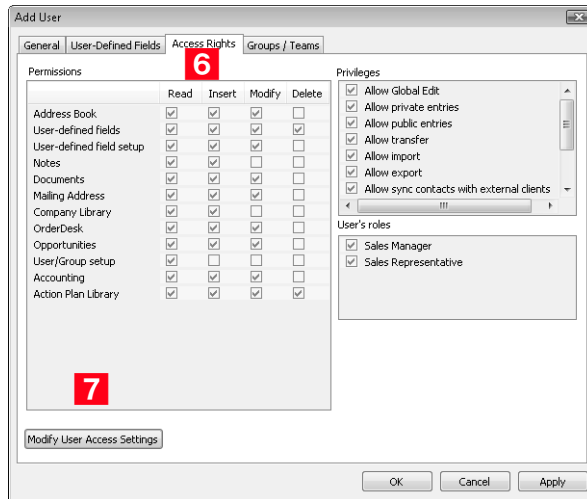
The "Add User" dialog box is shown with the "General" tab selected. The "Name and position" section includes fields for "User ID:", "Mr/Ms:", "First name:", "Initial:", "Last name:", "Salutation:", "Display name:", "Position:", and "Reports to:". The "Company and main address" section includes fields for "Company:", "Dept.:", "Division:", "Address 1:", "Address 2:", "City/Town:", "St/Co/Prov:", "Zip/Postcode:", and "Country:". The "Phone numbers and phone extensions" section includes fields for "1:", "2:", "3:", "4:", and "Fax:". The "Security" section has radio buttons for "Public" and "Private". The "Module Login" section has checkboxes for "Windows Access" and "Mobile", both of which are "Enabled". At the bottom are "OK", "Cancel", and "Apply" buttons.

- 5** In the **User-Defined Fields** tab, select the values of any user-defined fields, as appropriate.

You can set up these custom fields in the File > Set Up User-Defined Fields dialog box. Refer to "Setting Up User-Defined Fields for an Address Book" on page 69 for more information.

**6** Click the **Access Rights** tab.

**7** Click the **Modify User Access Settings** button.



**8** Modify any of these settings as appropriate.

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 44.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 45.

**9** Click **OK** to close the Access Settings dialog box.

**10** In the **Groups/Teams** tab, select any security groups and sales teams to which the user should belong.

(To add groups and teams, use the File > Security Groups dialog box.)

**11** Click **OK**.

The default user password is **maximizer**. Ensure that you or the user create a new password from the Manage Users dialog box.

The new User ID and its associated information now appear in the User list.

# Changing a User's Password

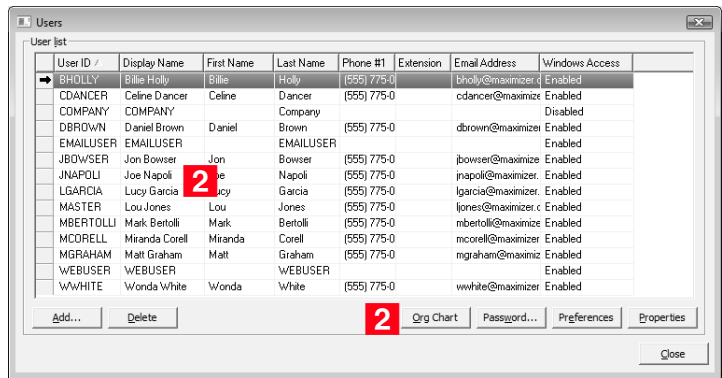
The following procedure explains how to change user passwords in Administrator. However, users can also change their own passwords in Maximizer by selecting Manage Users from the User Management group on the Setup tab.

## ➤ To set and change a user's password in Administrator

**1** In Administrator, select **File > Manage Users**.

The Manage Users dialog box opens.

**2** Select the Maximizer user, and click **Password**.

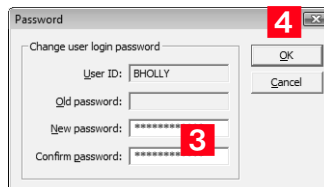


**i** The default password for a new user is "maximizer".

The Password dialog box opens.

**3** Type the new password, then retype it on the next line to confirm it.

**4** Click **OK** to accept the change of password and close the dialog box.



# User and Group Security

As the Administrator, you can restrict each user's access rights to types of entries, essentially providing per-module security. User access rights are accessible by going to the Access Rights tab of a user's properties (see 'Modifying User Access Settings" on page 48). These user access rights consist of the access settings (security settings) of the user account as well as the access settings of any security groups the user is a member of. For example, if the Opportunity Delete permission is not granted in the user's access settings, but is granted in the access settings of a group the user is a member of, then the user is granted Delete permissions to Opportunity entries.

Each checkbox contains one of the following potential values:

Checkbox State	Access Setting	Access Right
<input checked="" type="checkbox"/>	Granted	Granted
<input checked="" type="checkbox"/>	Not Granted	Not Granted
<input type="checkbox"/>	Black = Denied Grey = Disabled	n/a

The following table illustrates user access rights derived from user and group access settings.

User Access Setting	+ Group Access Setting	= User Access Right
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

If the user belongs to more than one group, the conflict illustrated below results in the user not being granted the access right.

User or Group Access Setting	+ User or Group Access Setting	+ User or Group Access Setting	= User Access Right
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## User Access Rights and User/Group Access Settings

**i** If a Read permission is denied (X), then the Insert, Modify, and Delete permissions are automatically disabled. A user cannot have Insert, Modify, or Delete permissions without having Read permission.

The following tables describe each of the user access rights and user or group access settings.

### Permissions

Permissions	Controls the selected user's or group's right to view, add, change, or remove . . .
Address Book	Entries in the Address Book window
User-defined fields	Values in user-defined fields
User-defined field setup	User-defined field definitions
Notes	Entries in the Notes following window Users must have the Delete checkbox selected to be able to use the File > Purge > Notes function.
Documents	Entries in the Documents following window Users must have the Delete checkbox selected to be able to use the File > Purge > Documents function.
Mailing Address	Mailing addresses of Address Book entries
Company Library	Files and folders in the Company Library
OrderDesk	Entries in the OrderDesk window
Opportunities	Entries in the Opportunities window
User/Group setup	Users and Security Groups <ul style="list-style-type: none"> <li>If the user does not have any User/Group Setup rights, other users' or groups' properties are not accessible.</li> <li>If the user has read rights only, the related tabs are visible, but information cannot be modified.</li> <li>Insert, Modify, and Delete rights provide the corresponding access rights to all user and group properties.</li> </ul>
Accounting	Accounting Link transactions Note that the Delete permission is disabled because Accounting Link transactions cannot be deleted through Maximizer.
Action Plan Library	Action plans in the Action Plan Library

## Privileges

Privilege	Grants authorization to . . .
Allow Global Edit	Perform global edits of Address Book entries in Maximizer (on the Edit tab, select Global Edit from the Replace group). Consider advising users with this privilege to back up the Address Book before making significant changes with Global Edit.
Allow private entries	Add entries that are not visible to other users. The user can use the Owner, Full Access, or Read Access fields to create private entries or restrict entries to a group or a user.
Allow public entries	Add entries that are visible to all other users in the Address Book. Note that the Allow private entries and Allow public entries options cannot be denied at the same time. If both of these options are denied in two different groups a user belongs to (i.e., the checkboxes contain an x), the user is granted the Allow private entries right by default.
Allow transfer	Transfer Address Book entries between Maximizer Address Books. If you do not select this option, the menu items for transferring are disabled.
Allow import	Import Address Book entries between Maximizer Address Books. If you do not select this option, the menu items for importing are disabled.
Allow export	Export Address Book entries between Maximizer Address Books. If you do not select this option, the menu items for exporting are disabled. This option also applies to the security right to export information to Excel.
Allow sync contacts with external clients	Synchronize Address Book entries and notes using Outlook Synchronization. However, users can still synchronize calendar appointments or Hotlist tasks without this access right.
Modify note properties	Change the values of the date, time, and creator fields in notes.
Modify/delete other owners' notes	Change and delete other users' notes. However, to be able to view other users' private notes, the user must have the "Modify other users' private entries" privilege enabled.

Privilege	Grants authorization to . . .
Modify other users' private entries	View and modify entries marked as private that belong to other users. If a user has this privilege enabled, the user has full read and modify access to all entries, regardless of the entry's Full Access, Read Access, or Owner settings. This security privilege is very powerful and should be granted with caution.
Modify other users' general information	Change information in the General and User-Defined Fields tabs of the User Properties dialog box for another user. Modifying a user's general information, such as Last Name, First Name, Company, and Phone Number, does not have to be restricted to the MASTER user. In many cases, an administrative assistant or a receptionist can be granted the rights to modify user's general information without compromising the security of Maximizer. This privilege allows the user to have access to all Maximizer users' general information without giving them full security rights to the Address Book.

### User's Roles

User Role	Grants authorization to . . .
Sales Manager	Belong to the Account Manager field. Sales Managers can re-assign the Account Manager field to a different user.
Sales Representative	Similar to the Sales Manager role, Sales Representatives can be assigned to the Account Manager field. A Sales Representative can assign the Account Manager field to anyone else, but only if the Account Manager field was assigned to him/herself or blank and not assigned to another user.

## Modifying User Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 44.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 45.

### ➤ To modify access settings of an existing user

- 1** Select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Properties**.
- 3** Select the **Access Rights** tab.

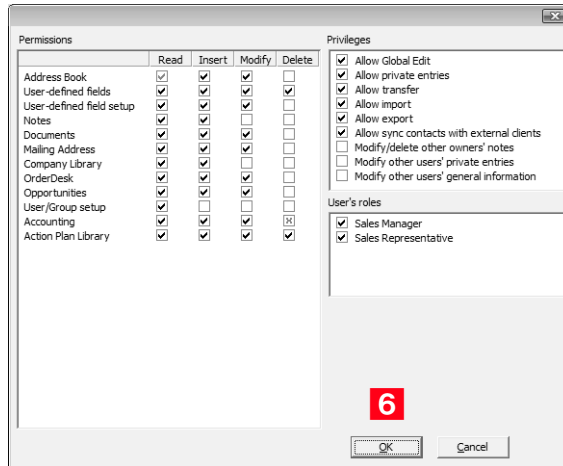
The screenshot shows the 'Add User' dialog box with the 'Access Rights' tab selected. The 'Permissions' table lists various entities and their access rights (Read, Insert, Modify, Delete). The 'Privileges' section on the right lists various permissions like 'Allow Global Edit', 'Allow private entries', etc. The 'User's roles' section lists 'Sales Manager' and 'Sales Representative'. At the bottom, there is a 'Modify User Access Settings' button and 'OK', 'Cancel', and 'Apply' buttons.

Permissions	Read	Insert	Modify	Delete
Address Book	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User-defined fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User-defined field setup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mailing Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Library	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OrderDesk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User/Group setup	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Action Plan Library	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 4** Click the **Modify User Access Settings** button.



**5** Modify any of these settings as appropriate.



**6** Click **OK** to close the Access Settings dialog box.

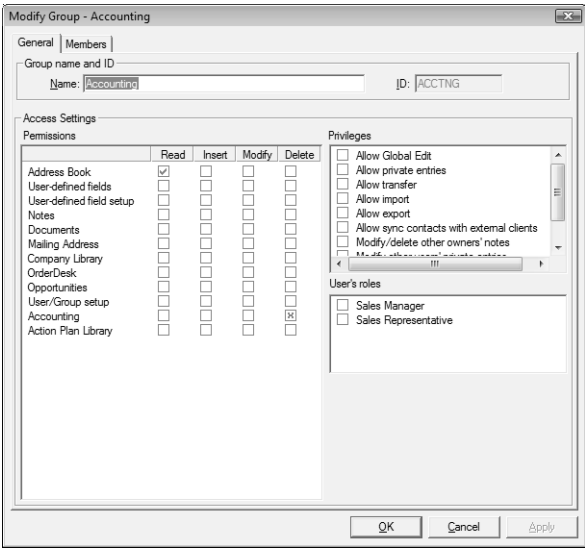
**7** Click **Apply** to save the changes.

# Security Groups

**i** It is important to note that groups have access settings, but they do not have access rights that users do.

A security group is a group of users, usually belonging to a functional group such as a Finance department, who have access to entries related to their group and have specific security access settings. A user may be a member of more than one security group.

The properties, access settings, and group members are specified in the Group dialog box.



## Group Name and ID

Every security group has a name and an ID that identify the group. Changing the name has no effect on the group functionality. However, you cannot change the group ID. If you ever need to recreate these security groups, it is imperative that you use the correct security group IDs (the group name is irrelevant).

## Group Access Settings

A security group has Access Settings that affect the level of access its members have within the Address Book. It is important to note that granting an Access Setting to a group does not necessarily mean that all members of the group will have that Access Right. The level of access each individual user has to the Address Book is controlled by the Access Settings of the user account and the Access Settings of any groups the user belongs to. For more information about user and

group Access Settings, refer to “User and Group Security” on page 44.

Group Members

You can add or remove users from the group in the Members tab of the Group dialog box.

You can also add or remove a user from any groups on the Groups/Teams tab of the User dialog box.

Default Security Groups in all New Address Books

Every new Address Book contains several security groups, described in the following table. Only the MASTER user belongs to these groups by default, but you can add additional users to each group.

Security Group Name	Group ID	Enables group members to...
Accounting	ACCTNG	Restrict accounting transaction notes to members of this group. If an Accounting Link user is not a member of the Accounting security group, notes for any accounting transactions created by that user are Public. However, notes for transactions created by members of the Accounting group are restricted to members of that group.
Crystal Reports Users	R_CRU	Generate new reports from the Crystal Reports option in the Reports tab in Maximizer.

## Creating a New Security Group

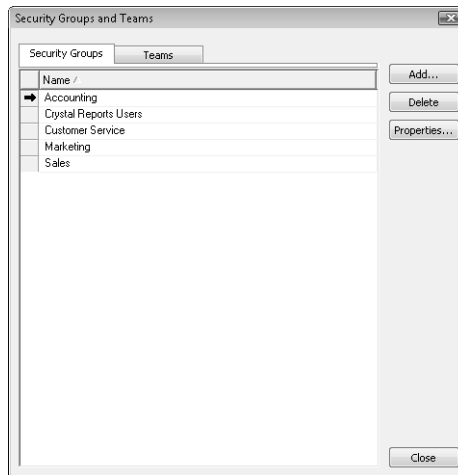
For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 44.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 45.

### ➤ To create a new security group and assign members

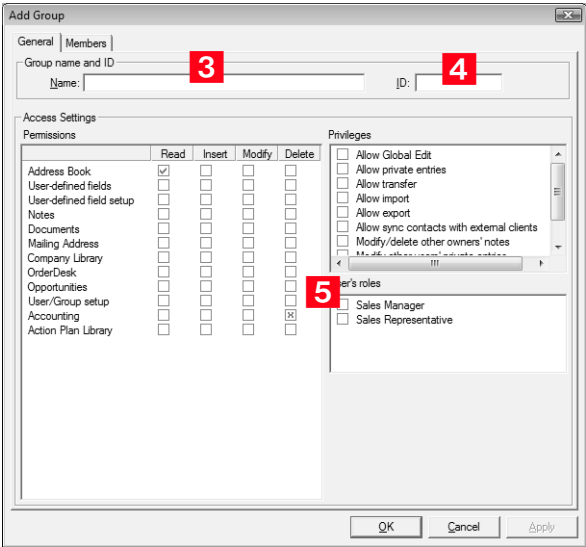
- 1 Select **File > Security Groups and Teams**.
- 2 Click **Add**.

**i** The Security Groups and Teams command is also available in Maximizer if the logged-in user has Insert rights for User/Group setup. On the Setup tab, select Security Groups from the User Management group.



- 3 Enter a **Group Name**.
- 4 Enter a unique **Group ID** (up to 6 characters). The first character of the Group ID must be a letter.
- 5 Assign **Access Settings** to the group.

Access Settings for the group affect the Access Rights of all users who are members of the group.

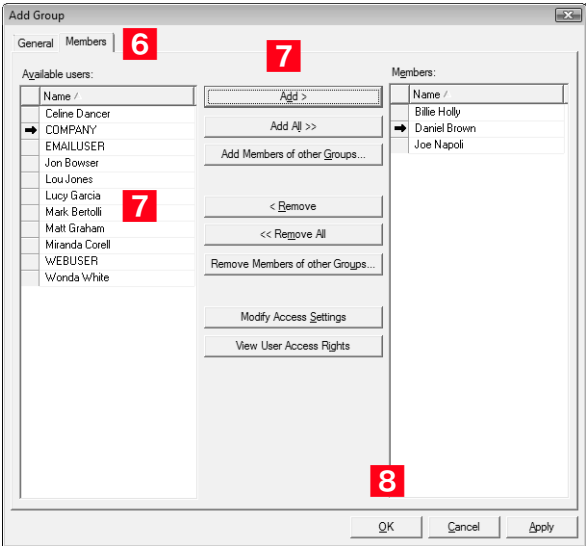


- 6

Click the **Members** tab.
- 7

From the **Available Users** list, select a user to add to the security group, and click **Add**. Repeat to add additional users.
- i

To remove a user, select the user from the **Members** list, and click **Remove**.



- 8 Click **OK** to close the Add Group dialog box.

The security group has now been created.

## Modifying Group Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 44.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 45.

### ➤ To modify access settings of an existing group

- 1 Select **File > Security Groups and Teams**.
- 2 Select the group name.
- 3 Click **Properties**.
- 4 Select the appropriate settings for the group, and click **OK**.
- 5 Click **Apply** to save the changes.

## Record Ownership

In Maximizer, many entries have an Owner field, or Full Access and Read Access fields. These fields control who can view or edit the entry. Users can access their own private records, all publicly owned records, and private records owned by their group. For example, the user “Alice” of the “Finance” group can view all of her own records, all records owned by the “Finance” group, and all Public records. See the example below as an example.

The screenshot shows a window titled "Note for Dolton, James". It contains the following information:

- Appointment Created:** Sales Status Report
- With:** For All Occasions, Jennifer Andrews, James Dolton, ABC Wine Shop Inc., Moshe Pate
- Appointment details:**
  - Date:** Recurring weekly every Friday from September 28, 2007 until September 28, 2010
  - From:** 3:00 PM [Pacific Daylight Time]
  - Until:** 4:30 PM [Pacific Daylight Time]
  - Priority:**
  - Location:** Meeting Room
- Properties:**
  - Date:** September 27, 2007
  - Time:** 5:14 PM
  - Creator:** Lou Jones
- Details:**
  - Full access:** [Sales]
  - Read access:** [Marketing]

At the bottom right are "OK" and "Cancel" buttons.

Sometimes it's important to allow users to have private entries because some entries aren't meant to be shared with your entire organization. In Maximizer, it's possible to specify Full Access and Read Access to specific users or groups for each entry in the Address Book. In addition to Address Book entries, you can specify ownership of notes, documents, and other types of entries.

When a user creates a new Address Book entry, he or she can designate access for that entry. Full Access or Read Access can be granted to a specific user, a group, or it can be Public.

To be able to use the Owner, Full Access, or Read Access fields, the user must have the "Allow private entries" access right enabled.

Field	Value	Description
Owner	Public	All users can view and modify the entry, regardless of their user or group security settings.
	User	Only the specified users can view or modify the entry.
	Group	Only members of the specified groups can view or modify the entry, regardless of their user or group security settings.
Full Access	Public	All users can modify the entry, regardless of their user or group security settings. Note that the Read Access field becomes disabled if Full Access is set to Public.
	User	Only the specified user can modify the entry.
	Group	Only members of the specified group can modify the entry, regardless of their user or group security settings.
Read Access	Public	All users can view the entry.
	User	Only the specified user can view the entry.
	Group	Only members of the specified group can view the entry.



# Sales Teams


If your company or organization is using opportunity management, use the File > Security Groups and Teams dialog box to set up sales teams. Teams are used for sales opportunities in Maximizer.

 You can set up Teams in both Maximizer and Administrator.

A team is composed of a team leader and team members:

- **Team Leader:** In a team, one person is designated as a team leader who has the right to make changes to the opportunity, as well as to the opportunity's team.
- **Team Member:** A regular team member does not have the right to change the opportunity or the team. The member's role is to perform the tasks the team leader assigns.

A team member has either edit, audit, or standard rights, as described below. The team leader always has edit rights.

 If you have someone in mind as a team member with edit rights, it saves time to assign rights in Administrator rather than on a per-opportunity basis.

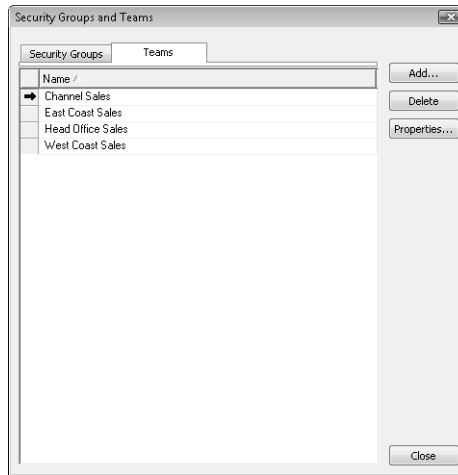
- **Edit:** Allows a member full access to all opportunities assigned to the team. Members with this type of access have full team leader rights and may modify the status of an opportunity and may also reassign tasks.
- **Audit:** Allows a member to view all opportunities assigned to him/her.
- **Standard:** Allows for basic rights to "work" (apply steps) opportunities. These rights do not allow the member to change a status of an opportunity.

Security, or access rights, cannot be assigned to sales teams. Therefore, to control the security of more than one user, you must set up a security group using the File > Security Groups and Teams menu.

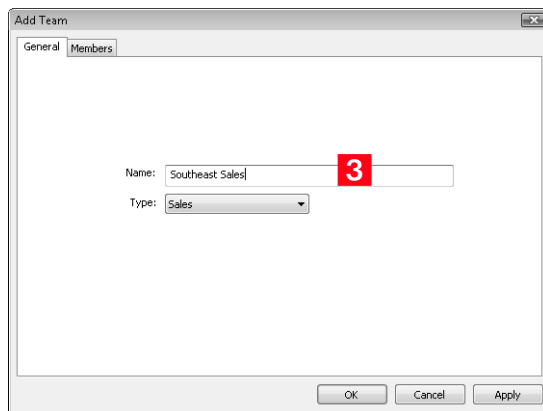
➤ **To create a new sales team**

**1** Select **File > Security Groups and Teams**.

**2** Select the **Teams** tab, and click **Add**.



**3** On the **General** tab, enter a team name.



**4** Click the **Members** tab.

**5** From the **Available Users** list, select a user to add to the team, and click **Add**. Repeat to add additional users to the team.

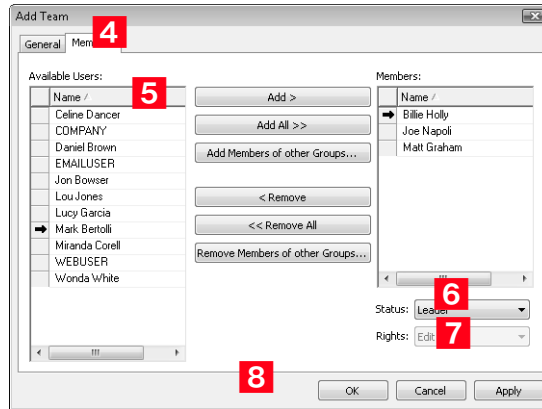
To remove a user, select the user from the Members list, and click **Remove**.

- 6** In the **Members** list, select a member to assign as the Leader, and select Leader from the **Status** drop-down list.

There can be only one leader and the status cannot be changed once the team is created.

- 7** For each member other than the Leader, select the appropriate member right from the **Rights** drop-down list.

- 8** Click **OK** to close the **Add Team** dialog box.

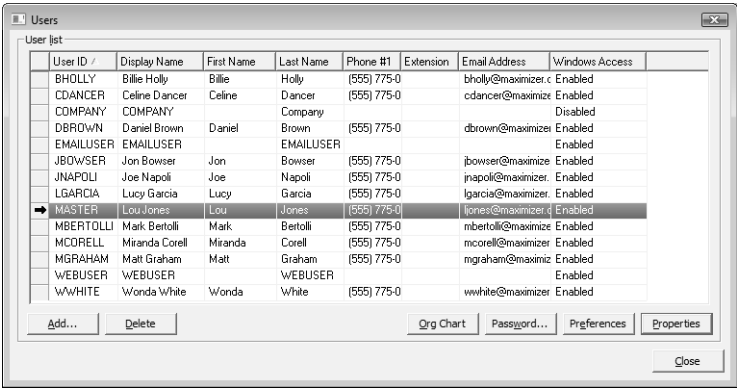


# User Preferences

The Address Book administrator is responsible for setting up initial user preferences in Administrator. However, users can change many of their user preferences in Maximizer.

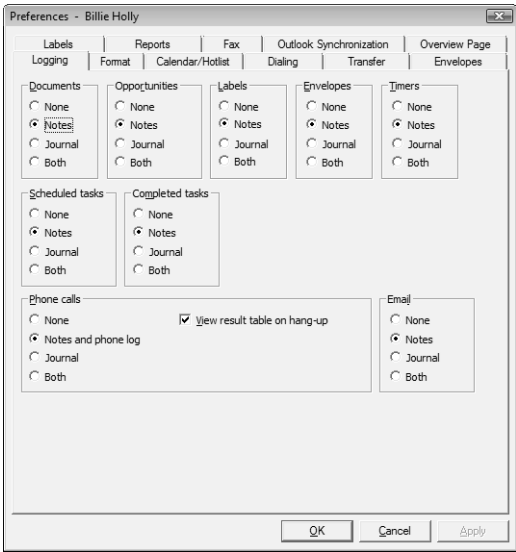
➤ **To set Address Book user preferences**

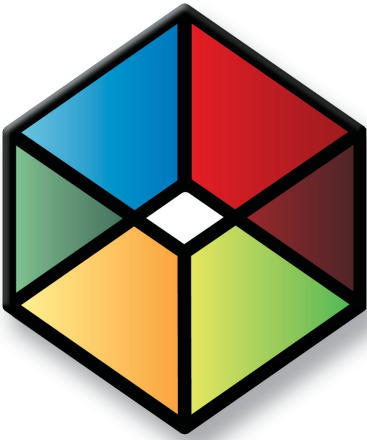
- 1 Select **File > Manage Users**.
- 2 Select the Maximizer user, and click **Preferences**.



**i** See the *Maximizer CRM User's Guide* for more information on user-related preferences Preferences.

- 3 Set the user-related preferences on each of the tabs.






# CHAPTER 5 **Configuring an Address Book**

In this chapter...

- "Address Book Preferences" on page 62
- "Preventing Duplicate Address Book Entries" on page 65
- "Setting Up User-Defined Fields for an Address Book" on page 69
- "Creating Key Fields Lists" on page 79
- "Recording Holidays in the Holiday Editor" on page 83

## Address Book Preferences

You can set Address Book preferences by selecting File > Preferences in Administrator. The following table outlines the settings available on each tab of the Preferences dialog box. For more information about any of these preferences, go to File > Preferences, select a tab, and press F1.

On this tab...	You can set the following preferences...
Address Book	<ul style="list-style-type: none"> <li>Values available in the Category field for Address Book entries.</li> <li>Fields to check for duplication of Address Book entries (refer to "Preventing Duplicate Address Book Entries" on page 65 for more information).</li> </ul>
Diagnostic	<ul style="list-style-type: none"> <li>Log file settings for Maximizer modules. Note that users can also set Diagnostic preferences in Maximizer.</li> </ul>
Key Fields	<ul style="list-style-type: none"> <li>Key user-defined fields available on the Basic Information tab of Address Book entries and opportunities (refer to "Creating Key Fields Lists" on page 79 for more information).</li> </ul>
Location/Resource	<ul style="list-style-type: none"> <li>Locations available for appointments.</li> <li>Resources available for appointments.</li> </ul>
Mandatory Fields	<ul style="list-style-type: none"> <li>Mandatory or optional data entry requirements for basic fields in Address Book entries and opportunities.</li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>Opportunity stages and probabilities of close.</li> <li>Opportunity confidence rating schemes.</li> <li>Opportunity completion reasons.</li> </ul> <p> The MASTER user is responsible for devising and implementing ratings schemes and completion reasons in Administrator.</p>
System Fields	<ul style="list-style-type: none"> <li>Add, modify, and delete values of system fields note/document categories and products/services.</li> </ul>

On this tab...	You can set the following preferences...
System Options	<ul style="list-style-type: none"> <li>• Address Book name and ID.</li> <li>• System-assigned Address Book entry IDs and opportunity IDs.</li> <li>• Overview page caption.</li> <li>• Default settings for Maximum entries field in Maximizer search dialog boxes.</li> <li>• TAPI phone number format.</li> <li>• User/group setting which determines if lists of users/groups display only groups to which the current user belongs and other users in the groups in fields such as Read Access and Full Access.</li> <li>• Live Update options.</li> </ul>

➤ **To set Address Book preferences**

- 1** Select **File > Preferences**.
- 2** Set the Address Book preferences on each of the tabs.

The screenshot shows the 'Preferences' dialog box with the 'Address Book' tab selected. The 'System defaults' section contains the following settings:

- Address Book name:** Esconia Tutorial
- Address Book ID:** 772238169
- Caption text displayed for Overview Page:** My Work Day
- Maximum number of entries to retrieve:** All
- ☒ System to assign Address Book entries' ID field values
- ☒ System to assign Opportunities' ID field values
- ☒ TAPI format Address Book entry phone numbers
- ☒ Disable creation of Maximizer Form Designer user-defined fields
- ☒ Enable security

A 'Live Update...' button is located to the right of the checkbox settings. At the bottom of the dialog are 'OK', 'Cancel', and 'Apply' buttons.

## Using Passwords

If you apply a user password for an Address Book, all Address Books on the server hosting the Address Book will use the same password. It is not possible to have different passwords for different Address Books for the same user on the same computer.



# Preventing Duplicate Address Book Entries

When more than one Address Book entry exists for the same person or organization, the entries are considered duplicates. These duplicates may occur when users create a new Address Book entry without determining whether an entry already exists for the person or organization. They can also occur when entries are created automatically by operations such as importing. Duplicate entries are undesirable because information related to the person or organization becomes fragmented. You can prevent most duplicate entries by using Maximizer's duplicate Address Book entry checking options.

**i** For information about preventing duplicates when importing data, refer to the sections about importing in chapter 7 "Managing Address Book Data" on page 99.

You can configure duplicate checking in Administrator (File > Preferences > Address Book tab).

The screenshot shows the 'Preferences' dialog box with the 'Address Book' tab selected. The 'Duplicate Address Book entry checking' section is expanded, showing the following options:

- ☒ Check for duplicates when adding Address Book entries
- Duplicate check list: Duplicate Check List 1
- Fields to match for the selected list**

1st field to match	Full Name/Company Name
2nd field to match	Company Name For Individual
3rd field to match	City/Town
- ☐ Allow partial match
- Duplicates may be entered by: Lou Jones

At the top of the dialog, there is a table for 'Values for Category field's selection list':

Value	Type
Analyst	(system)
Colleague	(system)
Competitor	(system)
Consultant	(system)
Customer	(system)
Dealer	(system)
Distributor	(system)
Investor	(system)

Buttons for 'Add...', 'Modify...', and 'Delete' are located to the right of this table.


Administrator enables you to prevent most duplicate Address Book entries by specifying up to three combinations of fields that must be unique to each entry. If a user attempts to create a new Address Book entry, and the values of any of those field combinations match an existing entry, Maximizer does not allow the duplicate entry to be created.

A combination of fields that must be unique to each entry is called a "duplicate check list". You can create up to three duplicate check lists, using up to three fields in each list.

Maximizer considers an entry to be a duplicate if the values of all fields from List 1, or all fields from List 2, or all fields from List 3 match an existing entry.

The default duplicate check lists, described below, effectively prevent most duplicate entries:

Check List	Fields
<b>Duplicate Check List 1:</b>	1. Full Name/Company Name 2. All Phone Numbers 3. None
<b>Duplicate Check List 2:</b>	1. Full Name/Company Name 2. Zip/Postal 3. None
<b>Duplicate Check List 3:</b>	1. None 2. None 3. None

 The "Full Name/Company Name" matching field checks the Full Name of Individual or Contact entries and checks the Company field of Company entries. The "Company for Individual" matching field checks the Company field of Individual entries.


When a user creates a new Address Book entry in Maximizer, and Maximizer detects it as a potential duplicate Address Book entry, the user is presented with the following list of options:

- **Merge with selected entry:** The newly created or modified Address Book entry merges with, and overwrites, the existing (selected) entry.
- **Edit selected entry:** The existing (selected) Address Book entry opens, allowing it to be edited by the user. Any information entered in the newly created entry that was detected as a duplicate must be re-entered.
- **Add the new entry:** This option adds the new entry. It is available only under certain circumstances. If a user or group has permission to create duplicate entries ("Duplicates may be entered by" field in the Address Book tab), he or she has the option to create duplicate entries. This option is also available if partial matching is enabled and Maximizer finds a partial match.

## Partial Matching

Partial matching identifies an entry as a possible duplicate even if not all fields in any of the duplicate check lists are the same in both the new entry and an existing entry.

With partial matching, the order of the fields (1st, 2nd, 3rd) in the duplicate check lists is important, as described in the following scenarios:


 If the first field only is defined in the list (the second and third fields are set to None), partial matching doesn't apply because matching one field is a complete match.

- If the first and second fields only are defined in the list (the third field is set to None), an entry is considered a possible duplicate if only the first field matches.
- If all three fields are defined in the list, an entry is considered a possible duplicate if only the first field matches, or if both the first and second field match.

If the first field doesn't match, an entry is never considered a possible match, even if the second and/or third field matches.

Maximizer displays the list of possible duplicates in order of number of fields matched.

By default, partial matching is disabled. To turn partial matching on, select the "Allow partial match" checkbox.

 If the Address Book has been upgraded from a previous version of Maximizer, and duplicate checking was enabled, partial matching is enabled after upgrading the Address Book to the new version.

The "Allow partial match" checkbox applies to all Duplicate Check Lists. You cannot allow partial matches for some lists and not for others.

Partial matching is relevant only if no exact matches exist. If all the fields in any of the duplicate check lists match an existing entry, it is considered a duplicate entry, and partial matching does not apply. However, if Maximizer finds no exact matches, it returns a list of entries matching any of the fields from the duplicate check lists.

## Permission to Create Duplicate Entries

If some users or groups require the ability to create duplicate Address Book entries, you can select a user or group from the "Duplicates may be entered by" drop-down list. If more than one user requires this ability, add those users to a new security group and then select that group from this drop-down list. In Maximizer's Duplicate Address Book Entry Found dialog box, the user(s) can then choose the "Add the new entry" option.

## Configuring Duplicate Address Book Entry Checking

### ► To configure duplicate Address Book entry checking

- 1** In Administrator, select **File > Preferences**.
- 2** Click the **Address Book** tab.
- 3** Select the **Check for duplicates when adding Address Book entries** checkbox.
- 4** From the **Duplicate check list** field, select one of the Duplicate Check Lists.
- 5** In the **Fields to match for the selected list** box, select the first, second, and third field to match. (You can select up to three fields, but selecting all three fields is not required.)
- 6** Repeat the previous two steps to configure any of the other Duplicate Check Lists.
- 7** To enable partial matching, select the **Allow partial match** checkbox.
- 8** If you want any users or groups to be able to create duplicate entries, select the name of the user or group from the **Duplicates may be entered by** drop-down list.
- 9** Click **Apply**, and then click **OK**.

The screenshot shows the 'Preferences' dialog box with the 'Address Book' tab selected. The 'Duplicate Address Book entry checking' section is expanded, showing the 'Check for duplicates when adding Address Book entries' checkbox checked. The 'Duplicate check list' is set to 'Duplicate Check List 1'. The 'Fields to match for the selected list' section shows three fields selected: 'Full Name/Company Name', 'Company Name For Individual', and 'City/Town'. The 'Allow partial match' checkbox is unchecked. The 'Duplicates may be entered by' dropdown is set to 'Lou Jones'. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom.

Value	Type
Analyst	(system)
Colleague	(system)
Competitor	(system)
Consultant	(system)
Customer	(system)
Dealer	(system)
Distributor	(system)
Investor	(system)

**2**

**3** ☒ Check for duplicates when adding Address Book entries

**4** Duplicate check list: Duplicate Check List 1

**5**

Fields to match for the selected list	
1st field to match	Full Name/Company Name
2nd field to match	Company Name For Individual
3rd field to match	City/Town


**7** ☐ Allow partial match

**8** Duplicates may be entered by: Lou Jones

**9** OK Cancel Apply

# Setting Up User-Defined Fields for an Address Book

Although the information you can record in Maximizer covers the basics, you probably want to record additional information, such as budgets, income, interests, number of employees, or other data. You can record this information in Maximizer with user-defined fields, which are custom fields for storing information in any of the following categories:


 User-defined fields can be created and modified in both Administrator and Maximizer (if users have the necessary rights). To setup User-defined fields in Maximizer, go to the Setup tab, and select the User-Defined Fields icon.

- **Address Book entries:** Available in the Address Book window
- **Opportunities:** Available in the Opportunities window of Maximizer
- **User accounts:** Available in the user properties dialog box

Once you have created a user-defined field, users can enter data in that field.

## Types of User-Defined Fields

There are different types of user-defined fields. Each type has different properties and uses.

 Encrypted user-defined fields cannot be transferred, imported, or exported. They are also not searchable.

- **Alphanumeric user-defined fields** record any alphanumeric text (letters and numbers) up to a maximum number of characters that you specify. Alphanumeric fields can be encrypted for security protection. Note that you cannot disable or enable encryption once you have created the field.
- **Date user-defined fields** can store a specific date or an annually recurring date.
- **Numeric user-defined fields** record any numeric value you wish to keep for the Address Book entries. If you specify a number of decimal places for the user-defined field, you can use this field type for monetary amounts.
- **Table user-defined fields** enable you to select a value or values from a list. This type of field is very useful for multiple choice or multiple value fields. If you create a table user-defined field with the “single value only” attribute, no more than one value can be selected from the list, which is particularly useful for fields where it wouldn't make sense to select more than one value.
- **Yes/No user-defined fields** contain either a yes or no value. Since the field always contains a yes or no, the mandatory attribute is disabled.

## User Access Rights for User-Defined Fields

As the Address Book administrator, you are responsible for creating user-defined fields in Administrator for Maximizer users. However, you can give any user the ability to create, change, or delete user-defined fields in Maximizer by enabling the following access rights in Administrator (See "Modifying User Access Settings" on page 48):

- The **User-defined fields** access right enables the user to assign values to user-defined fields, but not create fields.
- The **User-defined field setup** access right enables the user to create new user-defined fields.

For information about assigning user access rights, refer to "User and Group Security" on page 44.

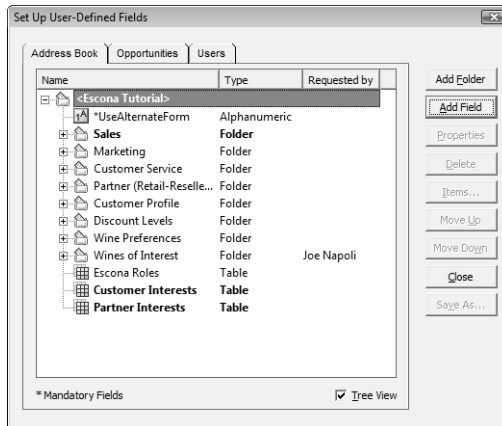
You can also restrict user access to a specific user-defined field. The user-defined field properties has options for Full Access (read and write) and Read Access (read-only) permissions.

The Full Access and Read Access fields contain a drop-down list of users, groups, and Public. Select which user(s) the Full Access or Read Access permission applies to:

- **Public** assigns the user-defined field access permission to all users
- **[user]** assigns the user-defined field access permission to an individual user
- **[security group]** assigns the user-defined field access permission to all members of a security group

## About the Set Up User-Defined Fields Dialog Box

User-defined fields are created and modified through the Set Up User-Defined Fields dialog box. In Administrator, the User-Defined Fields dialog Box is available by selecting File > Set Up User-Defined Fields. In Maximizer, select the Setup tab, and click the User-Defined Fields icon.



The dialog box contains tabs for each category of user-defined field. The user-defined field structure can also be multi-tiered with multiple levels of user-defined field folders, each of which may contain other folders or user-defined fields. The folder structure may contain a maximum of three folder levels.

## Mandatory User-Defined Fields and System Fields

**i** Key fields are specified on the Key Fields preferences tab in Administrator. (File > Preferences > Key Fields)

Some user-defined fields are displayed in bold or with an asterisk:

- **Mandatory** user-defined fields are denoted with an asterisk displayed after the field type.
- **System** fields are shown in bold, black text.

## Sort order

There are two methods of changing the order of fields and folders:

- **Drag and drop:** You can use the mouse to drag and drop fields or folders to a different position in the list. Dragging it onto a field places it immediately below that field. Dragging onto a folder places it at the top of the list inside that folder. Holding the mouse on a folder for about a second expands the folder, and then you can continue dragging the item to a specific position in that folder.
- **Move Up and Move Down buttons:** Click the Move Up and Move Down buttons to move a field or folder up or down in the list. These buttons only move items within their current folder level. You cannot use them to move items in or out of folders.

## Creating a New Folder for User-Defined Fields

Use the Set Up User-Defined Fields dialog box to create new user-defined fields and folders for use with Address Book entries, opportunities, and user accounts. This dialog box is available from the File menu in both Administrator and Maximizer, although users can create user-defined fields in Maximizer only if the **User-defined field setup** access right is granted in their user account.

You can group similar user-defined fields into folders and sub-folders to a maximum folder depth of 3 levels. Grouping user-defined fields into folders is particularly useful if you have a large number of user-defined fields. Grouping them makes them easier to find and reduces the amount of scrolling needed to find the one you're looking for.

### ➤ To create a new folder

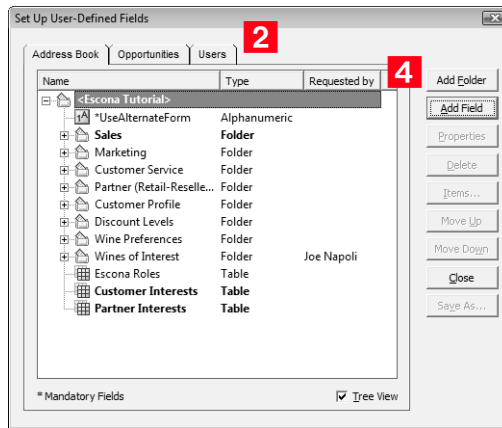
- 1 Open the Set Up User-Defined Fields dialog box (**File > Set Up User-Defined Fields**).
- 2 Select the tab for the category of user-defined field to create.
- 3 To create a top-level folder, select the Address Book name at the top of the list.

– or –

To create a folder within an existing folder, select the existing folder.

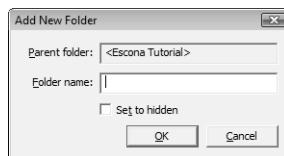


**4** Click the **Add Folder** button.



**i** User-defined field and folder names cannot contain forward slash or backward slash characters (/ \).

**5** Enter a name for the new folder, and click **OK**.



**i** If you set the folder to hidden, it is not displayed on the User-Defined Fields tab when the Show hidden fields option is deselected.

The new folder now appears in the Set Up User-Defined Fields dialog box.

**6** If necessary, move the new folder to a different position in the list.

## Creating a New User-Defined Field

Create user-defined fields for Address Book entries, opportunities, and user accounts in the Set Up User-Defined Fields dialog box. This dialog box is available from the File menu in Administrator and on the setup tab in Maximizer. Users can create user-defined fields in Maximizer only if the **User-defined field setup** access right is granted in their user account.

### ➤ To create a new user-defined field

**1** Open the Set Up User-Defined Fields dialog box (**File > Set Up User-Defined Fields**).

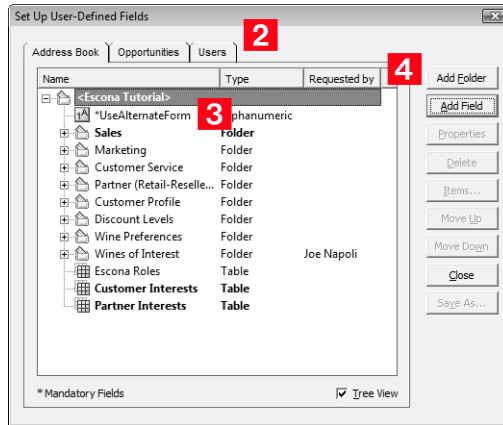
**2** Select the tab for the category of user-defined field to create.

**3** Select an existing folder, inside which to create a new field.

– or –

Select a user-defined field. The new field will be created at the same level as the selected user-defined field.

**4** Click the **Add Field** button.



**5** In the **Field Name** field, type a name for the user-defined field.

**6** From the **Type** drop-down list, select the type of user-defined field you want to add.

**7** Specify the properties of the user-defined field.

For detailed information about each of the property fields, click inside the dialog box and press **F1**.

**i** User-defined field and folder names cannot contain forward slash or backward slash characters (/ \).

**8** Click **OK**.

You have now created a user-defined field.

**Add User-Defined Field**

Folder Name: <Escona Tutorial>

Field Name: Escona Promotions Campaign **5**

Type: Table

Field may be added to:

- ☒ Companies
- ☒ Individuals
- ☒ Contacts

Attributes:

- ☐ Single value only
- ☐ Include in Hotlist
- ☐ Encrypted
- ☐ Set to hidden **7**
- ☐ Annually recurring event
- ☐ Retain year
- ☐ Mandatory

Maximum field length: 29 Number of decimals: 0

Full access: Miranda Corell Read access: Public

Creation Details:

Creator: Lou Jones Requested by: Lou Jones

Description: This field is to track each promotional campaign for customers. **8**

Spelling OK Cancel

## Adding Items to a Table User-Defined Field

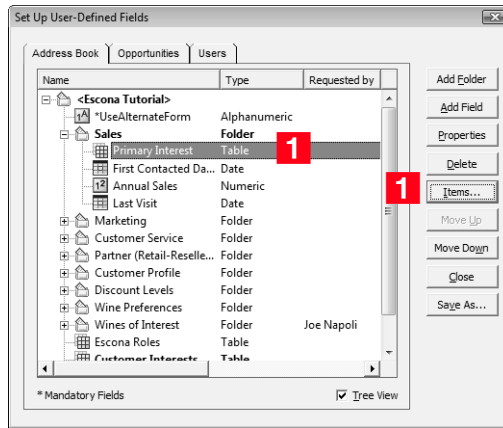
Table user-defined fields contain a list of similar items from which a user may select one or more items. As part of the process of creating a new user-defined field of this type, you should add the items to the table. However, while using the user-defined field in Maximizer, users may find a need to add an item to the list. A user can add items to a table user-defined field on-the-fly if the user account has sufficient privileges. Both procedures are explained below.

➤ **To add items to a table user-defined field**

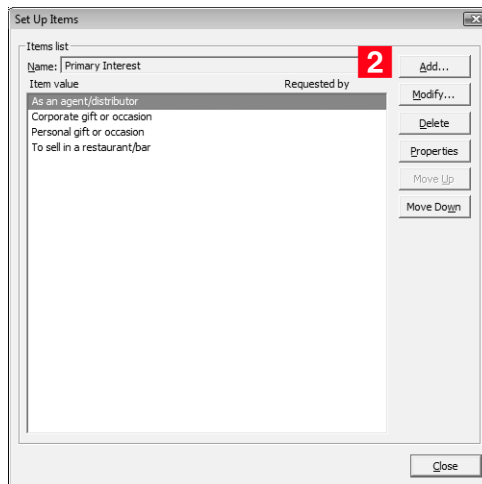
- 1** In the Set Up User-Defined Fields dialog box, select the table-type user-defined field, and click the **Items** button.

– or –

Double-click the table user-defined field.



- 2** In the Set Up Items dialog box, click **Add**.



- 3** Type a name for the item.

**i** If you set the item to hidden, the user can hide it from the Available values list by deselecting the Show hidden items option. The user must also ensure that the item is not selected in the list. If it is, the item will still be displayed.

- 4** In the **Requested by** field, select the name of the user who requested the item creation.
- 5** Click **OK**.

The 'Add Item' dialog box contains the following fields and controls:

- Item details:** A section containing three fields: 'Item' (text input), 'Creator' (text input with 'Lou Jones'), and 'Requested by' (dropdown menu with 'Lou Jones').
- Get to hidden:** A checkbox located below the 'Requested by' field.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

- 6** Repeat these steps to add any additional items to the table user-defined field.

## Transferring User-Defined Fields between Address Books

### ➤ To transfer user-defined fields between Address Books

**i** Encrypted user-defined fields cannot be transferred between Address Books.

- 1** In Maximizer, select the **Maximizer** button and select **Import/Export/Transfer > User-Defined Fields**.
- 2** In the Transfer User-Defined Fields dialog box, select the user-defined fields to transfer.
- 3** Click the **Transfer** button.

The 'Transfer User-Defined Fields' dialog box contains the following elements:

- Details:** A list of user-defined fields including: UseAlternateForm, Anniversary, Birthdate, Catalog Distribution, Children's Names, Collateral Displays, Collateral Packaging, Collateral Product (highlighted), Contract Expiry, Contract Number, Customer Profile Contact How?, Customer Profile Employees, Customer Profile First Contacted Date, Customer Profile Have Internet Access, Customer Profile Industry, Customer Profile Preferred Language, and Customer Profile Region.
- Buttons:** 'Transfer...' and 'Cancel' buttons at the bottom right.

- 4** To copy the data into a target Address Book that is accessible from the computer, select the **Direct Address Book access**

transfer method. Accessible Address Books are listed in **Available target Address Books**.

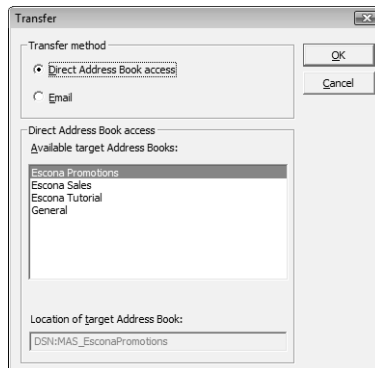
– or –

If the target Address Book is not listed, select the **Email** transfer method. The data is compressed into a .MET file and attached to an email message.

- 5** If you selected **Direct Address Book access**, select the target Address Book, click **OK**, and log on to the Address Book. Maximizer transfers the user-defined fields and notifies you when the transfer is complete.

– or –

If you selected **Email**, click **OK**. Maximizer creates an email message with the user-defined fields attached in a .MET file. Type an email address in the **To** field, and click **Send**.



# Creating Key Fields Lists

**i** Assigning a user-defined field to a Key Fields list does not remove it from the User-Defined Fields tab. Those fields appear in both tabs.

Key Fields are important user-defined fields that are highlighted on the Basic Information tab in Maximizer Address Book entries and opportunities, making them more readily accessible. Which user-defined fields appear as Key Fields is up to you. You might select mandatory user-defined fields as Key Fields, so users don't miss them when creating a new record. You might also select frequently used user-defined fields, making it easier for users to quickly enter these values. And you might select user-defined fields important to a particular group of users because different Key Field lists can be defined for a specific user or group, or for all users.

The following sections contain information on creating lists of Key Fields:

- "Specifying Key Fields by Entry Type" on page 79
- "Restricting Key Fields to Specific Users" on page 80
- "Creating a Key Fields List" on page 81

## Specifying Key Fields by Entry Type

When you create a Key Fields list in Maximizer, you can specify up to eight user-defined fields for each entry type. The entry types are described in the table below.

The user-defined fields available for each entry type correspond to the related type of user-defined field and the related Maximizer entries. For example, within a Key Fields list, the Opportunity Key Fields entry type may contain only opportunity user-defined fields, and these Key Fields will be available only in the Opportunity dialog box in Maximizer.

There are three types of Address Book entry key fields: Companies, Individuals, and Contacts. Only user-defined fields for the type of Address Book entry (Company, Individual, or Contact) are available for each Key Fields entry type. For example, only user-defined fields that are available for Contact Address Book entries will be available for Contact Key Fields entry types.

Key Fields Entry Type	Type of User-Defined Field	Visible in Maximizer Entry Type
Company	Address Book entry user-defined fields for Companies	Companies
Individual	Address Book entry user-defined fields for Individuals	Individuals

<b>Key Fields Entry Type</b>	<b>Type of User-Defined Field</b>	<b>Visible in Maximizer Entry Type</b>
Contact	Address Book entry user-defined fields for Contacts	Contacts
Opportunity	Opportunity user-defined fields	Opportunities

## Restricting Key Fields to Specific Users

The Key Fields in the Basic Information tab of Maximizer entries are visible only to the user or group specified as the owner of the Key Fields list. However, other users may still be able to access the fields through the User-Defined Fields tab, depending on which users or groups have full or read access to the user-defined field. Assigning a user-defined field to a Key Fields list does not determine who can access the user-defined field. The field is available as a Key Field only to users with access to both the user-defined field and to the Key Fields list.

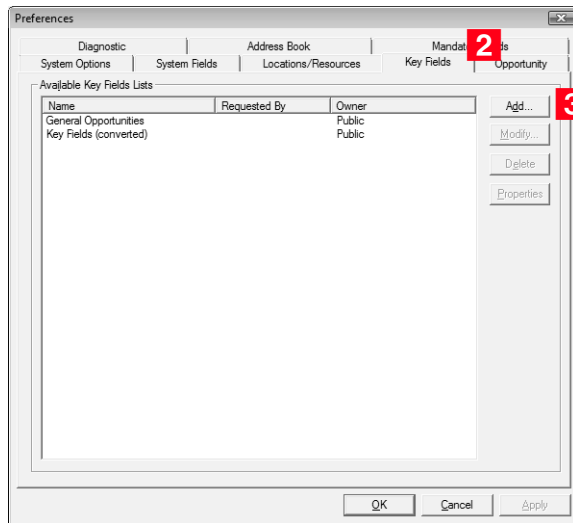


## Creating a Key Fields List

Create Key Fields lists in Administrator, as described in the following procedure.

### ► To create a Key Fields List

- 1 In Administrator, select **File > Preferences**.
- 2 Select the **Key Fields** tab.



- 3 Click **Add** to open the Add Key Fields dialog box.
- 4 In the **List name** field, create a name for the Key Fields list.
- 5 From the **Owner** drop-down list, select the user or security group with access to the Key Field list, or leave it as Public.
- 6 From the **Entry types** drop-down list, select the type of Maximizer entry to assign Key Fields to.

**i** The Owner field determines which users will see these fields in their Key Fields list in Maximizer.

The fields for that module appear in the Available Fields list.

- 7 Add up to eight user-defined fields to the Key Fields list by selecting each field and clicking **Add**.
- 8 Repeat steps 6 and 7 to add Key Fields for other modules.

**9** Click **OK** to save the list.

**Add Key Fields**

Creation details

List name: West Coast Sales **4**

Description: This Key Fields list contains the user-defined fields used by West Coast Sales.

Creator: Lou Jones Requested by: Billie Holly

Owner: West Coast Sales **5**

Key Fields

Entry types: Company (3 assigned fields) **6**

Available fields

Customer Profile

- Employees **7**
- First Contacted Date
- Have Internet Access
- Preferred Language
- Region
- Size of Client
- Industry
- Contact How?
- Retail Wine Cost

Assign up to 8 fields

- Primary Interest
- Annual Sales
- First Contacted Date
- Last Visit
- Subscription
- Contract Expiry
- Contract Number
- Region

Key Fields are important user-defined fields highlighted on the Basic Information tab for Address Book entries and opportunities. In each defined list, you can specify up to 8 user-defined fields for each entry type.

Spelling OK Cancel

**9**

## Recording Holidays in the Holiday Editor

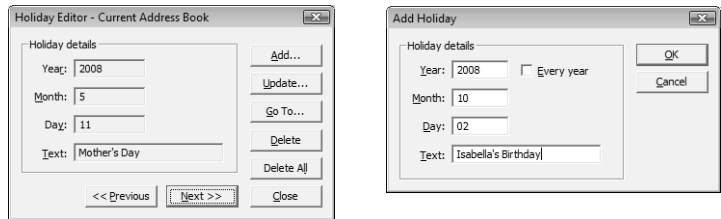
The Holiday Editor is a utility you can use to add or edit holidays in the Maximizer calendar. By default, the Holiday Editor contains many North American holidays. The holidays listed in the Holiday Editor also appear in the Calendar window in Maximizer. You can use Administrator to modify or delete existing holidays, or add new holidays.

If you wish to add personal holidays or events to your calendar, such as “Alice’s birthday”, you must create a yearly recurring appointment using the Calendar window in Maximizer.

The Holiday Editor’s data file—Mxzhol.nam—is inserted in the Maximizer program folder when you install Maximizer. In this location, you use Administrator’s Holiday Editor to manage one set of holidays for your installation of Maximizer.

### ➤ To add a holiday to your calendar

- 1 In Administrator, select **Utilities > Holiday Editor**.
- 2 Click **Add**.
- 3 Enter the details of the new holiday.
- 4 Click **OK** to close the Add Holiday dialog box.

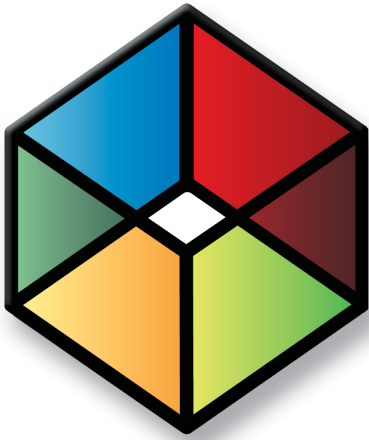


### ➤ To share your holidays with another Maximizer workstation

- Copy the **Mxzhol.nam** file from your Maximizer program folder to the program folder on the other computer.

Note that this replaces any existing holidays on the destination computer with your own.





# CHAPTER 6 **Configuring Email, Phone, and Synchronization**

In this chapter...

"Configuring Microsoft Outlook Synchronization" on page 86

"Configuring MaxMobile Wireless Server" on page 91

"Enabling TAPI" on page 93

"Phone Masks" on page 97

"Using Fax Software with Maximizer" on page 98


## Configuring Microsoft Outlook Synchronization

 Outlook Synchronization works with Microsoft Outlook only.

Outlook Synchronization mirrors select appointments, tasks, and Address Book entries between Maximizer and Microsoft Outlook to ensure the entries exist in both programs and that they both contain the same information.

Outlook Synchronization settings are configured on a per-user basis, and each Maximizer user has one set of configuration settings. Typically, users configure their own Outlook Synchronization settings in Maximizer by going to the Setup tab and selecting Preferences. However, you can also configure their settings through Administrator's user preferences.

Outlook Synchronization preferences enable you to select which entries will be synchronized:

 For information on how Maximizer and Outlook fields are mapped to each other in Outlook Synchronization, refer to "Field Mapping" on page 122.

- For appointments and tasks, only entries scheduled within the specified date ranges will synchronize, with the exception of recurring appointments and tasks, as described in the following section. These settings apply to appointments and tasks in both Maximizer and Outlook.
- For Maximizer Address Book entries, only the entries belonging to the selected Favorite List will synchronize with Outlook. Those entries will be assigned to the specified Outlook category.
- For Outlook contacts, only the contacts assigned to the specified category will synchronize with Maximizer. Those entries will be assigned to the selected Favorite List in Maximizer.
- Products/Services and Categories are synchronized to Outlook if you are using Microsoft Outlook Synchronization. Attendees, resources, and any notes you add to an appointment are also synchronized. These items appear as part of the appointment dialog box in Outlook.

Outlook Synchronization preferences also enable you to specify how often to synchronize and how to handle conflicts when the same entry has been modified in both Outlook and Maximizer.

Maximizer can synchronize only with Outlook profiles on the same machine. When configuring a user's Outlook Synchronization settings through Administrator, you must manually enter the Outlook profile name, but it cannot be verified until the Outlook Synchronization process runs on the user's machine. If you don't know the Outlook profile name, leave the field blank and the user can select it through Maximizer's user preferences. When Outlook Synchronization runs, it checks that the configuration has a valid Outlook profile name. If not, Outlook Synchronization logs the error.

## Appointment and Task Synchronization

When Outlook Synchronization is configured, it can synchronize select appointments and tasks between the Maximizer Address Book and Microsoft Outlook. Only those appointments and tasks scheduled within the specified date ranges will synchronize, with the following exceptions:

- if an instance of a recurring appointment occurs within the specified date range, all instances of the recurring appointment will be synchronized
- if a task is scheduled prior to the specified date range, but the "Carry forward unfinished tasks" option is selected, the task will be synchronized

You can also specify whether to synchronize private appointments and/or tasks.

### Recurring Appointments

Recurring appointments in Microsoft Outlook synchronize to Maximizer as recurring appointments unless they have no end date. If the recurring appointment has no end date, only the first occurrence synchronizes with Maximizer, not the recurrences. To synchronize recurring appointments with Maximizer, always provide an end date.

Note that while it is possible to modify the Private property of a single instance of a private appointment in Maximizer, this property can be changed only for the entire series of recurring appointments in Outlook. Therefore, if you change the Private property of a single instance of a recurring appointment in Maximizer, this change will not be synchronized to Outlook.

### Recurring Tasks

If you synchronize a recurring task from Outlook, and then mark the task as complete in Maximizer, Maximizer cannot create the next instance of the recurring task. You should mark the task as complete in Outlook, which will create the next instance of the task, and then re-synchronize with Maximizer.

If you synchronize a recurring task from Outlook, and then delete the task in Maximizer, all instances of the recurring tasks are deleted. If you want to delete a single instance of a recurring task, you should delete the task in Outlook and then re-synchronize with Maximizer.

## Group Appointments

When using Outlook Synchronization, group appointments in Maximizer synchronize to Outlook for the current user only. However, the synchronized appointment in Outlook includes all the locations, resources, and attendees information in the appointment notes.

## Synchronization from Outlook to Your PDA

In addition to synchronizing Maximizer data with Outlook, you can synchronize information from Outlook to your PDA. There are several selections of available software to perform this synchronization. Please consult with your PDA manufacturer or supplier for more information.

## Configuring Outlook Synchronization

### ► To configure Outlook Synchronization

- 1** In Administrator, select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Preferences**.
- 3** Select the **Outlook Synchronization** tab.

The screenshot shows the 'Preferences - Billie Holly' dialog box with the 'Outlook Synchronization' tab selected. The dialog has several sections:

- Synchronization frequency:**
  - ☒ Synchronization every: 1 Hour(s)
  - ☐ Synchronization daily at: 12:33:45 PM
  - ☐ Never (manual synchronization)
- Conflict resolution:**
  - ☒ Maximizer CRM overrides
  - ☐ Outlook overrides
- Options:**
  - Outlook profile: [Empty]
  - ☒ Synchronize appointments from: 5 Day(s) before today to: 2 Week(s) after today
    - ☐ Include private appointments
  - ☒ Synchronize tasks from: 5 Day(s) before today to: 2 Week(s) after today
    - ☐ Include private tasks
    - ☐ Carry forward unfinished tasks
  - ☒ Synchronize Address Book entries [Phone Mapping...]
    - Synchronize Address Book entries from Favorite List: All Entries in Escena
    - Synchronize Contacts from Outlook Category: Maximizer

At the bottom are buttons for OK, Cancel, and Apply.



- 4** In the **Synchronization frequency** group box, specify how often Maximizer should synchronize with Outlook.

If you select **Never (manual synchronization)**, the user must synchronize manually by selecting the **Tools** tab and clicking **Synchronize with Outlook** in the **Office** group.

- 5** In the **Conflict resolution** group box, select the desired method of handling entries that have been changed in both Maximizer and Outlook since the last synchronization.

- 6** In the **Outlook profile** field, enter the name of the user's Outlook profile. This information must be obtained from the user's computer.

To ignore the computer name when synchronizing, select the **Ignore computer name** checkbox.

**i** Do not select Ignore computer name if the user uses multiple computers and synchronizes to a different Outlook profile on each computer.

- 7** To synchronize appointments, select the **Synchronize appointments** checkbox and specify the date range of appointments to synchronize.

Private appointments will not be synchronized unless the **Include private appointments** checkbox is also selected.

- 8** To synchronize tasks, select the **Synchronize tasks** checkbox and specify the date range of tasks to synchronize.

Private tasks will not be synchronized unless the **Include private tasks** checkbox is also selected.

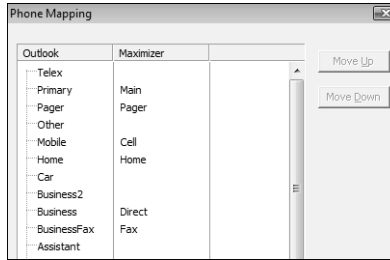
To also synchronize incomplete tasks that are scheduled prior to the specified date range, select the **Carry forward unfinished tasks** checkbox.

- 9** To synchronize Maximizer Address Book entries and Outlook contacts, select the **Synchronize Address Book entries** checkbox. Note that this option is used to synchronize a personal Contacts Address Book list. For information on selecting the Outlook address list for integration with Maximizer, see the *Maximizer CRM User's Guide*.

**i** The Synchronize Address Book entries checkbox is disabled if the user does not have the "Allow sync contacts with external clients" access right.

- 10** To specify the mapping between Outlook phone number fields and Maximizer phone number fields, click the **Phone Mapping**

button, select the Maximizer phone number field to map to each Outlook phone number field, and click **OK**.



Do not map all Outlook phone number fields. Maximizer supports only four phone numbers for each Address Book entry. If an Outlook contact has more than four phone numbers, and more than four types are mapped between Outlook and Maximizer, not all the Outlook phone numbers can be synchronized with Maximizer.

**1 1** In the **Synchronize Address Book entries from Favorite List** drop-down list, select the Maximizer Favorite List to synchronize.

**1 2** In the **Synchronize Contacts from Outlook Category** drop-down list, select the Outlook category to synchronize.

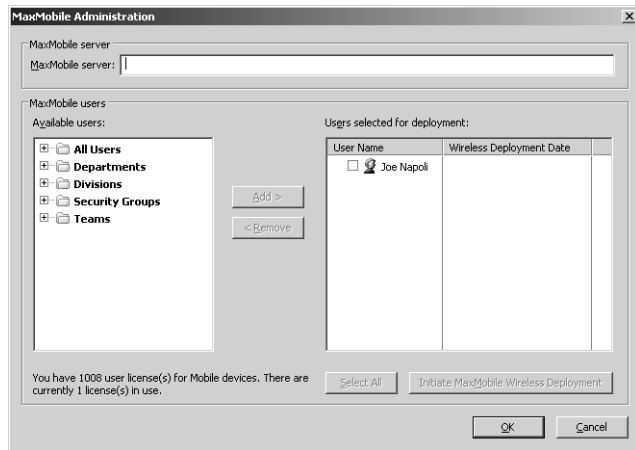
**1 3** Click **OK**.

# Configuring MaxMobile Wireless Server

Before users can use MaxMobile, the administrator must configure the wireless server in Administrator. The number of users allowed to use MaxMobile is controlled through your product license number.

## ➤ To configure MaxMobile Wireless Server

- 1 In Administrator, open the Address Book to use with MaxMobile, and select **File > MaxMobile Administration**. Note that you can access this dialog box from Maximizer only if you have administrative privileges as a Maximizer user.



- 2 Enter the URL of the MaxMobile Wireless Server. The URL should be in the following format:

**http://[server\_name]:port/MaxMobileService**

**https://[server\_name]:port/MaxMobileService**

- 3 For each **users, departments, divisions, security groups**, and **teams** who will use MaxMobile, select the name from the **MaxMobile users** list and click **Add** to move the item to the **Users selected for deployment** list. This enables MaxMobile for these users as shown below in the Module Login section of a user's properties. Use the Remove button to remove an item from this list.

Note that you can also enable MaxMobile for users in the General tab of the Properties dialog box for a user.

For more information about deploying MaxMobile, see the *MaxMobile Wireless Server Getting Started Guide*.

Properties for Joe Napoli

General

User-Defined Fields

Access Rights

Groups / Teams

Windows Authentication

Name and position

User ID: jnapoliMr. JoeNapoliFirst name: JoeInitial: Last name: NapoliSalutation: Dear < >:Display name: Joe NapoliPosition: PresidentReports to:

Company and main address

Company: Escona Estate WinesDept.: ExecutiveDivision: CAN - EastAddress 1: 1344 Eastside RoadAddress 2: City/Town: PetalumaSt/Co/Prov: CAZip/Postcode: 94954Country: USA

Phone numbers and phone extensions

1: (555) 775-09822: (555) 775-0900 fax3: 4:

Security

☒ Public☐ Private

Module Login

Windows Access

Enabled

Web Access

Disabled

Mobile

Enabled

Internet information

Email: jnapoli@maximizer.comWebsite: http://www.escona.com

OK

Cancel

Apply

## Enabling TAPI

Maximizer can use TAPI (Telephony Application Programming Interface) to detect incoming phone numbers (using caller ID) and log the phone conversation for the matching Address Book entry.

The following requirements must be met to use TAPI with Maximizer:

- Your telephone system must be TAPI-enabled.
- Your phone system's TAPI driver must be installed.
- Your computer's modem must be compatible with TAPI.

You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.

- Maximizer must be configured for TAPI.

## Requirements for Caller ID

Specific requirements are essential to implement caller ID detection:

- Caller ID service from the local telephone company.
- TAPI-compliant hardware that is Caller-ID capable.
- A TSPI component (such as an .INF file driver) for your Caller-ID enabled TAPI hardware (e.g., UniModemV)
- Microsoft TAPI software components.

Even if you meet these requirements, caller ID may not operate properly, especially if your local telephone company uses a different standard for caller ID than your TAPI driver. Call your local phone company to obtain more information regarding your caller ID standard and compare it to the standard used by the TAPI driver.

## Reasons Why Caller ID May Not Work

If you use a TAPI-enabled modem (as opposed to a PBX, H.323, or other TAPI hardware), and your telephone company provide MESH-format caller ID information (rather than SDM, another common format), caller ID call detection is unlikely to work. Microsoft's UniModemV TAPI driver and MODEM.INF file, provided with most TAPI modems, do not support MESH caller ID format, which means your modem (and Maximizer) may never receive caller ID information from TAPI. If your modem manufacturer provides its own TAPI modem or PBX driver and the appropriate INF file, or you are able to obtain SDM-format caller ID, you might have more success.

## Phone Number Matching with TAPI

When Maximizer uses TAPI to detect an incoming phone call, it matches the phone call to a Maximizer Address Book entry and logs the call as a note for the entry. Depending on your TAPI configuration in Maximizer, it uses either the "Smart Phone Number Matching" or "Exact Phone Number Matching" algorithm to determine which Address Book entry matches the incoming phone number.

### Smart Phone Number Matching

By default, Maximizer uses the Smart Phone Number Matching algorithm to determine which Address Book entry matches the incoming call.

When a call comes in, Smart Phone Number Matching looks for all Address Book entries with phone numbers ending with the incoming phone number string and displays those Address Book entries in a list so you can select the correct entry.

For example, if the incoming phone number string is four digits, Maximizer displays a list of all Address Book entries ending in those four digits.

Smart Phone Number Matching matches the digits from right to left. The number of matched digits required for matching is equal to the shorter length of the two phone numbers.

The following table illustrates Smart Phone Number Matching for four-digit and seven-digit incoming phone numbers.

<b>Address Book entry phone number</b>	<b>Does the incoming four-digit phone number (2314) match?</b>	<b>Does the incoming seven-digit phone number (732-2314) match?</b>
9-604-732-2314	Yes	Yes
1-604-732-2314	Yes	Yes
403-732-2314	Yes	Yes
732-2314	Yes	Yes
497-2314	Yes	No
2314	Yes	Yes
3514	No	No
14	Yes	Yes

## Exact Phone Number Matching

If you select the “Enable exact number matching” checkbox in the TAPI preferences in Maximizer, it uses the Exact Phone Number Matching algorithm instead of Smart Phone Number Matching. Exact Phone Number Matching considers an Address Book entry to match the incoming call only if both numbers contain exactly the same phone number with the specified number of digits.

By default, Exact Number Matching requires both phone numbers to be seven digits, but you can change the required number of digits.

The advantage of Exact Phone Number Matching is that when Maximizer finds an Address Book entry that matches exactly, you do not need to select it from a list of possible matches, as you do with Smart Phone Number Matching.

The following table illustrates Exact Phone Number Matching for four-digit and seven-digit incoming phone numbers.

Address Book entry phone number	Does the incoming four-digit phone number (2314) match?	Does the incoming seven-digit phone number (732-2314) match?
9-604-732-2314	No	No
1-604-732-2314	No	No
403-732-2314	No	No
732-2314	No	Yes
497-2314	No	No
2314	Yes	No
3514	No	No
14	No	No

## Configuring Maximizer to Use TAPI

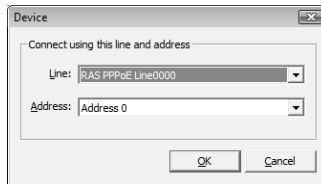
Before you can configure Maximizer to use TAPI, you must have a TAPI-enabled telephone system, and your computer’s modem must be configured to use TAPI. You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.

### ➤ To configure Maximizer to use TAPI

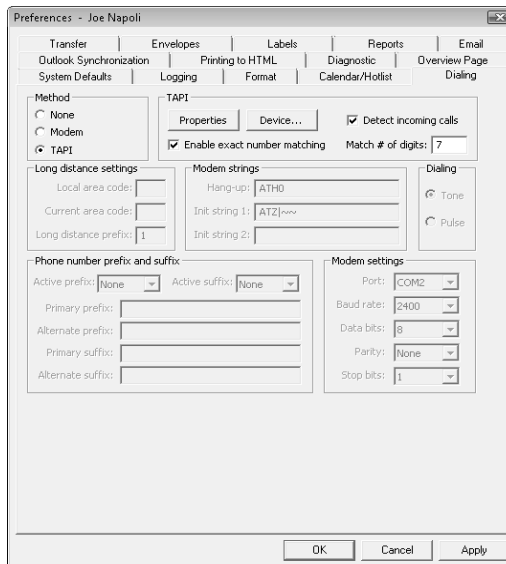
**1** On the **Setup** tab, select **Preferences**.

**2** Select the **Dialing** tab.

- 3 Under **Method**, select **TAPI**.
- 4 Under **TAPI**, click **Properties**.
- 5 Fill in your location information, and click **OK** to return to the Dialing Preferences.
- 6 Click **Device**.



- 7 From the **Line** drop-down list, select the TAPI device name, and click **OK**.
- 8 Select the **Detect incoming calls** option.
- 9 If desired, select the **Enable exact number matching** option, and specify the number of phone number digits to match.



- 10 Click **OK** to close the Preferences dialog box.



# Phone Masks

The registry entry (HKEY\_CURRENT\_USER\Software\Maximizer Software\Maximizer\Modules\AMGR\INTL\Phone Mask) overrides the default format of a phone number with the phone mask provided as a value. The mask uses # to indicate digits and can include any other characters (e.g., + - , ). If the Phone Mask registry key does not exist, you must create it as a String value.

 Exercise caution when working in the Windows Registry.

The mask formats from right to left. For example, if the phone mask value is ###-####, but a user enters a 10-digit phone number (e.g., 1234567890), the result would be formatted as 123456-7890. If the value has fewer digits than the mask allows, the extra (left-most) placeholders are not used.

The following table shows how some examples of how phone numbers are displayed using phone masks:

Phone Mask	Digits	Value Typed In	Value Displayed
Not specified	7	1234567	123-4567
"	10	1234567890	123456-7890
###-####	7	1234567	123-4567
"	10	1234567890	123456-7890
(###) ###-####	7	1234567	123-4567
"	10	1234567890	(123) 456-7890
+1 (###) ###-####	7	1234567	123-4567
"	10	1234567890	+1 (123) 456-7890
### ## #####-#####	15	123456789012345	123 45 6789-012345

The Phone Mask value affects the display of phone numbers in Maximizer program dialog boxes and window lists. The Phone Mask value is read during program startup.

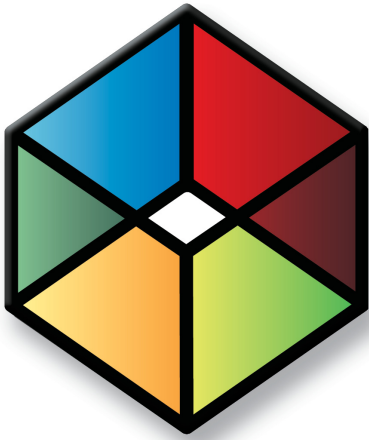
## Using Fax Software with Maximizer

 Visit the Maximizer website at [www.maximizer.com](http://www.maximizer.com) to obtain an updated list of supported fax applications.

You can set up Maximizer for faxing anytime after you have installed the fax modem and fax application.

To fax any document with Microsoft Fax, simply select the fax driver in place of a printer when you print the document. The Maximizer Word Processor also supports merging directly to faxing software, which enables you to perform broadcast faxing.

For information about setting up Microsoft Fax, refer to your Windows operating system documentation.



# CHAPTER 7 **Managing Address Book Data**

## In this chapter...

- "Backing Up and Restoring Address Book Data" on page 100
- "Converting Embedded Documents to Linked Documents" on page 106
- "Verifying and Recovering Address Book Data" on page 108
- "Exporting Data from Maximizer" on page 111
- "Importing Address Book Data from MXI or XML Files" on page 117
- "Importing Data from Other File Formats" on page 120
- "Transferring Entries between Address Books" on page 139
- "Purging Outdated Notes and Documents" on page 143
- "Using Log Files for Diagnosis" on page 145
- "System Reports" on page 147

## Backing Up and Restoring Address Book Data

This section explains how to back up and restore Maximizer Address Book database files, which contain the majority of your Maximizer data, including Address Book entries, opportunities, etc. However, if your Address Book uses a custom dictionary or holidays, you must back up those files separately.

The following sections contain information on backing up Address Book data in Maximizer:

- "Backing Up an Address Book" on page 100
- "Restoring an Address Book from a Backup" on page 103
- "Moving an Address Book to a Different Server" on page 105
- "Backing Up the Dictionary and Holiday Files" on page 105

### Backing Up an Address Book

There are two types of backup procedures available:

- **Regular Backup.** This backup procedure requires the Address Book to be closed. Regular backup can be performed only in Maximizer.
- **Quick Backup.** This backup procedure is performed on an open Address Book. You can perform a Quick Backup from either or Maximizer. If security is enabled, you will need access to the MASTER user password.

#### Regular Backup

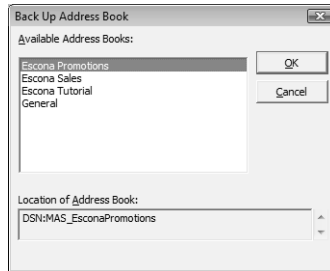
 The extension of the backup file is .BAK.

A regular backup is saved by default to the folder containing the SQL database files for the Address Book. If you don't want to save the backup to this location, you can browse to another one.

#### ➤ To perform a regular backup

- 1** To verify currently logged in users, open the Address Book in Administrator and select Reports > Current Users. Ensure that no users are logged into the Address Book you want to back up.
- 2** In Administrator, close the Address Book and select **Utilities > Back Up Address Book.**

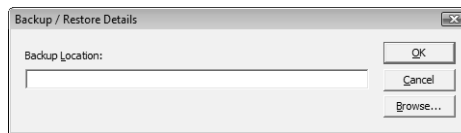
- 3** Select the Address Book to back up, and click **OK**.



- 4** Enter the MASTER user password, and click **OK**.



The Backup / Restore Details dialog box opens.

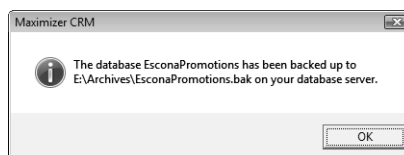


- 5** Select the backup folder:

- If you want to save the backup to the default location, leave the Backup Location field blank.
- If you want to save the backup file to a different folder, click **Browse**. Select a folder for the backup file and click **OK**.

**i** The default location is where the SQL database files for the Address Book are stored.

Maximizer starts backing up the files. Depending on the size of the Address Book, the backup could take several minutes or several hours. A message box confirms that the backup is complete. The backup file name is displayed.



- 6** Click **OK**.

## Quick Backup

The advantage of using Quick Backup is that you can perform frequent backups of any open Address Book.

If you choose to save the backup to the default location, Quick Backup creates a subfolder named Backup in the same folder as the Address Book files.

The backup file name includes the current date as an identifier. For example, the following backup file was created from a Quick Backup performed on March 23, 2007. (The backup was saved to the following default location).

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial\_20070323\_01.BAK

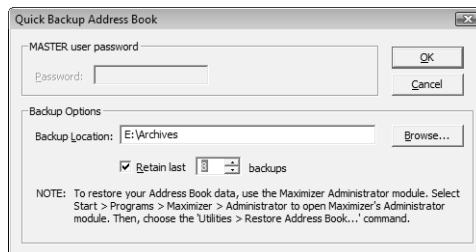
The “\_01” is added to the file name to differentiate between backups from the same day, so a second backup on the same day would be saved as follows:

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial\_20070323\_02.BAK

Quick Backup also lets you determine how many backups are kept. If you were to set Quick Backup to retain only five backups, then when you create the sixth backup, Quick Backup deletes the oldest backup.

### ► To perform a Quick Backup

- 1 Open the Address Book to back up.
- 2 Select **File > Quick Backup**.



- 3 Enter the MASTER user password.

If this box is disabled, continue to the next step.

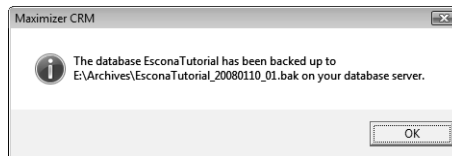
**4** Select the backup folder:

If you want to save the backup file to the default location (Address Book folder), leave the Backup Location field blank.

If you want to save the backup file to a different location, click Browse. Select a folder in the Browse for Folder dialog box and click OK. The location is displayed in the Backup Location field.

**5** Specify the number of previous backups to retain.**6** Click **OK** to begin backing up.

When the Quick Backup is complete, a message box confirms that the backup was successful. The backup file name and location are displayed.

**7** Click **OK**.

## Restoring an Address Book from a Backup

If you lose or damage your Address Book, you can restore it to a previously backed up version. When you perform a restore, existing Address Book data is replaced with backup Address Book data.

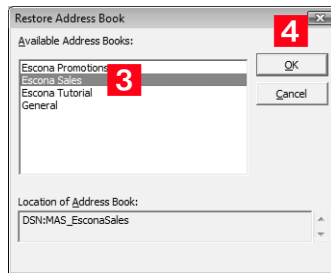
➤ **To restore an Address Book**

**1** To determine if users are logged in, open the Address Book in Administrator and select Reports > Current Users. Ensure that the Address Book you want to restore is not currently open by a user.

**2** In Administrator, close the Address Book and select **Utilities > Restore Address Book**.

**3** Select the Address Book to restore.

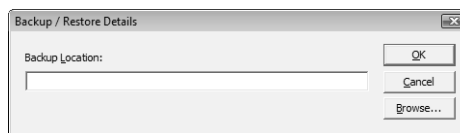
**4** Click **OK**.



**5** Enter the MASTER user password, and click **OK**.

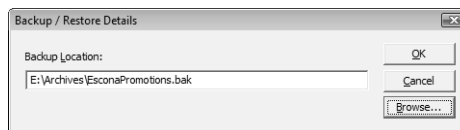


The Backup / Restore Details dialog box opens.



**6** Click **Browse**, select the backup file you want to restore, and click **Open**.

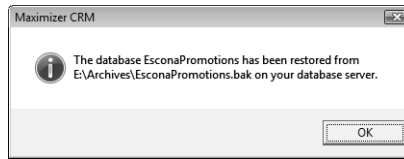
The full path of the backup file is displayed in the Backup Location field.



**7** Click **OK**.



Maximizer restores the Address Book from the selected backup file. A message box confirms that the restore is successful.



## Moving an Address Book to a Different Server

You can use the backup and restore functionality to move an Address Book to a different computer.

### ► To move an Address Book

- 1** Backup up the Address Book. For more information, see “Backing Up an Address Book” on page 100.
- 2** Move the backup Address Book (.BAK) file to the new computer.
- 3** Restore the Address Book on the new computer. For more information, see “Restoring an Address Book from a Backup” on page 103.

## Backing Up the Dictionary and Holiday Files

The Maximizer dictionary and holiday files are not backed up as part of the Address Book backup procedure(s) described previously. Therefore, if you have customized the dictionary or holidays, you need to back up those files separately, especially before upgrading or re-installing Maximizer.

To back up the dictionary and holiday files, copy them from the following location and paste them to another location, preferably the same location where your Address Book is backed up.

The user dictionary file is unique to each Maximizer workstation, so you will need to back up this file for each workstation.

User Dictionary File Location:

...\\Program Files\\Maximizer\\MaData6\\Userdict.lex

Holiday File Location:

...\\Program Files\\Maximizer\\MaData6\\Mxzhhol.nam

**i** By default, the Maximizer program folder is C:\\Program Files\\Maximizer. If Maximizer was installed in a different folder, then change the path accordingly.

# Converting Embedded Documents to Linked Documents

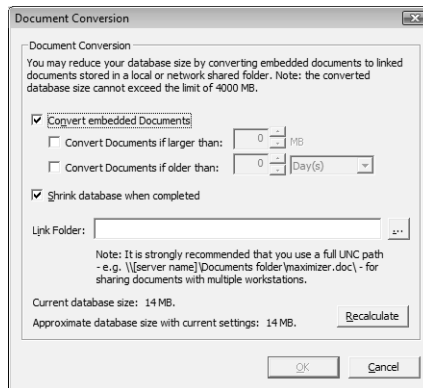
Maximizer has a built-in utility in Administrator for converting embedded documents to linked documents. This allows you to manage the size of your Address Book.

If necessary, you can move your linked documents from one location to another.

**Note** that a converted Address Book size cannot exceed 4 GB (4000 MB). If you are upgrading a Pervasive.SQL database to SQL Express, and the Address Book size exceeds 4 GB, the upgrade process is stopped and the initial state of the Pervasive.SQL is retained.

## ➤ To convert embedded documents to linked documents

- 1** In Administrator, select **File > Document Administration > Convert Embedded Documents**.



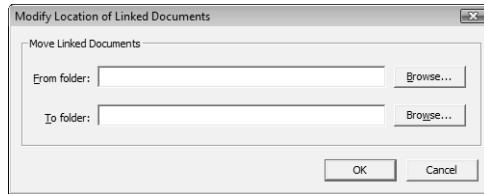
- 2** Select the **Convert embedded documents** checkbox.
- 3** Specify the document size and age limits. If these values are left as zeros, all embedded documents regardless of size/age are converted to linked documents.
- 4** Optionally, select the **Shrink database when completed** checkbox. This reduces the size of the Address Book once the conversion is complete. If you haven't chosen to convert your embedded documents, this reduces the size of the Address Book by removing any unused space.
- 5** Specify the folder in which linked documents will be stored in the **Link Folder** field.

You should use the full UNC path as the location. For example, enter \\[computer name]\Linked Documents\. To ensure the correct UNC path is used, browse to computer and folder where the linked documents are to be stored.

- 6 Click the **Recalculate** button after revising the conversion settings to estimate the size of the Address Book with the revised settings.

➤ **To modify the location of linked documents**

- 1 In Administrator, select **File > Document Administration > Move Linked Documents**.



- 2 Specify the folder where the linked documents were previously stored in the **From folder**.
- 3 Specify the new folder where the linked documents will be stored in the **To folder**.

You should use the full UNC path for both folders.

## Verifying and Recovering Address Book Data

 You can verify and recover only one Address Book at a time.

Address Book verification enables you to quickly identify and resolve invalid and orphan items in your Address Book. You should always run Address Book Verification and Recovery after upgrading or restoring an Address Book. Also, if database views have not been created for any user-defined fields and are needed for generating reports, use Address Book Verification and Recovery to create the missing database views.

Address Book Verification and Recovery identifies the following Address Book items.

Address Book Item	Description
Orphan Contacts	Contacts that are not associated with a Company record.
Orphan alternate addresses	Addresses that are not associated with an Address Book record.
Orphan notes	Notes that are not associated with an Address Book entry or opportunity.
Opportunity records with invalid Start_Date field value	Opportunities whose start date does not match the earliest Sales Step start date.
Notes with undefined Entity Type	Notes that do not have an entity type value (Address Book entry, opportunity, or user) assigned to the record
Broken Company Library links	Company Library links that try to connect to a missing document (link exists but the document is missing).
Orphan Company Library links	Company Library links that link to a missing Company Library folder (document exists, link exists, but the Company Library folder is missing).
Orphan Company Library documents	Company Library documents not listed in the Company Library folders (document exists but the link is missing).
Invalid Opportunity records	Opportunities whose start date does not match the earliest Sales Step start date.
Invalid Address book records	Company records containing personal information about an Individual or Contact.
Invalid Document records	Documents whose Owner field contains invalid characters or values.

Address Book Item	Description
Misplaced Document records	Documents whose Owner field contains an incorrect value.
User-defined fields that do not have associated database views	User-defined fields for which a database view has not been created.
Invalid Table UDF Item records	Table user-defined field items that have the wrong type (Company, Individual, Contact, etc.).
Invalid/orphan Table UDF values	Table user-defined field values that reference non-existent table items.
Orphan Link Records	Opportunities that do not have a related Address Book entry.

**i** To see recovered entries, you must log in as MASTER or have rights to open other users' entries.

When you choose to “recover” the Address Book, Maximizer transfers recovered Address Book entries into a single entry called “Recovered on [date of recovery]”, and it transfers recovered Company Library documents into a single folder called “Recovered on [date of recovery]”. You can then view the recovered entries and either delete or move them as needed.

➤ **To verify an Address Book**

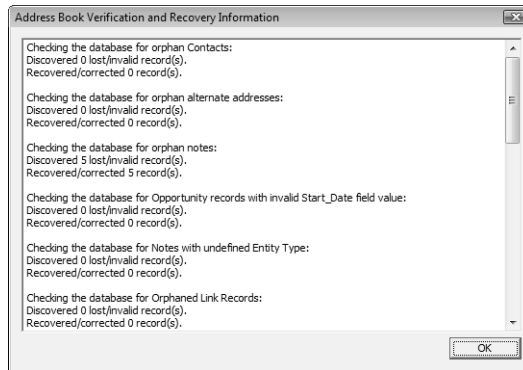
- 1** In Administrator, open the Address Book.
- 2** Select **File > Address Book Verification**.
- 3** Choose either the **Verify Only** or **Verify and Recover** option, and click **OK**.



**i** If you select Verify Only and Maximizer detects invalid records, it prompts you to recover them.

Maximizer runs the Address Book verification process, as well as the recovery process if you selected the second option. When it is complete, you see the Address Book Verification and Recovery

Information dialog box, which contains a summary of each verification performed and the results of the verification.



- 4** If you selected the **Verify and Recover** option, open the Address Book in Maximizer, and view the **Recovered on [date]** Address Book entry. You can then delete or move the recovered entries.

# Exporting Data from Maximizer


You can export Address Book entries from Maximizer only, not Administrator.

Exporting Address Book entries creates a text file or XML file containing information from the current Address Book. It exports any Companies and Individuals selected in the Address Book list. If no Address Book entries are selected, it exports all Companies and Individuals currently displayed in the list.

The following sections contain information on exporting data from Maximizer:


- “Exporting Address Book Entries in XML Format” on page 111
- “Exporting Address Book Entries in Text Format” on page 113
- “Selecting Fields for Export” on page 115

## Exporting Address Book Entries in XML Format

 The unique ID is exported with each Company or Individual, but unique IDs for contacts are not exported.

By default, exporting Address Book entries in XML format exports name, address, phone number, email address, and company details information from the Basic Information tab of the selected Companies and Individuals (or all entries in the list if none are selected). You can easily import this file into another Address Book.

You can optionally export the following additional information:

 These options are available for XML export only, not CSV or tab-delimited exports.

- **Include contacts** exports the contacts associated with the exported Address Book entries.
- **Include Opportunities** exports Opportunities associated with the exported Address Book entries.
- **Include UDFs** exports all Address Book user-defined fields associated with the exported Address Book entries, along with their attributes, and in the case of table user-defined fields, any items they contain. Keep in mind that exporting user-defined fields increases the length of time required for the export process, and not selecting this option improves speed.
- **Include notes** exports notes associated with the exported Address Book entries, including date and time, owner, creator, type, and text fields.
- **Include documents** exports documents associated with the exported Address Book entries, including date and time, document type, document name, creator, owner, as well as the document data itself.
- **Support non-English characters** converts the contents of the exported XML file to Unicode format, which is required for languages using more than one byte per character, such as

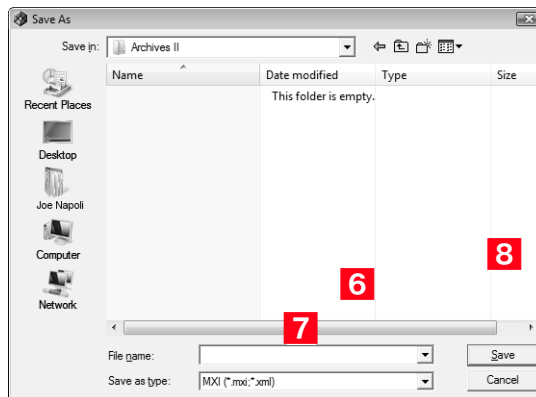
Chinese. If you don't select this checkbox, characters will be exported in ASCII format.

► **To export Address Book entries in XML format**

- 1** In Maximizer, open the Address Book window.
- 2** Select the Companies and Individuals to export. If you don't select any entries, Maximizer will export all entries currently displayed in the Address Book list.
- 3** In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer Address Book entries**

The Export Address Book Entries dialog box opens.

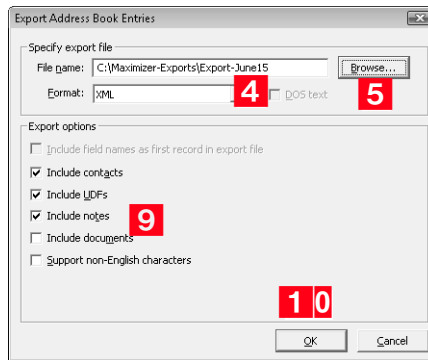
- 4** From the **Format** drop-down list, select **XML**.
- 5** Click the **Browse** button.



- 6** Specify the destination location and **File name** for the exported file.
- 7** In the **Save as type** drop-down list, select either **MXI** or **XML**.



**8** Click **Save**.



**9** Select any of the **Export options**, as needed. Each of the options is described before this procedure.

**10** Click **OK**.

Maximizer exports the Address Book entries and additional data as selected in the options to the specified file.

## Exporting Address Book Entries in Text Format

**i** User-defined fields that contain more than one item are not supported in a CSV or tab-delimited export. Use XML export instead.

Exporting to comma-separated values (CSV) format creates a file with a .CSV extension, which is readable by spreadsheets such as Microsoft Excel and many other programs.

Exporting to tab-delimited format creates a text (.txt) file with tabs separating each field value. This file is readable by any program that supports .txt files.

Exporting to these formats exports selected Companies and Individuals in the Address Book, but you do not have the option of exporting Contacts.

Unlike XML Format, exporting to CSV and tab-delimited format enables you to specify individual fields to export, including Address Book user-defined fields.

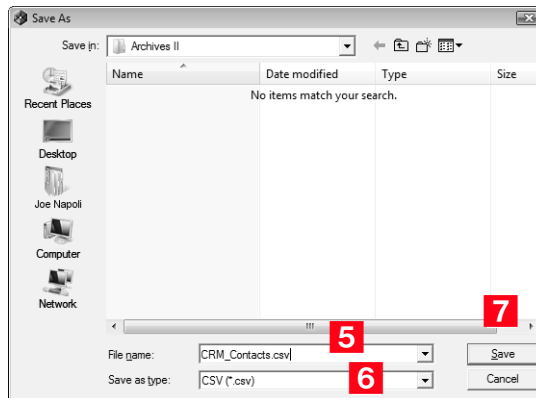
You can also export Notes associated with the Companies or Individuals. You have the option of exporting all notes or most recent notes.

➤ **To export Address Book entries in CSV or tab-delimited format**

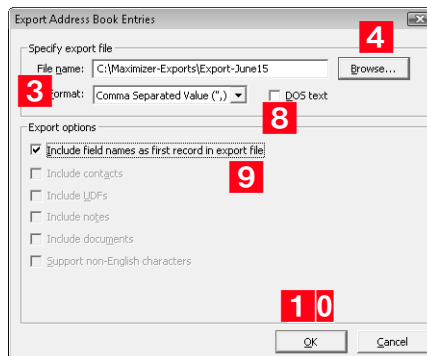
- 1** In Maximizer, open the Address Book window.
- 2** In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under Export, select **Address Book entries**.

The Export Address Book Entries dialog box opens.

- 3** From the **Format** drop-down list, select **Comma Separated Value** or **tab-delimited**.
- 4** Click the **Browse** button.



- 5** Specify the destination location and **File name** for the exported file.
- 6** Verify that the format you selected previously appears in the **Save as type** field.
- 7** Click **Save**.



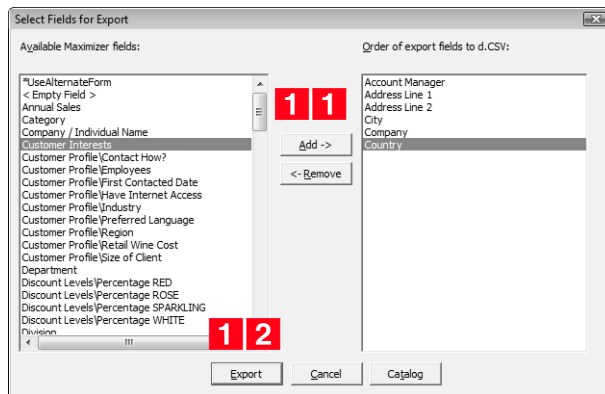
- 8** Select the **DOS text** checkbox to export data that is in DOS standard ASCII.

If the data is in ANSI ASCII (Windows default), do not select the checkbox.

- 9** If you want the field names to be exported as the first record in the exported file, similar to a headings row, select the **Include field names as first record in export file** checkbox.

- 10** Click **OK**.

The Select Fields for Export dialog box opens.



- 1 1** From the **Available Maximizer fields** list, select the fields to export by selecting each field and clicking **Add**.

– or –

Click **Catalog** to retrieve a previously saved export list.

- 1 2** Click **Export** to begin the export process.

## Selecting Fields for Export

**i** You cannot export encrypted user-defined fields.

When exporting to CSV or tab-delimited format, you must select which fields to export, and in which order. The Select Fields for Export dialog box has two columns: the left column lists the Address Book entry basic fields, user-defined fields, and two fields for notes; the right column is initially blank. Select the fields to export from the left column and add them to the right column.

The order of fields in the right column is the order in which they will be exported. If you need to change the order of any fields, select each one and click Remove to delete it from the list; then, in the right column, select the field after which you want to place another field.

Fields added to the right column appear directly below the field currently selected in the right column.

Once you have established the order of export fields as you would like it, you can click the Catalog button to save the export list for future exports. In the Export Catalog dialog box, click Add to create a new saved export list, or click Save to overwrite an existing export list. The Retrieve button opens an existing export list.

## Importing Address Book Data from MXI or XML Files

You can use Administrator or Maximizer to import Address Book entries and other data from MXI (Maximizer XML Interface) or XML Files.

After importing Address Book entries into Maximizer, you can identify the imported records by selecting the **View** tab, and selecting **All Lists** from the **Favorite List** group in the Address Book window. A list of imported Address Book entries is stored in a favorite list named according to the file format and import date and time.

The following sections contain additional information on importing data from MXI and XML files:

- “Importing MXI or XML Files Using Advanced Import” on page 117
- “Unattended Import of MXI or XML Files” on page 119

### Importing MXI or XML Files Using Advanced Import

For more control over importing MXI files, or to import XML files, use the Advanced Import method described below, which enables you to specify a number of preferences about how to import the file.

#### ➤ To import from an MXI or XML file

 Always back up the Address Book before importing.

- 1** In Administrator, select **File > Import > Advanced Import**.
- 2** For the **File name** field, click **Browse** and locate the .XML or .MXI file to import.

Once you have selected the file to import, Maximizer fills in the Log File field automatically.

- 3** Specify any import options in the other group boxes, or just use the default values.

**4** Click **OK** to begin the import.

Advanced Import

Select XML or MXT import file

File name: C:\MaximizerImports\ABEntries-June15.xml **2** Browse...

Address Book entry update options **3**

☐ Always insert

☐ Use Identification field to match entries

☒ Use Name field to match entries

☐ Use this user-defined field to match entries: [dropdown]

Contact update options

☐ Always insert

☐ Use Identification field to match entries

☒ Use Name field to match entries

☐ Use this user-defined field to match entries: [dropdown]

Client ID generation

☒ Follow system setting

☐ Always system generated

☐ Use values from the import file

**4** OK Cancel

Maximizer imports the data and then displays the number of records inserted, updated, and failed for each record type.

**5** Click **OK** to close the message box.

## Unattended Import of MXI or XML Files

An alternative to Advanced Import is an unattended import, which you can initiate by double-clicking the MXI or XML file or by passing parameters to the Maxwin executable (MaxWin.exe) through a command-line interface. When using unattended import, you may choose to specify some of the import preferences within the MXI or XML file itself.

### Importing MXI or XML Files by Double-Clicking

#### ➤ To import an MXI or XML file by double-clicking

- 1** Locate the MXI file on the computer.
- 2** Double-click the file.
- 3** Select the Address Book to import into, and click **Open**.
- 4** Enter your **User ID** and **Password** in the Login dialog box, and click **OK**.

Maximizer imports the data, and then displays a message identifying the number of records inserted, updated, and failed for each record type.

- 5** Click **OK**.

Maximizer displays a message with the name of the Favorite List, which lists the imported Address Book entries.

- 6** Click **OK** to view the Favorite List.

### Importing MXI or XML Files from the Command Line

To import an MXI or XML file from a command line, call Maxwin.exe with the following command-line syntax:

```
Maxwin.exe /DATABASE "EsconaTutorial" /USERID "JNAPOLI"  
/PASSWORD "maximizer" /FILE="d:\ABentries051013.mxi"
```

Keep the following points in mind:

- Only one space is allowed after the DATABASE, USERID, and PASSWORD keywords.
- Values must be surrounded by double quotation marks.
- The equal sign (=) after the FILE keywords must NOT have space before or after it.
- The FILE parameter must be the last parameter.

 The command-line syntax shown here uses sample parameter values.

## Importing Data from Other File Formats

You can use Administrator to import Address Book information from other sources, such as ACT!, GoldMine, or Outlook.

After importing Address Book entries into Maximizer, you can identify the imported records by clicking the **View** tab, and selecting **All Lists** from the **Favorite Lists** group, in the Address Book window. A list of imported Address Book entries is stored in a favorite list named according to the file format and import date and time.

Administrator provides the following methods of importing data. The best import method depends on the type of data you are importing.

- **Address Book Entries:** This method imports entries from a CSV (comma-separated values) or tab-delimited text file that is created when you export from Maximizer or another application. Outlook, for example, can export its address book to a text file. When you import from a text file, you must choose to import all the entries as Companies/Individuals or as Contacts, or you can do a two-tier import to import Companies/Individuals first and then import the associated Contacts. For more information, refer to "Two-Tier Import" on page 122.
- **ACT! or GoldMine Database:** Importing an ACT! or GoldMine database is straightforward because Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. Refer to "Importing Data from ACT! and GoldMine" on page 128.
- **Other Contact Manager Database:** This option enables you to import a variety of data file formats, including Organizer, Clipper, dBASE, FoxBase, and FoxPro, among others. For more information, refer to "Importing from Other Contact Managers" on page 125.



Use the following table to determine which import method to use.

<b>File Type</b>	<b>Import Method(s) (File &gt; Import &gt; ...)</b>
ACT! 1.x, 2.x, 3.x, 4.x, 2000, 6.x (*.dbf)	ACT! 6.0 or 2004 or earlier
ACT! 2005–2010 or ACT! Premium for Workgroups 2005–2010	ACT! 2005–2010 and ACT! Premium for Workgroups 2005–2010
GoldMine 2.x, 3.x, 4.x, 5.x, 6.x (*.dbf)	GoldMine 6.7 or earlier
GoldMine 6.7 Corporate Edition (MSSQL)	GoldMine 6.7 Corporate Edition or earlier
GoldMine 8.x Premium Edition (Firebird SQL, MSSQL)	GoldMine Premium Edition 8.x
Organizer 1.x (*.org)	Other Contact Manager Database
Delimited (*.txt, *.prn)	Other Contact Manager Database
Comma Delimited (*.csv) Tab Delimited (*.txt)	Address Book Entries
Clipper Summer '87 (*.dbf)	Other Contact Manager Database
Clipper 5.x (*.dbf)	Other Contact Manager Database
dBase III, III+, IV (*.dbf)	Address Book Entries
dBase V (*.dbf)	Other Contact Manager Database
Visual dBase 5.x (*.dbf)	Other Contact Manager Database
FoxBase/FoxBASE+ (*.dbf)	Other Contact Manager Database
FoxPro 1.x, 2.x (*.dbf)	Other Contact Manager Database
Visual FoxPro 3.x (*.dbf)	Other Contact Manager Database

## Field Mapping

**i** When you import from a recognized database type, such as GoldMine or ACT!, Maximizer automatically maps the fields for you.

When importing some types of data files, you need to map (create an association between) the fields in the source file and the fields in Maximizer. Keep in mind that different applications name their fields differently. For example, the field for a company name is called "Company" in Outlook and "Company or Individual" in Maximizer.

When you are importing a file type that requires you to map fields the Field Mapping dialog box opens where you can map Maximizer fields to fields in the source file. For each field in the source file, select one of the available Maximizer fields, and click Add to map the fields. Select a corresponding Maximizer field for every field in the source file. If there is no corresponding field, select <Skip Field> from the list of Maximizer fields. When you have finished mapping the fields, the Order of Import (middle column) displays the corresponding Maximizer field beside each field in the Fields from File column.

Select Fields for Import

Available Maximizer fields:

- "UseAlternateForm"
- < Skip Field >
- Annual Sales
- Category
- Additional Contacts
- Customer Profile/Contact How?
- Customer Profile/Employees
- Customer Profile/First Contacted Date
- Customer Profile/Have Internet Access
- Customer Profile/Industry
- Customer Profile/Preferred Language
- Customer Profile/Region
- Customer Profile/Retail Wine Cost
- Customer Profile/Size of Client
- Department
- Discount Levels/Percentage RED
- Discount Levels/Percentage ROSE
- Discount Levels/Percentage SPARKLING
- Discount Levels/Percentage WHITE
- Division
- E-mail Address
- E-mail Address 2

Order of Import Field Number 6:

- Account Manager
- Address Line 1
- Address Line 2
- City
- Company
- Country

Fields from file CRM\_Contacts.csv:

1. First Name
2. Last Name
3. E-mail Address
4. Mobile Phone
5. Personal Web Page
6. Business Street
7. Business City
8. Business Postal Code
9. Business State
10. Business Country
11. Business Web Page
12. Business Phone
13. Company
14. Job Title

☐ Convert to name case ☐ Do not import first record; it is a header

Import Cancel Catalog

## Two-Tier Import

**i** If you import a Company record, and an existing Company record in the database has an identical "Company" field, then the records are considered duplicates, and Maximizer will not import the duplicate Company record. However, Maximizer will import duplicate Individual and Contact records.

Many contact management programs keep two types of address book entries:

- Companies
- Contacts for Companies

Maximizer keeps its Address Book entries organized in a similar way:

- Companies/Individuals
- Contacts (associated with a Company or Individual)

The Import Address Book Entries function enables you to perform a two-tier import. In a two-tier import, you first import Company

entries as Companies/Individuals Address Book entries, and then you import the people as Contacts.

Two-tier importing is only applicable to comma-separated value files, tab-delimited files, dBase III, III+, or IV, or XML files using the File > Import > Address Book Entries command.

### ► To import Address Book entries (two-tier import)

**i** Always back up the Address Book before importing.

#### **1** From the **File** menu, select **Import > Address Book Entries**.

The Import Address Book Entries dialog box opens.

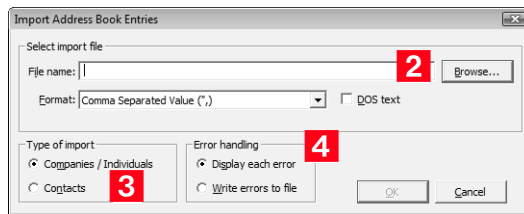
#### **2** Click **Browse** and locate the file to import.

#### **3** Select the **Companies / Individuals** option to import all records in the source file as Company or Individual Address Book entries.

(After you complete this procedure, repeat it a second time to import the Contacts. If you choose not to do a two-tier import, just select either **Companies / Individuals** or **Contacts**.)

**i** User-defined fields containing more than one available item are not supported in a CSV (comma-separated values) import. Use the Advanced Import feature or MTI (Maximizer Transfer Interface) as an alternative.

#### **4** Click **OK**.



The Select Fields for Import dialog box opens.

#### **5** In the **Available Maximizer fields** column, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**.

Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

For example, if the first field in the right column is First Name, select First Name from the Available Maximizer fields.

For fields that contain more than one value such as non-single valued table user-defined fields, and full/read access fields, each value must be its own column in the file and the same field must be mapped to each of those items.

The fields listed in the Available Maximizer Fields column is slightly different, depending on whether you selected Companies / Individuals or Contacts as the Type of Import in step 3.

**i** To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

**i** You can save the field mapping for reuse by clicking the Catalog button.

- 6** To convert text that is in capital letters (uppercase) into mixed case, select the **Convert to name case** checkbox.
- 7** Many comma-delimited data files use the first line as a column header. To exclude the first line from being imported, select the **Do not import first record; it is a header** checkbox.
- 8** Click **Import**.

Select Fields for Import

Available Maximizer fields:

- Phone 3 Description
- Phone 3 Extension
- Phone 4
- Phone 4 Description
- Phone 4 Extension
- Reports To
- Sales/Annual Sales
- Sales/First Contacted Date
- Sales/Last Visit
- Sales/Primary Interest
- Security
- Web Site**
- Wine Preferences/Cabernet Sauvignon
- Wine Preferences/Chablis
- Wine Preferences/Chardonnay
- Wine Preferences/Chianti
- Wine Preferences/Fume Blanc
- Wine Preferences/Merlot
- Wine Preferences/Pinot Blanc
- Wine Preferences/Pinot Noir
- Wine Preferences/Sh
- Wine Preferences/Sp
- Wine

Order of Import Field Number 13:

- Account Manager
- Address Line 1
- Address Line 2
- Category
- City
- Country
- E-mail Address
- First Name
- Full Name
- Phone 1
- Position
- Salutation
- State / Province**

Fields from file CRM\_Contacts.csv:

- 1. First Name
- 2. Last Name
- 3. E-mail Address
- 4. Mobile Phone
- 5. Personal Web Page
- 6. Business Street
- 7. Business City
- 8. Business Postal Code
- 9. Business State
- 10. Business Country
- 11. Business Web Page
- 12. Business Phone
- 13. Company
- 14. Job Title

☒ Convert to name case ☐ Do not import first record; it is a header


Import Cancel Catalog

The data from the source file now imports into Maximizer.

- 9** Repeat this procedure a second time to import the second tier, except select **Contacts** instead of **Companies / Individuals** as the Type of Import in step 3.

## Importing from Other Contact Managers

The instructions below describe importing data from a contact manager other than ACT! or GoldMine. For information about importing from ACT! or GoldMine, refer to “Importing Data from ACT! and GoldMine” on page 128.

 Always back up the Address Book before importing.

### ➤ To Import Contacts from another type of contact management database

- 1** Select **File > Import > Other Contact Manager Database**.

The Import Databases dialog box opens.

- 2** From the **List files of type** drop-down list, select the file format of the database you are importing.

- 3** Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** drop-down list to access the network drive.

- 4** In the **Import Options** group box, select the options you want to include. Depending on the type of database you are importing, some of these options may not be available.

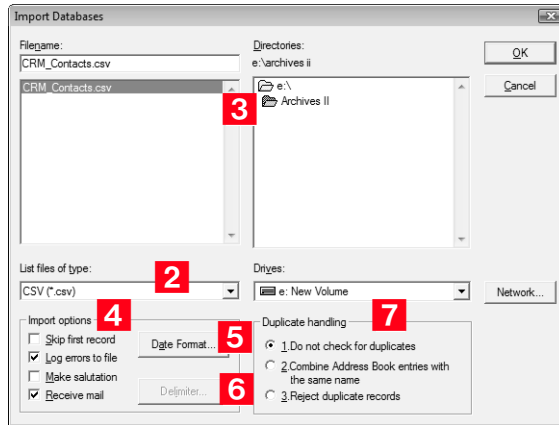
- 5** If you are importing a character delimited text file, you must specify a **Date Format**.

To do so, click the **Date Format** button, select the date format used in the source file, and click **OK**.

- 6** If you are importing a .txt or .prn file, you must also specify the character used as the field **Delimiter** in the import file.

Click the **Delimiter** button, select the delimiter type, and click **OK**.

- 7** In the **Duplicate handling** group box, select one of the options to specify what Maximizer should do when it encounters duplicate Address Book entries, and click **OK**.



The Select Fields for Import dialog box opens.

- 8** In the **Contact fields** or **Address Book entries fields** lists, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**. Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

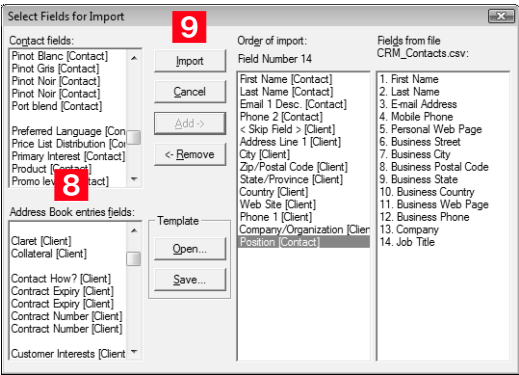
**i** To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

For example, if the first field in the right column is First Name, select First Name from the Contact fields or Address Book entries fields list.

Use **Contact fields** to create Contacts for Companies or Individuals.

Use **Address Book entries fields** to create Company or Individual Address Book entries.

**9** Click **Import** to begin the import process.



Once Maximizer imports the data from the import file, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings.

The Error Log appears next displaying the location of the import error message file. If you want to view this file, make a note of where it is located. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

## Importing Data from ACT! and GoldMine

**i** Duplicate Contacts are created on the second Import of the same ACT! or GoldMine database.

This section describes the procedure for importing data from ACT! or GoldMine, as well as the field mapping for data imported into Maximizer.

### Importing Contacts from ACT! 6.0, 2004, or Earlier, or from GoldMine 6.5 or Earlier

**i** Always back up your Maximizer Address Book before importing data.

**i** When importing GoldMine Contacts, GoldMine must be installed on the same machine as Maximizer; the Borland database engine is required during the import.

#### ➤ To import contacts from ACT! 6.0, 2004, or earlier, or from GoldMine 6.5 or earlier

**1** From the **File** menu, select **Import > ACT! 6.0 or 2004 or earlier**.

– or –

Select **Import > GoldMine 6.5 or earlier**.

The Import Databases dialog box opens. The file type is selected for you automatically.

**2** Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** field drop-down list to access the folder.

**3** In the Import Options group box, select the **Log Errors to File** checkbox if you want to log any errors that occur during the import process to a text file.

All other options in the Import Options group box are handled automatically by Maximizer.

**4** Specify how you want duplicate records handled, and click **OK**.

If duplicate records are found in the data, the option you select here determines whether or not duplicate records are combined. They will be added to the Address Book.

Maximizer requires that each Address Book entry be assigned a unique Address Book entry ID. If the import record contains an Address Book entry ID that is the same as an existing Maximizer Address Book entry or Contact, the Address Book entry ID of the imported entry is automatically changed when that entry is added to Maximizer and this action is recorded in the import error message file.

**5** Click **OK** to begin the Import process.

During the import process, a status indicator appears on the screen. Click **Cancel** if you want to halt the import process.



**i** The Errorlog.txt file appears in the same folder as the import file. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

**6** Once the data is imported, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, or merged, and the number of records with associated import warnings. Click **OK** to close the message box.

## Importing from ACT! 2005–2010 or ACT! Premium for Workgroups 2005–2010

There are two methods of importing from an ACT! 2005–2010 database. The first method explains how to import from ACT! when both ACT! and Administrator are installed on the same machine. The second method explains how to import from ACT! when ACT! and Administrator are on separate machines.

### ➤ To import from ACT! 2005–2010 or ACT! Premium for Workgroups 2005–2010 – Primary Method

**1** Make sure you are logged into Windows as an administrator on the SQL Server machine. Also ensure no users are logged into the ACT! database.

**2** In Administrator, log into the Address Book where you want to import the ACT! database.

**3** In Administrator, select **File > Import > ACT! 2005-2010 and ACT! Premium for Workgroups 2005-2010**.

The Reattaching ACT! databases process may take several minutes.

**4** Select the ACT! database to import from the drop-down list, and click **OK**.

Maximizer imports the database. When the import is complete, it displays the Import Statistics dialog box.

**5** Click **OK** to close the dialog box.

The import is complete.

### ➤ To import from ACT! 2005–2010 or ACT! Premium for Workgroups 2005–2010 – Secondary Method

**1** Back up your ACT! database in ACT!.

The Backup is typically saved to C:\Documents and Settings\<User Name>\My Documents\ACT\ACT for Win 7\Databases\

**2** In the Backup folder, there should be a zip file. Open this zip file and extract the .BAK file that contains the name of your ACT! database in the filename.

**i** Always back up your Maximizer Address Book before importing data.

- 3 The extracted file is a SQL backup. Restore this backup to a normal SQL 2005 (or later) server.

See your SQL Server documentation for details on how to restore backups.

- 4 Once the backup is restored, create a DSN to point to the database on the SQL Server. For instructions on creating a DSN, refer to the procedure below.

- 5 Start Administrator.

- 6 Open the Address Book to import the data into.

- 7 Select **File > Import > ACT! 2005-2010 and ACT! Premium for Workgroups 2005-2010**.

- 8 Click **OK** on the message box.

- 9 Click the **Machine Data Source** tab, select the DSN you created in step 4, and click **OK**.

You will be prompted for your sa password.

- 10 Enter the sa password, and click **OK**.

Maximizer begins importing the data.

► **To create a DSN to point to the database on the SQL Server**

- 1 Open **Control Panel > Administrative Tools > Data Sources (ODBC)**.

- 2 Click the **System DSN** tab, and click the **Add** button.

- 3 Select **SQL Server**, and click **Finish**.

- 4 Give a meaningful name and description, select the SQL server where you placed the restored backup, and click **Next**.

- 5 Select the **With SQL Server authentication** option, fill in the Login ID as **sa**, enter the sa password, and click **Next**.

- 6 Select **Change the default database to**, select the restored ACT! database from the drop-down list, and click **Next**.

- 7 Click **Finish**.

- 8 Click the **Test Data Source** button to make sure the DSN was configured correctly.

- 9 Click **OK** and then **OK** again to save the DSN.

## Importing from GoldMine 6.7 Corporate Edition (or Earlier) SQL Databases

**i** Always back up your Maximizer Address Book before importing data.

### ➤ To import from a GoldMine 6.7 Corporate Edition (or earlier) SQL database

- 1** Start Administrator.
- 2** Select **File > Import > GoldMine 6.7 Corporate Edition or earlier**.
- 3** Click **OK** on the message box.
- 4** Click the **Machine Data Source** tab, select the GoldMine DSN, and click **OK**.

You will be prompted for your sa password.

- 5** Enter the sa password, and click **OK**.

Maximizer begins importing the data.

## Importing from GoldMine 8.x Premium Edition SQL Databases

Maximizer supports importing data from GoldMine 8.x Premium Edition with MSSQL or Firebird SQL.

**i** Always back up your Maximizer Address Book before importing data.

### ➤ To import from a GoldMine 8.x Premium Edition SQL database

- 1** If you are importing from GoldMine 8.x with Firebird SQL, convert the Firebird SQL database to MSSQL. You can convert the database in GoldMine 8.02 or later. (In GoldMine, select **Tools > Database > New Databases**.) For more information, see the GoldMine documentation.
- 2** In Administrator, select **File > Import > GoldMine Premium Edition 8.x**.
- 3** Click **OK** in the message box.
- 4** Click the **Machine Data Source** tab, and select **GoldMine DSN**. Click **OK**.

You will be prompted for your sa password.

- 5** Enter the sa password, and click **OK**.

Maximizer begins importing the data.

## Setting User Passwords and Properties After Import

Note that if a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. After importing data, you can set each user's password, preferences, and properties manually.

### ➤ To set user passwords, preferences, and properties after import

- 1** In Administrator, select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Password, Preferences, or Properties** to specify the user settings.

## ACT! Data Conversion

The following table describes field mapping between ACT! and Maximizer. Before importing data into Maximizer, export the data from ACT! to a DBF file and use the DBF file for the import.

<b>ACT! 2000 (5.0), 6.0, or 2004–2010</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Company	Company	Yes	
Contact	First Name & Last Name	Yes	ACT! Contacts are imported as Contacts in Maximizer and the basic information about each Contact such as email address are imported into the Basic Info tab in the Address Book entry dialog box. If any of the information associated with the Contact cannot be mapped to a Maximizer field in this tab, the information is imported as user-defined fields. In ACT!, First and Last Name belong to the same single field. The correct names may not be properly imported into Maximizer. For example, a Contact 'Toni Spooner (female)' in ACT! is imported into Maximizer as "Toni Spooner" in the First name field and "(female)" in the Last name field.
Title	Position	Yes	
Department	Department, Position	Yes	In Maximizer, Department is populated with the Department information of the first Contact and the rest in the Position field separated by comma.
Phone	Phone 1	Yes	

<b>ACT! 2000 (5.0), 6.0, or 2004–2010</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Fax	Phone 2	Yes	Adds FAX to Extension field in Maximizer.
Mobile	Phone 4	Yes	Adds CELL to Extension field in Maximizer.
Alt Phone		No	
Ticker	UDF Ticker Symbol	Yes	Adds UDF to Company.
ID/Status	UDF ID/Status	Yes	Adds UDF to Company.
Address	Address	Yes	First address line in ACT! is imported as Address 1 in Maximizer. Second line goes to Address 2. Address comes from one of the Contacts for this Company and if there is no address, it may end up empty. Alternate addresses are added to Maximizer from different Contacts of the Company and alternate addresses are named by that Contact. The same address is not added but renamed by the other Contact. For some Contacts, the appropriate alternate address may not be selected.
Address	Division		Division in Maximizer may be populated by the address line in ACT!.
City	City/Town	Yes	Imported correctly to main and alternate addresses.
State	St/Co/Prov	Yes	Imported correctly to main and alternate addresses.
Zip	Zip/Postcode	Yes	Imported correctly to main and alternate addresses.
Country	Country	Yes	Imported correctly to main and alternate addresses.
Referred By	UDF Referred By	Yes	Adds UDF to Company.
Web Site	Website	Yes	Imported into the Company's website field.
E-mail Address	Email	Yes	Imported into the Contact's email field.
Last Result	Creates Table UDF named "Result"	Yes	Adds Company Table UDF with corresponding items selected for each Contact.
Assistant		No	
Asst. Title		No	
Asst. Phone		No	

<b>ACT! 2000 (5.0), 6.0, or 2004–2010</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
User fields for Contacts and Companies (ACT! 2005–2010 & ACT! 2005–2010 Premium only)	Creates UDFs for Contacts and Companies with the same name as in the source database	Yes	These fields can be renamed and can be changed to different field types. Any fields that are of MEMO type or are more than 120 Characters are converted to Notes in Maximizer.
User 1...User 15 (ACT! 2000 (5.0), 6.0, or 2004 only)	Creates UDFs named "Details Field 1"... "Details Field 15"	Yes	Adds UDFs to Company. Some UDFs that belong to some different Contacts in ACT! may be lost.
Users	Users	Yes	ACT! users are imported into Maximizer as users. Passwords are set to "maximizer" if the import was done using a DBF file. Users are displayed in the Administrator's Manage Users dialog box which may be accessed by selecting File > Manage Users. If a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. By default, passwords for users are set to "maximizer". Passwords can be changed manually for each imported user.
Notes	Notes	Yes	
Schedule Call Schedule To-do	Hotlist Task	Yes	The Duration information of a task in ACT! is imported as "Prior to task" in Maximizer. The Company name of some conflicting tasks may not be preserved.
Schedule Meeting	Appointments	Yes	Recurring appointments are not imported.
Notes Attachments	Notes Attachments	No	
Document	Document	No	
Groups	Groups	No	
Sales/ Opportunities	Opportunities	No	
History (ACT! 2005-2010 & ACT! 2005-2010 Premium only)	Notes	Yes	Each entry from the History tab in ACT! becomes a Note in Maximizer.

## GoldMine Data Conversion

The following table describes field mapping between GoldMine and Maximizer.

Note that Action, Call, and Appointment notes in GoldMine 6.x and 8.x may be in HTML format. When you import these notes into Maximizer, they contain HTML tags.

<b>GoldMine 5.x, 6.x, &amp; 8.x</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Company	Company	Yes	
Contact First Name Initial Last Name	First Name Initial Last Name	Yes	GoldMine's Contact field contains (First Name) (Initial) (Last Name) separated by spaces. In Maximizer, appropriate fields are populated accordingly.
Title	Position	Yes	
Dept	Dept.	Yes	In Maximizer, Dept. is populated with the department of the main Company's Contact.
Asst	Assistant (UDF)	Yes	Adds UDF to Contact record.
Source	Contact type (UDF)	Yes	Adds UDF to Contact record.
Address	Address1 & Address2	Yes	Address from the main Contact becomes the main Company address. The first line in the Address field from GoldMine goes to Address1 in Maximizer. The second line goes to Address2. The third line from GoldMine is NOT imported.  Alternate Addresses in Maximizer are created from the addresses of the Contact from the Contacts tab in GoldMine. Appropriate Alternate Addresses are selected for imported Contacts.
City	City/ Town	Yes	Imported correctly to main and alternate addresses.
State	St/Co/Prov	Yes	Imported correctly to main and alternate addresses.
Zip	Zip	Yes	Imported correctly to main and alternate addresses.
Country	Country	Yes	Imported correctly to main and alternate addresses.
Phone 1-3	Phone 1-3	Yes	Appropriate extensions are imported.
Fax	Phone 4	Yes	Adds FAX to Extension field in Maximizer.

<b>GoldMine 5.x, 6.x, &amp; 8.x</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
E-mail	Email	Yes	Email address of the main Contact is imported. Email addresses of Contacts from the Contacts tab in GoldMine are also imported.
Web Site	Website	Yes	Imported to main Contact record.
Contact Type	Contact Type	Yes	Adds UDF to Contact record.
Business	Business	Yes	Adds UDF to Contact record.
Interest	Interest	Yes	Adds UDF to Contact record.
Accnt Mngr	Accnt Mngr	Yes	Adds UDF to Contact record.
Open	Open	Yes	Adds UDF to Contact record.
Summary	Note	Yes	A note containing details from the Summary tab is created for the Company.
Role Status Account Type Account Size No. of Users Key Interest Competitor Platform	User role Purchase Status Account Type Account Size Users Key Interest Competitor Platform	Yes	Appropriate UDFs are created in Maximizer and populated with proper values.
Notes	Note	Yes	A note is created for the Contact in Maximizer and contains all the notes from the Notes tab in GoldMine.
Documents	Document	No	
Users	Users	Yes	GoldMine's users are imported into Maximizer as users. Users are displayed in the Administrator's Manage Users dialog box, which is accessible through the File > Manage Users menu.  If spaces are included in a user name, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary.  After import, users' Windows Access and Mobile Access are disabled in Maximizer and must be enabled by the administrator.  By default, passwords for users are set to "maximizer". Passwords can be changed manually for each imported user.
Details	Notes	Yes	For every detail, a note is created. Details are referred to as Profiles in the notes.



<b>GoldMine 5.x, 6.x, &amp; 8.x</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Pending	Hotlist Task	Yes	Each entry from the Pending tab in GoldMine is imported as Hotlist task in Maximizer.
Calendar	Hotlist Tasks	Yes	Calls and Activities from GoldMine's Calendar are imported as Hotlist tasks in Maximizer.
Referrals	Notes	Yes	A note is created for every Referral. Referrals are called References.
History	Notes	Yes	Each entry from the History tab in GoldMine becomes a Note in Maximizer.
Members		No	
Tracks		No	
Links		No	
Opptys		No	
Projects		No	
Partner	Notes	Yes	Limited information is imported.
Email text (email)	Documents	Yes	Imports email as documents in the Documents window. This feature is supported for GoldMine 8 only.

## Field Mapping for Outlook


The following table describes the field mapping that is used in Outlook Synchronization.

**i** For more information on Outlook Synchronization, refer to "Configuring Microsoft Outlook Synchronization" on page 86.

<b>Microsoft Outlook</b>	<b>Maximizer</b>
<b>Appointments</b>	
Subject	Subject
Start and End time date	Date
Start time	Start time
End time	End time
Reminder	Alarm time
Toggle alarm	Toggle alarm
Importance	Priority
Private	Private
Location	Location

Microsoft Outlook	Maximizer
Note (text box)	Note (text box)
Tasks	
Due date	Date
Alarm time	Time
Subject	Activity
End time	End time
Reminder set	Alarm set
Priority	Priority
Private	Private

# Transferring Entries between Address Books

 Encrypted user-defined fields cannot be transferred or exported to another Address Book.

Importing refers to copying data from an external database into a Maximizer Address Book. However, transferring refers to copying data between Maximizer Address Books. Transferring data is ideal for merging Address Books together and sharing entries and setups.

Entries cannot be transferred using Administrator. You must use Maximizer.

Transfer rights can be set on a per-user basis, although some field transfer options apply to all users.

The following sections contain information on transferring entries between Address Books:

- “What Happens During a Transfer?” on page 139
- “Transferring Address Book Entries” on page 140
- “Transfer Summary Reports and Logging” on page 141
- “Adjusting Address Book Transfer Settings” on page 142

## What Happens During a Transfer?


Once you start a transfer, Maximizer uses the following rules to determine which records to copy from the source Address Book into the target Address Book:

- **Address Book entry IDs:** If an Address Book entry ID number from the source Address Book does not exist in the target Address Book, the Address Book entry is inserted into the target Address Book.
- **Address Book entry names:** If the Address Book entry ID number from the source exists in the target Address Book, Maximizer compares the source and target Address Book entry names.

If the names are different, Maximizer changes the ID number in the target Address Book and inserts the entry as a new Address Book entry.

If the Address Book entry names are the same, they are considered to be duplicate entries. In this case, Maximizer merges duplicate Address Book entries in the target Address Book.

- **Date and Time:** Maximizer also checks the date and time of the record. It will not overwrite data in the target Address Book that has been modified more recently than the data in the source Address Book.

 Note that each Address Book entry has a unique ID.

## Transferring Address Book Entries

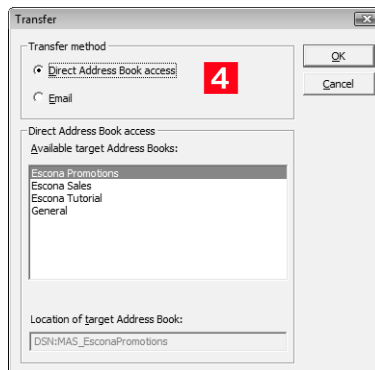
**i** For more information about transferring other information such as column setups, see the online help.

**i** To see if you have transfer and export rights, go to File > Users (select your user ID) > Properties > Access Rights.

By default, when you transfer Companies or Individuals, the following are included: all associated Contacts, user-defined fields, notes, files, appointments, Hotlist tasks, and opportunities. Encrypted user-defined fields cannot be transferred.

### ► To transfer Address Book entries

- 1** In the Address Book window in Maximizer, select the entries to transfer.
- 2** In the top left corner of the window, click the **Maximizer** button.
- 3** In the **Import/Export/Transfer** sub-menu, select **Address Book Entries** from the **Transfer** section.
- 4** Select **Direct Address Book Access** or **Email** as the transfer method.
- 5** If you have chosen to transfer your Address Book entries using **Direct Address Book access**, select the **target Address Book** before clicking **OK**.



A login dialog box appears.

- 6** Type your **User ID** and **Password** to log into the target Address Book, and click **OK**.

The Transfer Address Book Entries dialog box appears.

- 7** Select items associated with the entries that you want to include in the transfer from the **Transfer options** section.

For example, you can choose whether to include user-defined fields, documents, notes, appointments, Hotlist tasks, and opportunities.

- 8** Enter a **Message to log to notes** to be logged for each Address Book entry affected by the transfer in the source Address Book, if necessary.

- 9** To set the advanced options, click the **Advanced** button.

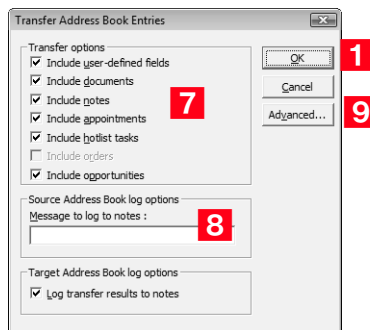
See the **F1** help for more information on each available option.

- 10** Click **OK** to begin the transfer.

When the transfer is complete, the Transfer Summary displays the results of the transfer.

If you chose to email the data, Maximizer prepares the transfer file (with an .MET extension) as an email file attachment and displays the Compose Mail Message dialog box.

- 11** **(Applies to Email transfer only.)** Enter the email address where you would like the transfer sent. See the Maximizer online help topic, Receiving Maximizer Data by Email, for detailed instructions on receiving a transfer by email.



## Transfer Summary Reports and Logging

Each time you transfer Address Book entries, Maximizer displays a transfer summary report. The report indicates the number of data items inserted, modified, bypassed, and deleted. It also displays the transfer setting used and other related information. You can print this report for your records.

As well, for each Address Book entry updated in the target Address Book, Maximizer can optionally add a note. The note summarizes the fields that have been added, changed, and deleted. This feature can also be used if you want to find the data that has been added or modified. After a transfer, simply do a search by notes.

## Adjusting Address Book Transfer Settings

 Only the MASTER user can modify protection on fields.

You can set the options for transferring information between the open Address Book and other Address Books. Some of these are system options, which apply to all users; others are user-specific options, which apply to the selected user only.

Regardless of a user's transfer settings, encrypted user-defined fields cannot be transferred or exported to another Address Book.

### ► To adjust transfer settings for one user or all users

- 1** Select **File > Manage Users**.
- 2** Select a Maximizer user, and click **Preferences**.
- 3** Select the **Transfer** tab.
- 4** In the **Protect fields from update** list, double-click any fields you don't want included in the transfer.
  - **System** field transfer options apply to all users.
  - **User specific** field options apply to the selected user only.
- 5** In the **Transfer options** group box, set your transfer preferences.
- 6** In the **Advanced options** group box, set your advanced transfer preferences, which are described below:
  - The **Overwrite duplicates** option overwrites the target Address Book entry with source Address Book entry information when duplicate records are found.
  - The **Use record modify flag** option sets a flag to "on" when an Address Book entry is added or modified. Maximizer uses it as an internal check to determine if the Address Book entry has been modified since the last transfer.
  - The **Reset record modify flag** option resets the record modify flag back to null (not modified) for each transferred record.
- 7** If you don't want Maximizer to add a note for every Address Book entry that is added or updated in the target Address Book, clear the **Log transfer results to notes** checkbox.
- 8** Click **OK** to finish.

## Purging Outdated Notes and Documents

After a long period of activity, you may want to delete outdated notes and documents using Administrator's purge feature.

When you purge notes, you must specify the note types to delete.

Note Type	Creation Method
Accounting	Created by Accounting Link. Applicable only if Accounting Link is installed.
Email	Notes created in the Address Book window when you send an email to one or more Address Book entries.
History	Created when opportunities are added or changed. History notes can be printed or searched only from these windows.
Incoming call	Created when you receive a phone call.
Mail-out	Created when users print labels, envelopes, or letters using the Maximizer Word Processor's merge feature. Mail-out notes are also created when users send an email to more than one Address Book entry.
Manual	Added manually to the Notes window.
Opportunity	Created in the Address Book window when opportunities are added or changed. Opportunity notes can be printed or searched only from the Address Book window.
Other	Third-party or custom notes created by the administrator.
Outgoing call	Created when phone an Address Book entry.
Tasks	Created when appointments or Hotlist tasks are scheduled or completed.
Timed notes	Created when the Timer is used while writing a note.
Transfer log	Notes logged when Address Book entries are transferred between Address Books.

The purge command deletes all notes, with the exception of other user's private notes (unless the user purging the notes has rights to delete other users' notes), in the specified date range for all Address Book entries in the open Address Book. You should back up the Address Book before purging notes.

➤ **To purge notes**

- 1** In Administrator, open the Address Book you want to clean up.
- 2** Select **File > Purge > Notes**.
- 3** Specify a date range.  
Maximizer deletes notes dated between the specified dates.
- 4** Select the type(s) of notes to delete, and click **OK**.

➤ **To purge documents**

- 1** In Administrator, open the Address Book you want to clean up.
- 2** Select **File > Purge > Documents**.
- 3** Specify a date range.  
Maximizer deletes documents dated between the specified dates.
- 4** If you want to purge private documents belonging to other users, select the **Delete other users' private documents** option.
- 5** Click **OK**.



## Using Log Files for Diagnosis

One of the most powerful tools in diagnosing a Maximizer installation is the automated logging feature. Maximizer supports logging for a number of server and client components.

You can control the amount of detail that is logged for various modules. The range of logging levels is 0 through 7:

- 0 = logging disabled
- 1 = least detailed
- 7 = most detailed

You can also control the frequency in which the log files are purged and if the information is sent to the Windows event log.

Logs are written into the default folder “\Program Files\Maximizer\Logs”. You can define logging preferences in Administrator and Maximizer. These preferences control the following registry keys.

Component	Registry Key	Log File
Maximizer (AMGR)	HKEY_LOCAL_MACHINE\SOFTWARE\Maximizer\Software\Maximizer\Modules\AMGR	AMGR_yyyymmdd.log
Administrator (ADMN)	HKEY_LOCAL_MACHINE\SOFTWARE\Maximizer\Software\Maximizer\Modules\ADMN	ADMN_yyyymmdd.log

### ➤ To set logging preference values

**1** In Maximizer, click the **Setup** tab and select **Preferences**. In Administrator, select **File > Preferences**.


**2** Select the **Diagnostic** tab.

If you want logs for all modules saved in one specific location, specify a default folder where your log files will be saved. If you don't specify a location in this field or a location per module, logs are saved in the Logs folder where Maximizer is installed (e.g., Program Files\Maximizer\Logs).

**3** Select a module from the **Preferences for this module** drop-down list.


- 4 If you want logs related to a module saved in a specific location, specify a folder in the **Module log folder** field.
- 5 Select a logging detail level from the **Maximizer log level** drop-down list.
- 6 Set your other logging preference values such as the frequency logs are purged. By default, logs are purged after 5 days.
- 7 Repeat the previous steps to configure logging for any other module(s).
- 8 Click **OK**.

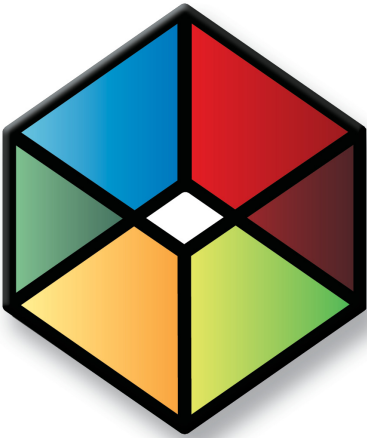
# System Reports

 HTML reports can be opened easily in Microsoft Excel, where you can edit the data as required.

The Reports menu in Administrator enables you to quickly create a number of reports about the open Address Book, as described below.

Report	Information Reported
User ID List	<ul style="list-style-type: none"><li>• Total number of users in the Address Book</li><li>• Total number of security groups in the Address Book</li></ul> <p>For each user in the Address Book:</p> <ul style="list-style-type: none"><li>• User ID</li><li>• Display Name</li><li>• First and Last Name</li><li>• Phone number</li><li>• Email Address</li><li>• Maximizer Login Enabled/Disabled status</li><li>• User's Roles (Access Rights)</li></ul> <p>For each security group in the Address Book:</p> <ul style="list-style-type: none"><li>• Group Name</li><li>• Group ID</li><li>• Group members</li></ul>
User-Defined Fields	<ul style="list-style-type: none"><li>• Folder (if applicable) and field name</li><li>• Type of entry the field is applicable to (Company, Individual, Contact, Opportunity, or User)</li><li>• Full Access and Read Access</li><li>• Type (Table, Date, Alphanumeric, Numeric, Yes/No)</li><li>• Creator</li><li>• Requested by</li><li>• Description</li><li>• Attributes</li><li>• Items in table user-defined fields</li><li>• Usage count (only if Show Usage Count checkbox selected in Print Report dialog box)</li></ul>

Report	Information Reported
Address Book Summary	<p>Total number of each of the following types of entries in the current Address Book:</p> <ul style="list-style-type: none"> <li>• Users</li> <li>• Security groups</li> <li>• Companies and Individuals</li> <li>• Lowest, highest, average, and total number of contacts per Company and Individual</li> <li>• Opportunities (total and per status)</li> <li>• User-defined fields (total and per type)</li> <li>• User-defined field entries (total and per type)</li> <li>• Notes</li> <li>• Documents</li> </ul>
Sales/Marketing Teams	<p>Details about teams and team members, sorted by Team Type (Sales or Marketing)</p> <ul style="list-style-type: none"> <li>• Team name</li> <li>• Member user ID</li> <li>• Member name</li> <li>• Member status (member or team leader)</li> <li>• Distribution sites</li> </ul>
Current Users	<ul style="list-style-type: none"> <li>• Number of licenses in use</li> </ul> <p>For each user currently logged into the Address Book:</p> <ul style="list-style-type: none"> <li>• User name</li> <li>• Computer name</li> <li>• Date and time logged in</li> <li>• Maximizer module connected</li> </ul> <p>Licenses installed:</p> <ul style="list-style-type: none"> <li>• Product license number (PLN)</li> <li>• Computer name</li> <li>• Product</li> <li>• User count</li> <li>• Description</li> <li>• Total number of applied licenses</li> </ul> <p> This report displays on-screen rather than printing. To print the report, press Alt and Print Screen to capture the report window to the Windows clipboard, and then paste it into a word processor or graphics program.</p>



# APPENDIX A **Administrator's Reference**

In this chapter...

"Recreating the Maximizer\_Default User" on page 150

"MaConfig Table (Server and Address Book Configuration)" on page 151

"Maximizer File Types" on page 159

"Maximizer XML Interface (MXI)" on page 160

## Recreating the Maximizer\_Default User

The maximizer\_default security login is created during the initial installation of Maximizer.

The following are steps to recreate the Maximizer\_Default user if it is not in the list of security logins in SQL.

➤ **To create the maximizer\_default security login**

- Select **Utilities > Repair Database**.

# MaConfig Table (Server and Address Book Configuration)

Maximizer uses a special SQL database called MaConfig to store the settings for the Address Books, global settings, and some IIS settings. During a Workstation installation, the Maximizer Workstation Setup program reads from the server's MaConfig table in the MaConfig database to obtain the correct registry settings for the workstation.

The following sections contain information on the MaConfig table:

- "Editing the MaConfig Settings" on page 151
- "Four-letter Module Codes" on page 151
- "MaConfig Table: Entries and their Meanings" on page 152

## Editing the MaConfig Settings

If you need to edit the MaConfig table directly, you can access it through Microsoft SQL Enterprise Manager.

### ➤ To edit the Maximizer configuration settings in the MaConfig table using Microsoft SQL Enterprise Manager

- 1** Open Microsoft SQL Enterprise Manager.
- 2** Browse to the SQL Server, and select the **MaConfig** database.
- 3** Under **Tables** locate and select the **MaConfig** table.
- 4** Right-click the table, and select **Open Table > Return All Rows**.  
Enterprise Manager displays the entire MaConfig table.
- 5** Edit the entries as needed, and close the table.

## Four-letter Module Codes

Entries in the MaConfig table often contain a four-letter code to identify which component uses that particular entry.

Code	Module
ADMN	Administrator
AMGR	Maximizer
AUTO	Maximizer Automated Services
CMGR	Campaign Manager
DSGN	Portals (not used)

Code	Module
RPTR	Reporter
EMPP	Maximizer Web Access
EXTP	Partner Access and Customer Access
EXCH	MaxExchange

## MaConfig Table: Entries and their Meanings

The MaConfig table contains information about a set of Maximizer Address Books. The MaConfig table is stored in the MaConfig database in SQL Server. Some of the entries in the table may not apply depending on the edition of Maximizer you are using.

The following tables describe the keys in the MaConfig table.

**Table 1 Address Book Configuration Settings in the MaConfig Table**

Section	Key	Value
<Address Book>	AUTO_EMAIL_TEMPLATES	Path to the automated campaign email template files (*.etf).
<Address Book>	DASHBOARD_DISABLED	Determines if dashboards are disabled for the current Address Book: yes = Dashboards are disabled This key is not included by default in the MaConfig table. You must manually add a new entry to the table with this key for the specific Address Book.
<Address Book>	Dashboard_URL	URL of dashboards.
<Address Book>	DB_NAME	Actual name of the Maximizer database. It can be different from display name.
<Address Book>	DB_SERVER	Network machine name of the computer that hosts the Maximizer configuration table (MaConfig table).
<Address Book>	DB_SYS_TYPE	Type of database used for the Maximizer Address Book.
<Address Book>	DB_USERFRIENDLY_NAME	Display name of Maximizer database in Address Book list.
<Address Book>	DSGN_ISAPI_CUSTOMER	URL of Customer Access.
<Address Book>	DSGN_ISAPI_PARTNER	URL of Partner Access.
<Address Book>	DSGN_SSL_ISAPI	
<Address Book>	EADV_MASRCH_FILE	



**Table 1 Address Book Configuration Settings in the MaConfig Table**

Section	Key	Value
<Address Book>	EADV_MASRCH_Update_URL	
<Address Book>	HTML_TEMPLATES_PATH	Path of the root HTML folder on the Maximizer Application Server. (Maximizer\Address Books\<AddressBook>\Html).
<Address Book>	HTML_TEMPLATES_URL	
<Address Book>	IN_MEMORY_RESPONSE_TABLE	
<Address Book>	LIST_LIMIT	Controls the maximum value of the Maximum entries field in the Search dialog boxes that can be carried forward to the next session. The value of the Maximum entries field in any of the Search dialog boxes will always be less than or equal to the LIST_LIMIT value the next time the Search dialog box is opened. If the user selects a value less than LIST_LIMIT, that value will be selected automatically the next time they open the dialog box. If the user selects a value greater than LIST_LIMIT, the value will be reset to LIST_LIMIT the next time they open the dialog box. This control helps avoid overloading the SQL server. By default, the value of LIST_LIMIT is 1000. Setting LIST_LIMIT to 0 allows the "All" option to be saved for the next session.
<Address Book>	Refresh ISAPI Details	
<Address Book>	RPTR_START_FINANCIAL_DAY	Day of the month (specified in "RPTR_START_FINANCIAL_MONTH") in which the fiscal year begins.
<Address Book>	RPTR_START_FINANCIAL_MONTH	Month (i.e., 1–12) in which the fiscal year begins.
<Address Book>	RPTR_URL	URL location of the Reporter ASP. If you are calling this URL, add the parameter: WORKSPACE=<Address Book>.
<Address Book>	SERVICE_CMGR_PASSWORD	Default email service password for automated campaigns (emailsystem).
<Address Book>	SERVICE_CMGR_USERID	Default User ID for email service login user. (EMAILUSER).
<Address Book>	SERVICE_DSGN_PASSWORD	Default WEBUSER password. (websystem).
<Address Book>	SERVICE_DSGN_USERID	Default User ID for ISAPI login user. (WEBUSER).

**Table 1 Address Book Configuration Settings in the MaConfig Table**

Section	Key	Value
<Address Book>	SERVICE_PASSWORD	
<Address Book>	SERVICE_SMTP_SERVER	
<Address Book>	SERVICE_USERID	
<Address Book>	SERVICE_WORKSPACE_PATH	DSN of the Address Book.
<Address Book>	PUBLISHED_PROJECTS	

**Table 2 Global Address Book Server Configuration Settings in the MaConfig Table**

Section	Key	Value
Global Settings	AcntQB	
Global Settings	AcntQB0	
Global Settings	AcntQBDesc0	
Global Settings	AUTO_EMAIL_BATCH_CYCLE	
Global Settings	AUTO_EMAIL_BATCH_SIZE	Number of emails sent in the specified interval of time for the batch.
Global Settings	AUTO_EMAIL_CYCLE_TIME	Number of polls in the time unit specified under "AUTO_EMAIL_TIME_UNIT" in which the SQL Server is checked for outgoing automated emails.
Global Settings	AUTO_EMAIL_JOB_PER_THREAD	Length of prepared messages sent to queue per thread. The default is 20.
Global Settings	AUTO_EMAIL_REDIRECT_URL_BASE	Specifies the URL of the script that redirects the email recipients to the Landing page URL in automated email campaign activities.
Global Settings	AUTO_EMAIL_REQUIRES_AUTH	Specifies if SMTP server requires authentication: 0 = Authentication not required 1 = Authentication required
Global Settings	AUTO_EMAIL_SERVICE	Default server that hosts the Email Service.
Global Settings	AUTO_EMAIL_SMTP_PORT	Port number of the SMTP server. The default is 25.
Global Settings	AUTO_EMAIL_THREAD_COUNT	Number of email threads. This value cannot be higher than 31 and the default is 20.

**Table 2 Global Address Book Server Configuration Settings in the MaConfig Table**

Section	Key	Value
Global Settings	AUTO_EMAIL_TIME_UNIT	Time unit used for AUTO_EMAIL_CYCLE_TIME: 0 = Minutes 1 = Hours 2 = Days 3 = Months
Global Settings	AUTO_PRINTFAX_BATCH_CYCLE	
Global Settings	AUTO_PRINTFAX_BATCH_SIZE	Number of print jobs for each batch.
Global Settings	AUTO_PRINTFAX_CYCLE_TIME	Number of polls in the time unit specified in AUTO_PRINTFAX_TIME_UNIT, in which the SQL Server is checked for outgoing automated print jobs and faxes.
Global Settings	AUTO_PRINTFAX_TIME_UNIT	Time unit used for AUTO_PRINTFAX_CYCLE_TIME: 0 = Minutes 1 = Hours 2 = Days 3 = Months
Global Settings	BTI_PATH	Defines the UNC location of the "Maximizer\Address Books" folder on the Maximizer Main Server. The "Address Books" folder is usually shared as "EAddress Books", so that in a typical installation the UNC path would be "\\<servername>\EAddress Books".
Global Settings	CAMPAIGN_PRINTFAX_DEVICES	List of printers and fax software used by the Maximizer Print/Fax Service.
Global Settings	COMMON_WORKSPACES	Defines the Maximizer Address Books that are to appear in the Address Books list when you open an Address Book. The Address Book names should be separated by a comma, as in "COMMON_ Address Book5=Address Book1,Address Book2,Address Book3". Each Address Book listed here should have a corresponding section in the MaConfig table. For example "Address Book1" would have a "[Address Book1]" section.
Global Settings	Dashboard_URL	URL of dashboards.
Global Settings	DB_SERVER	Name of database server.
Global Settings	DB_SYS_TYPE	Type of database (SQL).
Global Settings	EMPLOYEE_PORTAL_URL	URL of Maximizer Web Access.

**Table 2 Global Address Book Server Configuration Settings in the MaConfig Table**

Section	Key	Value
Global Settings	ENCRYPTION_TYPE	Type of encryption: 0 = Standard 1 = No encryption 2 = BLOWFISH40
Global Settings	IIS	Name of the IIS Server.
Global Settings	IIS External Server	Network machine name of the IIS Server that you have set up for external Internet access.
Global Settings	IIS Internal Server	Network machine name of the IIS Server that you have set up for internal access.
Global Settings	Install Path	Local path of the Maximizer program folder on the Maximizer Application Server.
Global Settings	License_MAXEXCH	Number of installed MaxExchange PLNs (Product License Numbers).
Global Settings	License_MAXEXCH_DESC <i>n</i>	Description of <i>n</i> th MaxExchange PLN.
Global Settings	License_MAXEXCH <i>n</i>	<i>n</i> th MaxExchange PLN.
Global Settings	License_MAXIMIZER	Number of installed Maximizer PLNs (Product License Numbers).
Global Settings	License_MAXIMIZER_DESC <i>n</i>	Description of <i>n</i> th Maximizer PLN.
Global Settings	License_MAXIMIZER <i>n</i>	<i>n</i> th Maximizer PLN.
Global Settings	License_PORTAL	Number of installed Web Access Site PLNs (Product License Numbers).
Global Settings	License_PORTAL_DESC <i>n</i>	Description of <i>n</i> th Web Access Site PLN.
Global Settings	License_PORTAL <i>n</i>	<i>n</i> th Web Access Site PLN.
Global Settings	Maximizer Server	Network machine name of the Maximizer Server.
Global Settings	Maximizer Server Setup	Maximizer series number installed on the Maximizer Application Server. This value is set by the installation program.
Global Settings	NONTESTED_COLLATION_LIST	
Global Settings	ONETOONE_REQUIRES_AUTH	
Global Settings	ONETOONE_SMTP_SERVER	
Global Settings	ONETOONE_SMTP_SERVER_PORT	

**Table 2 Global Address Book Server Configuration Settings in the MaConfig Table**

Section	Key	Value
Global Settings	Server Path UNC	Refers to the UNC path of the "Maximizer\ServerShared" folder. The "ServerShared" folder is shared as "MaximizerServer" during a Maximizer installation. For example, a typical installation would have the entry "Server Path UNC=\\<servername>\MaximizerServer".
Global Settings	SMTP Server	Specifies the name of the outgoing mail server used for automated campaigns.
Global Settings	SMTP_TIMEOUT	Duration that the email service waits for the SMTP server's response for each email. The unit of measurement is in seconds.
Global Settings	SQL_SERVER	
Global Settings	<IIS Server>_Domain Name	HTTP server name.
Global Settings	TESTED_COLLATION_LIST	Comma-delimited list of SQL database collations supported by Maximizer.
Global Settings	Thin_Clients_Installation	
Global Settings	USE_UNIFIED_LOGIN	"Trusted Connection" login security: 0 = Disabled 1 = Enabled
Global Settings	AUTO_TRANSLATE	This key must be created manually. Create this key when a workstation that uses non-English regional settings must access a database that uses an English database collation. It affects the "Perform translation for character data" flag in the database DSN. Set the value of this key to 0 or 1. 0 = Turn "Perform translation for character data" flag OFF 1 = Turn "Perform translation for character data" flag ON

**Table 3 ISS Server Configuration Settings in the MaConfig Table**

Section	Key	Value
IIS_<IIS Server>	BASE_HREF	
IIS_<IIS Server>	IIS_URL	Virtual directory path of the "Scriptpub.dll".
IIS_<IIS Server>	WORKSPACE	
IIS_<IIS Server>	WORKSPACE_PATH	Installation path of the Address Books folder.

**Table 4    Live Update Configuration Settings in the MaConfig Table**

Section	Key	Value
Live Update	Enable	
Live Update	Enable Auto	
Live Update	Server Base URL	

**Table 5    Workstation Configuration Settings in the MaConfig Table**

Section	Key	Value
Workstation_ <Server>	Installed_Series	
Workstation_ <Server>	Setup_Completion_Date	

## Maximizer File Types

The following table lists the extensions of file types created in the registry during the Maximizer installation.

Extension	Application	Comment
.MDE	MaxWin.exe	Maximizer Data Exchange file used by email transfer (prior to version 7 – now .MET)
.MEC	ecMeclm.exe	OrderDesk's order data file
.MET	MaxWin.exe	Maximizer Email Transfer files (version 7 and higher)
.MXD	MaxWord.ter	Maximizer Document extension
.MXI	MaxWin.exe	Maximizer XML format data file
.MTI	MaxWin.exe	Maximizer Transfer Interface (CSV format data file – elaborate or skip CSV altogether; manual says EDI, flags, etc.)

The following table lists the extensions of file types used by Maximizer. These file types have no association in the registry.

Extension	Application	Comment
.ETF	MaxWord.ter	Template files used by MaxWord

## Maximizer XML Interface (MXI)

Maximizer enables you to import Address Book entries from Maximizer or other applications using XML. If the records were exported from Maximizer in MXI (Maximizer XML Interface) or XML format, you can import them back into Maximizer directly. However, to import records from other applications in XML format, you must ensure that the XML file conforms to the Maximizer XML schema. The Maximizer XML schema file is named `MXISchema.xsd` and is installed with Maximizer in the `..\Program Files\Maximizer` directory. The schema describes the XML elements and attributes used to identify records and fields for importing data into Maximizer.

After you have converted your data to XML format and it has been validated against the `MXISchema.xsd`, you can use the Advanced Import feature available in both Maximizer and Administrator to import this data into an Address Book.

The names of and relationships between the elements in the Maximizer XML schema correspond to the Maximizer Address Book fields, with a few exceptions. Several elements are named "Detail...". These elements correspond to user-defined fields:

- DetailDef = definition of a user-defined field
- DetailDate = date user-defined field
- DetailNumber = numeric user-defined field
- DetailString = alphanumeric user-defined field
- DetailList = single-value table user-defined field
- DetailListMulti = multiple-value table user-defined field
- DetailBoolean = yes/no user-defined field

The following sections outline the tree-structure hierarchy of Maximizer XML elements. The first section outlines just the top-level elements, and the following sections outline the elements below the top-level. Mandatory elements are shown in bold, and are mandatory only if their parent element is used.

For further details about the properties of each of the elements, refer to "Element Details" on page 169.



## Top-Level Elements

The <AllData> element is the root element, which contains the following elements, which contain all other elements. For specific information about each of the elements, refer to the appropriate section.

### <AllData>

<ImportOptions>

Refer to "ImportOptions Element" on page 161.

</ImportOptions>

<DetailDef>

Refer to "DetailDef Element" on page 164 for sub-elements.

</DetailDef>

<Individual>

Refer to "Individual Element" on page 165 for sub-elements.

</Individual>

<Company>

Refer to "Company Element" on page 166 for sub-elements.

</Company>

### </AllData>

## ImportOptions Element

The <ImportOptions> element and its sub-elements describe how Address Book entries should be imported.

<ImportOptions>

<ClientIdGeneration></ClientIdGeneration>

<LogFile></LogFile>

<LogLevel></LogLevel>

<ClientOptions>

<MatchMode></MatchMode>

<MatchDetail></MatchDetail>

</ClientOptions>

<ContactOptions>

<MatchMode></MatchMode>

<MatchDetail></MatchDetail>

</ContactOptions>

</ImportOptions>

The following table describes the values of each of the <ImportOptions> elements.

The valid values for each element are listed in the Value column. The Equivalent Field column identifies the field in the import dialog boxes that sets the same import option.

Element Name	Valid Values	Equivalent Field(s) in Maximizer	Description
ClientIdGeneration	Setting	Follow system setting	If the imported Address Book entry contains a Client ID, it uses the Client ID of the imported entry. If the imported Address Book entry does not contain a Client ID, and the "System to assign Address Book entries' Identification field values" setting is turned ON, it creates a new Client ID for the imported Address Book entry. If the imported Address Book entry does not contain a Client ID, and the "System to assign Address Book entries' Identification field values" setting is turned OFF, the Address Book entry will fail to import.
	System	Always system generated	Creates a new Client ID for each imported Address Book entry.
	File	Use values from the import file	Uses the Client IDs of the Address Book entries being imported.
LogFile		Log File	Path and filename where the log file should be saved (e.g., c:\folder\file.log).
LogLevel	0	n/a	Do not log (leaving this element value blank has same result).
	1	Errors	Log errors only.
	5	Info	Log record additions and field changes.
	7	Trace	Record all details (very large log file size).
ClientOptions	n/a	n/a	Client Options apply to Company and Individual Address Book entries; Contact Options apply to Contact Address Book entries. Client Options and Contact Options are defined in the nested <MatchMode> and <MatchDetail> elements.
ContactOptions	n/a	n/a	
MatchMode	AlwaysInsert	Address Book entry update options/ Contact update options: Always insert	Inserts all Company, Individual, and Contact records from the import file and does not match imported records to existing records. Duplicate entries may result.

Element Name	Valid Values	Equivalent Field(s) in Maximizer	Description
	Id	Address Book entry update options/ Contact update options: Use IDentification field to match entries	Uses Address Book identification values as the criteria for matching records. For Company and Individual records, this option uses the Client ID field to match entries. For Contact records, this option uses the Client ID and Contact Number fields to match entries.
	Name	Address Book entry update options/ Contact update options: Use Name field to match entries	Company records will use the Company field, and Individual and Contact records will use the Last Name field as the criteria for matching records.
	Detail	Address Book entry update options/ Contact update options: Use this user-defined field to match entries	Specifies an alphanumeric user-defined field to use as the criterion for matching records. Only Address Book entry user-defined fields that apply to the applicable record type appear in this list.
MatchDetail		Address Book entry update options/ Contact update options: Use this user-defined field to match entries	Name of the alphanumeric user-defined field to use to match entries when MatchMode is set to Detail.

## DetailDef Element

The <DetailDef> element and its sub-elements describe the user-defined field definitions. If the user-defined field includes a description, it appears in the <Description> element. If it is a table user-defined field, the table items each appear in the <ListItem> elements.

```
<DetailDef Name="" Type="">  
  <Description></Description>  
  <ListItem></ListItem>  
</DetailDef>
```

Much of the information about the user-defined field is stored in the element's attributes, which are described in the following table.

Attribute	Data Type	Valid Values	Description
Name	string		Name of the user-defined field.
Type	string	Multiple Single Date String Number	Indicates the type of user-defined field: <ul style="list-style-type: none"><li>Multiple = Table user-defined field that allows selection of multiple items.</li><li>Single = Table user-defined field that allows selection of single item only.</li><li>Date = Date user-defined field.</li><li>String = Alphanumeric user-defined field.</li><li>Number = Numeric user-defined field.</li><li>Boolean = Yes/No user-defined field.</li></ul> This attribute also applies to the <Detail> elements within other elements. The maximum length of the Type attribute is 80 characters.
Companies	string	No Yes	Indicates whether the user-defined field can be assigned to Company, Individual, or Contact Address Book entries.
Individuals	string	No Yes	
Contacts	string	No Yes	
DateAnnual	string	Yes	Applies to Date user-defined fields only. Yes = Annually recurring event.
RetainYear	string	Yes	Applies to Annually Recurring Date user-defined fields only. Yes = Retain year in annually recurring dates.
Hotlist	integer	1	Applies to Date user-defined fields only. 1 = Create Hotlist task.
Length	integer		Applies to Alphanumeric user-defined fields only. Indicates the maximum length of the field value.

## Individual Element

The <Individual> element describes an Address Book entry for an Individual. Mandatory sub-elements are shown in bold.

```

<Individual>
  <ContactNo></ContactNo>
  <FirstName></FirstName>
  <LastName></LastName>
  <Initial></Initial>
  <MrMs></MrMs>
  <Title></Title>
  <Salutation></Salutation>
  <Phone>
    <Number></Number>
    <Extension></Extension>
    <Description></Description>
  </Phone>
  <Email>
    <Address></Address>
    <Description></Description>
  </Email>
  <Department></Department>
  <Division></Division>
  <ReportsTo></ReportsTo>
  <AssignedTo></AssignedTo>
  <Category></Category>
  <DoNotSolicitBy></DoNotSolicitBy>
  <Website></Website>
  <Created></Created>
  <LastModified></LastModified>
  <Address>
    Refer to "Address Element" on page 168.
  </Address>
  <DetailDate Name=""></DetailDate>
  <DetailNumber Name=""></DetailNumber>
  <DetailString Name=""></DetailString>
  <DetailList Name=""></DetailList>
  <DetailListMulti Name="">
    <Value></Value>
  </DetailListMulti>
  <Note>
    Refer to "Note Element" on page 168.
  </Note>
  <Document>
    Refer to "Document Element" on page 168.
  </Document>
  <Id></Id>
  <Firm></Firm>
  <Contact>
    Refer to "Contact Element" on page 167.
  </Contact>
</Individual>

```

## Company Element

The <Company> element describes an Address Book entry for a Company. Mandatory sub-elements are shown in bold.

```
<Company>
  <Id></Id>
  <Name></Name>
  <Department></Department>
  <Division></Division>
  <Phone>
    <Number></Number>
    <Extension></Extension>
    <Description></Description>
  </Phone>
  <Email>
    <Address></Address>
    <Description></Description>
  </Email>
  <Website></Website>
  <AssignedTo></AssignedTo>
  <Category></Category>
  <DoNotSolicitBy></DoNotSolicitBy>
  <Created></Created>
  <LastModified></LastModified>
  <Address>
    Refer to "Address Element" on page 168.
  </Address>
  <DetailDate Name=""></DetailDate>
  <DetailNumber Name=""></DetailNumber>
  <DetailString Name=""></DetailString>
  <DetailList Name=""></DetailList>
  <DetailListMulti Name="">
    <Value></Value>
  </DetailListMulti>
  <Note>
    Refer to "Note Element" on page 168.
  </Note>
  <Document>
    Refer to "Document Element" on page 168.
  </Document>
  <Contact>
    Refer to "Contact Element" on page 167.
  </Contact>
</Company>
```

## Contact Element

The <Contact> element describes an Address Book entry for a Contact. This element is nested within the <Individual> and <Company> elements. Mandatory sub-elements are shown in bold.

```
<Contact>
  <ContactNo></ContactNo>
  <FirstName></FirstName>
  <LastName></LastName>
  <Initial></Initial>
  <MrMs></MrMs>
  <Title></Title>
  <Salutation></Salutation>
  <Phone>
    <Number></Number>
    <Extension></Extension>
    <Description></Description>
  </Phone>
  <Email>
    <Address></Address>
    <Description></Description>
  </Email>
  <Department></Department>
  <Division></Division>
  <ReportsTo></ReportsTo>
  <AssignedTo></AssignedTo>
  <Category></Category>
  <DoNotSolicitBy></DoNotSolicitBy>
  <Website></Website>
  <Created></Created>
  <LastModified></LastModified>
  <Address>
    Refer to "Address Element" on page 168.
  </Address>
  <DetailDate Name=""></DetailDate>
  <DetailNumber Name=""></DetailNumber>
  <DetailString Name=""></DetailString>
  <DetailList Name=""></DetailList>
  <DetailListMulti Name="">
    <Value></Value>
  </DetailListMulti>
  <Note>
    Refer to "Note Element" on page 168.
  </Note>
  <Document>
    Refer to "Document Element" on page 168.
  </Document>
</Contact>
```

## Address Element

The <Contact> element describes the address of an Address Book entry. This element is nested within the <Individual>, <Company>, and <Contact> elements.

```
<Address>
  <Description></Description>
  <AddressLine1></AddressLine1>
  <AddressLine2></AddressLine2>
  <City></City>
  <StateProvince></StateProvince>
  <Country></Country>
  <ZipCode></ZipCode>
</Address>
```

## Note Element

The <Note> element describes any notes for Address Book entries. This element is nested within the <Individual>, <Company>, <Contact>, and <Case> elements. Mandatory sub-elements are shown in bold. The body of the note is stored in the <Text> element.

```
<Note>
  <Date></Date>
  <Creator></Creator>
  <Owner></Owner>
  <Type></Type>
  <Text></Text>
</Note>
```

## Document Element

The <Document> element describes any Documents for Address Book entries. This element is nested within the <Individual>, <Company>, <Contact>, and <Case> elements. Mandatory sub-elements are shown in bold. The body of the document is stored in the <DocData> element.

```
<Document>
  <DocumentId></DocumentId>
  <Name></Name>
  <Date></Date>
  <Creator></Creator>
  <Owner></Owner>
  <Extension></Extension>
  <DocData></DocData>
</Document>
```



## Element Details

The following table lists all the elements in the Maximizer XML schema in alphabetical order and describes the following properties of each:

- **Element Name:** The name of the XML element. An element name may be listed more than once if it has different properties depending on its parent element. Most of the element names correspond to Maximizer field names.
- **Parent Element(s):** The name of the XML element(s) within which the element is nested. If an element with the same name and same properties may exist within more than one parent element, all parent elements are listed.
- **Min. Occur.:** The minimum number of times the element must occur within its parent element. A value of 1 indicates that the element is mandatory, and a value of 0 indicates it is not.
- **Max. Occur.:** The maximum number of times the element may occur within its parent element. The infinity symbol indicates that the maximum occurrences are unbounded (unlimited).
- **Data Type:** The type of data that may be stored in the element.
- **Max. Length:** The maximum length of the element contents. If this value is blank, there is no maximum length.

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Address <sup>a</sup>	Email	1	1	string	120
Address <sup>a</sup>	Individual Company Contact	0	1	none <sup>b</sup>	
AddressLine1	Address	0	1	string	80
AddressLine2	Address	0	1	string	80
AllData	none	1	1	none <sup>b</sup>	
Category <sup>a</sup>	Individual Company Contact	0	1	string	
City	Address	0	1	string	80
ClientIdGeneration	ImportOptions	0	1	string	
ClientOptions	ImportOptions	0	1	none <sup>b</sup>	
Company	AllData	0	unlimited	none <sup>b</sup>	
Contact	Individual Company	0	unlimited	none <sup>b</sup>	
ContactNo <sup>a</sup>	Individual Contact	0	1	integer	
ContactOptions	ImportOptions	0	1	none <sup>b</sup>	

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Country	Address	0	1	string	80
Created	Individual Company Contact	0	1	dateTime	
Creator	Note Document	0	1	string	80
Date	Note Document	1	1	dateTime	
Department	Individual Company Contact	0	1	string	80
Description <sup>a</sup>	Phone Email	0	1	string	22
Description <sup>a</sup>	Address	0	1	string	80
Description <sup>a</sup>	DetailDef	0	1	string	
DetailDate	Individual Company Contact	0	unlimited	date	
DetailDef	AllData	0	unlimited	none <sup>b</sup>	
DetailList	Individual Company Contact	0	unlimited	string	80
DetailListMulti	Individual Company Contact	0	unlimited	none <sup>b</sup>	
DetailNumber	Individual Company Contact	0	unlimited	double	

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
DetailString	Individual Company Contact	0	unlimited	string	120
Division	Individual Contact Company	0	1	string	80
DocData	Document	0	1	string	
Document	Individual Company Contact	0	unlimited	none <sup>b</sup>	
DocumentId	Document	0	1	integer	
DoNotSolicitBy	Individual Company Contact	0	1	string	
Email	Individual Company Contact	0	3	none <sup>b</sup>	
Extension	Phone Document	0	1	string	22
Firm	Individual	0	1	string	80
FirstName	Individual Contact	0	1	string	80
Id	Individual Company	1	1	string	23
ImportOptions	AllData	0	1	none <sup>b</sup>	
Individual	AllData	0	unlimited	none <sup>b</sup>	
Initial	Individual Contact	0	1	string	80
KnowledgeBaseArticle	AllData	0	unlimited	none <sup>b</sup>	
LastModified	Individual Company Contact	0	1	dateTime	

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
LastName	Individual Contact	1	1	string	80
ListItem	DetailDef	0	unlimited	string	80
LogFile	ImportOptions	0	1	string	
LogLevel	ImportOptions	0	1	integer	
MatchDetail	ClientOptions ContactOptions	0	1	string	
MatchMode	ClientOptions ContactOptions	1	1	string	
MrMs	Individual Contact	0	1	string	80
Name	Company Document	1	1	string	80
Note	Individual Company Contact	0	unlimited	none <sup>b</sup>	
Number	Phone	1	1	string	22
Owner	Note Document	0	1	string	80
Phone	Individual Company Contact	0	4	none <sup>b</sup>	
Product	KnowledgeBaseArticle	0	1	string	80
ReportsTo	Individual Contact	0	1	string	80
Salutation	Individual Contact	0	1	string	80
StateProvince	Address	0	1	string	80
Text	Note	1	1	string	
Title <sup>a</sup>	Individual Contact	0	1	string	80
Type	Note	0	1	string	80
Value	DetailListMulti	1	unlimited	string	80

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Website	Individual Company Contact	0	1	string	120
ZipCode	Address	0	1	string	80

- a. This element is listed more than once because of differing properties depending on which element is the parent element.
- b. This element cannot contain a value; it can only contain other elements.



# Index

## A

- access rights 44—45
- access settings 44—45
  - modifying user access settings 48
  - security groups 50
- Accounting Link
  - Accounting security group 51
  - permissions 45
- accounts
  - COMPANY 33
  - MASTER 33
- ACT!, importing from 128, 132
- Action Plan Library permissions 45
- Address Book
  - adding users 40
  - backing up 100—103
  - converting 35
  - creating 29—32
  - exporting data 111—117
  - holidays 83
  - ID 63
  - importing data 117—128
  - moving 105
  - name 63
  - permissions 45
  - preferences 62
  - restoring from backup 103
  - Short ID 63
  - summary report 148
  - updating 35
  - upgrading 35
  - verification and recovery 108
- Address Book entries
  - categories 62
  - duplicate checking 65
  - exporting 111
  - importing 117—128
  - mandatory fields 62
  - synchronizing with Outlook 68, 86—90
  - transferring 139—142
  - verification and recovery 108
- Administrator
  - overview 5
- Advanced Import 117—120
- Allow Global Edit privilege 46
- Allow private entries privilege 46, 56
- Allow public entries privilege 46
- Allow Sync Contacts with External clients privilege 46
- Allow transfer and import/export 46

- alphanumeric user-defined fields 69
- appointments
  - locations and resources 62
  - with Outlook Synchronization 87

## B

- backing up
  - Address Book 100—103
  - dictionary file 105
  - holiday file 105
- browser
  - system requirements 7

## C

- caller ID 93
- categories, Address Book entries 62
- Company Library
  - permissions 45
  - verification and recovery 108
- COMPANY user account 33
- completion reasons
  - opportunities 62
- Configuring 91
- converting an Address Book 35
- Crystal Reports 10
  - Crystal Reports Users security group 51
- Current Users report 22, 148

## D

- database
  - backing up 100—103
  - creating an Address Book 29—32
  - restoring from backup 103
  - upgrading 35
- date user-defined fields 69
- default password 43
- diagnostics 62
- dictionary file 105
- display name (user) 41
- documents
  - deleting old 143
  - permissions 45
- drivers
  - PBX 93
  - TAPI 93
- duplicate checking for Address Book entries 65

## E

- email
  - system requirements 7
  - transfer Address Book data by 140
- encrypted user-defined fields 69, 77
- ETF files 159
- exact phone number matching 95
- exporting
  - access rights required 46, 140
  - Address Book entries 111
- extensions, file extensions 159

## F

- fax software 98
- field mapping, data imports 122
- fields
  - Full Access field 56
  - Key Fields 79—82
  - mandatory and optional 62
  - mapping for import 122, 128
  - Owner field 56
  - Read Access field 56
  - system 62
  - user-defined fields 69—78
- files
  - dictionary 105
  - holidays 105
  - MXI 160
  - types in Maximizer 159
- four-letter module codes 151
- Full Access field 56

## G

- global edit, privileges 46
- GoldMine, importing from 128, 135
- groups
  - access settings 44—45
  - Accounting security group 51
  - creating security groups 52
  - Crystal Reports Users security group 51
  - modifying access settings 54
  - permissions 45
  - privileges 46
  - record ownership 55
  - roles 47
  - security groups 50—55
  - user and group setup permissions 45
  - User ID List report 147

## H

- hard disk space, system requirements 7
- Holiday Editor 83

- holidays, file 105
- Hotlist, locations and resources 62

## I

- importing
  - access rights required 46
  - Address Book entries 117—128
  - field mapping 122, 128
  - vertical templates 37
- installing
  - Maximizer 9—25
  - Maximizer licenses 21
  - Maximizer server 13
  - upgrading from a previous version 12
- Internet browser
  - system requirements 7

## K

- Key Fields 79—82

## L

- licenses
  - installing Maximizer licenses 21
- Live Update 23—24
  - wizard 23
- locations, for appointments 62
- logging
  - Address Book transfers 141
  - import error log file 127
  - log files 62
  - Maximizer Email Service Log Files 147

## M

- MaConfig table 151—152
- mailing address permissions 45
- mandatory
  - fields 62
  - user-defined fields 71
- mapping fields for import 122, 128
- marketing teams
  - report 148
- MASTER
  - password 34
  - user account 33
- MaxAlarm 6
- Maximizer
  - companion applications 6
  - installation 9—25
  - installing server 13
  - licenses 21
- Maximizer Email Service Log Files 147
- MaxMobile 6



- synchronization privileges 46
- MDAC (Microsoft Data Access Components) 11
- MDE files 159
- MEC files 159
- memory, system requirements 7
- MSG format
  - for caller ID 93
- MET files 159
- MET transfer file 140
- Microsoft Outlook Synchronization 86—90
  - privileges 46
- Microsoft TAPI 93
- MODEM.INF file 93
- modems
  - TAPI 93
- Modify note properties privilege 46
- Modify other users' general info only privileges 47
- Modify other users' private entries privileges 47
- Modify/delete other owners' notes privileges 46
- modifying
  - group access settings 54
- modules, four-letter module codes 151
- moving
  - Address Book 105
- MTI files 159
- MXD files 159
- MXI (Maximizer XML Interface) files 117—120, 159—160
- Mxzhn.am file 105
- My Work Day
  - caption text 63

## N

- notes
  - deleting old 143
  - permissions 45
  - privileges 46
  - types 143
- numeric user-defined fields 69

## O

- operating system, system requirements 7
- opportunities
  - completion reasons 62
  - confidence ratings 62
  - IDs 63
  - permissions 45
  - probability of close 62
  - stages 62
  - verification and recovery 108
- optional fields 62
- options, system 63
- OrderDesk, permissions 45
- Outlook Synchronization, see Microsoft Outlook Synchronization

- overview page caption text 63
- owner field 56

## P

- passwords
  - changing 43
  - default 43
  - MASTER user 34
- PBX drivers 93
- permissions
  - groups 45
  - users 45
- phone
  - TAPI phone number format 63
- phone calls
  - TAPI 93
- phone masks 97
- phone numbers
  - matching with TAPI 94
- PLNs (product license numbers), see licenses
- preferences
  - Address Book 62
  - user 62
  - user preferences 60
- printing
  - system reports 147
- private
  - entries (privileges) 46
  - records 55
- privileges (users and groups) 46
- probabilities of close (opportunities) 62
- processor speed, system requirements 7
- public entries (privileges) 46
- public records 55

## Q

- quick backup of Address Book 102

## R

- RAM, system requirements 7
- ratings schemes 62
- Read Access field 56
- record ownership 55
- recovering an Address Book 108
- reports 147—148
  - Crystal Reports 10
  - current users 22
  - system 147
  - transfer summary 141
- resources, for appointments 62
- restoring
  - Address Book from backup 103

roles (User's Roles) 47

## S

sales

- Sales Manager user role 47
- Sales Representative user role 47
- sales teams report 148

sales teams 57

SDM format 93

security

- privileges 46
- security groups 50—55
- users and groups 44—45
- view rights 140

security groups 50—55

- access settings 44—45
- Accounting security group 51
- creating 52
- Crystal Reports Users security group 51
- modifying access settings 54
- permissions 45
- privileges 46
- record ownership 55
- roles 47
- user and group setup permissions 45
- User ID list report 147

servers

- installing Maximizer 13

settings in MaConfig table 151

smart phone number matching 94

sort order of user-defined fields 72

stages (opportunities) 62

synchronization

- Outlook Synchronization, see Microsoft Outlook Synchronization

system

- fields 62
- login accounts 33
- options 63
- reports 147
- user-defined fields 71

system requirements

- Maximizer CRM 7

## T

table user-defined fields 69

- adding items 76

tables

- MaConfig 151—152

TAPI 93

- called ID 93
- configuring 95
- exact phone number matching 95

phone number format 63

phone number matching 94

smart phone number matching 94

tasks

- with Outlook Synchronization 87

teams 57

- report 148

transferring

- access rights required 46, 140
- Address Book entries 139—142
- data by email using MET file 140
- user-defined fields 77

TSPI 93

two-tier import 122—124

types of files in Maximizer 159

## U

UniModemV 93

upgrading

- Address Book 35
- Maximizer 12

User ID List report 147

user-defined fields 69—78

- adding table items 76
- encrypted 69
- folders 72
- Key Fields 79—82
- permissions 45
- report 147
- sort order 72
- transferring 77
- types 69
- user access rights 70
- verification and recovery 109

userdict.lex file 105

users

- access rights and settings 44—45
- adding to Address Book 40
- changing password 43
- Current Users report 148
- current users report 22
- modifying user access settings 48
- permissions 45
- preferences 60, 62
- privileges 46
- record ownership 55
- security 140
- system login accounts 33
- transport and export rights 140
- user and group setup permissions 45
- User ID List report 147
- User's Roles 47
- user-defined field access 70

**V**

- verify and recover Address Book 108
- vertical templates 37
- video resolution, system requirements 7
- views
  - security rights 140

**W**

- web browser
  - system requirements 7
- Windows Registry 97

**X**

- XML files 117—120, 160

