

Maximizer™ CRM 11



User's Guide for Entrepreneur and Team Editions

Maximizer Software
Simply Successful CRM

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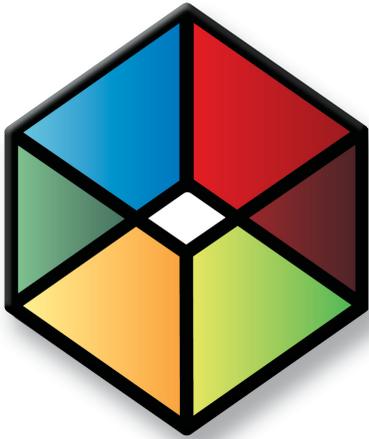
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CHAPTER **1**
**Welcome to
Maximizer**

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 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 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.

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) ^a
Email system	32-bit MAPI- or VIM-compliant
Internet browser	Microsoft Internet Explorer 8.0 or 7.0

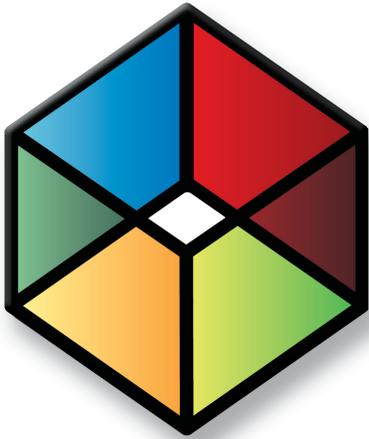
- a. Microsoft Windows 7 Home Premium, Vista Home/Home Premium, XP Home, and XP Media Center are not supported in a network environment when logging in to a domain is required. Refer to your Microsoft documentation for details on how to set up networking in a workgroup environment.

Maximizer CRM Entrepreneur Edition System Requirements

The following table lists the system requirements for Maximizer CRM Entrepreneur Edition. For more information visit the Maximizer website at 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, Vista, XP, or 2003 (updated to their latest service packs) ^a
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 **Getting Started** 2

Start working in Maximizer CRM

In this chapter...

- "Maximizer CRM" on page 10
- "Maximizer Interface" on page 11
- "Opening an Address Book" on page 16
- "Lists of Entries" on page 18
- "My Work Day" on page 21
- "Getting Help" on page 22

Maximizer CRM

Maximizer CRM is specifically designed for small and medium-sized businesses and corporate divisions of large companies. Maximizer CRM helps organizations realize their primary customer management goal of having many profitable and satisfied customers.

 Throughout this document, Maximizer CRM is referred to as Maximizer.

Throughout the customer life cycle, as prospects move from the marketing department to the sales department, and as customers are passed onto service departments, Maximizer CRM enables an organization to communicate with its customers through multiple channels, to share information, and to organize individual and team efforts.

Maximizer CRM is a complete software solution that brings together elements of contact management and other related applications to meet the sales challenges of modern businesses.

- Managing your company's lists of Companies, Individuals (people not associated with a Company), and Contacts (people associated with a Company or Individual).
- Keeping track of your scheduled appointments and tasks.
- Sending letters, faxes, or email messages to one or many recipients.
- Managing incoming orders and inquiries from your online catalog—payment, refunds, shipping, and reporting.
- Organizing and accessing your sales and marketing literature in a shared library.
- Generating reports from any of the lists—Address Book entries, opportunities, Hotlist tasks, and additional information you keep on your entries.

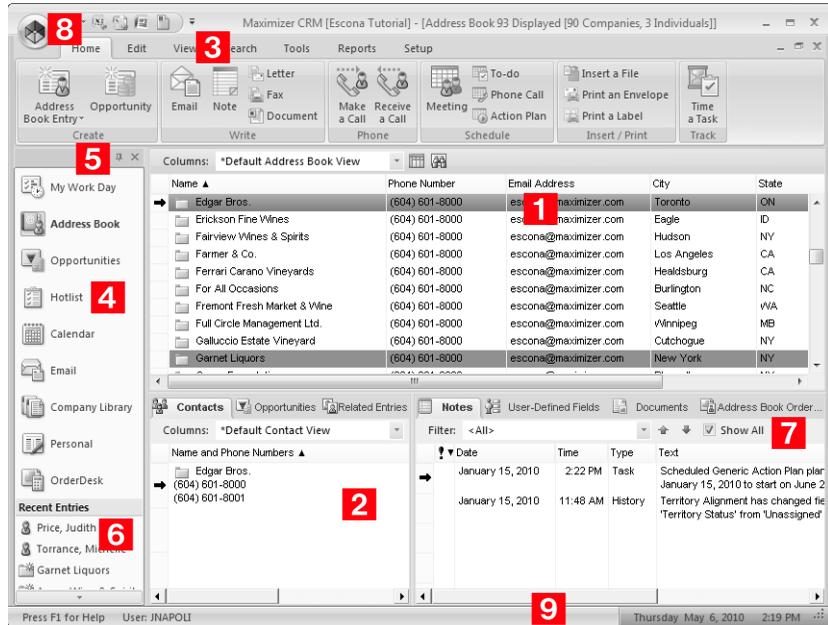
Maximizer Interface

Information in Maximizer is displayed in lists, which means that it can be sorted and arranged in rows and columns. Lists make it easy to see many entries at once and customize your views. Different types of information are viewed in different windows in Maximizer. You can easily move from window to window to access different types of entries.

Keep the following points in mind when working with the Maximizer windows.

- 1** Select or open **entries** in the list to view information and perform tasks on the entries.
- 2** View information and attached entries for the current entry in the tabbed **following windows**.
- 3** Use the **tabs** at the top of the window to access all tasks that are available in the current window. Each tab organizes tasks into groups. Select an icon to perform the task. You can also right-click to select common tasks from the shortcut menu.
- 4** Select an **icon** in the icon bar to move to a different window.
- 5** At the top of the icon bar, use the button with the **pin graphic** on it to hide or display the icon bar view.
- 6** In the **Recent Entries** area, select an Address Book entry that you have recently viewed to add it to the current list quickly.
- 7** Use the **view bars** in a window or following window to filter your list and access common tasks and the column setup. You can also use the arrow buttons to move from one entry to the next.
- 8** In the top-left corner of the window, select the **Maximizer** icon to access additional tasks, such as opening and closing an Address Book, printing reports, and viewing the online help.

9 Watch the **status bar** to see the current user, date, and time.



Maximizer Windows

The main Maximizer window is the Address Book window, which lists the Companies, Individuals, and Contacts in your Maximizer database (Address Book). The following list provides a brief description of each main window accessible from Maximizer.

My Work Day



The My Work Day view is an area where everyone in your company using Maximizer can view Hotlist tasks, and appointments.

Address Book



The Address Book window contains all the information about your prospects, customers, business and professional associates, or any other group of people you deal with on a regular basis. It links you to related information about each Address Book entry, such as Contacts, Hotlist tasks, opportunities, documents, user-defined fields, and orders and inquiries.

Opportunities



The Opportunities window helps you and your colleagues manage complex sales that involve the participation of more than one person in the buying decision.

Use the Opportunities following window to view the opportunities associated with the entries selected in the Address Book window.

Hotlist



The Hotlist is a to-do list of tasks and reminders that are usually timeless. The Hotlist is where you record actions and follow-up activities related to your interactions with Companies, Individuals, and Contacts. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

Calendar



The Calendar window allows you to schedule, print, and view your appointments with Maximizer users or Address Book entries. Because the calendar works with the Peg Board feature, you can make sure that when you have an appointment, others can see when you are busy or out of the office. If you need to be reminded of an appointment, Maximizer can sound an alarm in advance of the appointment or task.

Email



The Email window provides you with the ability to send, receive, and preview email within Maximizer using your existing email system. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily. Additionally, you can transfer data files by email.

Company Library



The Company Library stores vital sales and marketing information for everyone to access. The Company Library window allows you to preview and open any note and many types of files in the preview pane.

Personal



The Personal window contains the Journal and Expenses windows, which provide a location to keep notes and financial records that are not associated with Address Book entries.

OrderDesk



When you receive orders or inquiries from your website, you can manage them using the OrderDesk window. You can use the same OrderDesk window to enter a new order, capture a payment for an order, pre-authorize a payment for an order, complete a pre-authorized payment for an order, and refund a payment for orders that come to you by telephone, mail, or other methods. OrderDesk allows you to track the status of your inquiries and orders, whether your customers have received a response or had their order fulfilled.

Use the Address Book OrderDesk following window to view the orders and inquiries associated with the entries selected in the Address Book or Opportunities window.

Contacts



The Contacts window displays the current Contacts for the Company or Individual selected in the Address Book, Hotlist, or Opportunities window. You can use this window to add, update, or delete a Contact.

Notes



The Notes window records your Address Book activities and displays only those notes that belong to the selected Address Book entry or opportunity.

User-Defined Fields



The User-Defined Fields window displays the custom fields for the selected Address Book entry, or opportunity. You assign values to these fields, and, if your system administrator has given you the access rights, you can add, change, or delete user-defined fields.

Documents



The Documents window displays the document entries for the selected Address Book entry or opportunity. You can add new documents, as well as files not created in Maximizer, modify documents, or delete documents.

Accounting



You can access this window if you have the Accounting Link Designed for use with QuickBooks® add-on component installed. This window contains all your invoices, estimates, and purchase orders for your Address Book entries. You can create these items in Maximizer and the transactions are automatically shared with your accounting application.

For information on using Accounting Link, see the online manual.

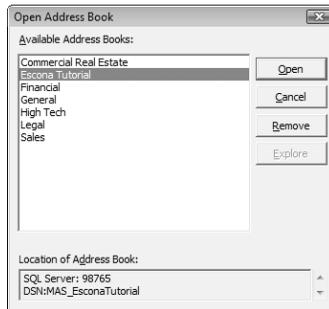
Opening an Address Book

Address Books can be opened in Administrator or Maximizer. There are no conflicts if you open an Address Book while it is being used by other users.

► To open an Address Book

- 1** In the top-left corner of the window, click the **Maximizer** button, and select **Open Address Book**.

The Open Address Book dialog box opens.



- 2** Select the Address Book to open, and click **Open**.

The Login dialog box opens.

- 3** Type your password and click **OK**.

The name of the Address Book appears in the application title bar.

► To log in to the current Address Book as another user

- 1** In the top-left corner of the window, click the **Maximizer** button, and select **Login**.

– or –

At the bottom of the window, double-click in the **User** section of the Maximizer status bar.

The Login dialog box opens.

- 2** Enter a **user ID** and **password**.

- 3** Click **OK**.

i The default password for new users and for the users in the sample Address Books is "maximizer".

Connecting to an Address Book

Maximizer allows you to connect to any shared Address Book on another computer. The computer can be a Maximizer workstation or a server. Once you have connected to an Address Book, you can access the Address Book from the Open Address Book dialog box.

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

► To connect to an Address Book

- 1** In the top-left corner of the window, click the **Maximizer** button, and select **Connect to Address Book**.
The Connect to Address Book dialog box opens.
- 2** Select the computer that hosts the Address Book to which you would like to connect.
- 3** Select an Address Book from the **Available Address Books** list and click **Open**.



Once you connect to the Address Book, you are prompted with a message saying the connection was successful.

- 4** Click **OK** to close the message.

Lists of Entries

Maximizer is list-based. You can customize the information listed by changing the column setup, saving a Favorite List, or using a view filter. In some windows, you can tell how many entries and what types of entries are displayed in the current list by reading the title bar.

An important part of viewing information in a list-based window is sorting your list by different columns. By clicking on a column title, you can re-sort your list by that column. If you click the column title again, the list sorts in reverse order. Sorting entries by column works from left to right. For example, if you sort by a column that contains the City/Town field, entries with the same city/town will be sorted by the next column to the right. If you wish to change the order of the columns, change the column setup.

 After selecting the column to sort by, you can quickly move to an entry by typing the character(s) with which the entry starts. For example, to reach an entry called "Seismic Explorations", type "se".

Filters are available for every window that has a View bar. Filters control the type and amount of data you want to see at any given time. Filters contain options that are specific to the type of data that is displayed in each window.

The following sections contain additional information on working with lists in Maximizer:

- "Types of Entries" on page 18
- "Selecting Entries" on page 19
- "Displaying Entries" on page 20

Types of Entries

Almost all of the information displayed in Maximizer is displayed in a list, including notes and documents attached to entries, email messages, and Calendar appointments. Maximizer contains main modules that list the following types of entries.

- **Address Book entries** – The main type of entry in Maximizer. They include Companies, Individuals, and Contacts that are attached to Companies or Individuals.
- **Opportunities** – Entries to keep track of sales opportunities. They are associated with Address Book entries.

Selecting Entries

When you click on an entry, it becomes the current entry, marked with an arrow to the left of the entry. Most commands are performed on the current entry. The entries listed in the following windows depend on the current entry.

You can also select multiple entries to perform commands on many entries at the same time. The current entry may or may not be one of the selected entries. The current entry is shaded with a different color than the selected entries.

i You can customize the color of current and selected entries. On the **Setup** tab, select **Window > Window Settings > Set Color > Current/All Window** from the **Workspace** group.

➤ To select entries

- Click on the gray box to the left of an entry.
- To select multiple entries, click on the entries one at a time while holding down the **Control** key.
- To select all entries between two entries, select an entry and, while holding down the **Shift** key, select another entry.
- To select or clear all entries in the current list, click the gray box in the top-left corner of the list. Or on the **Edit** tab, select **Select All** from the **List** group.

The screenshot shows a window titled "Columns: *Default Address Book View". It contains a table with two columns: "Name" and "Phone Number". The first entry, "ABC Wine Shop Inc.", is selected, indicated by a right-pointing arrow in a gray box to its left. The other entries are not selected.

Name	Phone Number
➔ ABC Wine Shop Inc.	(604) 601-8000
Aggassi Cold Beer & Wine Store	(604) 601-8000
Albert's Steak House	(604) 601-8000
All The Best Spirits	(604) 601-8000
Amelia Liquors South	(604) 601-8000

- To clear selected entries, on the **Edit** tab, select **De-select All** from the **List** group.
- To reverse which entries in the list are selected, on the **Edit** tab, select **Invert Selection** from the **List** group.

Displaying Entries

Some actions can be performed on the entire list of entries in a window. There are some ways to quickly display and remove entries in a list.

➤ **To display only selected entries**

1 Select the entries that you want to display.

2 On the **Edit** tab, select **Make List Current** from the **List** group. The other entries are removed from the list.

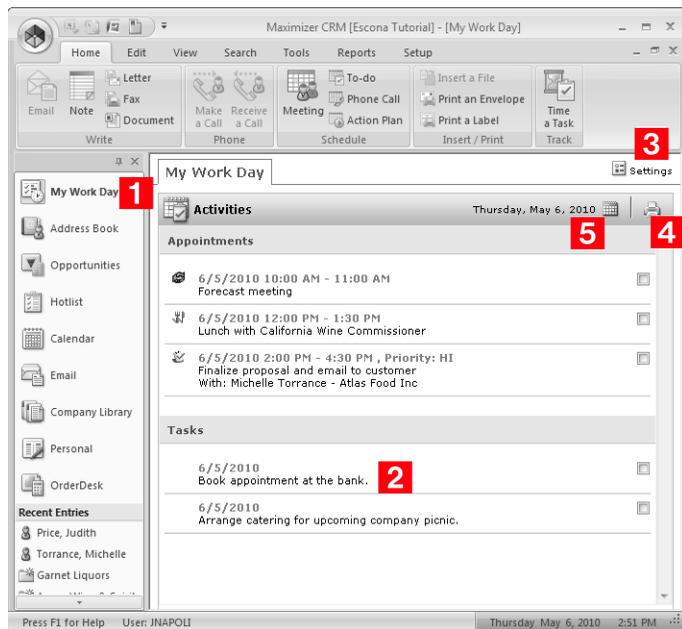
➤ **To remove all entries from a list**

- On the **View** tab, select **Clear List** from the **Filter** group.

My Work Day

My Work Day is an area where everyone in your company using Maximizer can see Hotlist tasks and appointments.

- 1** Select the **My Work Day** icon to open the My Work Day window.
- 2** Click on an **appointment** or a **Hotlist task** to view details of the activity.
- 3** Click **Settings** to specify to open the My Work Day window when starting Maximizer.
- 4** Select the **Print** icons to print activities for the day.
- 5** Select the **Calendar** icon and select a date to display tasks and appointments for a different day.



Getting Help

Maximizer Help is your comprehensive guide to working with the Maximizer modules. As you work with Maximizer, you probably already know what business task you want to accomplish—such as sending a fax to many recipients, building and publishing your online catalog, and recording your contact management information. Maximizer's help and guides have the answers you are looking for. The types of documentation you can expect to find to help you with Maximizer include:

- **F1 Help** – Context-sensitive help for all windows and dialog boxes.
- **Contents Help** – Online step-by-step instructions with a table of contents, an index, and search.
- **Online manuals** – On-screen versions of the printed documentation that you can read using Adobe Acrobat Reader.

Whether you are looking for help using a particular dialog box or looking for instructions on how to perform an activity, you can always find what you are looking for in the Help. Maximizer Help provides not only step-by-step instructions for each module, but also detailed descriptions of every control in every dialog box and window.

The following sections contain additional information on getting Help in Maximizer:

- "F1 Help" on page 22
- "Contents Help" on page 23
- "Online Manuals" on page 24
- "Sample Address Books" on page 24

F1 Help

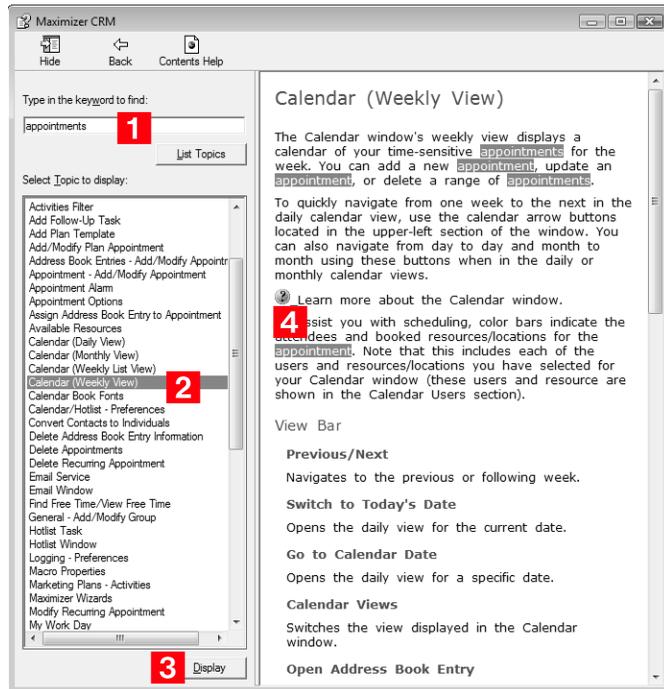
If you come across a window or dialog box you don't know how to use, press the F1 key to see brief descriptions of the window or dialog box options. Frequently, F1 Help topics have convenient links to related step-by-step instructions.

From the F1 Help window you can search the module's F1 Help for information on other windows, dialog boxes, or features—simply enter a keyword.

Keep the following points in mind when using the F1 help:

- 1** Enter a keyword and click **List Topics** to search for topics containing the keyword.
- 2** Topics containing your search keyword are displayed in the list.

- 3 Click **Display** to open the selected topic. You can also open a topic by double-clicking it.
- 4 Shortcuts link you directly to more information about what you are doing in the Contents Help.



Contents Help

You can look up Help topics the same way you would in a book—the table of contents lists the topics in a logical order, and the index lets you look up topics by keyword. Maximizer Help also lets you perform a search for any word or words in any topic.

You can access the Contents Help locally on your computer or online from the Internet. The local Contents Help opens as a separate application in its own window. The online Contents Help opens in a browser window.

➤ To open the Contents Help from Maximizer

- In the top-left corner of the window, click the **Maximizer** button, and select **Help > Local/Online Contents**.

➤ **To open the Contents Help from another module**

- Select **Help > Local/Online Contents**.

Online Manuals

A typical installation of Maximizer includes manuals in .PDF format that you can read online using Adobe Acrobat or Acrobat Reader. Having the Maximizer manuals in this format offers the advantage of full-text search, as well as hyperlinks on the table of contents, index, and any cross-references.

➤ **To open an online manual**

- In Maximizer, click the **Maximizer** button, and select **Help**. Then, under **Documents**, select the guide that you want to open.
- In another module, select **Help**, and select the guide that you want to open.
- From the **Start** menu, select **Programs > Maximizer CRM > Documentation and Help**, and select the guide that you want to open.

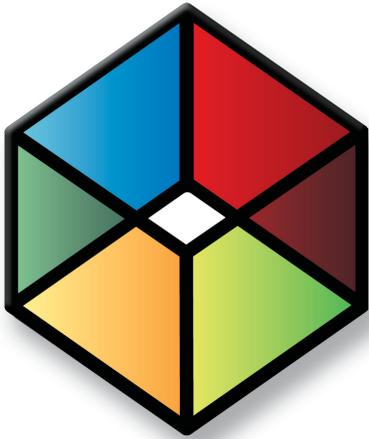
Sample Address Books

In a typical server installation of Maximizer, the Maximizer setup program creates several complete sample Address Books, one of which is named "Escona Tutorial". This Address Book is designed to be used as an environment in which you can learn how to use Maximizer.

Using the example of Escona Estate Wines, a fictitious vintner in California's Sonoma Valley, the Escona Address Book provides realistic examples of how Maximizer might be used to improve your customer relationship management.

The Escona Address Book includes detailed data related to all areas of Maximizer including the following:

- List of Address Book entries (Companies, Individuals, and Contacts)
- Sample sales opportunities
- Appointments and Hotlist tasks
- Sample Company Library files



CHAPTER
Address Book Entries 3

Keep Track of Companies and Contacts

In this chapter...

- "About Address Book Entries" on page 26
- "Adding Address Book Entries" on page 30
- "Modifying Address Book Entries" on page 33
- "Drawing Maps of Address Book Entries" on page 37
- "Phoning Address Book Entries" on page 38
- "Organizational Charts" on page 42

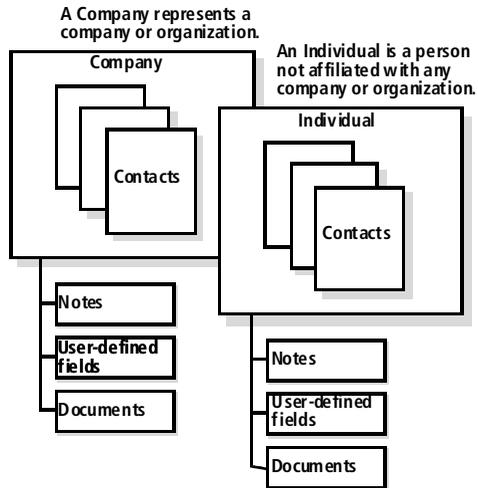
About Address Book Entries

Maximizer's focus is on Address Book entries—Companies, Individuals, and Contacts.

The Address Book window gives you the ability to manage your daily activities with companies, and the people who work for them. In addition to the basic Address Book information, including addresses, phone numbers, and email addresses, you can record other important information, such as relationships between companies or extra details, like the business type.

As you work with the Address Book entries in your Maximizer Address Book, you can keep notes on your activities, so you can always have a history of your activities with your customers.

Company and Individual type Address Book entries contain Contacts (people associated with a Company or Individual). You can attach notes, user-defined fields, and documents to Address Book entries.



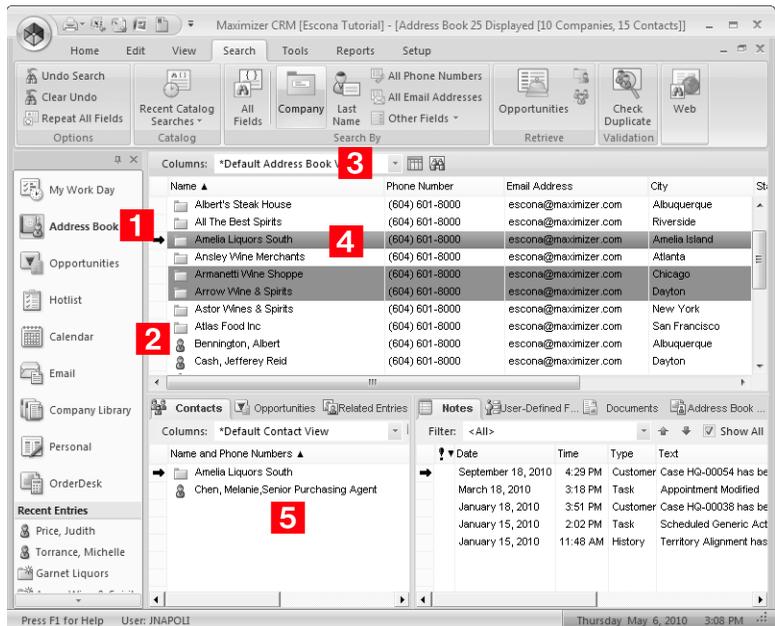
The following sections contain information on working with Address Book entries:

- "Address Book Window" on page 27
- "Choosing an Address Book List" on page 28
- "Viewing Address Book Entries" on page 28

Address Book Window

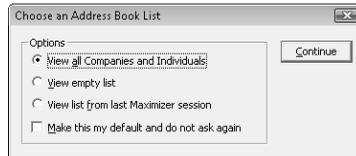
Typically, most of the activities on your Address Book entries are completed in the Address Book window. Keep the following points in mind when working in the Address Book window.

- 1** Select the **Address Book** icon to open the Address Book window.
- 2** Differentiate the **types** of entries with the icons representing Companies, Individuals, Contacts.
- 3** Use the **Columns** drop-down list to select a column setup and change the fields displayed in the window.
- 4** Double-click on an Address Book entry to open it.
- 5** Use the tabbed **following windows** to view more information and attached entries for the current entry in the main window.



Choosing an Address Book List

When you first open the Address Book window, you are prompted to choose an Address Book list to view.



The following options are available for viewing an Address Book:

- All Companies and Individuals in the Address Book
- An empty list (no Address book entries displayed)
- The list from your last Maximizer session

If you want the list you select to be displayed every time you open the Address Book window, select the “Make this my default and do not ask again” option. If you later decide that you don’t want the list to display by default, select the “Ask at Address Book startup which list to view” option in your preferences. (On the Setup tab, select Preferences.)

Viewing Address Book Entries

You can view and edit details of Address Book entries at any time.

► To view an Address Book entry

- 1** In the Address Book window, double-click on the entry to open it.

The Address Book entry opens showing the information in the entry.

- 2** To modify the details of the entry, click **Edit**.

- 3** To view and modify other information related to the entry, select the **User-Defined Fields** and **Activities** tabs.

- 4** If necessary, click **OK** to save changes made to the Address Book entry.

All The Best Spirits

abp Copy Favorite List Actions Preferences

View Basic Information | User-Defined Fields | Activities

Name and address

All The Best Spirits
1155 E Putnam Ave
Riverside CT 06878
USA

Other information

Phone numbers
Main: (604) 601-8000
Fax: (604) 601-8001
Cell:

Email addresses / Website
Main: escona@maximizer.com
Email 2:
Email 3:
Website: www.maximizer.com

Key Fields for: General Customer

Primary Interest	As an agent/distributor
Last Visit	
Annual Sales	975,000.00
Retail Wine Cost	
Region	US - Northeast
Industry	Wine-Retail
Size of Client	
First Contacted Date	

Company details

Category	Distributor, Partner
Account Manager	Mark Bertolli
Full Access	Public
Read Access	Public

Edit OK Cancel Apply

Adding Address Book Entries

You can add Companies, Individuals, and Contacts to your Address Book. Typically, "Company" entries represent a corporate entity you would like included in your Address Book. "Individuals" represent a person who is not affiliated with a company or organization. "Contacts" are entries that are always associated with Companies or Individuals. "Address Book entries" refers to all Companies, Individuals, and Contacts in your Address Book.

If you need to add people to your Address Book, add them as Individuals or as Contacts of an Individual or Company. If you need to delete a Contact, its associated notes and documents are automatically transferred to the "parent" Company or Individual, which ensures you maintain a record of all interactions with a company, even during changes.

The following sections contain information on adding Address Book entries.

- "Adding Companies and Individuals" on page 30
- "Adding Contacts" on page 31
- "Adding Address Book Entries from Email" on page 32
- "Access Rights for Address Book Entries" on page 32

Adding Companies and Individuals

When you add entries for Companies and Individuals, you must specify all of the details on the entry.

► To add a Company or an Individual

1 Select the **Address Book** icon to open the Address Book window.

2 On the **Home** tab, select **Address Book Entry > Company/Individual** from the **Create** group.

– or –

Right-click and select **Add > Company/Individual**.

The Add Company or Add Individual dialog box opens.

3 Enter the basic information for the Company or Individual including **name, address, phone numbers, and email addresses**.

4 Select a **Key Fields** list and then select the appropriate fields for the entry.

Key Fields are important user-defined fields specific to the various types of Address Book entries. They are defined by your system administrator in the Key Fields preferences in Administrator. (Select File > Preferences, and select the Key Fields tab.) An unlimited number of Key Fields lists can be set up using up to eight user-defined fields for each list.

- 5** In the **Company/Individual details** area, enter the entry's details such as the category. Click in the field, then click the ellipsis button to access possible values.
- 6** Select the **User-Defined Fields** tab and specify values for any additional user-defined fields. Make sure you select the field and then click inside the field on the right to access the possible values for the field.
If necessary, select the **Show blank fields** option to display all fields in the Address Book, not only the fields with values defined in the entry.
- 7** Click **OK** to save the entry to the Address Book.

Adding Contacts

You can add Contact entries attached to existing Companies and Individuals. When you add a new Contact to the Address Book, you need to specify only fields that are different than the Company or Individual entry.

➤ To add a Contact

- 1** In the Address Book window, select the Company or Individual entry.
- 2** On the **Home** tab, select **Address Book Entry > Contact** from the **Create** group.
– or –
In the **Contacts** following window, right-click and select **Add > Contact**.
The dialog box for the new Contact opens. Some fields are populated with values from the Company or Individual entry.
- 3** Enter the basic information about the Contact, including the **name**, **position**, and **department**. And specify any additional information that differs from the Company or Individual entry.
- 4** Click **OK** to save the entry.

Adding Address Book Entries from Email

You can create Address Book entries from email messages in the Email window. Email messages are automatically saved as documents for the new Address Book entries. You can create Companies, Individuals, or Contacts with Companies from email messages.

► To add an Address Book entry from an email message

- 1** In the Email window, select the email message.
- 2** On the **Home** tab, select **Address Book Entry** from the **Create** group.
– or –
Right-click, and select **Create a New > Address Book Entry**.
- 3** Select the type of Address Book entry, and click **OK**.
- 4** Enter the details for the new entry, and click **OK** to save the entry.
The Save Document dialog box opens.
- 5** Enter properties of the document including the name, owner, category, and description.
- 6** Click **OK** to save the email message with the Address Book entry.

 The document name cannot contain the following characters: \ / : * ? < > |

Access Rights for Address Book Entries

For each Address Book entry, you can specify full access and read access rights for any Maximizer users or groups, or you can specify public access to grant access to all Maximizer users. Access rights to specific entries are shown in the Company/Individual/Contact details area of the Basic Information tab in the entry.

You can specify access rights while adding or modifying an entry. You can select a user, a group, or public from the Full Access and Read Access drop-down lists.

Modifying Address Book Entries

When you open an Address Book entry, you can click **Edit** to modify the details of the entry. You can perform a number of other tasks to change the properties of Address Book entries, including adding alternate addresses to entries, converting Individuals to Companies and Contacts to Individuals, and recording relationships between Address Book entries.

The following sections contain information on modifying Address Book entries:

- “Adding Alternate Addresses for Address Book Entries” on page 33
- “Converting Individuals to Companies and Contacts to Individuals” on page 34
- “Recording Relationships with Related Entries” on page 35

Adding Alternate Addresses for Address Book Entries

While the main address is specified in the Basic Information tab of an Address Book entry, you can also add alternate addresses for entries from the same tab.

➤ To add an alternate address for an Address Book entry

- 1** Open the Address Book entry.
- 2** Click **Edit**.
- 3** Click the **Address** button next to the **Address 2** field.
The Mailing Address dialog box opens.
- 4** Click **Add** to enter a new address.
You can also click **Modify** to change an existing alternate address.
- 5** Specify the new address, and click **OK**.
- 6** To set the address as the default (or main) address, select the address and click **Select**.
- 7** Click **OK** to return to the Address Book entry.

Converting Individuals to Companies and Contacts to Individuals

If you originally created an entry as an Individual and now decide the entry is more appropriate as a Company with Contacts, you can convert the entry.

In the conversion, Maximizer copies the entire contents of the Individual to a new Company entry with the Individual converted to a Contact for the Company. All data is converted, including the Individual's Contacts. The original Individual is automatically deleted in the process.

Additionally, you can convert Contacts to Individuals. You are asked to confirm if you want the new Individual to inherit the Contact's address. All data is transferred to the new Individual entry and the original Contact is automatically deleted.

Any number of Contacts or Individuals can be converted at once.

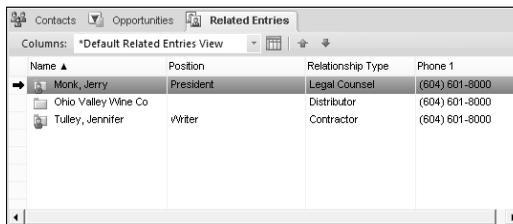
➤ **To convert Address Book entries**

- 1** Select the Individuals or Contacts that you want to convert.
- 2** On the **Edit** tab, select **Convert Individuals to Companies** or **Convert Contacts to Individuals** from the **Relate & Convert** group.
– or –
Right click and select **Convert Individuals to Companies** or **Convert Contacts to Individuals**.
- 3** Click **OK** to confirm the change.

Recording Relationships with Related Entries

In the course of business, it's common to have people and companies who are somehow related or connected to each other. For example, one of your contacts might be another's accountant. Maximizer allows you to view these types of relationships in the Related Entries window.

Any Address Book entry can be related to another. All notes, user-defined fields, and documents associated with a related entry are then linked to the relationship. If an Address Book entry has entries related to it, these are displayed in the Related Entries following window.



Name	Position	Relationship Type	Phone 1
Monk, Jerry	President	Legal Counsel	(604) 601-8000
Ohio Valley Wine Co		Distributor	(604) 601-8000
Tulley, Jennifer	Writer	Contractor	(604) 601-8000

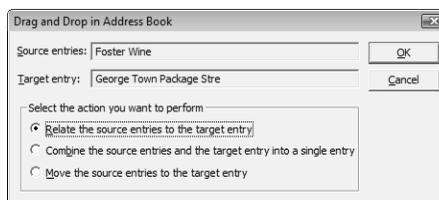
Occasionally, relationships that you set up between two Address Book entries change, and you may want to remove relationships between entries. You can unlink two entries to remove the relationship.

► To relate two entries

- 1 Select the two Address Book entries you wish to relate to each other. Then, on the **Edit** tab, select **Relate Entries** from the **Relate & Convert** group.

– or –

Drag an entry and drop it on to another entry. Then, select **Relate the source entry to the target entry**, and click **OK**.



- 2 Specify the details of the relationship between the two entries, and click **OK**.

The screenshot shows a dialog box titled "Related Entry Description". It contains the following elements:

- A section titled "These Address Book entries are linked" with two text boxes: "The Address Book entry" containing "George Town Package Stre" and "is related to" containing "Foster Wine".
- A section titled "Details of linked Address Book entries" with a dropdown menu for "Relationship type" set to "Distributor" and a text area containing "George Town Package Stre is one of Foster Wine's distributors."
- A checkbox at the bottom labeled "These entries are also related in reverse order" which is currently unchecked.
- Buttons for "OK", "Cancel", and "Spelling" on the right side.

➤ **To unlink Address Book entries**

- 1 In the **Related Entries** following window, select the entry to unlink.
- 2 On the **Edit** tab, select **Unlink Selected Entry** from the **Relate & Convert** group.

Drawing Maps of Address Book Entries

You can quickly draw a map showing the location of an Address Book entry or of the Address Book entry associated with an opportunity. You can choose to view only the location of the entry, or you can view directions to or from the Address Book entry and your current address.

➤ To draw a map of an Address Book entry

1 Select an Address Book entry opportunity.

2 On the **View** tab, select **Map** from the **Show** group.

The Draw a Map dialog box opens displaying the address of the current Address Book entry.

3 Under **Draw this type of map**, select the type of map that you want to view.

You can choose the following types of maps:

- Map of selected entry only.
- Map of travel route from current address to selected entry.
- Map of travel route from selected entry to current address.

4 If necessary, enter your address in the **Current address** fields.

5 Click **OK**.

A new browser window opens to a page displaying the address for the map.

6 Choose an online map site and click **OK**.

Phoning Address Book Entries

With Maximizer, you can quickly dial an Address Book entry, make a series of phone calls, receive calls, and record incoming and outgoing phone call activities in the Phone Log. Depending on your logging preferences, notes are automatically saved to the entries associated with the calls.

i You can enable logging for phone calls in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

Users can transfer incoming calls to any other phone extension in the phone company's system. If a note is logged for the phone call transfer, the logged note includes the transfer information.

Use the Previous and Next buttons in the Phone dialog box to work through the current Address Book entry list.

If you are using TAPI, you can phone entries directly from Maximizer. Otherwise, you can still use Maximizer to log phone calls with Address Book entries.

The following sections contain additional information on phoning Address Book entries:

- "Logging Phone Calls with Address Book Entries" on page 38
- "Setting Up Automatic Dialing" on page 41

Logging Phone Calls with Address Book Entries

You can use Maximizer to log phone calls with Address Book entries. When you phone an Address Book entry or receive a phone call from an Address Book entry, you can take notes while the call is timed.

Depending on your logging preferences, notes are automatically saved to the Address Book entries or opportunities associated with the calls.

After completing a phone call, you have the option of scheduling a follow-up activity saved to your Hotlist.

If you are using TAPI, follow this procedure to phone Address Book entries directly from Maximizer.

➤ To phone an Address Book entry

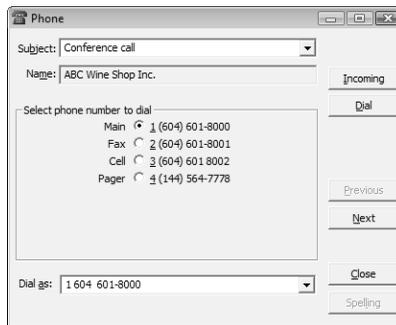
- 1** Select the Address Book entry to call.
- 2** On the **Tools** tab, select **Phone** from the **Other** group.

– or –

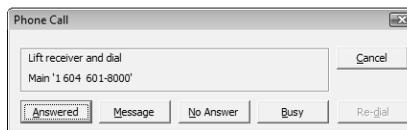
On the **Home** tab, select **Make a Call** from the **Phone** group. Or right-click and select **Phone > Make a Call**. Then, skip to Step 5.

The first phone number associated with the Address Book entry is automatically selected as the number to dial.

- 3** Specify the phone number and subject of the phone call.
- In the **Subject** field, select or type the subject of the call.
 - In the **Select a phone number to dial** area, select the phone number to dial.
 - In the **Dial as** field, select the format of the phone number.
Phone number formats are set up in your dialing preferences. (On the Setup tab, select Preferences, and select the Dialing tab.)



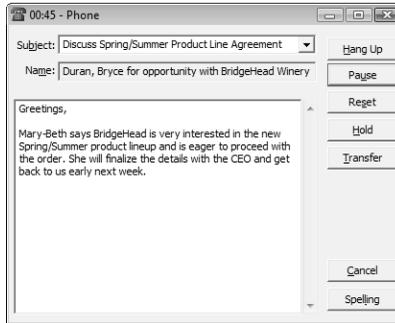
- 4** Click **Dial**.
- 5** In the Phone Call dialog box, choose a response.
For example, if the call is answered, choose Answered.



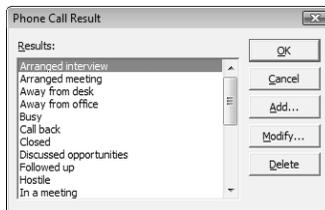
i In order for the Phone notes dialog box to appear automatically, logging must be enabled for Phone Calls in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

The Phone dialog box appears.

- 6** Record notes on your call as you talk.
- 7** When you are finished, click **Hang Up**, and then click **Save**.



- 8 Optionally, record the result of the outgoing call in the Phone Call Result dialog box, and click **OK**.



➤ **To receive a phone call**

- 1 Select the Address Book entry.
- 2 On the **Tools** tab, select **Phone** from the **Other** group. Then, click the **Incoming** button in the Phone dialog box.
– or –
On the **Home** tab, select **Receive a Call** from the **Phone** group.
– or –
Right-click and select **Phone > Receive a Call**

- 3 Select or type a **Subject** for your phone call.

- 4 Record notes on your call as you talk.

- 5 When you are finished, click **Hang Up**, and then click **Save**.

- 6 Optionally, record the result of the outgoing call in the Phone Call Result dialog box, and click **OK**.

i In order for the Phone notes dialog box to appear automatically, logging must be enabled for phone calls in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

➤ To transfer a phone call

- 1 When you have an incoming call that you would like to transfer, click the **Transfer** button in the Phone dialog box.
- 2 In the **Display name** list, select a user, or enter a valid extension for your company's phone system.
Note that a phone extension does not have to be associated with a user in the current Address Book.
- 3 Click **OK** to complete the transfer.

Setting Up Automatic Dialing

If you have a modem installed in your computer, you can configure Maximizer to dial the phone for you when you make a phone call using the Phone feature in Maximizer. Before Maximizer can use your modem, you must first make sure that your modem functions correctly with your computer system, then configure your modem in your dialing preferences in Maximizer.

Your modem preferences tell Maximizer where your computer's modem is connected and how it performs. Some of these settings are more critical than others. For example, if you set up your port incorrectly, your modem will not work at all. But if you set up your baud rate incorrectly, the modem will operate but perhaps at a slower speed.

TAPI lets you use your Telephony Application Programming Interface modem to identify and direct signals received by your communications port to the appropriate application.

For more information on setting up dialing preferences, including documentation on using TAPI, refer to the *Maximizer CRM Administrator's Guide*.

➤ To set up automatic dialing from Maximizer

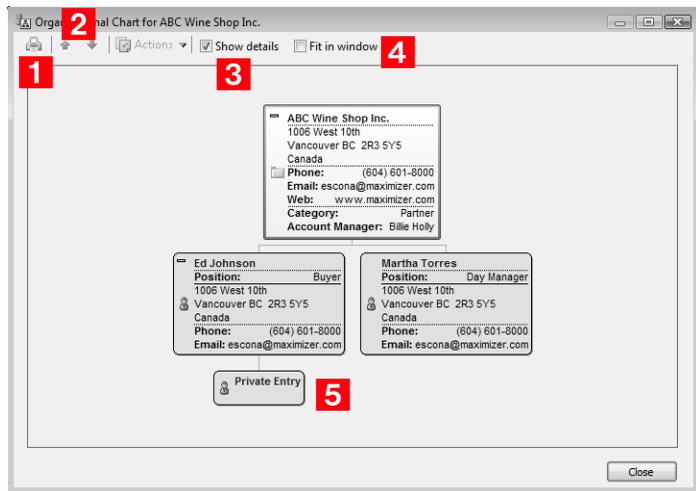
- 1 On the **Setup** tab, select **Preferences**.
- 2 In the **Dialing** tab, select **Modem** or **TAPI**.
- 3 If you selected TAPI, click **Properties** to configure the dialing properties for the modem, and click **Device** to configure the Device properties for the modem.
– or –
If you selected Modem, fill in the remaining fields.
- 4 Click **OK**.

Organizational Charts

Organizational charts display the hierarchical structure of a Company or an Individual entry. The chart shows the entry's associated Contacts in a hierarchical format. The Company's organization is based on values in the Reports to field for each Contact.

Keep the following points in mind when working with an organizational chart:

- 1** Use the **Print** button to print the organizational chart.
- 2** Use the **Previous entry** and **Next entry** buttons to view the organizational chart for the previous or next entry in the Address Book list.
- 3** Select or clear the **Show details** option to show or hide details of the Contacts.
- 4** Select the **Fit in window** option to fit the entire organizational chart into the dialog box.
- 5** **Private Entry** displays in place of the entry details if users do not have rights to view a particular Address Book entry.



➤ To view an organizational chart for an Address Book entry

- 1** Select the Address Book entry.
- 2** On the **View** tab, select **Organization Chart** from the **Show** group.

Modifying Organizational Charts

You can modify the structure of organizational charts in two ways:

- Change the value in the Reports to field in the Contact details section of the Edit Basic Information tab in an open Contact or in the user's general properties.
- Drag and drop an entry to the another entry the Contact or user reports to.

The Reports to field automatically updates showing the new value.

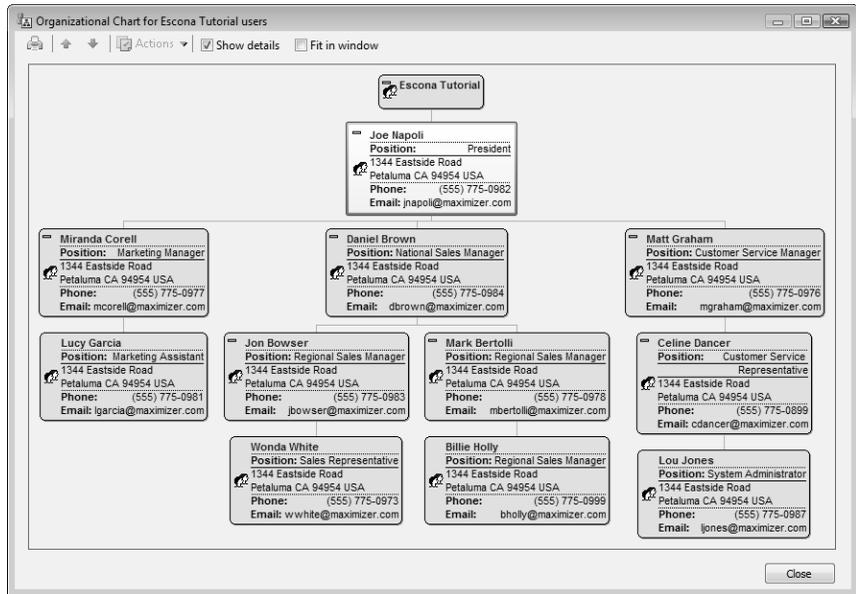
Organizational Charts for Maximizer Users

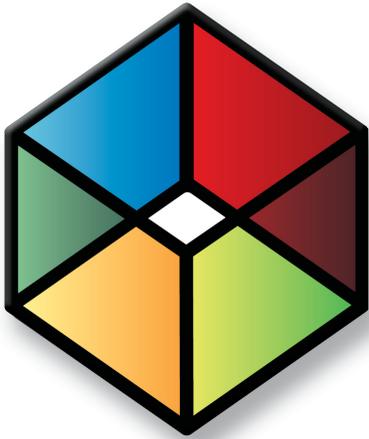
You can view Maximizer users within an organizational chart. As with organizational charts for Address Book entries, the hierarchy of the organizational chart shows users based on values in the Reports to field in the user properties. Organizational charts include disabled users along with all fully enabled Maximizer users.

➤ To view an organizational chart of Maximizer users

- 1** On the **Setup** tab, select **Manage Users** from the **User Management** group.
- 2** Click **Org Chart**.

The Organizational Chart dialog box opens displaying the chart for all Maximizer users.





CHAPTER 4 Maximizer Entries

Manage All Types of Information

In this chapter...

- "User-Defined Fields" on page 46
- "Setting Up User-Defined Fields" on page 50
- "Default Entries" on page 57
- "Searching" on page 58
- "Global Edits" on page 64
- "Favorite Lists" on page 68
- "Column Setups" on page 72
- "Coloring Rules" on page 75

User-Defined Fields

User-defined fields are custom fields used to record additional information on Maximizer entries. You can set up different user-defined fields for the different types of entries in Maximizer. Each user-defined field can be associated with only one type of entry. You can create user-defined fields for the following types of entries:

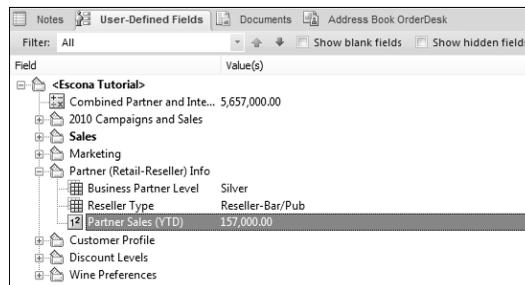
- **Address Book** – Classifies Address Book entries. You can view these fields in the Address Book window or in an open Address Book entry.
- **Opportunities** – Classifies opportunities. You can view these fields in the Opportunities window or in an open opportunity.
- **Users** – Classifies Maximizer users. You can view these fields in the User Properties dialog box.

The following sections contain information on using user-defined fields:

- “User-Defined Fields Following Window” on page 46
- “User-Defined Fields Tab” on page 47
- “Types of User-Defined Fields” on page 47
- “Working with User-Defined Fields” on page 48
- “Mandatory, System, and Key Fields” on page 49

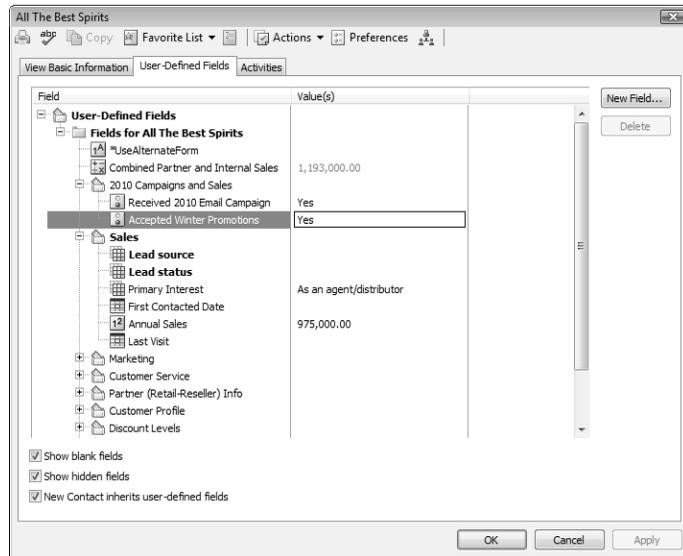
User-Defined Fields Following Window

User-defined fields for the current Address Book entry and opportunity are displayed in the User-Defined Fields following window. The following window displays only the user-defined fields for the type of entry, with values for the current entry. For example, when viewing Address Book entries, the User-Defined Fields following window contains only the user-defined fields for Address Book entries. The values of the fields are for the current Address Book entry in the controlling window.



User-Defined Fields Tab

You can access user-defined fields for open Address Book entries and opportunities from the User-Defined Fields tab of the dialog box for the entry. The folders and field names appear in a list on the left, and the field values appear on the right.



Types of User-Defined Fields

You can create different types of user-defined fields depending on the types of values required for the field. Maximizer defines the following types of user-defined fields:

- **Alphanumeric user-defined fields** – These fields record any alphanumeric text (letters and numbers) up to a specified maximum number of characters. You can encrypt alphanumeric fields for security protection. Note that you cannot disable or enable encryption once you have created the field.
- **Date user-defined fields** – These fields store a specific date or an annually recurring date.
- **Numeric user-defined fields** – These fields record numeric values. You can specify a number of decimal places. For example, specify two decimal places to use this type of field for monetary values.
- **Table user-defined fields** – These 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

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

user-defined field with the "single value only" attribute, only one value can be selected from the list.

- **Yes/no user-defined fields** – These fields record either yes or no values. Since the fields must contain one of these values, these user-defined fields are always mandatory.

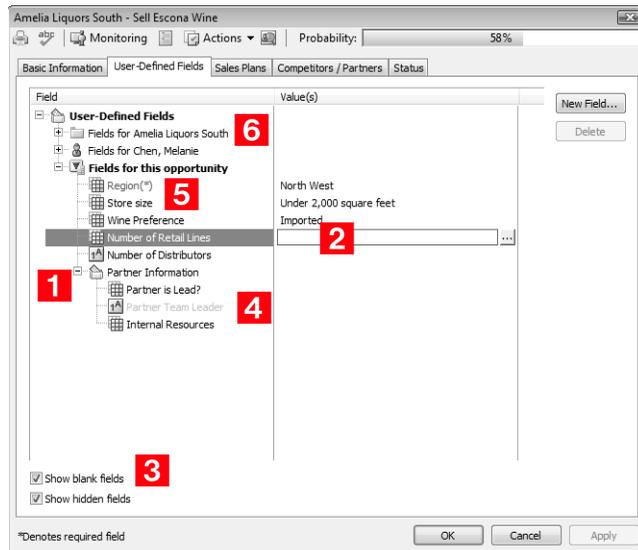
Working with User-Defined Fields

Keep the following points in mind when working with user-defined fields:

- 1** By default, user-defined fields are displayed in a tree view, where fields are nested within folders. You can also display the fields in an alphabetical list, without their folder structure.

You can set your default user-defined field view in your preferences. On the **Setup** tab, select **Preferences**, and select the **View User-defined fields in tree view** option in the System Defaults tab.
- 2** Double-click on a field to add or modify a user-defined field value.
- 3** When you select the **Show blank fields** option, all user-defined fields in the Address Book for the type of entry are displayed, not only the fields with existing values.
- 4** When you select the **Show hidden fields** option, fields and folders that are set to hidden appear shaded. When you clear this option, the fields and folders are completely hidden.
- 5** Mandatory fields are denoted with an asterisk displayed after the field name and type. System-defined fields are shown in bold, black text.
- 6** Opportunities display the user-defined fields for the associated Address Book entries, as well as the user-defined fields for opportunities.

Contacts display the user-defined fields for the associated Companies or Individuals, as well as the user-defined fields for Contacts.



Mandatory, System, and Key Fields

There are a number of types of fields in Maximizer. These fields display differently depending on some of their characteristics.

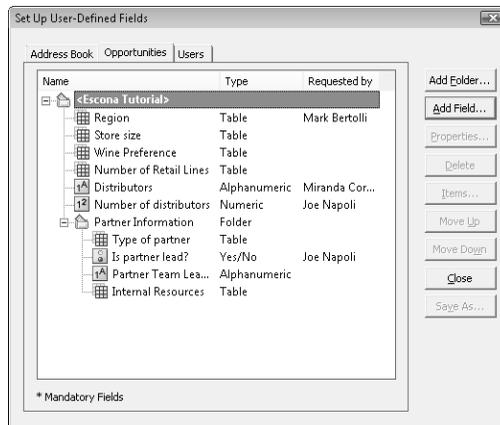
- **Mandatory Fields** – These fields must have values. System fields are set as mandatory in Administrator. User-defined fields are set as mandatory when creating the user-defined fields in the Set Up User-Defined Fields dialog box. Mandatory fields are denoted with an asterisk displayed after the field type.
- **System Fields** – These fields are created by default and are not user-defined. They cannot be deleted or modified, though the values of some of these fields can be modified in Administrator. Some fields in the User-Defined Fields tab are system fields. They are shown in bold, black text.
- **Key fields** – These user-defined fields are displayed in an entry's Basic Information tab. They are specified in the Key Fields preferences in Administrator. (Select File > Preferences, and select the Key Fields tab.)

Setting Up User-Defined Fields

User-defined fields are usually set up by your system administrator using Administrator. However, any user may be assigned permission to create, change, or delete user-defined fields in Maximizer.

User-defined fields are created and modified in the Set Up User-Defined Fields dialog box. You can access this dialog box from the Setup tab.

The dialog box contains five tabs, one 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.



The following sections contain information on setting up user-defined fields:

- “Sorting User-Defined Fields” on page 51
- “Creating Folders for User-Defined Fields” on page 51
- “Creating User-Defined Fields” on page 52
- “Modifying User-Defined Fields” on page 53
- “Adding Items to Table User-Defined Fields” on page 54
- “Modifying Items in User-Defined Fields” on page 55

Sorting User-Defined Fields

The order that user-defined fields display in the Set Up User-Defined Fields dialog box determines the order that user-defined fields display for users.

Click the Move Up and Move Down buttons to move a field or folder up or down in the list. These buttons move fields only within their current folder level. You cannot use them to move items in or out of folders.

You can also use the mouse to drag and drop a field or a folder to a different position in the list. Dragging it onto a field places it immediately below that field. Dragging it 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.

Creating Folders for User-Defined Fields

You can group similar user-defined fields into folders and subfolders to a maximum folder depth of three 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 are looking for.

➤ To create a folder for user-defined fields

1 On the **Setup** tab, select **User-Defined Fields**.

– or –

In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

The Set Up User-Defined Fields dialog box opens.

2 Select the tab for the category of user-defined fields you want to work with.

3 To create a top-level folder, select the Address Book name at the top of the list.

– or –

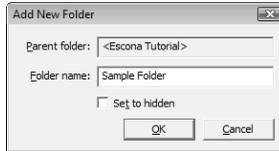
To create a folder within an existing folder, select the existing folder.

4 Click **Add Folder**.

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

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

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



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

6 Move the new folder to a different position in the list, if desired.

Creating User-Defined Fields

You can 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 Setup tab in Maximizer or the File menu in Administrator. Users can create user-defined fields only if they have insert permission for User-defined field setup.

► To create a user-defined field

1 On the **Setup** tab, select **User-Defined Fields**.

– or –

In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

The Set Up User-Defined Fields dialog box opens.

2 Select the tab for the category of user-defined fields you want to work with.

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

– or –

Select a user-defined field to create the new field at the same level as the selected field.

4 Click **Add Field**.

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.

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

8 Click **OK**.

The user-defined field is added to the list.

Modifying User-Defined Fields

You can change most properties of existing user-defined fields. However, you cannot change the type of user-defined field.

➤ To modify a user-defined field

1 On the **Setup** tab, select **User-Defined Fields**.

– or –

In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

The Set Up User-Defined Fields dialog box opens.

2 Select the user-defined field and click **Properties**.

– or –

Double-click the alphanumeric, date, or numeric user-defined field.

3 Change the properties as required.

4 Click **OK** to save the changes.

Adding Items to Table User-Defined Fields

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.

► To add items to a table user-defined field

1 On the **Setup** tab, select **User-Defined Fields**.

– or –

In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

The Set Up User-Defined Fields dialog box opens.

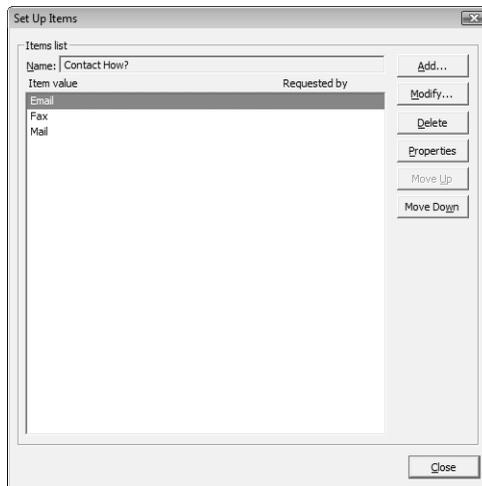
2 Select the table user-defined field, and click **Items**.

– or –

Double-click the table user-defined field.

The Set Up Items dialog box opens.

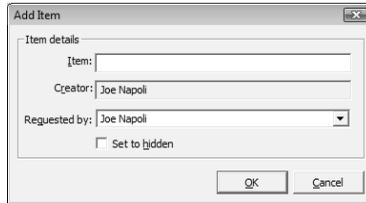
3 Click **Add**.



4 Type a name for the item, and specify the other properties of the item.

5 Click **OK**.

i If you set the item to hidden, you can hide it from the Available Values list by clearing the Show hidden items option.



- 6** Repeat steps 3 to 5 to add any additional items to the table user-defined field.

Modifying Items in User-Defined Fields

You can change the properties of existing items in table or yes/no user-defined fields. For yes/no user-defined fields, you can specify one of the items as the default value that is automatically set for the field in all new entries.

➤ To modify an item in a user-defined field

- 1** On the **Setup** tab, select **User-Defined Fields**.

– or –

In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

The Set Up User-Defined Fields dialog box opens.

- 2** Select the table or yes/no user-defined field, and click **Items**.

– or –

Double-click the table or yes/no user-defined field.

The Set Up Items dialog box opens.

- 3** Double-click the item you want to modify.

– or –

Select the item and click **Modify**.

- 4** Modify the properties of the item.

For yes/no user-defined fields, you can select **Default value** to set this item as the default value for the field.

- 5** Click **OK**.

➤ **To modify an item in a table user-defined field from the User-Defined Fields following window**

- 1** Select the **User-Defined Fields** following window.
- 2** Double-click the table user-defined field that contains the item you want to modify.
The Table Values dialog box opens.
- 3** Select the item you want to modify and click **Modify**.
- 4** Modify the properties of the item and click **OK**.

Default Entries

You can set up default entries in the Address Book and Opportunities windows. When you create new entries, fields specified in the default entry are already filled in for you. For example, if you know all your Address Book entries will have the same city and state, you can specify these fields in the default Address Book entry.

Default entries are user-specific, so each user in the Address Book can have different default entries.

➤ To modify a default entry

1 On the **Setup** tab, select **Default Entry** from the **Default Entry** group.

The Default Entry dialog box opens.

2 Specify default values for fields in the **Basic Information** and **User-Defined Fields** tabs.

3 Click **OK** to save the changes to the default entry.

The screenshot shows a dialog box titled "Default Entry for Joe Napoli". It has a menu bar with "Copy", "Favorite List", "Actions", and "Preferences". Below the menu bar are three tabs: "Edit Basic Information", "User-Defined Fields", and "Mailing Rules". The "Edit Basic Information" tab is selected and contains the following sections:

- Name and address:** Fields for Mr/Ms, First name, Middle name, Last name (with a dropdown set to "Default Entry"), Position, Salutation, Department, Division, Company, Address 1, Address 2 (with an "Address..." button), City/Town, St/Co/Prov, Zip/Postal, and Country.
- Other information:** Phone numbers (Main, Fax, Cell) with dropdown menus and input fields; Email addresses / Website (Email, Email 2, Email 3) with dropdown menus and input fields; and a Website field.
- Details:** A table with columns for Category, Account Manager, Full Access, and Read Access. The values are: Category (empty), Account Manager (Joe Napoli), Full Access (Joe Napoli), and Read Access (Public).

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Apply".

Searching

Many of the actions you can perform with Address Book entries and opportunities apply to the entire list of entries in the active window. For instance, when you print a report from the Address Book window, you are generally given a choice between printing the selected entry (or entries) or printing the entire list. When you perform a mail merge, for instance, you generally use the entire current list.

Maximizer's search features let you search any field for the data you specify and modify your current list with the matching entries. If you wanted to create a list of Address Book entries in Washington State, for example, you would search the State/Province field for entries with "WA" in that field.

A search retrieves any entries that match the search criteria and that you have the rights to view.

The following sections contain additional information on searching for Maximizer entries:

- "Searching by Basic Fields" on page 58
- "Searching by All Fields" on page 59
- "Saving Searches in the Search Catalog" on page 61
- "Retrieving Saved Searches from the Search Catalog" on page 62
- "Undoing Searches" on page 63

Searching by Basic Fields

Maximizer makes it easy to search for entries by basic field, such as Last Name, Company, City/Town, or Email for Address Book entries or Status or Revenue for opportunities. The items in the Search tab vary depending on what window is selected. You can search for entries matching a single field or multiple fields.

➤ **To search for entries by a field**

- 1** On the **Search** tab, select the field you are searching for from the **Search by** group.
Select **Other** to see additional fields to search for.
The Search By [field] dialog box opens.
- 2** Specify the search criteria.
- 3** Select how you want to update the current list with your search results.

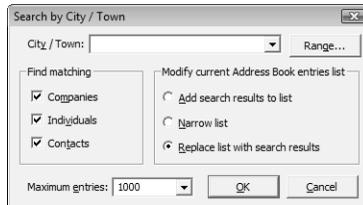
- **Add search results to list** displays the entries that match your search criteria, without removing any currently displayed entries from the list.
- **Narrow list** searches only selected entries (or all currently displayed entries if none are selected), and removes any entries that do not match your search criteria.
- **Replace list with search results** removes all entries currently displayed in the list and replaces them with entries that match your search criteria.

4 If applicable, specify the **Range** of the items to search.

5 Specify the **Maximum entries** to be returned in your search. This number is important to note because it affects what is displayed in your list after your search.

6 Click **OK** to run the search.

i If you change the maximum entries field to a value less than the system default value, the value will remain as your default value for subsequent searches. If you change this field to a value more than the system default value, it will return to the system default value for subsequent searches. The default values for the number of entries returned in a search is set in Administrator.



Searching by All Fields

Maximizer's Search by All Fields feature is useful when you need to search by fields that are not listed in the Search tab or when you want to search by more than one field. In the Search by All Fields dialog box, you can build complex search arguments and even save your search in the catalog for later use.

Use the Search by All Fields feature to find user-defined fields or a combination of user-defined fields and basic fields to produce a custom list of Address Book entries and opportunities.

In the Opportunities window, you can search by Address Book entry fields, as well as opportunity fields. The search returns opportunities associated with the Address Book entries matching the field values.

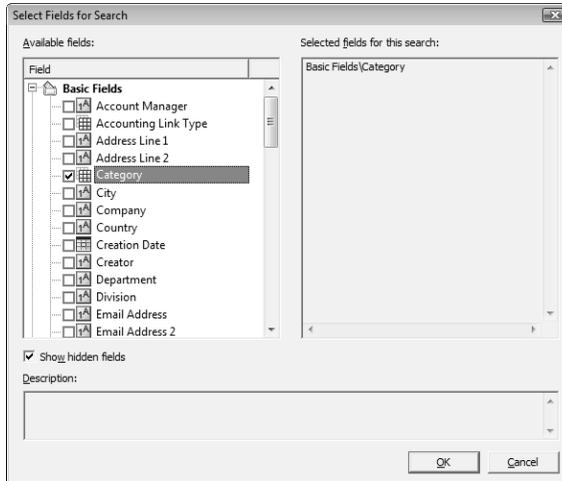
➤ To search by all fields

1 On the **Search** tab, select **All Fields** from the **Search By** group. The Search by All Fields dialog box opens.

2 Click **Add**.

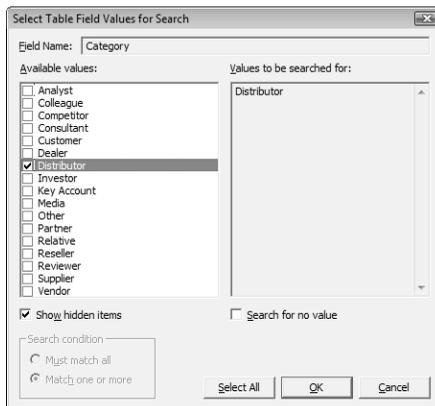
The Select Fields for Search dialog box opens.

3 Select one or more fields and click **OK**.



4 For each field selected in the previous step, select or specify values in the dialog box that is provided.

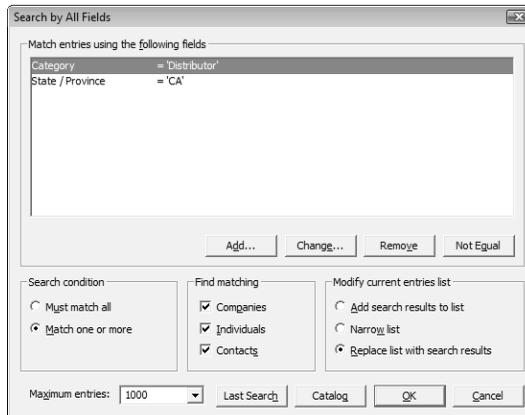
- For date fields, select **Rolling date range** to specify date values relative to the current date or select **Specified date range** to specify the exact values of the date.
- For alphanumeric, date, and numeric fields, specify values in the **From** and **To** fields to return any values within the range.
- If applicable, indicate under **Search conditions** whether to return entries that match all values, or that match one or more values.
- Select the **Search for no value** checkbox to search for entries where no value is assigned to the selected field.



- 5** Specify the remaining search criteria in the Search by All Fields dialog box.

To build a list of entries that excludes a certain group, as in a list of all Address Book entries except those in a certain state or province, use the Not Equal button.

- 6** In the **Modify current entries list** area, select one of the options.
- **Add search results to list** displays the entries that match your search criteria, without removing any currently displayed entries from the list.
 - **Narrow list** searches only selected entries (or all currently displayed entries if none are selected), and removes any entries that do not match your search criteria.
 - **Replace list with search results** removes all entries currently displayed in the list and replaces them with entries that match your search criteria.
- 7** Specify the **Maximum entries** you would like to be returned.
- 8** Click **OK** to start the search.



Saving Searches in the Search Catalog

You can save values in the Search by All Fields dialog box to the search catalog to retrieve at a later time. While saving the search, you can select a column setup to display automatically whenever the search is retrieved.

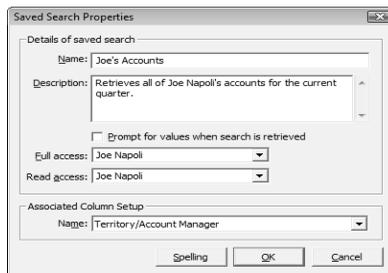
While setting up the search criteria, you can specify generic values in your searches to make them reusable for different users and at different times. For fields that take Maximizer users as values, you can specify the current user as the value of the field. For date fields, you can specify values in relation to the current date, such as today,

next month, and current fiscal quarter. Each time the search is run, values for the current user and values relative to the current date are retrieved.

➤ **To save a search in the search catalog**

- 1** On the **Search** tab, select **All Fields** from the **Search By** group.
- 2** Enter your search criteria in the Search by All Fields dialog box.
- 3** Click **Catalog** and click **Add**.
- 4** Specify the properties of the search.
 - In the **Full Access** and **Read Access** fields, select a Maximizer user or group with access to the saved search.
 - In the **Associated Column Setup** area, select an existing column setup to display when the search is retrieved.
- 5** Click **OK**.

The search is added to the search catalog.



Retrieving Saved Searches from the Search Catalog

You can quickly retrieve saved searches from the search catalog. You can retrieve a recent search directly from the Search tab. You can access other saved searches from the Search by All Fields dialog box. If the saved search has a column setup associated with it, the column setup is automatically displayed when the search is retrieved.

➤ **To retrieve a recent search from the search catalog**

- On the **Search** tab, select **Recent Catalog Searches** from the **Catalog** group, and select the name of the saved search.

➤ **To retrieve a search from the search catalog**

- 1** On the **Search** tab, select **All Fields** from the **Search By** group.
- 2** Click **Catalog**.
- 3** Select the saved search and click **Retrieve**.
The search criteria from the saved search is displayed in the Search by All Fields dialog box.
- 4** Click **OK** to run the search.

Undoing Searches

You can quickly undo the most recent search in the Address Book and Opportunities windows.

➤ **To undo the most recent search**

- On the **Search** tab, select **Undo Search** from the **Options** group.
The entries in the current list are replaced with the entries in the previous list.

Global Edits

You can update a number of entries at the same time with the Global Edit command. The changes are applied to all entries included in the global edit. You can either select the entries to apply the edits to or apply the edits to all entries in the current list.

When working with a global edit, keep the following points in mind:

- Specify values in most fields available for the type of entry you are working with.
- Specify **Remove** to remove values from basic and user-defined fields, leaving the fields blank.
- In the **Remove** column of a table user-defined field, select specific field values to remove from the field without removing all values.
- In the **Global Edit Rules** tab, specify how to add values to modified user-defined fields and some basic fields, such as category.
- In the **Note** tab, specify a note that is logged to all entries included in the global edit.

Global Edit is a very powerful feature, so you might consider backing up your Address Book before making significant changes. You can perform global edits on Address Book entries and opportunities.

► To perform a global edit

1 Create a list of entries to modify.

– or –

In the current list, select the entries you want to modify.

2 On the **Edit** tab, select **Global Edit** from the **Replace** group. The Global Edit dialog box opens.

3 Apply your edits in the **Basic Information** and **User-Defined Fields** tabs.

For many basic fields, you can select **Remove** to remove existing values for a field without specifying alternative values. For user-defined fields, use the **Remove** column to remove all values or specific values from a field.

The screenshot shows the 'Global Edit' dialog box with the 'Edit Basic Information' tab selected. The dialog is divided into several sections:

- Name and address:** Fields for Mi/Ms, First name, Middle name, Last name, Position, Salutation, Department, Division, Company, Address 1, Address 2, City/Town, St/Co/Prov, Zip/Postal, and Country.
- Other information:** Fields for Phone numbers (with dropdown menus) and Email addresses / Website (with dropdown menus).
- Website:** A text field.
- Details:** A table with columns for Category, Account Manager, Full Access, Read Access, and Competitor.

Buttons for OK, Cancel, and Help are located at the bottom right.

- 4** Select the **Note** tab and add a description for the global edit. The note is logged to all affected entries. You can also specify the Access Rights for the default note and a Category.

The screenshot shows the 'Global Edit' dialog box with the 'Note' tab selected. The dialog is divided into several sections:

- Add this note to the Notes window:** A text area with a rich text editor toolbar (font, bold, italic, underline, link, list, etc.). The text 'Assigned this entry to the Competitor category.' is entered.
- Details:** Fields for Full access (Public), Read access (Public), and Category (dropdown menu).

Buttons for OK, Cancel, and Help are located at the bottom right.

- 5** Select the **Global Edit Rules** tab.
- 6** If you are working with Address Book entries, set the mailing address options under **Mailing rules**.

You can specify **Do not change**, **Yes**, or **No** for each of the options.

- In the **Receives mail sent to Company or Individual** drop-down list, specify if you want to send mailings to the associated Contacts when sending mail to the Company or Individual.

This option applies only to Contacts.

- In the **Use Address Book entry's name in mailing address** drop-down list, specify if you want to list the Address Book entry name as well as the Contact name (if applicable) in the mailing address.

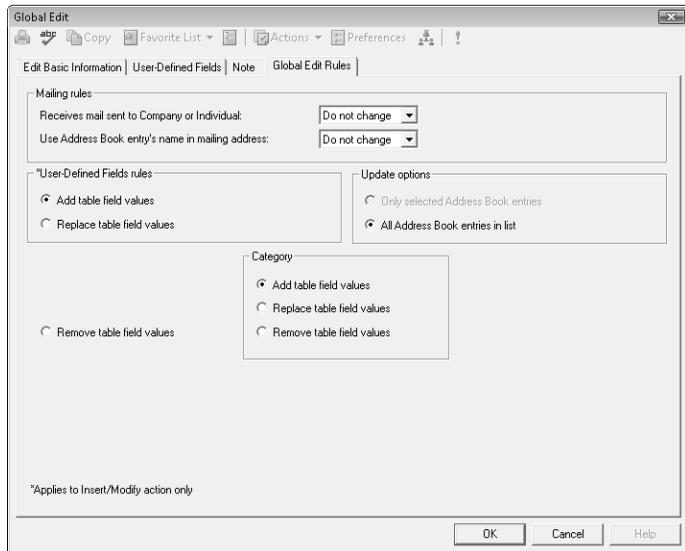
7 Under **Update options**, specify how you want to use the current list.

8 In the other sections of the Global Edit Rules tab, specify how you want the edits applied to specific basic fields and table user-defined fields.

- To add the selected values to the existing values, select **Add table field values** or **Add user/group field values**.
- To replace the existing values with the selected values, select **Replace table field values** or **Replace user/group field values**.
- To remove the selected values from the existing values, select **Remove table field values** or **Remove user/group field values**.

This option is available only for specific basic fields. You can specify to remove table field values from user-defined fields in the **Remove** column of the User-Defined Fields tab.

i If the table user-defined field is "single-value only", the Add Table Field values option does not apply. The new value always replaces the existing one.



9 Click **OK** to perform the global edit.

You are prompted with a message to verify that you want to continue with the operation.

Favorite Lists

Favorite Lists keep track of lists of Address Book entries and opportunities. You can easily create new Favorite Lists and retrieve the lists at any time. You can also add and remove entries from existing Favorite Lists to keep track of changes to the list.

The following sections contain additional information on Favorite Lists:

- “Creating Favorite Lists” on page 68
- “Retrieving Favorite Lists” on page 69
- “Adding and Removing Entries in Favorite Lists” on page 70
- “Retrieving Favorite Lists” on page 69

Creating Favorite Lists

You can quickly create a new Favorite List from a list of entries in the Address Book or Opportunities window. While creating the Favorite List, you can select a column setup to display automatically when the Favorite List is retrieved.

➤ To create a Favorite List

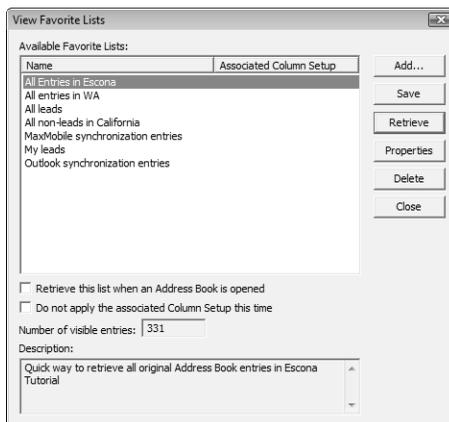
1 Create a list of the entries you want saved in the Favorite List.

– or –

From the current list, select the entries to save in the Favorite List.

2 On the **View** tab, select **All Lists** from the **Favorite Lists** group.

The View Favorite Lists dialog box opens displaying all existing Favorite Lists.



3 Click **Add**.

The Favorite List dialog box opens.

4 Specify the properties of the Favorite List.

- In the **Full Access** and **Read Access** fields, select a Maximizer user or security group with access to the Favorite List.

If you select Public, all users can modify or retrieve the Favorite List. If you select a group or user, only members of that group or that particular user can perform these actions.

- In the **Associated Column Setup** area, select an existing column setup to display when the Favorite List is retrieved.

5 Click **OK**.

The new Favorite List is added to the list in the View Favorite Lists dialog box.

6 To set the Favorite List as the default Favorite List, select the **Retrieve this list when an Address Book is opened** option in the View Favorite Lists dialog box.

The default Favorite List is retrieved automatically when you first open the Address Book or Opportunities window.

For Address Book entry Favorite Lists, this option overrides the “Ask at Address Book startup which list to view” setting in your preferences.

Retrieving Favorite Lists

You can quickly retrieve an existing Favorite List and replace the current list of entries with the entries in the Favorite List. If the Favorite List has a column setup associated with it, the column setup is automatically displayed when the Favorite List is retrieved.

You can retrieve Favorite Lists from the Address Book and Opportunities windows.

➤ **To retrieve a Favorite List**

1 On the **View** tab, select **All Lists**, from the **Favorite Lists** group.

– or –

On the **View** tab, select **Recent Lists** from the **Favorite Lists** group, and select a Favorite List that you have recently accessed.

2 Select the Favorite List, and click **Retrieve**.

Adding and Removing Entries in Favorite Lists

You can add and remove entries from existing Favorite Lists at any time. You can select entries in the current list to add to or remove from the Favorite List, or you can add or remove an open entry.

➤ **To add or remove entries in a Favorite List**

1 In the Address Book or Opportunities window, select the entries to add to or remove from the Favorite List.

– or –

Open an entry to add to or remove from the Favorite List.

2 On the **View** tab, select **Add to List** or **Remove from List** from the **Favorite Lists** group.

– or –

In an open entry, select **Favorite List > Add to Favorite List** or **Remove from Favorite List**.

The Add to Favorite List or Remove from Favorite List dialog box opens.

3 Select the Favorite List and specify the details as to what entries you are adding or removing.

For example, to add or remove only the selected entries in the current Address Book list, select **Selected Entries**.

- 4** Click **OK** to save the changes to the Favorite List.



Viewing Favorite Lists for Entries

You can view a list of the Favorite Lists to which the current Address Book entry or opportunity belongs.

➤ To view a list of Favorite Lists for an entry

- 1** Open the entry.
- 2** Select **Favorite List > View Favorite Lists**.

The View Favorite Lists dialog box opens listing all the Favorite Lists that the current entry belongs to.

Column Setups

Maximizer provides a selection of column setups you can use for the Address Book and Opportunities windows. You can also create your own column setups to display different fields in various combinations.

Column setups contain basic and user-defined fields specific for the type of entry displayed in the window. You can specify the fields displayed in each column of the window, as well as the width and heading of the columns.

In the Opportunities window, column setups can contain fields for Address Book entries, as well as for opportunities. Columns with Address Book entry fields display values for the Company or Individual associated with the entry.

After creating a column setup, you can associate it with a saved search in the search catalog or with a Favorite List. The column setup is automatically displayed whenever the saved search or Favorite List is retrieved.

The following sections contain additional information on column setups:

- "Creating Column Setups" on page 72
- "Retrieving Column Setups" on page 74

Creating Column Setups

You can create custom column setups displaying any of the basic or user-defined fields in your list of entries. You can create column setups for the Address Book and Opportunities windows.

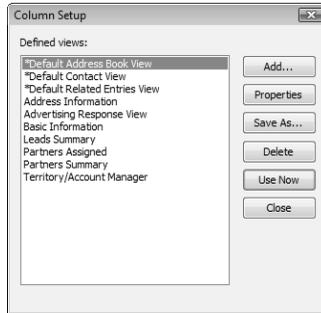
➤ To create a column setup

1 On the **Setup** tab, select **Column Setup** from the **Display** group.

– or –

On the **View** bar, click the **Column Setup** icon.

The Column Setup dialog box opens.



2 Click **Add**.

The Defined View Properties dialog box opens.

3 In the **Details of View** area, specify the basic properties of the column setup.

- Enter a **Name** for the column setup.
- Specify the access rights in the **Full Access** and **Read Access** drop-down lists.

If you leave Public selected, all users can modify or retrieve the column setup. If you select a group or user, only members of that group or that particular user can perform these actions.

4 In the **Columns in View** area, click a column header.

5 In the **Available fields** list, click the plus symbol to expand a folder, select a field, and click **Add** to add the field to the selected column.

You can repeat this step to add multiple fields to the selected column.

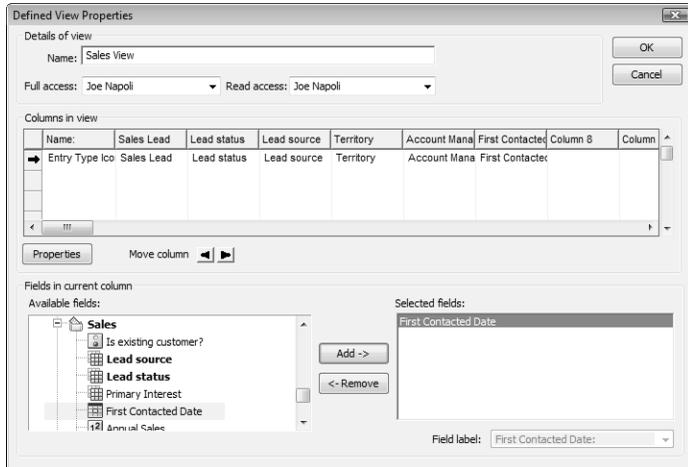
Fields in the current column appear in display order in the Selected Fields list.

6 If you add multiple fields to the column, specify the field label for each field, or select field separator characters from the **Field Label** drop-down list to place multiple fields on the same line.

7 If necessary, click **Properties** and modify the heading and width of the column.

8 Repeat steps 4–7 for each column in the column setup.

9 Click **OK** to save the column setup.

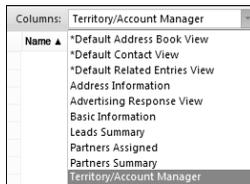


Retrieving Column Setups

You can retrieve existing column setups to change the fields displayed in the current window. In some windows, you can retrieve a column setup directly from the View bar. Otherwise, you can retrieve a column setup from the Column Setup dialog box.

➤ **To retrieve a column setup**

- In the **View** bar, select a column setup from the **Columns** drop-down list.



- On the **Setup** tab, select **Column Setups** from the **Display** group. Then, select the column setup, and click **Use Now**.

Coloring Rules

Coloring rules shade entries with different colors depending on the values of specific fields. You can set up coloring rules in the Address Book, Opportunities, and Hotlist windows. Each coloring rule includes a set of values for a specific field. You can choose a background color and a text color for each value in the rule. When you apply a coloring rule, the entries that have the same value for the field are colored even if the value is hidden in the current column setup.

You can also set up the color of current and selected entries. These colors override the coloring rules.

The following sections contain additional information on coloring rules:

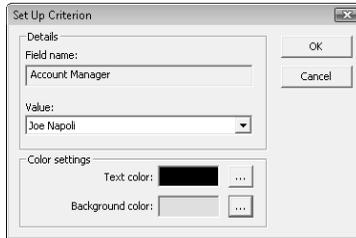
- “Creating Coloring Rules” on page 75
- “Applying Coloring Rules” on page 77

Creating Coloring Rules

You can create coloring rules from the Address Book, Opportunities, and Hotlist windows.

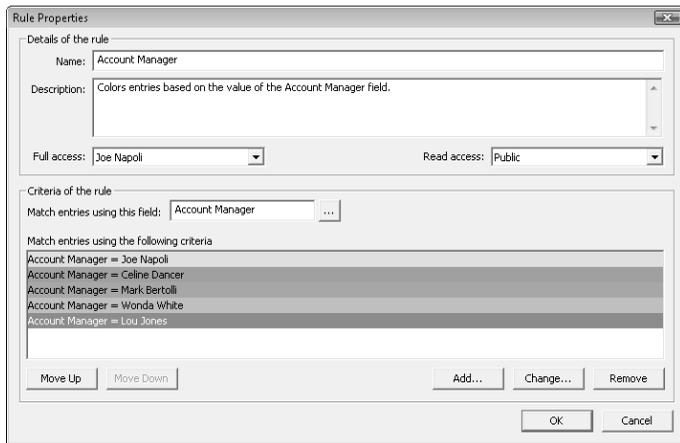
➤ To create a coloring rule

- 1** On the **Setup** tab, select **Coloring Rule** from the **Display** group.
- 2** Click **Add**.
The Rule Properties dialog box opens.
- 3** Enter a **name** for the coloring rule.
You can also enter a **description** and specify values in the **Full access** and **Read access** fields.
- 4** Next to **Match entries using this field**, click the ellipsis button.
- 5** From the **Basic Fields** or **User Defined Fields** list, select the field for the rule, and click **OK**.
- 6** Click **Add**.
The Set Up Criterion dialog box opens.
- 7** Select a **value** for the field, choose **text** and **background** colors, and click **OK**.



8 Repeat steps 6–7 for other values of the field.

9 Click **OK** to save the coloring rule.



Applying Coloring Rules

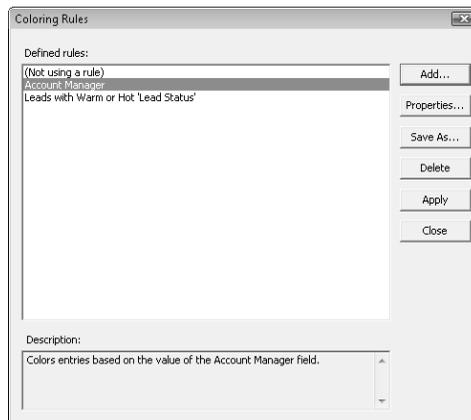
You can apply any existing coloring rule to the current list in the Address Book, Opportunities, or Hotlist window.

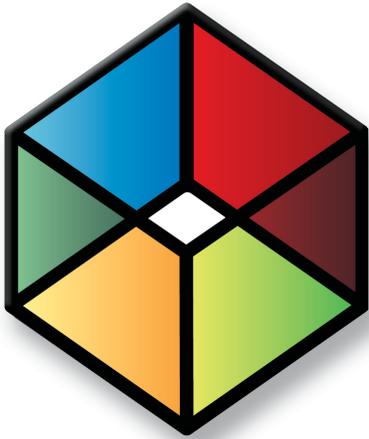
➤ To apply a coloring rule

- 1** On the **Setup** tab, select **Coloring Rule** from the **Display** group.

The Coloring Rules dialog box opens.

- 2** Select an existing coloring rule, and click **Apply**.





CHAPTER 5 **Notes and Documents**

Store Notes and Documents in your Address Book

In this chapter...

“Notes” on page 80

“Journal” on page 85

“Documents” on page 87

“Maximizer Word Processor” on page 89

“Merge Fields” on page 93

“Microsoft Word and Corel Word Perfect Integrations” on page 96

“Company Library” on page 99

Notes

Notes are used to record activities associated with Address Book entries and opportunities. Use notes to jot down “manual” notes—your ideas and impressions about a customer or an opportunity. You can enter manual notes for short company profiles or summaries of contracts and business agreements.

You can search for entries by notes. (On the Search tab, select Other Fields > Notes from the Search By group.) And you can view notes reports. (On the Reports tab, select Notes from the Associated Entries group.) Simply select the types of notes you want in your search or report.

The following sections contain additional information on working with notes in Maximizer:

- “Types of Notes” on page 80
- “Notes Window” on page 81
- “Adding Notes” on page 82
- “Default Notes” on page 83

Types of Notes

Maximizer automatically creates different types of notes, providing a history of all your activities. Maximizer creates the following types of notes:

 By default, notes are logged for all of the main activities you can perform in Maximizer. You can adjust logging in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

- **Accounting** – Created when you create or modify accounting transactions using Accounting Link.
- **Email** – Created when you send an email message to one or more Address Book entries.
- **History** – Created when opportunities are added or changed.
- **Incoming call** – Created when you receive a phone call.
- **Mail-outs** – Created when you print documents, labels, envelopes, or letters using the Maximizer Word Processor's merge feature.
- **Manual** – Added manually to entries.
- **Opportunity** – Created for Address Book entries when opportunities are added or changed. Opportunity notes can be printed or searched only from Address Book entries.
- **Outgoing call** – Created when you phone an Address Book entry.
- **Task** – Created when appointments or Hotlist tasks are scheduled, modified, deleted, or completed. For Hotlist task notes, the current owner of the Hotlist task is included in the

note, even when a task is reassigned. For appointment notes, details of the appointment are included when the appointment is scheduled. And when an attendee list is modified, an additional note is logged.

- **Timed** – Created when you use the Timer
- **Transfer log** – Created when you transfer entries between Address Books.

Notes Window

The Notes window is a following window, which means it displays notes only for the selected Address Book entry or opportunity.

Keep the following tips in mind when working in the Notes window:

- 1** Identify notes marked as important with the **Important** icon. By default, notes are sorted by the Important column, but you can sort by any column.
- 2** Use the **Filter** drop-down list to narrow the entries to a specific note type (for example, “Manual” or “Email”). Choosing **<Custom...>** enables you to search for notes that contain certain text, notes that were created by a particular user or accessible by a particular user or group, notes in a specific date range, and/or a combination of note types.
- 3** Use the up and down arrows to view the notes for the previous or next Address Book entry.
- 4** Use the **Show All** option to display all notes for the current Address Book entry. This includes notes belonging to the selected Company/Individual and all associated Contacts. If this checkbox is not enabled, only notes belonging to the Company/Individual or the selected Contact are displayed.
- 5** Double-click on an entry to view the entire note.

Date	Time	Type	Text	Creator	Full Access	Read Access
February 25, 2010	3:25 PM	History	Joe Napoli has subscribed Delta Astor Wines & Spirits	Joe Napoli	Public	Public
March 12, 2010	9:38 AM	Task	Hotlist Task Created: Confirm meeting with representative on	Joe Napoli	Public	Public
February 25, 2010	3:25 PM	History	Joe Napoli has subscribed Delta Hicoy - Astor Wines & Spirits	Joe Napoli	Public	Public
January 18, 2010	3:51 PM	Custom Service	Case HQ-00039 has been created: Training Request	Joe Napoli	Public	Public
January 18, 2010	3:51 PM	Custom Service	Case HQ-00032 has been deleted: Faulty Product	Joe Napoli	Public	Public
January 18, 2010	3:51 PM	Custom Service	Case HQ-00028 has been deleted: Faulty Product	Joe Napoli	Public	Public
January 18, 2010	3:51 PM	Custom Service	Case HQ-00017 has been deleted: Faulty Product	Joe Napoli	Public	Public
January 15, 2010	2:03 PM	Task	Scheduled Generic Action Plan plan on January 15, 2010 to	Joe Napoli	Public	Public
January 15, 2010	11:48 AM	History	Territory Alignment has changed field 'Territory Status'	Lou Jones	Public	Public

Adding Notes

When you add or edit a note, you can add formatting and hyperlinks in the note. You can also view and edit the HTML source of the note.

➤ To add a note

1 Select the entry to which you want to add the note.
Notes for the entry are displayed in the Notes following window.

2 Drag the entry to the **Notes** following window.

– or –

On the **Home** tab, select **Note** from the **Write** group.

– or –

In Notes following window, right-click and select **Add Note**.

– or –

In the Notes following window, double-click a blank note cell.

The Add Note dialog box opens.

3 Enter the content of the note.

4 Use the options in the toolbar to format the note.

To view the HTML source of the note, select the **View Source/HTML** icon.

You can use the icons in the Menu bar to perform other tasks in the note. For example, you can click the Spelling icon to check the spelling in the note.

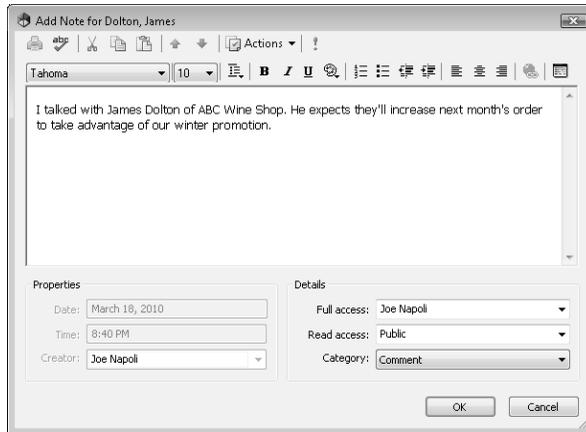
5 If necessary, select the **Important** icon to mark the note as important, and adjust the **Full access**, **Read access**, and **Category** fields in the note.

i You can also add a note by copying text from the Windows Clipboard. In the Notes window, right-click and select Paste Link.

i You can choose to always check spelling when saving changes in a dialog box in your preferences. (On the Setup tab, select Preferences.)

i The Category field is available for only manual notes.

6 Click **OK**.



Default Notes

You can create default notes for different types of entries. Default notes are specific to the current user. The content of the default note automatically appears when you create a new note. The Full Access, Read Access, and Category fields can also have default values.

You can add default notes in the Address Book, Opportunities, and Journal windows.

➤ To add a default note

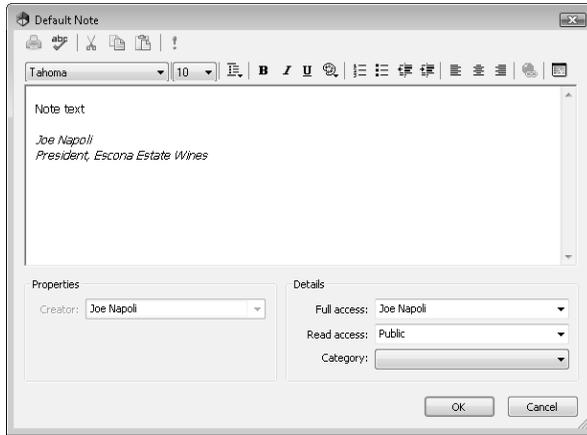
1 On the **Setup** tab, select **Default Note** from the **Default Entry** group.

The Default Note dialog box opens.

2 Enter the content of the note.

3 If necessary select a user or group for the **Full Access** and **Read Access** fields, as well as a note category.

4 Click **OK** to save the default note.



Journal

The journal provides you with a location to keep personal records. Journal entries can be business activities, reference notes, and personal ideas. These entries are similar to notes, except they are not attached to Address Book entries.

You can add journal entries up to 9,216 characters in length. By default, journal entries are stamped with today's date. You can change the date stamp if you want to add an entry for a past or future time period.

You can automatically log your Address Book activities as journal entries and search most Maximizer note types from the Journal window if you choose the Journal or Both options in your logging preferences.

The following sections contain additional information on journal entries.

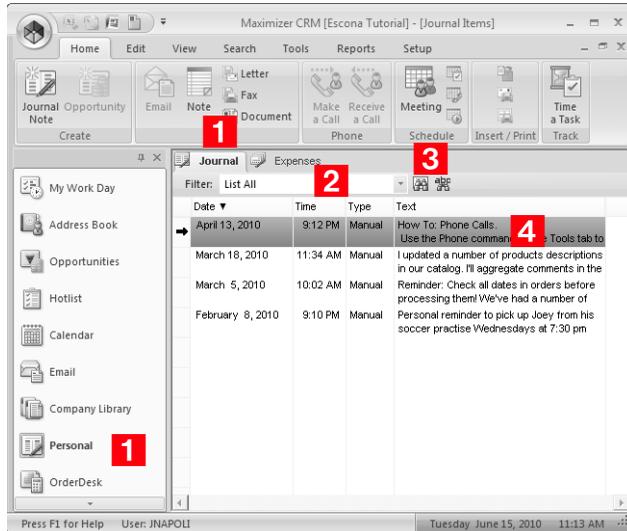
- "Journal Window" on page 85
- "Adding Journal Notes" on page 86

Journal Window

You can access the Journal window by selecting the Personal icon and clicking the Journal tab. You can also access the Expenses window from the Journal window. Keep the following points in mind while working in the Journal window:

- 1** Select the **Personal** icon, and select the **Journal** tab to open the Journal window.
- 2** Use the **Filter** drop down list and filter your journal entries displaying only entries in a specific date range—**List All, Today, Yesterday, This Week, or This Month.**
- 3** Select one of the search icons to search for a note by date or text.

4 Double-click on a journal note to open it and view its details.



Adding Journal Notes

You can add manual journal notes to the Journal window at any time. These notes are not attached to any entries and are accessible only to you.

► To add a Journal note

- 1** Select the **Personal** icon, and select the **Journal** tab to open the Journal window.
- 2** On the **Home** tab, select **Journal Note** from the **Create** group.
– or –
Right-click and select **Add Journal Note**.
- 3** Enter the text of the note, and click **OK**.

Documents

You can import into Maximizer files that are created in other applications. You can attach any files as documents to Address Book entries and opportunities. You can also save email messages to entries as documents directly from the Email window. The documents are stored with the entry to be accessed at any time.

The following sections contain additional information on working with documents in Maximizer:

- “Documents Window” on page 87
- “Viewing Documents” on page 87
- “Adding Documents” on page 88

Documents Window

You can view all of the documents attached to entries in the Documents following window.

Date	Time	Category	Type	Name
March 18, 2010	9:28 PM	Urgent	.pdf	Contract 2010
March 4, 2008	2:27 PM		Maximizer Letter of Introduction	

Viewing Documents

You can view documents attached to entries from Maximizer. The file opens in the default application for the file extension of the document.

➤ To view a document

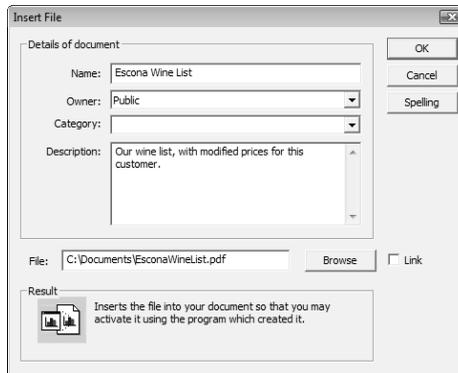
- 1 Select the entry to which the document is attached.
- 2 Select the **Documents** following window.
All documents attached to the entry are displayed.
- 3 Double-click on the document that you want to open.

Adding Documents

You can attach any type of files to your Address Book entries and opportunities as documents.

➤ To add a document to an entry

- 1 Select the entry to which you want to add the document.
- 2 Select the **Documents** following window.
- 3 On the **Home** tab, select **Insert File** from the **Insert/Print** group.
– or –
Right-click and select **Insert File**.
- 4 Specify properties for the document, such as **name**, **description**, and **owner**.
- 5 Click **Browse** and browse to the location of the file, and click **Open**.
- 6 Click **OK** to save the file with the entry.



Maximizer Word Processor

To create documents and templates, you can use the Maximizer Word Processor, which is always installed as part of Maximizer. You also have the option of using Microsoft Word or Corel WordPerfect as your word processor.

The Maximizer Word Processor is a separate application with a toolbar and menus that are similar to other commonly used word processors.

The word processor includes fax, invoice, letter, and memo templates. You can customize these templates or create your own custom templates.

➤ To open the Maximizer Word Processor

- Drag an Address Book entry to the **Documents** following window.
- On the **Home** tab, select **Letter**, **Fax**, or **Document** from the **Write** group.

The Maximizer Word Processor opens the template for the type of document selected.

- On the **Tools** tab, select **Maximizer Editor** from the **Other** group.
- Press F8.

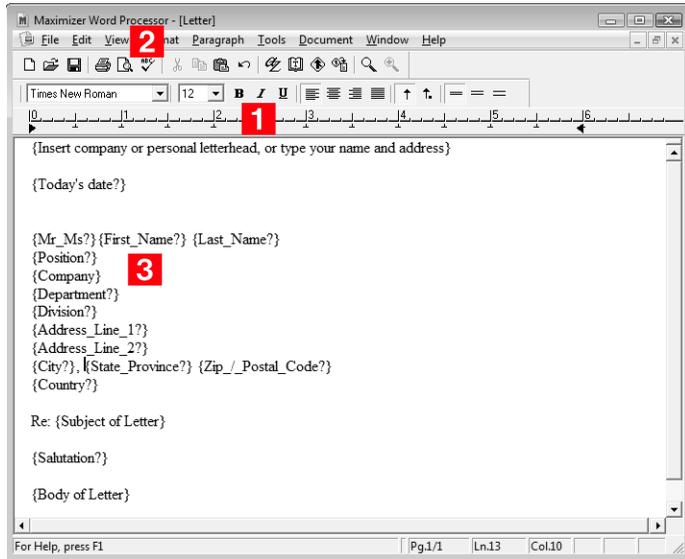
Maximizer Word Processor Window

When you open the Maximizer Word Processor, it opens a separate window where you can create and edit documents and templates. Keep the following points in mind when working in the Maximizer Word Processor window:

- 1** Use the toolbars for common tasks and formatting text and paragraphs.
- 2** To run a spell check, place your cursor at the top of the document, and click the **Spell Check** button on the toolbar.

i You can choose to always check spelling when saving changes in your preferences. (On the Setup tab, select Preferences.)

3 If your template has merge fields, the information for the selected Address Book entry—like the address—is inserted in place of the merge fields.



Documents and Templates

Understanding how templates and documents are used and how they communicate with each other is the key to working efficiently with this correspondence system.

Templates

A template is a standard design meant to be used repeatedly to create new documents. Templates are generally designed to be used with a company's stationery, including default page margins, standard fonts, and merge fields.

For example, a template might be used for the following:

- Create form letters for bulk mailings to clients and prospects.
- Provide a default structure for letters and faxes.
- Provide a consistent company image.

You can create a template in the Maximizer Word Processor by designing a document then selecting "Template" when you save your work. When you next create a new document, you can use your saved template as the basis for the document. You can also customize existing templates to suit your needs.

Documents

A Maximizer Word Processor document is always specific to an Address Book entry or opportunity. Typically, documents are created from one of the templates created with the word processor. A document can be a letter, a fax, a flyer, or anything you write with the word processor and send by mail, fax, or email.

Location of Templates and Documents

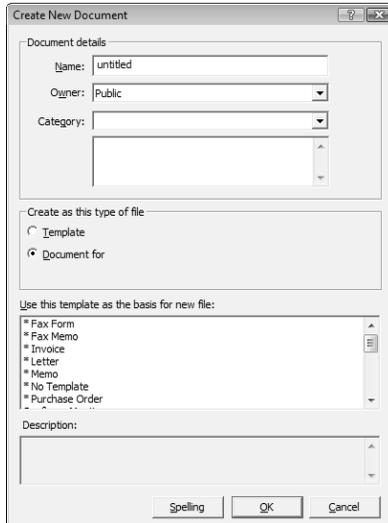
When you use the Maximizer Word Processor to save your templates and documents, they are automatically stored in the database, not the Address Book folder. Therefore, they can be viewed only through the Maximizer Word Processor and not Windows Explorer or another file management tool.

Creating Documents

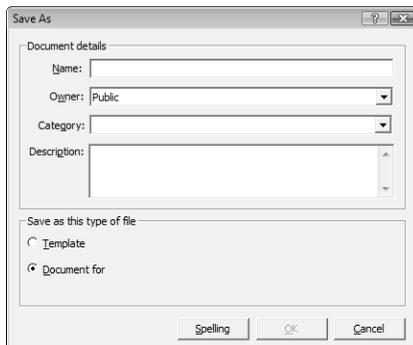
You can open the Maximizer Word Processor and create documents at any time while working with Maximizer. You can base the documents on existing templates, or you can start from a blank document. The document is attached to the currently selected Address Book entry.

➤ To create a document

- 1** In Maximizer, select the entry that the document is associated with.
- 2** On the **Home** tab, select **Document** from the **Write** group.
- 3** Select the template to base the document on and click **OK**.



- 4** In the Maximizer Word Processor, modify the document as required.
- 5** Select **File > Save**.
- 6** Specify the properties of the document and click **OK**.



Merge Fields

Merge fields are simply place-holders in your document that can be replaced by basic Address Book entry or user-defined field information when you perform a merge. For example, in the body of a letter, you can insert a merge field for a Contact's name:

{First_Name?}

i Ensure the start and end of the merge field reside on a single line. The start of a merge field is denoted by the left brace ({) character and the end of a merge field is denoted by the right brace (}) character.

When you perform the merge, the name of each recipient is displayed in place of the merge field. If the entry does not have an assigned value for the chosen merge field, the field does not display.

Merge fields are not restricted to Address Book entry information—you can insert merge fields for your own user information and opportunities as well.

You can insert merge fields in email templates, email messages, Maximizer Word Processor templates, and Microsoft Word documents.

The following sections contain additional information on working with merge fields in Maximizer:

- “Inserting Merge Fields in the Maximizer Word Processor” on page 93
- “Mail Merge” on page 94

Inserting Merge Fields in the Maximizer Word Processor

You can insert merge fields into documents and templates in the Maximizer Word Processor, letting you add information for specific entries to generic documents and templates.

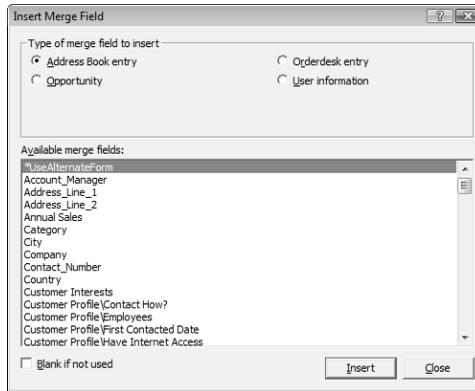
➤ To insert a merge field in the Maximizer Word Processor

- 1** In the Maximizer Word Processor, place your cursor where you want to insert a merge field.
- 2** Select **Tools > Merge Field**.
– or –
On the toolbar, click the **Merge Field** icon.
The Insert Merge Field dialog box opens.
- 3** Select the type of merge field you would like to insert.
- 4** Select a merge field from the list and click **Insert**.
- 5** Select the **Blank if Not Used** checkbox if you prefer.

During a mail-merge, this option leaves a blank space if there is no information available for a field. (By default, if there is no information in the field, the Maximizer Word Processor simply omits the field and leaves no space; it also adjusts the position of the other merge fields accordingly.)

6 Click **Insert**.

The selected merge field is inserted in the template.



Mail Merge

Use mail merge in the Maximizer Word Processor to send a letter, an email message, or a fax to many recipients. The merge feature allows you to send a single document to multiple Address Book entries by fax, email, or regular mail. This type of merge is called a “broadcast” merge.

Because the word processor has merge fields for your Address Book information, you can create a document with a merge field in place of a specific name. These merge fields are replaced with the recipient’s information when you perform the merge and send the document.

➤ **To send a mail merge**

1 In Maximizer, create a list of Address Book entries that should receive your merged document.

You can create a list by searching for the appropriate entries or simply selecting entries in your current list.

2 In the Maximizer Word Processor, select **File > Merge > to Printer, to Email, or to Microsoft Fax**.

i You can also send a mail merge from Microsoft Word or WordPerfect using the Maximizer toolbar embedded in the word processor to insert the merge fields.

3 Specify your merge options, and click OK to continue with the merge.

Depending on what window you have active, the available merge entries vary



4 Select **Print** or **Send** to merge the document with the first entry in the list of entries, or select **Send All** or **Print All** to merge the document with all of your selected entries.

Click **Skip** to go on to the next entry.

Microsoft Word and Corel Word Perfect Integrations

You can use Microsoft Word or Corel Word Perfect as your word processor while working with Maximizer. With the integration, you can launch your word processor directly from your Address Book with a toolbar button in the custom toolbar.

Word or Word Perfect integration installs a Maximizer toolbar in the word processor. The options in the Maximizer toolbar integrate Address Book entries in Maximizer with the word processor.

The following sections contain additional information on working with Word Integration:

- “Inserting Merge Fields in Microsoft Word” on page 96
- “Sending Microsoft Word Documents” on page 97
- “Unlinking Merge Fields in Microsoft Word” on page 98

Inserting Merge Fields in Microsoft Word

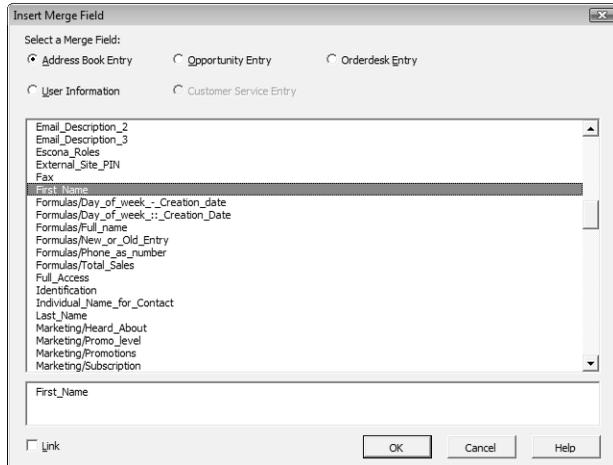
You can insert merge fields into documents in Microsoft Word, letting you add information in your Address Book to your document.

When you add merge fields to Word documents, you have the option of adding the merge field as a link. When the merge field is added as a link, the merge field syntax is added to the document. When you merge the document, the syntax is replaced with values for the current entry. If you add merge fields without linking them, the value of the merge field for the current entry is added to the document.

► To insert a merge field in a Word document

- 1** With a document open in Word, place your cursor where you want to insert the merge field.
- 2** From the **Maximizer** toolbar, select the **Insert Merge Field** icon.
The Insert Merge Field dialog box opens.
- 3** In the top of the dialog box, select the type of merge field to insert.
- 4** Select a merge field from the list.
- 5** To add the merge field as a link, select the **Link** checkbox.

6 Click **OK** to finish adding the merge field to the document.



Sending Microsoft Word Documents

When you use Microsoft Word with Maximizer, you can send a Word document to the printer, fax, or email, automatically merging the document with one or multiple entries in Maximizer. When you send the document, you can choose to merge the document with the current entry, with all selected entries, or with all entries in the current list in Maximizer. You can also log a note to all entries included in the merge.

i Word integration is available only in Microsoft Internet Explorer.

If you are sending the document to the printer or fax, the document is automatically sent to the printer or fax that is currently set up in Word.

If you are sending the document by mail, you can compose an email message to accompany the document.

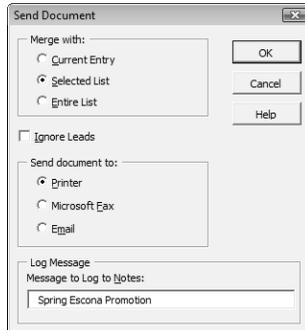
► To send a Word document to the printer

- 1** Open the document in Word.
- 2** Create a list or select the entry or multiple entries in Maximizer.
- 3** From the **Maximizer** toolbar in Word, select **Send Document**. The Send Document dialog box opens.
- 4** Under **Merge with**, select how you want to use the current list.
 - Select **Current Entry** to merge the document with only the current entry.

- Select **Selected List** to merge the document with all selected entries in the current list.
- Select **Entire List** to merge the document with all entries in the current list.

5 Under **Log Message**, enter a note to log with each of the selected entries.

6 Click **OK** to send the document to the current printer.



Unlinking Merge Fields in Microsoft Word

After inserting merge fields into Microsoft Word documents, the links between the Maximizer fields and the corresponding fields in the Word document are dynamic. The field values in the document change depending on the Address Book entry that is selected.

If you do not want the document's merged values to change when a different Address Book entry is selected, you can break the merge field links and save the document with the information from the current entry.

i Dynamic links are created in the Word document only if the Link checkbox is selected in the Insert Merge Field dialog box.

➤ To break links to merge fields in Word

1 On the **Maximizer** toolbar in Word, click the **Break Links and Save** icon.

2 Browse to the location to save the document, and click **Save**.

Company Library

You know the value of keeping an organized database of your marketing materials and other company collateral. Brochures, price lists, photos, magazine reviews—all of these materials should be easy to find when you need them. The Company Library provides shared access to a central library of these materials with the security offered by the Maximizer environment.

If you use another word processor—such as Microsoft Word or Corel WordPerfect—for your correspondence, you can even open a document from the Company Library, merge it with one or more Address Book entries, and print or send it as an email message.

Most file types are supported in the Company Library if you have the associated application installed on your computer. These include the following file types:

- .DOC and .RTF files – Microsoft Word
- .XLS files – Microsoft Excel
- .PPT files – Microsoft PowerPoint
- .HTM and .HTML
- .BMP files – bitmaps
- .TXT files – text and Company Library notes
- .JPG, .GIF, and .TIF files – graphic files
- .PDF files – Adobe Portable Document Format files
- .MXD files – Maximizer Documents
- .MSG files – Outlook Email Messages

The following sections contain additional information on working with the Company Library:

- “Company Library Window” on page 100
- “Organizing the Company Library” on page 101
- “Adding Documents and Notes to the Company Library” on page 102
- “Sending Documents by Email from the Company Library” on page 103

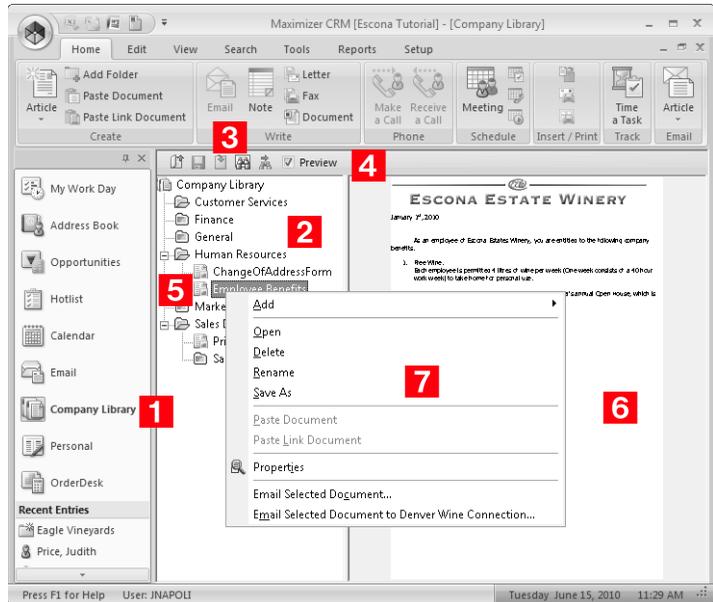
Company Library Window

The Company Library window is divided into two areas: the left side is a tree view, which displays the folders and files in your library; the right side is a preview area, in which you see a preview of certain file types or type text notes.

Keep the following points in mind when working in the Company Library window.

- 1** Select the **Company Library** icon to open the Company Library window.
- 2** In the area on the left side of the window, view your folders and files in a tree view.
To view the contents of a folder, click the plus sign on the left side of the folder.
- 3** Use the toolbar for common tasks.
- 4** Select the **Preview** checkbox to display a preview of notes and most file types in the right part of the window.
- 5** Double-click on a document or note to open it.
- 6** Write new notes and edit existing notes in the pane on the right-side of the window.

- 7** Use the shortcut menu to perform common tasks in the window such as adding, deleting, or renaming files.
- Save files on your computer or a network location by right-clicking on the file and choosing **Save As**.
 - Print documents and notes, by right-clicking and choosing **Print**.



Organizing the Company Library

The files in the Company Library are organized in a folder structure to help you keep track of your corporate documents and notes. Folders, documents, and notes are listed in alphabetical order in the Company Library. You can create new folders and move existing documents and notes to other folders to organize this structure.

You can drag documents and notes to other folders to move them. You can also drag folders to other folders to move the folder and all of its contents.

➤ To add a folder to the Company Library

- 1** In the Company Library window, click on the parent folder that you want to add the new folder to.

– or –

To add the folder at the root level, click the Company Library folder.

- 2 On the **Home** tab, select **Add Folder** from the **Create** group.
– or –
Right-click and select **Add > Folder**.
- 3 Enter the name for the new folder.

Adding Documents and Notes to the Company Library

The Company Library can store many different file types. Provided that your system administrator has given you access to the Company Library, you can add documents and notes as either private or public entries. If you add a document, you can browse for an existing file on your hard disk drive or network.

You can choose to either “link” or “embed” files in the Company Library. Embedding is usually a better choice, as a link is only a “shortcut” to the original file, which may get moved, renamed, or may not be accessible to all Maximizer users.

➤ To add a document to the Company Library

- 1 In the Company Library window, click on the folder to which you want to add the document.
- 2 On the **Home** tab, select **Article > Document** from the **Create** group.
– or –
Right-click, and select **Add > Document**.
The Insert File dialog box opens.
- 3 Click **Browse** to select a file.
- 4 Locate the file, and click **Open**.
- 5 Specify a **Name**, **Category** (optional), and **Owner** for the document.
- 6 Click **OK**.

➤ To add a note to the Company Library

- 1 In the Company Library window, click on the folder to which you want to add the note.
- 2 On the **Home** tab, select **Article > Note** from the **Create** group.
– or –
Right-click, and select **Add > Note**.
- 3 Enter a name for the note.

- 4 Click in the right pane of the window, and type the content of the note.
- 5 In the toolbar, click the **Save Note** icon.
- 6 To specify properties of the note, right-click and select **Properties**.
- 7 Specify a **Category** (optional), and **Owner** for the note.
- 8 Click **OK**.

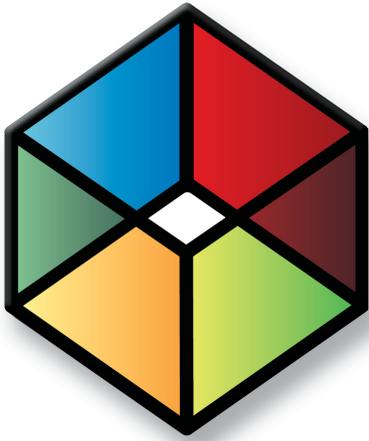
Sending Documents by Email from the Company Library

You can send documents by email directly from the Company Library window. The Company Library documents are attached to the email message. You can select one or multiple documents and notes to attach to the email message.

You can send the documents to the currently selected Address Book entry, or you can select Address Book entries while sending the documents.

► To send documents by email from the Company Library

- 1 If you want to send the documents to an Address Book entry, in the Address Book window, select the Address Book entry to send the documents to.
- 2 In the Company Library window, select any documents and notes you want to send.
You can hold down the Control key to select multiple documents and notes.
- 3 In the **Home** tab, select **Article** from the **Email** group, and select the name of the document.
Depending on your email preferences, the Send Email dialog box may open with options for logging the email message with Address Book entries.
If necessary, adjust the email options, and click **OK**.
- 4 Enter the details of your email message.
- 5 Click **Send**.



CHAPTER **Calendar and Hotlist** 6

Track Your Appointments and Tasks

In this chapter...

- "Hotlist Tasks" on page 106
- "Calendar Appointments" on page 110
- "Calendar and Hotlist Preferences" on page 116
- "Action Plans" on page 117
- "Viewing Activities for Entries" on page 121
- "Peg Board" on page 122
- "World Clock" on page 123

Hotlist Tasks

The Hotlist is a timeless “to-do” list of tasks and reminders. Tasks include calling and writing to customers. Use the Hotlist window to record actions and follow up on personal activities, such as producing expense reports, or those related to your interactions with Address Book entries. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

The following sections contain information on working with Hotlist tasks:

- “Hotlist Window” on page 106
- “Viewing Hotlist Tasks” on page 107
- “Adding Hotlist Tasks” on page 108
- “Reassigning Hotlist Tasks” on page 109

Hotlist Window

You can view all of your Hotlist tasks in the Hotlist window. Because the Hotlist is a controlling window, the following windows update with information on the Address Book entry associated with the task. Keep the following points in mind when working in the Hotlist window.

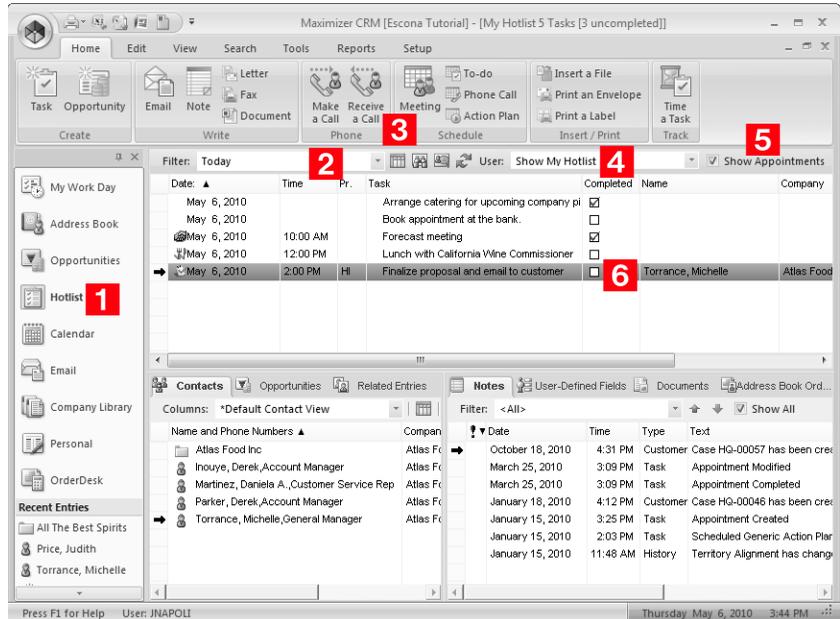
- 1** Select the **Hotlist** icon to open the Hotlist window.
- 2** Use the **Filter** drop-down list or click the **Build Hotlist** icon to select the date range you want to show.
- 3** Click the **Column Setup** icon to add or modify a column setup in the Hotlist window.
- 4** From the **User** drop-down list, select a Maximizer user to view another user's Hotlist.

You must have access to other users' Hotlist to view their Hotlist tasks. You can give other users access to your Hotlist in your Calendar/Hotlist preferences.

- 5** Select **Show Appointments** to view your appointments in the list with your tasks.

i On the View tab, select Carry Forward Unfinished Activities from the Filter group to view old tasks that are not yet complete in your current Hotlist.

6 Double-click on a task to view its details.

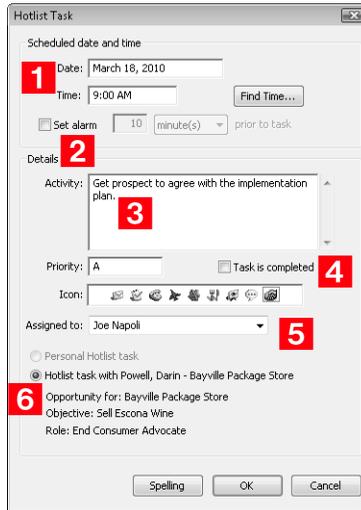


Viewing Hotlist Tasks

You can click on a Hotlist task in the Hotlist window to open the Hotlist Task dialog box where you can view and edit details of the task. Keep the following points in mind when working in the Hotlist Task dialog box.

- 1** Specify a **date** and, optionally, a **time** for the task.
- 2** Select **Set alarm** to remind yourself of the task before the scheduled time.
- 3** Enter the **activity** or select a predefined activity from the drop-down list.
- 4** Mark the task as completed when you are finished with the task.
- 5** From the **Assigned to** drop-down list, select a user to assign the Hotlist task to another user.

- 6 Select **Personal Hotlist task** if you want to make the task personal and remove the Address Book entry associated with the task.



Adding Hotlist Tasks

You can create Hotlist tasks for Address Book entries opportunities. You can also create personal Hotlist tasks. Personal Hotlist tasks are not associated with Companies, Individuals, or Contacts.

➤ To add a Hotlist task

- 1 Select or open the entry associated with the task.
– or –
To add a personal task, select the **Hotlist** icon to open the Hotlist window.
- 2 In an open entry, select **Actions > Schedule a To-do**.
– or –
On the **Home** tab, select **To-do** from the **Schedule** group.
– or –
Right-click and select **Schedule > To-do**.
– or –
In the Hotlist window, on the **Home** tab, select **Task** from the **Create** group.
The Add Hotlist Task dialog box opens.

- 3 Enter the Hotlist task details.
- 4 Click **OK** to save the Hotlist task.

Reassigning Hotlist Tasks

You can reassign Hotlist tasks to different Maximizer users directly in the Hotlist window. You can reassign one or multiple Hotlist tasks at the same time.

➤ To reassign Hotlist tasks

- 1 In the Hotlist window, select the tasks you want to reassign.
- 2 On the **Edit** tab, select **Reassign** from the **Manage Activity** group.
– or –
Right-click, and select **Reassign**.
The Reassign Hotlist Tasks dialog box opens.
- 3 Select a user and click **OK**.

Calendar Appointments

The Calendar lets you schedule meetings and appointments with other Maximizer users and Address Book entries. Calendar appointments can be associated with Address Book entries and opportunities, or they can be personal.

The following sections contain information on working with Calendar appointments:

- “Calendar Window” on page 110
- “Viewing Appointments” on page 112
- “Adding Appointments” on page 114

Calendar Window

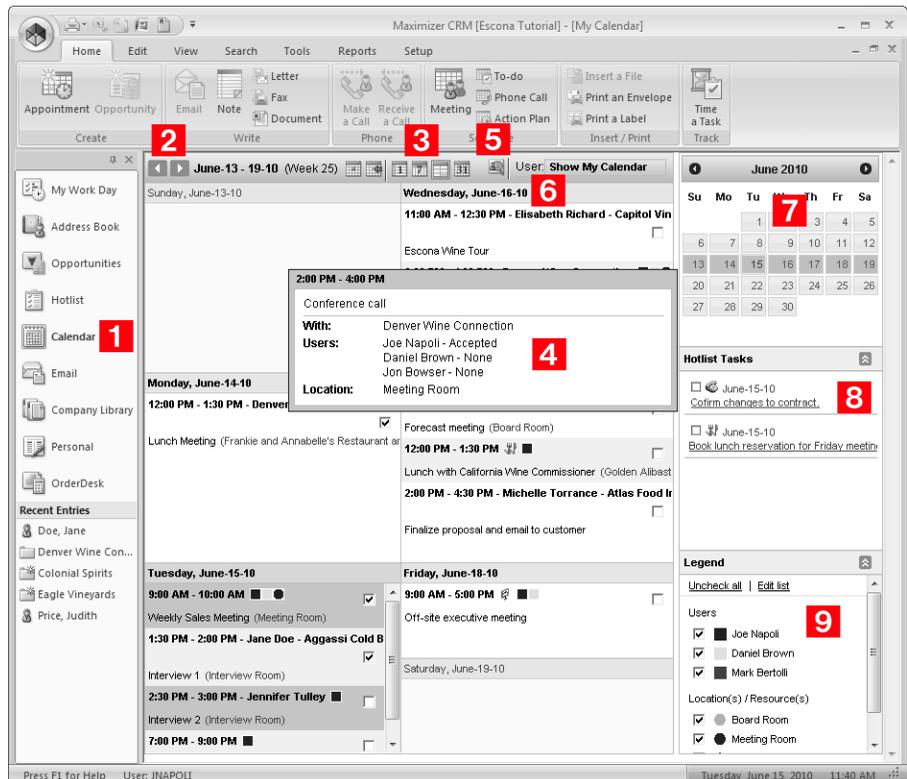
You can view, add, and modify your appointments in the Calendar window. Appointments and Hotlist tasks are displayed in a daily, weekly, weekly list, or monthly view. All views allow you to see your appointments at a glance.

To assist you with scheduling, color bars and icons indicate the attendees and booked resources and locations for the appointment. You can display the appointments for other users if they have given you access to their calendars. Calendar access is set in your Calendar/Hotlist preferences.

Here are some tips for working with the Calendar window.

- 1** Select the **Calendar** icon to open the Calendar window.
- 2** In the top-left corner of the window, select the **arrow** buttons to navigate from day to day, week to week, or month to month.
- 3** Select the **Daily, Weekly, Weekly List, or Monthly** icon to change the calendar view.
- 4** View details of appointments directly in the Calendar window.
 - In the monthly view, hold your mouse pointer over a day to display all the appointment details for that day in a pop-up window. Then, hold your mouse over a particular appointment to view the appointment details. Or, click on the appointment in the pop-up window to open it.
 - In the weekly, weekly list, and daily views, hold your mouse over an appointment to display the appointment details. Double-click on an appointment to open it.
 - In the weekly list view, view appointment details directly in the calendar, where details such as start/end time and location are listed in an easy-to-view format.

- 5** Select the **Open Address Book entry** icon to view the Address Book entry associated with the selected appointment.
- 6** From the **User** drop-down list, select a user to display another user's appointments. You can also select a location or resource to view the booked time for meeting locations and resources.
- 7** Select **dates** in the miniature calendar view to navigate to different dates in the calendar. Use the arrow buttons to move between months or years.
- 8** In the **Hotlist Tasks** section, view the day's Hotlist tasks. You can click on a Hotlist task to open it and view its details.
- 9** In the **Legend** section, select the checkbox beside other users and locations/resources to view the availability of users and locations/resources. You can use the **Check All** or **Uncheck All** icon to quickly select or clear all users and resources in the list. Use the **Edit List** icon to add users and resources to the calendar and to set icon colors for these users and resources.



Viewing Appointments

Appointments for a day, week, or month, are displayed in the Calendar window. You can hold your mouse pointer directly over an appointment to see more information. You can also click on an appointment to open it and view its details.

When you open an appointment, its details are displayed in the Modify Appointment dialog box. Here are some tips for working in the Modify Appointment dialog box.

1 Click **Options** to set lead times for alarms and to sign yourself out of the Peg Board.
Default settings for alarms are specified in your Calendar/Hotlist preferences.

2 Click **Recurring** to view details of recurring appointments.

3 Select **Completed** to mark the appointment as completed.

4 View information on the **entry** associated with the appointment in the information bar.

If the appointment is linked to an opportunity, the entry is displayed as a link in the appointment. You can click the link to retrieve the entry in the associated controlling window.

If the appointment is personal, you can link it with the current entry.

5 Specify the **date** and **time** of the appointment.

If the end time of the appointment is earlier than the start time, the appointment spans into the next day.

After clicking in one of the time fields, you can click the ellipsis button next to the field to view the availability of selected users, locations, and resources.

6 Select **Private** to keep the appointment details private.

When this option is selected, even users with access to your calendar cannot see the appointment details. The appointment appears in the calendar with the subject displayed as "Private appointment".

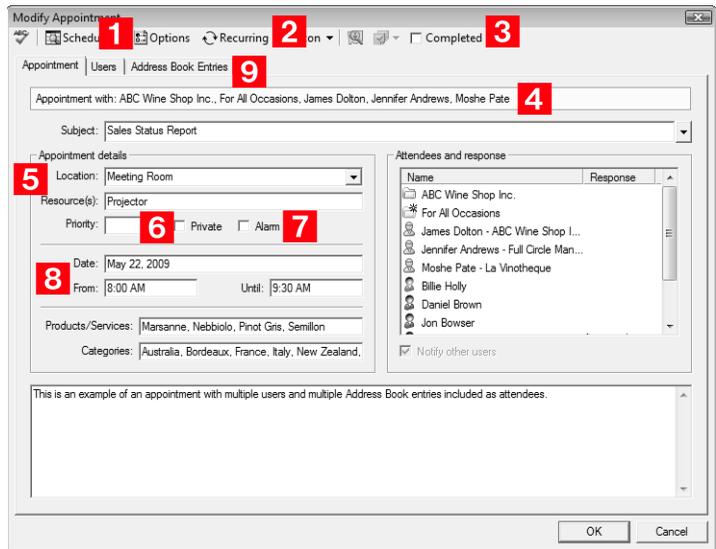
7 Select **Alarm** to set an alarm.

8 Select a **location** for the appointment and specify the needed **resources**.

These values are set in Administrator, but you can specify any value as a location.

9 Select the **Users** and **Address Book Entries** tabs to assign Maximizer users and Address Book entries to the appointment.

You can view the current users and Address Book entries assigned to the appointment in the **Attendees and response** list.



Adding Appointments

You can easily schedule an appointment with Address Book entries, other users, or yourself. The Add Appointment dialog box gathers all the information for the appointment—the date and time, the description, and who will be in attendance.

When scheduling appointments, you can set an alarm in advance of the appointment, mark yourself out of the Peg Board, set the priority, and send notifications to the selected users.

You can schedule appointments from the Address Book, Opportunities, or Calendar window. If you add an appointment from one of the main windows, the appointment is linked by default to the current entry. If you add an appointment from the Calendar window, it is by default created as a personal appointment.

➤ To add an appointment

1 In the Calendar window, select a day, and on the **Home** tab, select **Appointment** from the **Create** group.

– or –

In a main window, select an entry, and on the **Home** tab, select **Meeting** from the **Schedule** group.

– or –

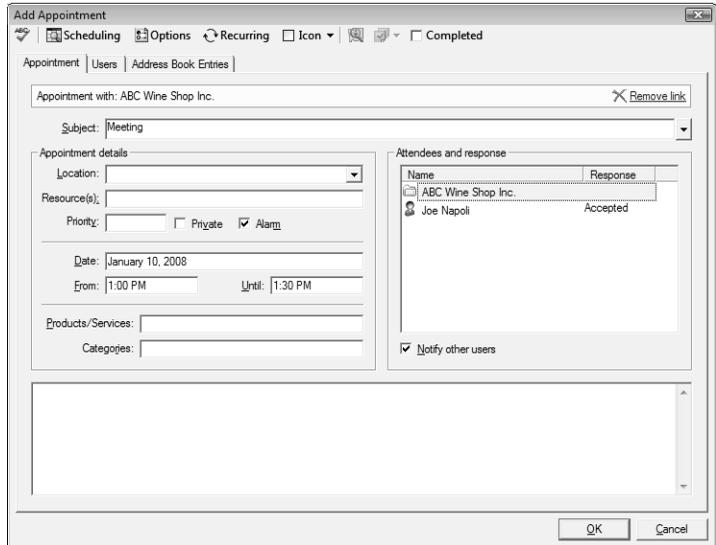
In a main window, open an entry, and select **Actions > Schedule a Meeting**.

– or –

In the Address Book window, select an entry, right-click, and select **Schedule > Meeting**.

The Add Appointment dialog box opens.

2 Specify the details of the appointment.



- 3** If necessary, select the **Users** and **Address Book Entries** tabs and add other Maximizer users or Address Book entries to the appointment.

In the Appointment tab, you can select **Notify other users** to notify other attendees of the appointment and prompt them to select a response when they next open Maximizer.

- 4** Click **OK** to save the appointment.

Depending on your Calendar/Hotlist preferences and the details of the appointment, you may be prompted to send an email message to the other users added to the appointment.

- 5** If necessary, customize the email notification, and click **Send**.

Calendar and Hotlist Preferences

Use the Calendar/Hotlist preferences to change your Hotlist task and calendar preferences. Most of the options on this tab apply to the calendar.

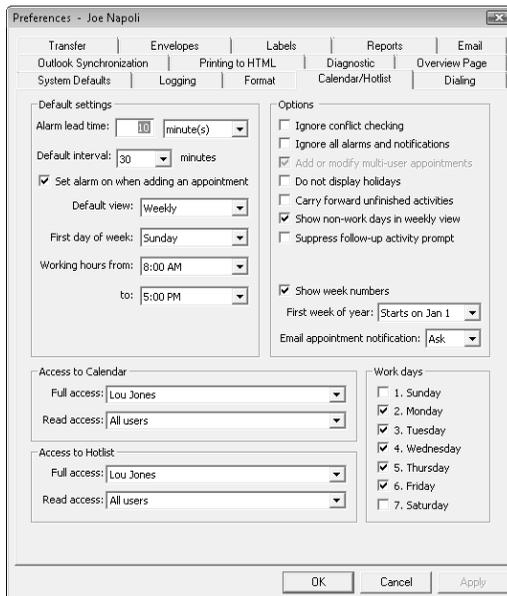
i Hotlist and calendar preferences can also be controlled in Administrator using the user preferences

You can control which users can view or modify your tasks and appointments using the Full Access and Read Access options. For example, if you want a user or group to be able to view your tasks and appointments, select the name from the Read Access drop-down list. The selected user or members of the group can then view your tasks and appointments by selecting your user name from their Hotlist window View bar. If you want them to be able to add or modify your existing tasks and appointments, use the Full Access option.

The Full Access option also controls your ability to reassign tasks and appointments to other users, as you can only assign tasks and appointments to other users if they have given you permission.

➤ To set calendar and Hotlist task preferences

- 1** On the **Setup** tab, select **Preferences**, and select the **Calendar/Hotlist** tab.
- 2** Set your calendar and Hotlist default options, and click **OK** when you are finished.



Action Plans

Action Plans are lists of pre-determined appointments and Hotlist tasks that can be scheduled all at once. Each appointment or task is scheduled to occur a specified number of days before or after the Action Plan start date. Action Plans can be scheduled as personal appointments and tasks for Maximizer users or scheduled for Address Book entries or opportunities.

The following topics contain information on working with Action Plans:

- “Creating Action Plan Templates” on page 117
- “Scheduling Action Plans” on page 119

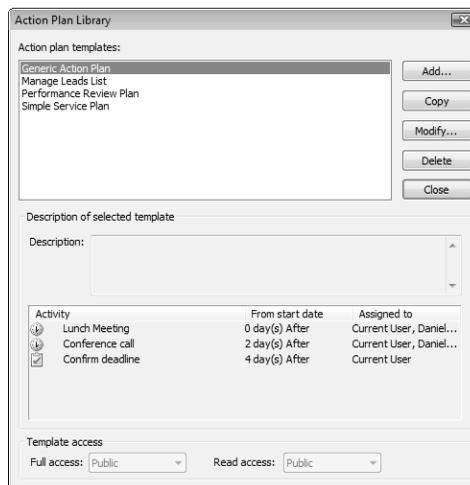
Creating Action Plan Templates

You can create Action Plan templates, which can later be scheduled to create appointments and Hotlist tasks for Maximizer users and for specific entries. You must have the corresponding permissions for the Action Plan Library as a user to create Action Plan templates.

► To create an Action Plan template

- 1** On the **Setup** tab, select **Template Library > Action Plan Library** from the **File Management** group.

The Action Plan Library dialog box opens.



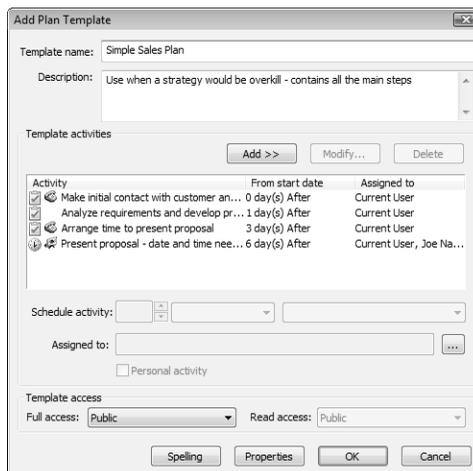
- 2** Click **Add**.

The Add Plan Template dialog box opens.

- 3** Enter the template **name** and **description**.
- 4** Click **Add** and select **Appointment** or **Task** to add an activity in the template.
- 5** Enter the appointment or Hotlist task details.
 - In the **Schedule activity** fields, specify when to schedule the activity in relation to the start date of the Action Plan.
 - In the **Assigned to** field or the **Users** tab, select a Maximizer user (or multiple users in appointments) to assign to the activity.

By default, the activity is assigned to the user who schedules the Action Plan.
 - Select the **Personal** or **Personal Hotlist task** option to mark the activity as personal, not associated with an Address Book entry.
- 6** Click **OK**.

The activity is listed as part of the template.
- 7** Repeat steps 4–6 for each activity in the template.
- 8** In the **Full Access** and **Read Access** fields, select a user or group to make this Action Plan template accessible to only a particular user or group.
- 9** Click **OK** to save the Action Plan template.



Scheduling Action Plans

You can schedule Action Plans for Address Book entries or opportunities, as well as personal Actions Plans not associated with any entries. You can select a single entry or multiple entries. You can choose any existing Action Plan template for the Action Plan.

➤ To schedule an Action Plan for entries

- 1** Select or open the entry or entries to associate with the Action Plan.
- 2** In an open entry, select **Actions > Schedule an Action Plan**.
– or –
On the **Home** tab, select **Action Plan** from the **Schedule** group.
– or –
Right-click and select **Schedule > Action Plan** or **Schedule an Action Plan**.
- 3** If necessary, select how you want to use the current list.
You can schedule the Action Plan with only the current entry, with all selected entries, or with all entries in the current list.
If no entries are selected, the Action Plan is automatically scheduled with the current entry.



- 4** From the **Plan template** drop-down list, select an existing Action Plan template.
Details of the selected template are displayed. Optionally, you can modify the plan name and description.
- 5** In the **Start plan on** field, specify the start date of the Action Plan.
You can click inside the field and then click the arrow button to choose a date from a pop-up calendar.
- 6** If necessary, click **Advanced** to toggle between the advanced and simplified view of the dialog box.
- 7** In the **Replace current user with** drop-down list, select the user to schedule the main Action Plan activities for.

All template activities assigned to the current user are scheduled for the selected user. Template activities assigned for specific users continue to be scheduled for the users specified in the template.

You can also assign specific appointments and tasks to other users by editing the details of the appointment or task.

8 If necessary, click **More** to modify or add activities to the Action Plan.

You can click **Save As** to save a modified Action Plan as a new template.

9 Click **OK** to finish scheduling the Action Plan for the selected entries.

Schedule Action Plan for All Selected Entries

Action Plan details

Plan template: Simple Service Plan

Description: Use on its own or with an existing Service workflow to follow up on resolved cases. The start date is the resolution date.

*Plan name: Simple Service Plan Save As...

Start plan on: March 19, 2010 Advanced <<

Replace current user with: Joe Napoli Skip non-work days

Description: Use on its own or with an existing Service workflow to follow up on resolved cases. The start date is the resolution date.

Action Plan activities

Activity	Start date	Assigned to
<input checked="" type="checkbox"/> Confirm that solution notes are com...	March 22, 2010	Joe Napoli
<input checked="" type="checkbox"/> Contact Channel Manager to plan P...	March 22, 2010	Joe Napoli
<input checked="" type="checkbox"/> Conduct lunch and learn for CS&S st...	March 24, 2010	Celine Dancer, Joe ...

*Denotes required field Spelling More >> OK Cancel

Viewing Activities for Entries

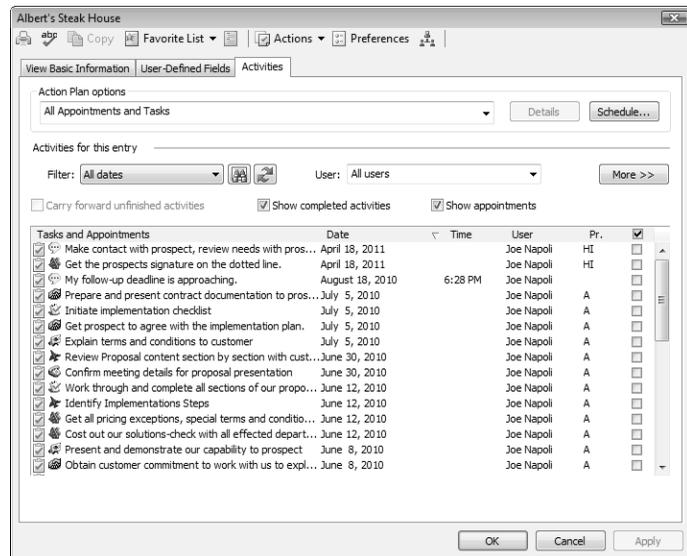
You can access all appointments and Hotlist tasks scheduled for specific entries directly in open entries. Appointments and tasks are displayed in the Activities tab for Address Book entries. You can also add and modify activities directly in entries.

► To view activities scheduled for an entry

- 1** Open the entry.
- 2** Select the **Activities** tab depending on the type of entry that is open.
- 3** Optionally, select **Show appointments** or **Show completed activities** to view more activities scheduled for the entry.

You can also filter the activities displayed for the entry. You can choose to view only Action Plan activities. And you can filter activities by date and user.

To add, modify, or delete activities for the entry, click **More**.



Peg Board

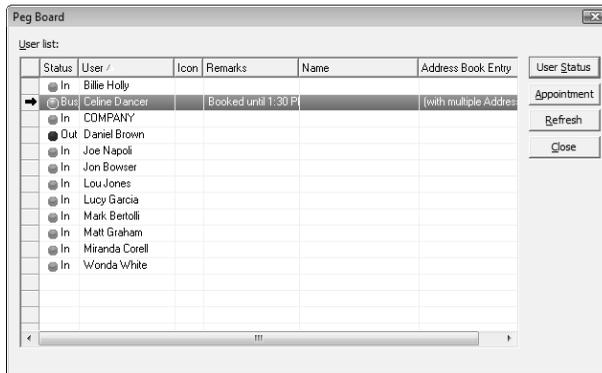
In a medium to large office, it's not always obvious when people are in, out, or busy with an appointment. The Peg Board works with Maximizer's calendar to show you each user's current status.

When users create appointment, they can automatically sign out of the Peg Board during the appointment. The Peg Board displays users that are currently available. You can also override the calendar status, and change your status directly in the Peg Board.

You can see other users' busy periods in the Peg Board if they have allowed you to view their calendars in the Calendar/Hotlist preferences. If you have permission to view users' calendar appointments, you can also click the Appointment button to view appointment details.

► To view the Peg Board

- On the **View** tab, select **Pegboard** from the **Availability** group.



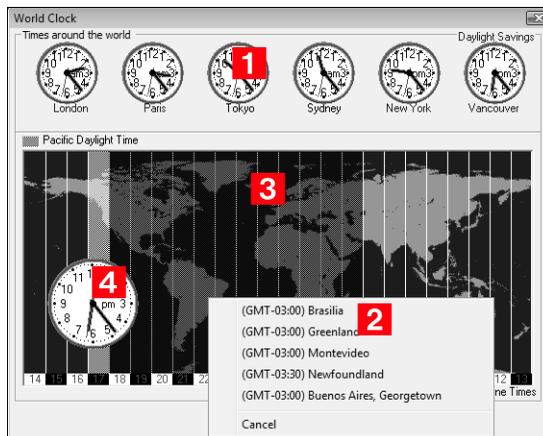
World Clock

The World Clock is a utility that allows you to view the time in various locations around the world. You determine which locations are displayed. It's great if you have international dealings of any kind—from the occasional phone call to regular contact with your international clients.

You can set the time for up to six remote locations around the world by adjusting the dials shown in the Clock frame in the World Clock window.

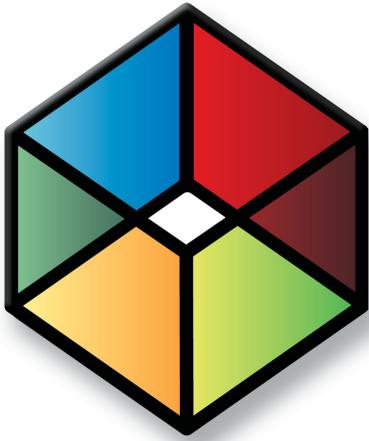
Keep the following points in mind when using the World Clock:

- 1** To select a time zone, right-click on one of clocks.
- 2** To view time zone information, click in the corresponding area of the world map.
- 3** To shade the area of the clock where it's night time, right-click and select **Show night**.
- 4** To change the time zone displayed in the large clock, click on any time zone in the world map and select the time zone.



➤ To view the World Clock

- On the **Tools** tab, select **World Clock** from the **Other** group.



CHAPTER
Email 7

Send Email to Address Book Entries

In this chapter...

“Email” on page 126

“Setting Up Email” on page 134

“Microsoft Outlook Integration” on page 136

“Microsoft Outlook Synchronization” on page 145

Email

You can use the Email window to send and receive email using your existing email system. You can also send email to Address Book entries directly from the other main windows.

Email preferences are set in Maximizer and in Administrator. To set email preferences, on the Setup tab, select Preferences, and select the Email tab.

The following sections contain additional information on using email in Maximizer:

- “Email Window” on page 126
- “Sending Email” on page 127
- “Sending Email to Address Book Entries” on page 128
- “Send Email Options” on page 130
- “Email Templates” on page 131
- “Creating Appointments and Tasks from Email” on page 132

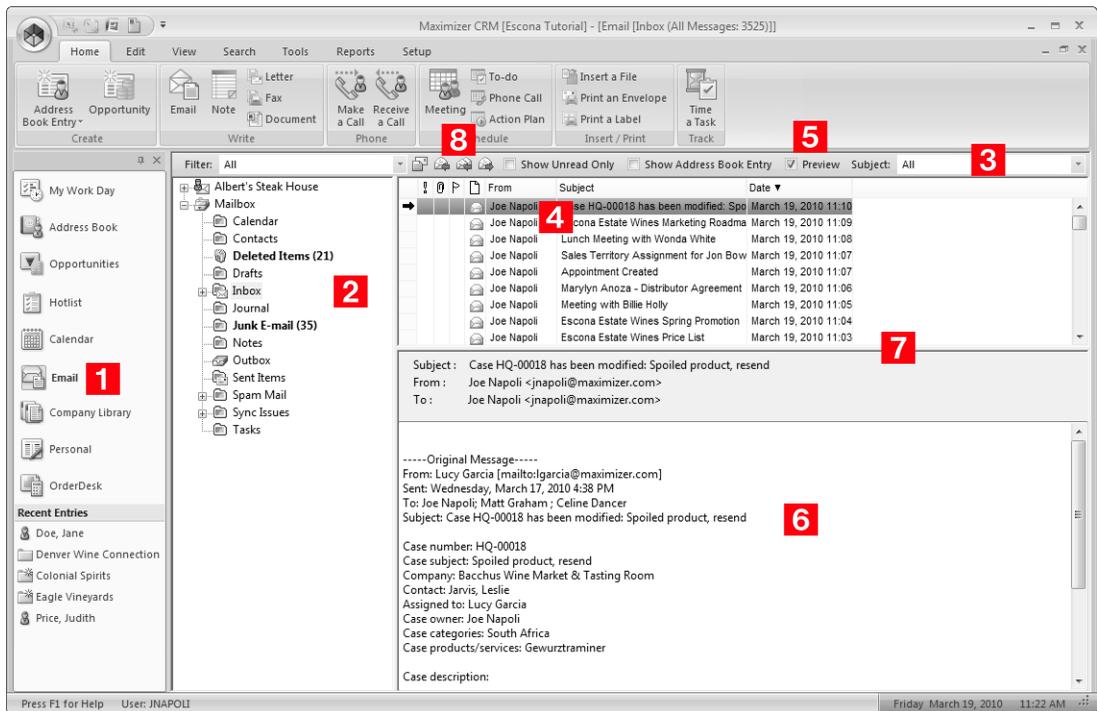
Email Window

Use the Email window to perform your email tasks. You can send email messages, reply to messages, move messages, and perform other common email tasks. You can also save messages to associated Address Book entries.

Keep the following points in mind when working with the Email window.

- 1** Select the **Email** icon to open the Email window.
- 2** Select email **folders** on the left side of the Email window.
- 3** To search for email messages by subject, select **Custom** from the **Subject** drop-down list, and enter the text to search for.
- 4** Select **email messages** in the top-right area of the window.
- 5** Toggle the preview pane on and off with the **Preview** checkbox in the top-right corner of the window.
- 6** View the currently selected email message in the **preview** pane.
- 7** Move the upper preview border up and down to adjust the size of the preview pane.

8 Use the icons to perform common tasks—such as **reply** and **forward**—on the selected email message.



Sending Email

You can compose email messages in HTML or plain text format depending on your email preferences. You can attach files to your message. If you are using the HTML format, you can also insert hyperlinks. To check the spelling in your message, click the Spell Checker button.

➤ To compose and send an email message

1 In the Email window, select the **Compose** icon.

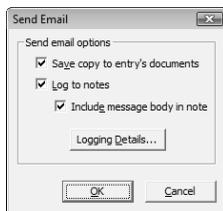
– or –

In the Email window, right-click, and select **Compose New Email**.

Depending on your email preferences, the Send Email dialog box may open with options for logging the email message with Address Book entries.

i To display the Send Email dialog box, select the "Always display the Send Email options before composing an email" option in your email preferences. (On the Setup tab, select Preferences, and select the Email tab.)

If necessary, adjust the email options, and click **OK**.



The Compose Email Message dialog box opens.

2 Enter email addresses in the **To**, **Cc**, or **Bcc** fields, separating email addresses with semicolons.

– or –

Click the **To**, **Cc**, or **Bcc** buttons and select the type of entry you want to add.

You can select a contact from your email service provider or from your Maximizer Address Book.

3 Enter a subject and your email text.

4 If the email recipient is associated with an Address Book entry, set the logging options.

5 Click **Send**.

Sending Email to Address Book Entries

You can send email to Address Book entries directly from the Address Book, Opportunities, and Hotlist windows. If you send the email message from the Address Book window, the message is sent to the selected Address Book entries. If you send the email message from another window, the email message is sent to the Address Book entries associated with the selected entries.

► To send an email message to Address Book entries

1 Choose the entry or multiple entries for the email message by doing one of the following:

- Select the entries.
- Open an entry.
- Create a list of entries.

2 On the **Home** tab, select **Email** from the **Write** group.

– or –

Right-click and select **Write > Email**.

Depending on your email preferences, the Send Email dialog box may open. For information on the options in the Send Email dialog box, see “Send Email Options” on page 130.

- 3** To add more email recipients, click the **To**, **Cc**, or **Bcc** buttons.

You can search the current Address Book or your global address list.

These options are available only if the One email option is selected in the Send Email dialog box.

- 4** Enter a **subject** and the text of the email message.

Use the toolbar icons and font drop-down lists in the **Format Text** group to format your message.

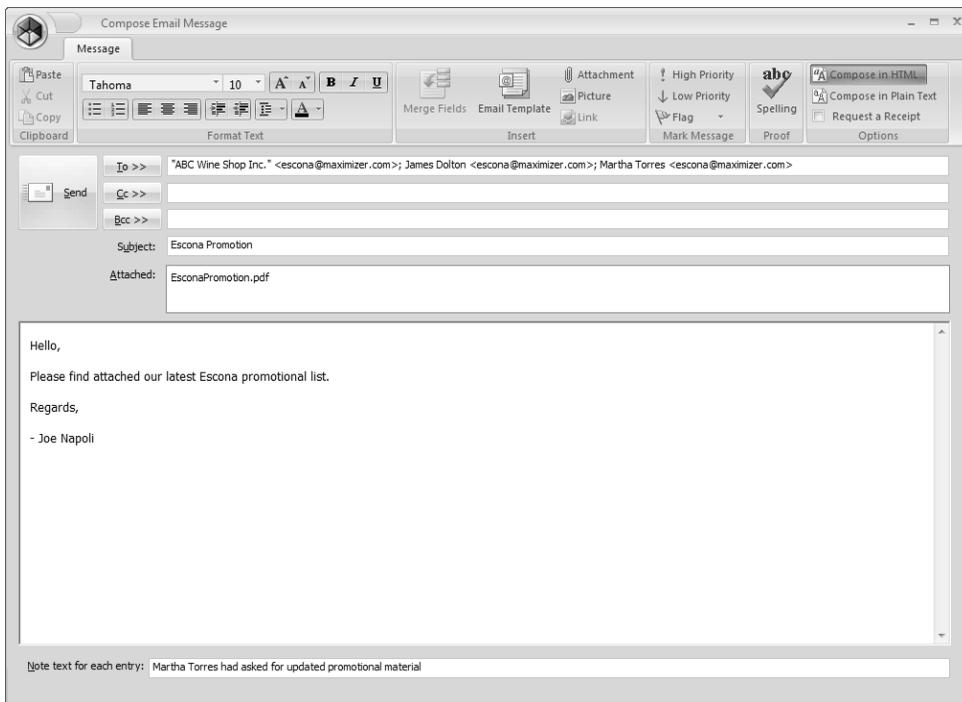
If you are sending email to Address Book entries separately, you have the option of inserting merge fields into the message text.

To add a merge field, select **Merge Fields** from the **Insert** group, select the field and click **Insert**. When the message is sent, the field value corresponding to the Address Book entry is merged into the message.

- 5** Select **Attachment** from the **Insert** group to select file attachments to send with the email message.

- 6** In the **Note for Address Book entry** field, enter any additional text you would like to log as part of the note created by the email message.

7 Click **Send**.



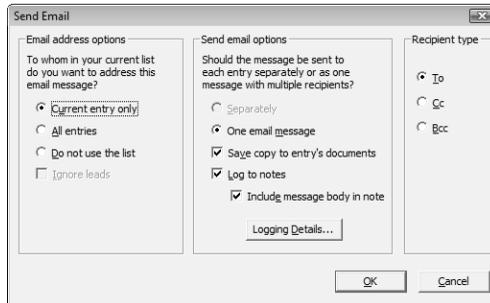
Send Email Options

In the Send Email dialog box, you can specify how the email will be sent and set logging options. Here are some points to keep in mind:

- Select **Separately** to send a separate email message to each Address Book entry.
If you want to send the email message to more than 1,000 entries at a time, you must either select the **Separately** option or select the entries in groups of 999 or less.
- Select **One email** to send one email message to all the selected entries at once.
- Select the **Save copy to entry's documents** option to save the message as a document for the entry.
- Select the **Log to notes** and **Include message body** options to save the message to the note created.

These options are unavailable if logging is disabled for email in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

- Click the **Logging Details** button and then the **Assign More** button to log the email details to additional Address Book entries.



Email Templates

You can create email templates that you can reuse to send to many Address Book entries at different times. An email template can include merge fields that are populated with information from the selected Address Book entries, or from the Address Book entries associated with the selected opportunities, when email messages are sent using the template.

You can create email templates from the Compose Email Message dialog box whenever you compose a new email message. If you want to add merge fields to the email template, you must first select Address Book entries or opportunities, and select to send the email message separately to the selected entries.

➤ To create an email template

1 From the Address Book or Opportunities window, select the entries to send the email to.

2 On the **Home** tab, select **Email** from the **Write** group.

Depending on your email preferences, the Send Email dialog box may open. For information on the options in the Send Email dialog box, see “Send Email Options” on page 130.

If you want to add merge fields to your email template, you must select the **All selected entries** and **Separately** options in the Send Email dialog box.

3 Compose the text of the email message.

You can compose the email message in HTML or in plain text. You can use the formatting toolbar to apply additional formatting to the email text.

- 4** Select **Merge Fields** from the **Insert** group to insert merge fields in your template.
- 5** Select **Email Template** from the **Insert** group.
The HTML Email Templates or Text Email Templates dialog box opens.
- 6** Click **Add** to add a new email template.
- 7** Enter a name, description, and owner for the template and click **OK**.
To reuse this template in the future, select the template in the Available email templates list, and click **Retrieve**.
To save changes made to the template, select the template in the Available email templates list, and click **Save**.
To retrieve this template automatically each time you compose an email message, select **Retrieve this template when the Compose Email Message dialog is opened**.
- 8** Click **Close** to return to the email message.

Creating Appointments and Tasks from Email

You can create appointments and tasks directly from the Email window. You can create the appointment or task for the Address Book entry associated with the email message or for the currently selected Address Book entry or opportunity. You can also create a personal appointment or task that is not associated with an entry.

The subject of the email message becomes the subject of the appointment or the activity of the task. The body of the email message becomes the body note of the appointment.

➤ **To create an appointment or task from an email message**

- 1** In the Email window, select the email message you want to create an appointment or a task for.
- 2** On the **Home** tab, select **Meeting > Appointment for <entry>** or **To-do > Task for <entry>** from the **Schedule** group.
– or –
Right-click and select **Create a New > Appointment/Task for <entry>**.

Depending on the email message, you can select either the Address Book entry associated with the message or the currently selected Address Book entry or opportunity.

- 3** Enter the appointment/task details and click **OK**.
- 4** To save the email message as a document with the entry, specify the properties of the document and click **OK**.

➤ **To create a personal appointment or task from an email message**

- 1** In the Email window, select the email message you want to create an appointment or a task for.
- 2** On the Home tab, select **Meeting > Personal Appointment** or **To-do > Personal Task**.
– or –
Right-click and select **Create a New > Personal Appointment/Task**.
- 3** Enter the appointment or task details and click **OK**.

Setting Up Email

The Email window in Maximizer provides you with the ability to send and receive email within Maximizer. The Email window works with your existing email system so that you can take advantage of some of the benefits of sending and receiving email. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily.

Maximizer's Email window works much the same as any email application, but has additional functionality that enables you to easily integrate your Address Book entries with your email.

The following sections contain information on setting up Maximizer for email:

- "Supported Email Clients" on page 134
- "Setting Up Novell GroupWise and Lotus cc:Mail/Mail" on page 135
- "Setting Up Microsoft Outlook" on page 135

Supported Email Clients

To use these features, you must already have a Messaging Application Programming Interface (MAPI) or Vendor Independent Messaging (VIM) email client. Email clients that should work with Maximizer when properly configured include the following:

- Lotus cc:Mail
- Lotus Mail
- Lotus Notes
- Microsoft Outlook
- Novell GroupWise

For the latest version information of compatible email programs, see the Maximizer website at www.maximizer.com.

Setting Up Novell GroupWise and Lotus cc:Mail/Mail

If you are using Novell GroupWise, Lotus cc:Mail (MAPI), or Lotus Mail (MAPI), select the corresponding option in the advanced email preferences in Maximizer. (On the Setup tab, select Preferences, and select the Email tab. Then, click Advanced.) If you do not select the correct option, a program fault error will occur when you use the Email window. For Lotus cc:Mail and Lotus Mail, you also must have the "Override Extended MAPI" option selected in your email preferences.

Setting Up Microsoft Outlook

i Outlook 2007, Outlook 2003, and Outlook 2002 are Extended MAPI programs. This means the Maximizer Email window will show the same folders as Outlook.

Maximizer cannot use Extended MAPI with the Internet Mail Only installation type. Ensure the installation type is Corporate or Workgroup.

When you open the Email window, folders such as Inbox, Outbox, Sent Items, Deleted Items, and your personal folders are displayed.

For more information on configuring Maximizer for Outlook Synchronization, refer to the *Maximizer CRM Administrator's Guide* and to Maximizer Help.

➤ To set up Maximizer for Outlook

- 1** On the **Setup** tab, select **Preferences**.
- 2** Select the **Email** tab.
- 3** Find the **Override Extended MAPI** option and verify this setting is disabled (the checkbox should be cleared).
- 4** Click **OK**.
- 5** Exit Maximizer.
- 6** Restart Maximizer.

Microsoft Outlook Integration

i Outlook integration works with Outlook XP, 2003, or higher.

i In Outlook, select View > Toolbars to view and modify the toolbars that are currently enabled.

i Outlook integration is not the same as Outlook synchronization, which synchronizes information in Outlook and Maximizer.

Microsoft Outlook integration for Maximizer installs toolbars in the Mail, Contacts, and Contact information windows in Outlook.

To access Maximizer commands, the Maximizer Add-In toolbar must be enabled. From the toolbar, you can complete the following tasks in Maximizer:

- Create Address Book entries.
- Save email messages to Address Book entries.
- View Address Book entries.

Before you can use Outlook integration, you must specify which Address Book to save the contacts and email messages to.

The following sections contain additional information on using Outlook integration for Maximizer:

- “Setting Up Microsoft Outlook Integration” on page 136
- “Selecting a Microsoft Outlook Address List for Integration” on page 138
- “Adding Address Book Entries from Microsoft Outlook” on page 139
- “Sending Email to Address Book Entries from Microsoft Outlook” on page 141
- “Saving Email from Microsoft Outlook” on page 142
- “Viewing Address Book Entries from Microsoft Outlook” on page 144

Setting Up Microsoft Outlook Integration

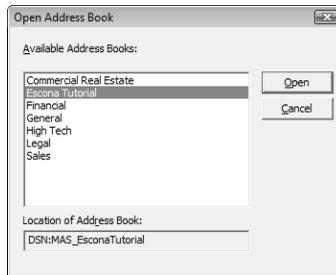
You must configure the Outlook integration to communicate with your Address Book. You must specify the Address Book and the Maximizer user ID that logs in to the Address Book. You can also set some default preferences for creating new Address Book entries.

Each Windows user can integrate Outlook with only one Maximizer Address Book on a single machine. If you use Maximizer on more than one machine, you must specify the Address Book for integration on each machine. If you want, you can specify a different Address Book for integration on each machine.

If multiple users log in to the same machine using different Windows login accounts, each user must specify the Address Book for integration in Maximizer on that machine.

➤ **To set up Outlook integration**

- 1** In Maximizer, on the **Home** tab, select **Preferences**. Then, click **Other Options** on the **System Defaults** tab.
- 2** Click **Address Book**.
- 3** Select the Address Book to integrate with Outlook, and click **Open**.



- 4** Enter your **User ID** and **Password**.

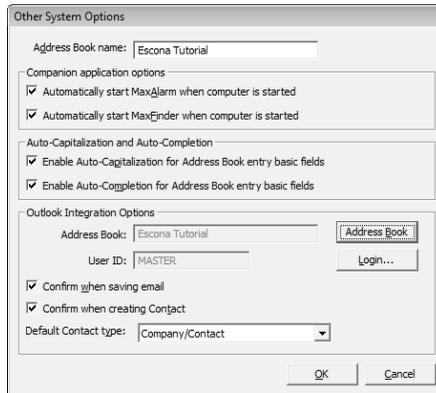
If your Maximizer password changes, or if you ever need to change the User ID you use for Outlook integration with Maximizer, open the Other System Options dialog box, click the Login button, and change your login credentials.

- 5** Click **OK**.

- 6** Select the options for creating Address Book entries and saving email messages:
 - Select the **Confirm when saving email** and the **Confirm when creating Contact** options to specify details before saving email or contact information to Maximizer.
 - In the **Default Contact type** drop-down list, select the type of Address Book entry that is created when you add contacts from Outlook.

If the “Confirm when creating Contact” option is selected, you can select a different type of Address Book entry while creating the entry.

- 7 Click **OK** to close the Other System Options dialog box, and click **OK** again to close the Preferences dialog box.



Selecting a Microsoft Outlook Address List for Integration

Outlook integration with Maximizer only works with address lists in the Outlook Address Book (such as Contacts), and only with one address list at a time. It does not work with the global address list or other address lists.

If Outlook is set to use the global address list or another address list, which might be the case if your organization uses Microsoft Exchange, you will see an error message when you try to save an Outlook contact to Maximizer. If you see such an error message, use the procedure below to select an Outlook address list.

► To select an Outlook Address Book list

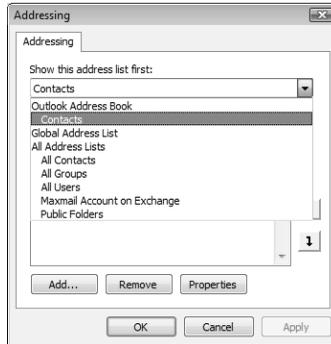
- 1 In Outlook, select **Tools > Address Book**.

The Address Book dialog box opens.

- 2 Select **Tools > Options**.

- 3 Open the **Show this address list first** drop-down list, and select one of the items under Outlook Address Book.

Typically, there is only one item in this list, called Contacts. In that case, select Contacts.



- 4** Click **OK**, and then close the dialog box in Outlook.

Adding Address Book Entries from Microsoft Outlook

You can create Address Book entries in Maximizer directly from Microsoft Outlook. You can create Address Book entries from Outlook contacts or from email messages in Outlook. If you create the entry from an email message, the entry is created from the email sender (From address).

You can access the command from the Save Contact to Maximizer button in a contacts window or from the Save Sender As Contact to Maximize button from a mail window in Outlook.

If you cleared the “Confirm when creating Contact” option when setting up Outlook integration, Maximizer automatically creates entries as follows:

- If Individual is selected as the default contact type, Maximizer creates an Individual Address Book entry.
- If Company/Contact is selected as the default contact type, Maximizer creates a Company/Contact Address Book entry. If the Outlook contact information does not include a company name, you are prompted to provide one when saving the Contact to Maximizer.

➤ To add an Address Book entry from Outlook

- 1** In Outlook, select the contact or the email message.
- 2** Select the **Save Contact to Maximizer** or the **Save Sender As Contact to Maximizer** icon.

If the “Confirm when creating Contact” option is disabled, the Company or Individual Address Book entry is created automatically in Maximizer.

If the "Confirm when creating Contact" option is selected, the Save Contact to Maximizer dialog box opens.

The dialog box is titled "Save Contact to Maximizer". It has three radio buttons at the top: "Company/Contact" (selected), "Contact for an existing Company/Individual" (with a "Search..." button), and "Individual".

Name and Address section:

- Mr/Ms: []
- First name: []
- Middle name: []
- *Last name: [Argonaut Wine & Lic]
- *Company: []
- Dept.: []
- Division: []
- Address 1: [718 E Colfax Ave]
- Address 2: []
- City/Town: [Denver]
- St/Prov: [CO]
- Zip/Postal: [80203]
- Country: [USA]

Other information section:

- Phone numbers:
 - Main: [(604) 601-8000]
 - Fax: [(604) 601-8001]
 - Cell: []
- Email addresses / Website:
 - Email: [escona@maximizer.com]
 - Email 2: []
 - Email 3: []
 - Website: [www.maximizer.com]

Buttons: "OK" and "Cancel". A note at the bottom says "* Denotes required field".

i To enable or disable the "Confirm when creating Contact" option, click Other Options in the system defaults preferences. (On the Setup tab, select Preferences.)

3 If necessary, change the Address Book entry type.

4 If you are creating a Contact for an existing Company/Individual, click **Search** to find and select the Address Book entry for which you want to create a Contact.

The dialog box is titled "Maximizer Addresses". It has a "Search for Entry" section with:

- Radio buttons: "Last Name:" (selected), "Company:", "Ignore leads" (checkbox).
- Text input: "Beck" next to "Last Name:".
- Button: "Search".

Below is a table titled "Entries available for assignment from search results":

Name	Email
Emma Beck	escona@maximizer.com

Buttons: "OK" and "Cancel". A "View" button is next to the table.

5 Edit the information in the available fields as required.

6 Click **OK** to save the entry.

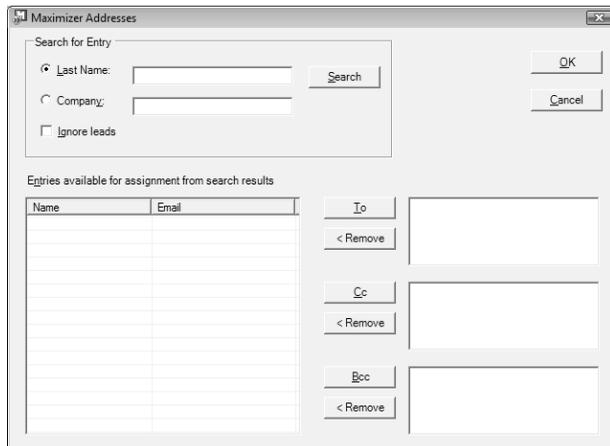
Sending Email to Address Book Entries from Microsoft Outlook

You can use Microsoft Outlook to send email messages to Maximizer Address Book entries, even if the Address Book entries do not have related contact records in Outlook.

This method may not be available if you are using Word as your email editor. To determine if Word is your email editor, select Tools > Options from the menu in Outlook, and click the Mail Format tab. If the “Use Microsoft Office Word to edit e-mail messages” checkbox is selected, the Maximizer Addresses button may not be available in the new email message dialog box.

► To send an email message to Address Book entries from Outlook

- 1** In Outlook, open a new email message.
- 2** Click the **Maximizer Addresses** button.
The Maximizer Addresses dialog box opens.



- 3** Select **Last Name** or **Company** and enter the full or partial last name or company name to search for.
- 4** Click Search.
The names and primary email addresses of the matching Address Book entries appear in the “Entries available for assignment from search results” list.
- 5** Select the Address Book entry from the list, and click the To, Cc, or Bcc button.

You can select multiple entries by holding down the Ctrl key or Shift key.

6 Click **OK**.

Saving Email from Microsoft Outlook

You can save email messages in Microsoft Outlook directly to Address Book entries in Maximizer. Email messages are saved in the documents tab of the Address Book entries. You can save and send a new email message to an Address Book entry, or you can save an existing email message to an Address Book entry.

If there are no Address Book entries associated with the email message, you either create an entry yourself or let Maximizer create it for you, depending on your preference settings. The email message is then saved to this entry's documents. If the email address does not have a record in Outlook contacts, Maximizer creates a corresponding Outlook contact.

If you are using Outlook Synchronization for Address Book entries, Outlook integration also adds the newly created Address Book entries to the synchronized Favorite List in Maximizer and category in Outlook, so they will get synchronized in the future.

► **To save an email message to an Address Book entry from Outlook**

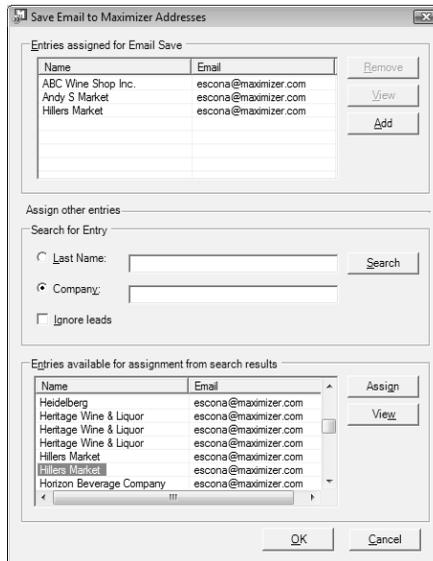
1 In Outlook, select the email message, and select the **Save Email to Contact in Maximizer** icon.

– or –

In Outlook, compose a new email message, and select the **Send email and save to Contact in Maximizer** icon.

If the “Confirm when saving email” option is disabled, the email message is saved as a document to the Address Book entry that contains the email address of the sender or recipient.

If the “Confirm when saving email” option is selected, the Save Email to Maximizer Address Book Entry dialog box opens. The Entries assigned for save list displays Address Book entries that contain the email address of the sender or recipient. If no such entries exist, this list is empty.



i To enable or disable the “Confirm when saving email” option, click **Other Options** in the system defaults preferences. (On the **Setup** tab, select **Preferences**.)

- 2** If necessary, click **Add** to create an Address Book entry to save the email message to. Then, enter and edit information as required and click **OK**.
- 3** To remove an entry from the Entries assigned for Email Save list, select the entry and click **Remove**.
- 4** If necessary, select other Address Book entries to save the email message to:
 - Search for the entries by **Company** or **Last Name** and click **Search**.
 - Select the entries from the **Entries available for assignment from search results** list and click **Assign**.
- 5** Click **OK**.

Viewing Address Book Entries from Microsoft Outlook

You can automatically open Maximizer to view Address Book entries from Microsoft Outlook. You can view Address Book entries associated with Outlook contacts or with email messages.

Which Maximizer Address Book entry is associated with the Outlook contact depends on how the association was created:

- If you are using Outlook Synchronization, and the Outlook contact is synchronized with Maximizer, the View Contact in Maximizer button takes you to the synchronized Address Book entry.
- If the Maximizer Address Book entry was created from Outlook using the Save Sender as Contact in Maximizer button, the View Contact in Maximizer button takes you to the Maximizer Address Book entry that was created previously.
- Otherwise, Outlook Integration uses email addresses to associate Outlook contacts with Maximizer Address Book entries, so if more than one Maximizer Address Book entry has the same email address as the selected contact, all matching Address Book entries are highlighted in Maximizer. It matches based on Email 1, 2, or 3 in the Maximizer Address Book entry.

When you view Address Book entries from Outlook, Maximizer opens displaying the Address Book window. The window lists all matching entries.

➤ **To view an Address Book entry from Outlook**

- 1** In a mail or contacts window in Outlook, select an email message or contact.
- 2** Select the **View Contact in Maximizer** icon.

Microsoft Outlook Synchronization

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

- 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. 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.

The following sections contain additional information on Outlook Synchronization:

- “Synchronizing Appointments and Tasks with Microsoft Outlook” on page 146
- “Setting Up Microsoft Outlook for Synchronization” on page 147
- “Configuring Microsoft Outlook Synchronization” on page 148
- “How Phone Numbers are Synchronized with Microsoft Outlook” on page 149
- “Manually Synchronizing with Microsoft Outlook” on page 151

Synchronizing Appointments and Tasks with Microsoft Outlook

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.

Setting Up Microsoft Outlook for Synchronization

Microsoft Outlook contacts are synchronized with Maximizer based on their assigned categories. Each Outlook contact that you want to synchronize, must be assigned to a category.

The following procedures describes how to assign a new category named Maximizer to selected Outlook contacts.

➤ To assign a category to Outlook contacts

- 1** In Outlook, open the Address Book list to synchronize with Maximizer.
For example, open the Contacts Address Book list.
- 2** Select **Edit > Select All to** select all entries in the list.
– or –
Or select specific entries in the list to assign for synchronization.
- 3** Select **Edit > Categories**.
- 4** Click **Master Category List** and add a new category called **Maximizer**.
- 5** In the **Available categories** list, select the checkbox beside the Maximizer category and click **OK**.

Configuring Microsoft Outlook Synchronization

Maximizer Address Book entries are synchronized with Microsoft Outlook based on Favorite Lists. Before configuring Outlook synchronization in Maximizer, you must create a Maximizer Favorite List that specifies which Address Book entries are to be synchronized with Outlook.

► To configure Outlook synchronization

1 On the **Setup** tab, select **Preferences**, and select the **Outlook Synchronization** tab.

2 Under **Synchronization frequency**, specify how often Maximizer should synchronize with Outlook.

If you select Never (manual synchronization), the user must synchronize manually. (On the Add-Ins tab, select Synchronize with Outlook from the Office group.)

3 Under **Conflict resolution**, select the desired method of handling entries that have been changed in both Maximizer and Outlook since the last synchronization.

4 Under **Options**, specify the remaining settings.

- 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.
- 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.
- 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.
- To synchronize Maximizer Address Book entries and Outlook contacts, select the **Synchronize Address Book entries** checkbox.

i Do not select **Ignore computer name** if you use multiple computers and synchronize to a different Outlook profile on each computer.

- To specify the mapping between Outlook and Maximizer phone number fields, click **Phone Mapping**, and select the Maximizer phone number field to map to each Outlook phone number field.

If necessary, use the Move Up and Move Down buttons to prioritize the fields in the phone mapping list.

Maximizer supports only four phone numbers for an Address Book entry, so when you synchronize from Outlook to Maximizer, only four Outlook phone numbers are synchronized.

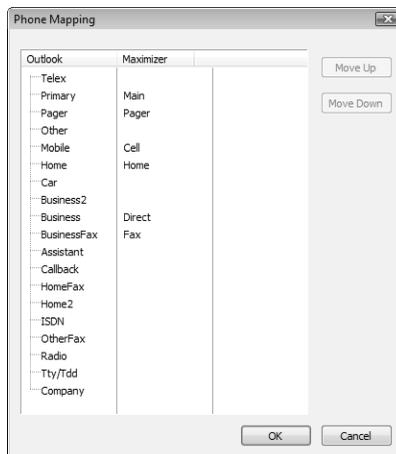
- In the **Synchronize Address Book entries from Favorite List** drop-down list, select the Maximizer Favorite List to synchronize.
- In the **Synchronize Contacts from Outlook Category** drop-down list, select the Outlook category to synchronize.

5 Click **OK**.

How Phone Numbers are Synchronized with Microsoft Outlook

In an Outlook to Maximizer synchronization, Maximizer first tries to synchronize mapped phone numbers whose descriptions exist in the default Address Book entry. Maximizer then tries to synchronize mapped phone numbers that appear highest in the phone mapping list. Only mapped phone numbers are synchronized to Maximizer.

In the following examples, the phone number descriptions in the default entry are Main, Fax, and Cell, and the mapped phone numbers are as follows:



Maximizer Field	Outlook Field
Main	Primary
Pager	Pager
Cell	Mobile
Home	Home
Direct	Business
Fax	BusinessFax

Example: Outlook values exist for all mapped phone numbers

If Outlook values exist for all mapped phone numbers, the following phone numbers would be included in the synchronized entry.

Main, Fax, Phone, Pager

Because the fourth phone number description is empty in the default entry, Maximizer fills it with the Pager phone number description. Main is higher in the phone mapping list, but it has already been synchronized.

Phone numbers		
Main	↓	[(604) 601-8000]
Fax	↓	[(604) 601-8001]
Cell	↓	[(718) 385-4221]
Pager	↓	[(580) 555-0812]

Example: Outlook values exist for three mapped phone numbers

If Outlook values exist for all mapped phone numbers except Fax, the following phone numbers would be included in the synchronized entry.

Main, Home, Cell, Pager

As in the previous example, Maximizer uses Pager for the fourth phone number description. In a later pass, Maximizer determines that there is not an Outlook value for Fax, so it replaces the Fax phone number description with Home, the highest phone number that is not synchronized in the phone mapping list.

Phone numbers		
Main	↓	[(604) 601-8000]
Home	↓	[(604) 681-9230]
Cell	↓	[(718) 385-4221]
Pager	↓	[(580) 555-0812]

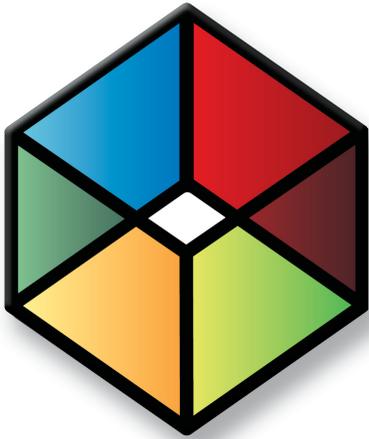
Manually Synchronizing with Microsoft Outlook

You can manually synchronize your Maximizer Address Book with Microsoft Outlook at any time. After synchronizing, you can retrieve the Favorite List used for synchronization to view the changes.

➤ **To synchronize with Outlook**

- On the **Tools** tab, select **Synchronize with Outlook** from the **Office** group.

Depending on how many Outlook contacts you are synchronizing, the processing time will vary. A message box appears when the synchronization is complete.



CHAPTER
Opportunities 8

Organize Your Sales with Opportunity Management

In this chapter...

- "About Opportunities" on page 154
- "Adding Opportunities" on page 157
- "Sales Teams" on page 159
- "Opportunity Pipeline Report" on page 160

About Opportunities

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

You can use opportunities to formalize your sales processes.

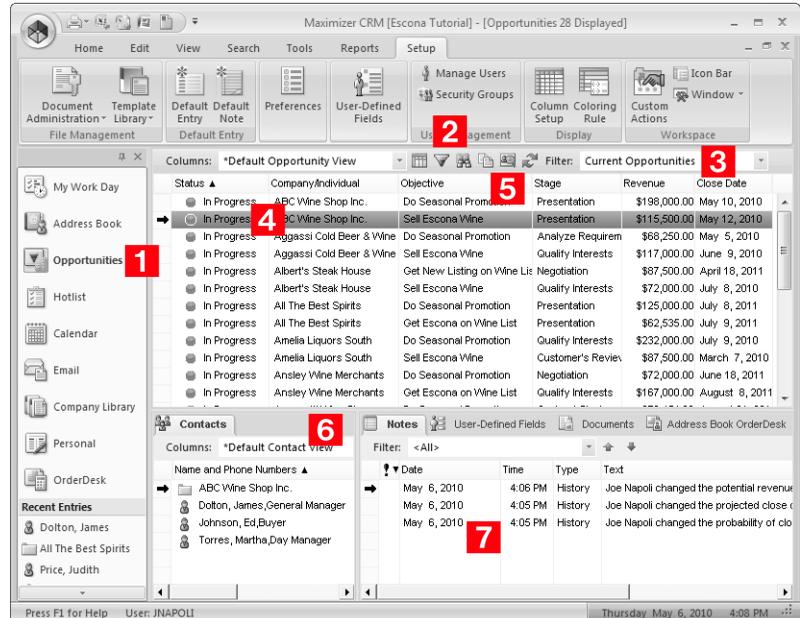
- Effectively schedule and coordinate the selling process among all members of your sales team.
- Ensure that all the right people in your organization have up-to-date information about the status of your opportunities.
- Forecast the probability of successfully closing your opportunities.

Opportunities Window

Keep the following points in mind when working with the Opportunities window:

- 1** Select the **Opportunities** icon to open the Opportunities window.
- 2** Use the **view bar** buttons for common opportunity tasks.
- 3** Use the **Filter** drop-down list to show all opportunities, team-updated opportunities, or current opportunities.
- 4** Double-click an **opportunity** to view or modify it.
- 5** Click the **View in Address Book** button in the View bar or choose the option from the shortcut menu to view the Address Book entry associated with the current opportunity.
- 6** View additional information for the selected opportunity in the **following windows**.
- 7** View **notes** that Maximizer automatically creates to record opportunity activity.

 Team-updated opportunities do not apply to Maximizer CRM Entrepreneur Edition.



Viewing Opportunities

You can view and modify existing opportunities in your Address Book from the Opportunities window or from the Address Book entry associated with the opportunity.

➤ To view an opportunity from the Opportunities window

1 Select the **Opportunities** icon to open the Opportunities window.

The Opportunities window opens.

2 If necessary, select an option from the **Filter** drop-down list.

- **All Opportunities** displays all opportunities that you have the rights to view.
- **Current Opportunities** displays the opportunities that are in progress.
- **Team Updated Opportunities** displays opportunities that have been updated by remote sales teams.

3 Double-click on an opportunity to open it.

The opportunity dialog box opens displaying the details of the opportunity.

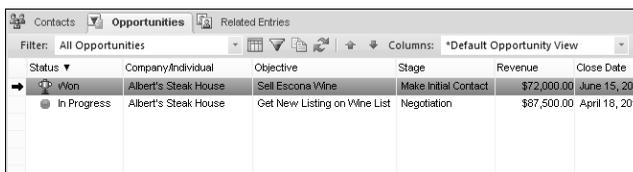
i Team-updated opportunities do not apply to Maximizer CRM Entrepreneur Edition.

- 4 Select the other tabs to view more information on the opportunity.
- 5 If necessary, click **OK** to save changes made to the opportunity.

➤ **To view an opportunity from an Address Book entry**

- 1 Select the Address Book entry.
- 2 Select the **Opportunities** following window.

All opportunities for the current Address Book entry are displayed in the list.



Status	Company/Individual	Objective	Stage	Revenue	Close Date
→ Vision	Albert's Steak House	Sell Escrow Wine	Make Initial Contact	\$72,000.00	June 15, 201
● In Progress	Albert's Steak House	Get New Listing on Wine List	Negotiation	\$87,500.00	April 18, 201

- 3 Click on an opportunity to open it.

Adding Opportunities

All opportunities have an associated Address Book entry. You can add new opportunities by selecting an Address Book entry in the Address Book window, then adding the new opportunity. You can also select existing opportunities, tasks, or appointments associated with the Address Book entry.

➤ To add an opportunity

- 1** Select or open the Address Book entry or an opportunity associated with the Address Book entry.
- 2** On the **Home** tab, select **Opportunity** from the **Create** group.
– or –
Drag and drop the entry to the **Opportunities** following window.
A new opportunity dialog box opens.
- 3** Specify the basic fields for the opportunity.
 - Enter the opportunity **Objective**. The objective should describe the goal of this opportunity.
 - Select the applicable **Products/Services** and **Categories**.
 - Enter the **Description** of the opportunity.
 - Select the **Stage** of the opportunity.

i If you have upgraded opportunities from a previous version of Maximizer, ratings are transferred to the Stage field.

For example, if you feel confident the opportunity is a good investment of your time, you may select a value such as “Initiate Contact”. The stage coincides with the Probability bar. Note that stages are set up in the opportunity preferences in Administrator. (Select File > Preferences, and select the Opportunity tab.)

You can also enter the Confidence rating. This field is similar to the Stage field. However, it is not linked to the probability of close and is set based on the sales representative’s feeling about the opportunity.

i Mandatory opportunity fields are denoted by an asterisk.

- 4** Select a **Key Fields** list and then select the appropriate Key Fields for the opportunity.
Key Fields are important user-defined fields specific to opportunities and are defined in the Key Fields preferences in Administrator. (Select File > Preferences, and select the Key Fields tab.) An unlimited number of Key Fields lists can be set up using up to eight opportunity user-defined fields for each list.
- 5** Enter the opportunity’s **details** such as the revenue and cost.

6 Work through the remaining tabs, entering the opportunity's details including the user-defined fields and status.

7 Click **OK** to save the opportunity.

Amelia Liquors South - Acquire as reseller

Probability: 15%

Basic Information | User-Defined Fields | Status

Company/Individual: Amelia Liquors South Contact: Chen, Melanie

Opportunity description

Objective: Acquire as reseller

Products/Services: Chardonnay, Pinot Blanc, Pinot Gris, Riesling, Zinfar Categories: California

Description: Opportunity for Escona to be added to their wine list season...

Opportunity Analysis

Stage: Make Initial Contact Confidence rating: Warm

Key Fields for: General Opportunities

Region	
Store size	Under 2,000 square feet
Wine Preference	Domestic
Number of Retail Lines	3 - 5
Distributors	

Opportunity details

Status	In Progress
Start date	May 6, 2010
Close date	June 22, 2010
Next action	Call the prospect
Revenue	\$0.00
Cost	\$0.00
Leader	Joe Napoli

*Denotes required field

OK Cancel Apply

Sales Teams

 Sales teams are not available in Maximizer CRM Entrepreneur Edition.

Maximizer offers you the ability to assign an opportunity to any sales team your system administrator has set up in Administrator. Teams allow you to delegate individual activities of the opportunity to members of the team. These activities appear in the team member's Hotlist for completion by the scheduled time. For information on setting up sales teams, see the *Maximizer CRM Administrator's Guide*.

Sales Team Members

Sales team are composed of the following types of 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 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.
- **Team member with edit rights** – In Maximizer, the team leader can grant any member the right to edit the opportunity, which essentially gives the same abilities of the team leader. This right must be granted on a per-opportunity basis, unless your system administrator specifies otherwise.

If you are working on an opportunity as a team leader or a team member with edit rights, you have the ability to delegate the opportunity's activities to individual team members. You can modify the team's membership or members' rights at any time. After you assign a team to work on an opportunity, you can then delegate activities and modify the team.

Opportunity Pipeline Report

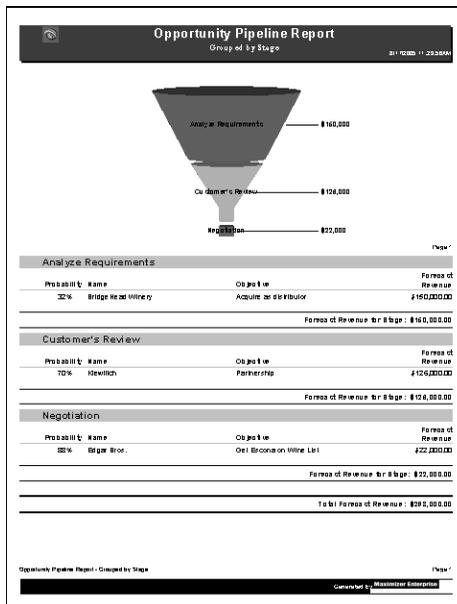
With a single click, you can view the current opportunities in the pipeline. The report graphically displays all opportunities that you select to include grouped by opportunity stage. The Opportunity Pipeline report can also be modified using Crystal Reports.

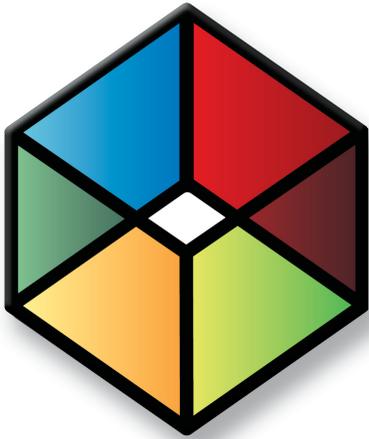
➤ **To view the Opportunity Pipeline report**

1 In the Opportunities window, click the **Display Opportunity Pipeline Report** button in the **View** bar.

You are prompted for which entries to include in the report.

2 Select the entries to include, and click **OK**.





CHAPTER
**Customizing
Maximizer** 9

Customize Maximizer to suit your needs

In this chapter...

- "Preferences" on page 162
- "Customizing the Interface" on page 164
- "Custom Actions" on page 168
- "Web Inquiry Forms for Websites" on page 173
- "Income and Expenses" on page 176
- "OrderDesk" on page 179

Preferences

You can personalize how Maximizer works for you. Maximizer provides you with various settings that give a great deal of flexibility in how you work—in other words, Maximizer adapts to the way you want to work.

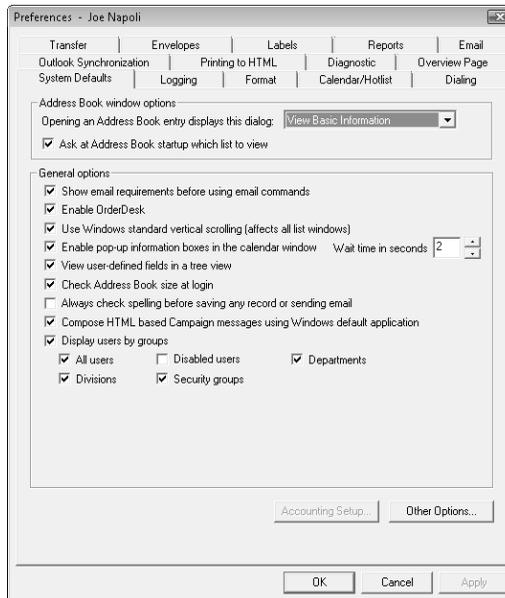
► To set your Maximizer preferences

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

The Preferences dialog box opens.

2 Select the tab for the settings you want to edit.

- Select **System Defaults** to specify default settings and Microsoft Outlook integration options.
- Select **Logging** to specify how notes are logged for various actions.
- Select **Format** to specify date and address formats.
- Select **Calendar/Hotlist** to specify the default settings and access rights for the calendar and Hotlist.
- Select **Dialing** to specify settings for dialing phone calls from Maximizer.
- Select **Transfer** to specify settings for transferring information between Address Books.
- Select **Envelopes, Labels, or Reports** to specify settings for printing envelopes, labels, and reports from Maximizer.
- Select **Email** to specify the default settings for sending email and the email server.
- Select **Outlook Synchronization** to specify settings for synchronizing Address Book information with Microsoft Outlook.
- Select **Printing to HTML** to specify settings for creating HTML files from Maximizer information.
- Select **Diagnostic** to specify settings for logging error messages.
- Select **Overview Page** to specify options for the My Work Day page.



3 Edit the settings and click **OK** to save the changes.

Customizing the Interface

You can customize the basic Maximizer interface in a number of ways. You can select the layout of the main window. You can adjust the properties of the icon bar containing the icons linking to the main Maximizer windows.

The following sections contain information on customizing the Maximizer interface:

- “Window Layout” on page 164
- “Adjusting the Icon Bar” on page 165
- “Customizing the Quick Access Toolbar” on page 166

Window Layout

You can control what windows are displayed and how they are laid out. On the Setup tab, you can select Window > Window Settings from the Workspace group to select one of the Maximizer window views—Classic, Outlook Style, and Custom.

- **Classic** displays the following windows below the controlling (main) windows. This setting is Maximizer’s default window layout.
- **Outlook Style** is somewhat similar to Microsoft Outlook’s display. The controlling windows form the left pane while the following windows occupy the top-right and bottom-right panes.
- **Custom** allows you to control what windows are displayed. For example, use this option if you want only the Address Book and Calendar windows open, without their following windows open. Open the windows you want using the icons on the icon bar or the Switch Windows commands. (On the View tab, select Switch Window from the Window group.) Then, tile the windows. (On the Setup tab, select Window > Window Management from the Workspace group, and select an option.) Of course, you can manually size any window.

You can also control such things as the colors, fonts, and grid lines in your windows. (On the Setup tab, select Window > Window Settings from the Workspace group, and choose Set Color or Set Font.)

Adjusting the Icon Bar

You can adjust the icon bar properties and also choose the state of the icon bar's visibility.

➤ To adjust the icon bar

- 1** On the **Setup** tab, select **Icon Bar** from the **Workspace** group. The Icon Bar Properties dialog box opens.
- 2** In the **General** area, set the default properties of the icon bar:
 - Select the **Visible** option to display the icon bar in the Maximizer window.
 - Select the **Display tooltips** option to show information about each icon when you pass the mouse pointer over it.
- 3** Set the icon size to **Small** or **Large**.
- 4** Set the location of the icon bar.
 - The **Floating** option allows you to place the icon bar anywhere inside the Maximizer window.
 - The **Docked at left** and **Docked at right** options place the icon bar on the left or right side of the Maximizer window.
- 5** In the **Set button order** area, select the icons you want to be displayed.
Use the **Move Up** and **Move Down** buttons to position the icons.
- 6** In the **Recent entries list** area, set the number of entries to be displayed.
To hide the section, clear the **Show Recent Entries list** option.

7 Click **OK**.



Customizing the Quick Access Toolbar

The Quick Access toolbar is located directly above or below the ribbon. You can click the arrow button next to the toolbar to add or remove the default commands on the toolbar. You can also add any other command from the ribbon, from sub-menus, or from the icon bar to the Quick Access toolbar.

➤ **To add a command to the Quick Access toolbar**

- Right-click on the command, and select **Add to Quick Access Toolbar**.

➤ **To customize the Quick Access toolbar**

- 1** Right-click anywhere in the ribbon, and select **Customize Quick Access Toolbar**.

The Customize Quick Access Toolbar dialog box opens.

- 2** From the **Choose commands from** drop-down list, select the location of a command to add to the toolbar.

You can select a tab, the icon bar, or the Maximizer menu that displays when you click the Maximizer button.

- 3** Select a command, and click **Add**.

You can also select <Separator> to add a separator between commands.

- 4** Repeat steps 2 and 3 to add more commands to the toolbar.

- 5 To move a command on the toolbar, select the command on the right, and click the arrow buttons to move the command up or down in the list.
- 6 When you are finished, click **OK** to save the changes to the Quick Access toolbar.

Custom Actions

Custom actions are commands that you can set up and personalize and then access from the Custom Actions tab. You can create the following types of custom actions:

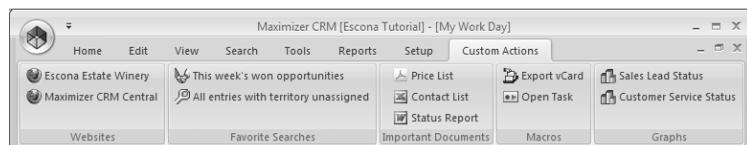
- **Browse a website** – Open a specific website or HTML document.
- **Open a document or run an application** – Open a document or file, or run an external application such as a word processor, spreadsheet, or graphics program.
- **Start a user-defined field for an Address Book entry** – Treat the value of an alphanumeric user-defined field as the fully qualified name of a document or an application to open or start. For example, you could use an alphanumeric user-defined field to record a secondary web site for an Address Book entry. When you access the command, you can open the current Address Book entry's secondary website in your browser.
- **Run a Maximizer macro** – Run an existing Maximizer macro.
- **Draw a graph from a defined graph catalog** – View an existing graph in the graph catalog.
- **Retrieve a search catalog** – Retrieve an existing saved search from the search catalog in the Address Book or Opportunities window.

The following sections contain information on custom actions in Maximizer:

- “Custom Actions Tab” on page 168
- “Creating Custom Actions Groups” on page 169

Custom Actions Tab

You can access your custom actions from the Custom Actions tab. The custom actions are arranged into groups. When you set up your custom actions, you create the groups and add each action to an existing group. Custom toolbars created in previous versions of Maximizer are converted into groups on the Custom Actions tab. The Custom Actions tab is visible only after you create a custom actions group.



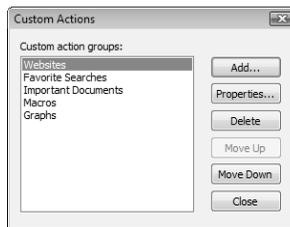
Creating Custom Actions Groups

You can create groups in the Custom Actions tab to perform personalized actions such as launching another application or performing a specific search that was saved in your search catalog.

► To create a group in the Custom Actions tab

- 1 On the **Setup** tab, select **Custom Actions** from the **Workspace** group.

The Custom Actions dialog box opens.

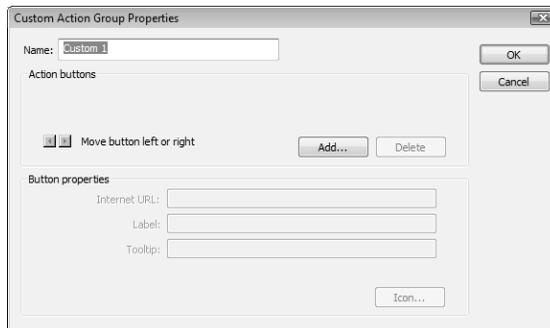


- 2 To create a new custom actions group, click **Add**.

– or –

To add a button to an existing custom actions group, select the existing group, and click **Properties**.

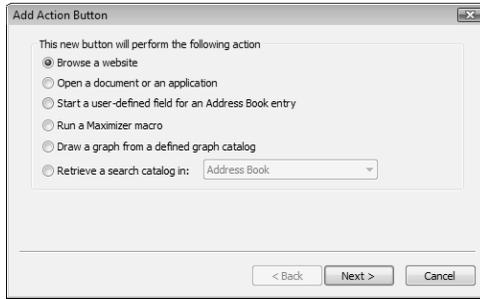
The Customize Action Group Properties dialog box opens.



- 3 Enter a name for the group, and click **Add** to add a command to the group.

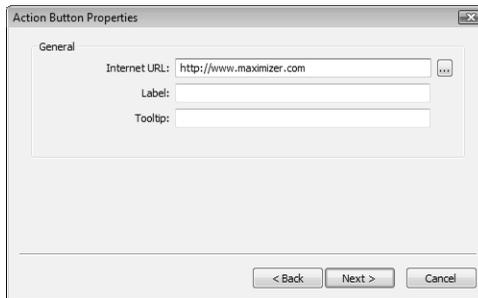
The Add Action Button dialog box opens.

- 4 Under **This new button will perform the following action**, select the main action, and click **Next**.



5 Specify the details of the custom action.

- If you chose **Browse a website** or **Open a document or an application**, click **Browse** to locate the document/application to run, or enter the URL or the path to the document/application.



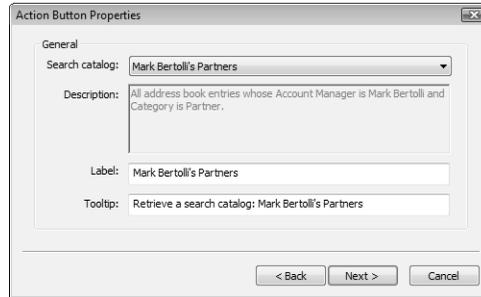
If you select a document, it opens in the default application for the type of document. To open the document with another application, specify the path to the application enclosed in double quotes, enter a space, then specify path to the file.

For example, to launch WordPad and open the file Notes.txt, in the Document/Application text box type the following:

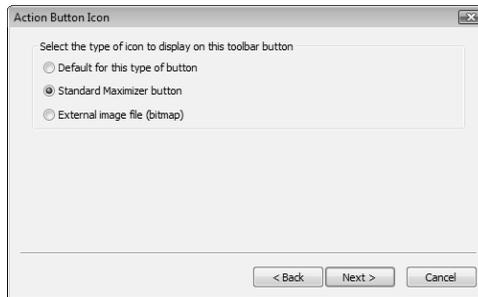
`"C:\ProgramFiles\Accessories\WordPad.exe" C:\Notes.txt`

To load a new instance of an already running program, select the **Load new instance** checkbox.

- If you chose any other item, select the specific user-defined field, macro, graph, or search from the drop-down list.

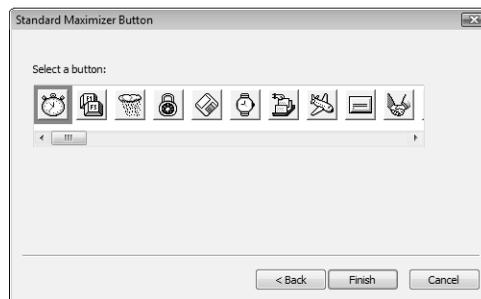


- 6** Enter the **Label** and **Tooltip**, and click **Next**.
- 7** Select the type of button you would like to display for the command, and click **Finish** or **Next** depending on the option you choose.

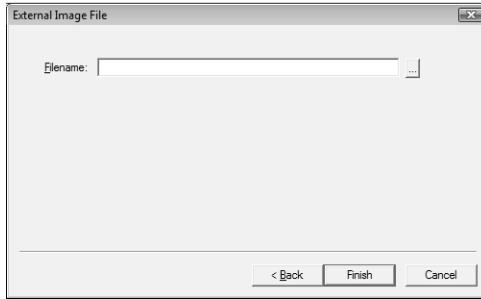


If you chose to display the default button, Maximizer selects the button automatically, and you can skip to step 9.

- 8** Select the image to use for the custom action, and click **Finish**.
 - If you chose to use a standard Maximizer button, select one of the available buttons.

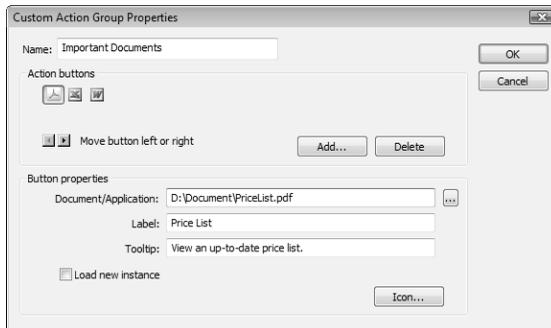


- If you chose to use an external image file (bitmap), locate the image using the ellipsis button.



9 To add another custom action to the group, return to step 3 and repeat the steps for the next custom action.

10 If desired, change the position of the new command in the group using the arrows, and click **OK** to save the group.



Web Inquiry Forms for Websites

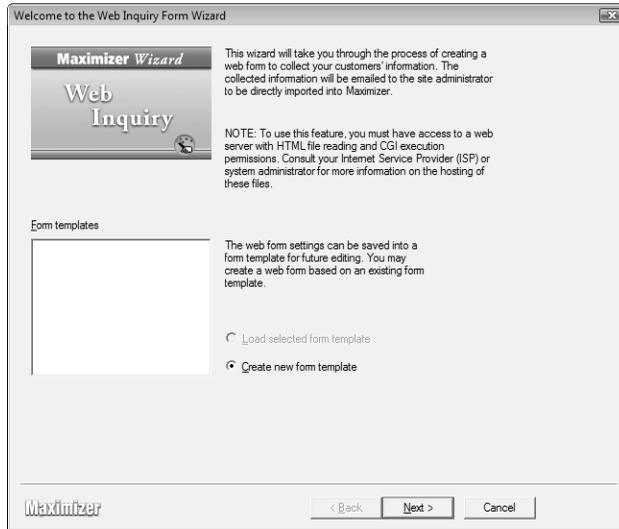
Maximizer can help you create an inquiry form to collect pertinent information from your website visitors. The collected information is sent to the specified email addresses as an .MTI or .XML file and then imported directly into Maximizer as Address Book entries by double-clicking on the file. You can also use a direct import (direct insert) of information.

You can create web inquiry forms with the Web Inquiry Form wizard. You can use the wizard for the following tasks:

- Save the web form settings as a template for future editing, so you can customize the form as the need arises.
- Select the Maximizer fields, including user-defined fields, you want to appear on the form. Information entered in the form's Last Name field, for example, is inserted into the Last Name field when importing information into Maximizer. If you have chosen a table user-defined field, a drop-down list is automatically created so customers can select available choices.
- Change displayed field names. For example, if you want to include in the form an existing Maximizer user-defined field called "GIC Heard About", you can choose to display a helpful label such as "How did you hear about our GIC program?".
- Designate mandatory fields, in addition to the last name and email address fields. If information is not entered in these mandatory fields, the customer will be notified via a Failure page.
- Create rules to manage when collected information is sent to the website administrator (or whatever other email addresses you specify).
- Use HTML to customize the look of the areas above and below the web form; the look of the form itself cannot be customized.
- Use HTML to customize the Success page and the areas above and below the Failure page.
- Preview the web form and return to the respective wizard screens to make the required adjustments.

➤ **To open the Web Inquiry Form wizard**

- On the **Tools** tab, select **Web Form** from the **Internet** group.



Requirements for Web Inquiry Forms

If you are creating forms using the Web Inquiry Form wizard in Maximizer, you must consider some mandatory circumstances regarding your Internet Service Provider (ISP). First, your ISP must support HTML file readings and CGI execute permissions. Second, if your ISP is running a UNIX server, you must ensure the ISP installs the following Perl modules:

- CGI
- Net::SMTP
- MIME::Base64

Third, you may have to ask your ISP to install the "winqcgi.pl" file into a folder that has execute permissions.

You may also have to modify the generated web form HTML page to target the winqcgi.pl file installed by the ISP. To do so, modify the following line:

```
<FORM action="winqcgi.pl" method="post"  
name="mtiform">
```

to

```
<FORM action="/cgi-bin/winqcgi.pl" method="post"  
name="mtiform">
```

Creating Direct Insert Web Forms

You can set up your web forms so that they insert new entries directly into a Maximizer Address Book. In order to create direct insert forms, Maximizer must be installed on the web server that is hosting your web form. Before creating the direct insert web form, you must first set up a virtual directory. If your web server runs Windows Server 2003, you also need to add a web service extension for the web form.

➤ To create a direct insert web form

- 1** Create a folder for the web form.
- 2** On the **Tools** tab, select **Web Form** from the **Internet** group. The Web Inquiry Form Wizard opens.
- 3** Follow the instructions in the Web Inquiry Form Wizard.
 - On the **Server and File Options** screen, select the **Direct Insert** option.
- 4** Copy the form's .html files and the winqcgi.exe (for Windows servers) or winqcgi.pl (for Unix servers) file to the folder.
- 5** Launch IIS and create a virtual directory pointing to the folder.

Income and Expenses

Use the Expenses window to record your income and expense items in separate accounts. Keep the following points in mind when working in the Expenses window.

- 1** Select the **Personal** icon, and select the **Expenses** tab to open the Expenses window.
- 2** Income and expenses are split up into accounts. The account totals are displayed for the current month and the current year.
- 3** Use the **Filter** drop-down list and the **Previous Month** and **Next Month** buttons to change the month for which income and expenses are displayed.

The screenshot shows the Maximizer CRM interface with the 'Expenses' window open. The window title is 'Maximizer CRM [Escona Tutorial] - [Personal - Expenses]'. The left sidebar contains navigation icons, with 'Personal' highlighted by a red box labeled '1'. The main area shows the 'Expenses' tab selected, with a red box labeled '2' pointing to the 'Expenses' tab. The 'Filter' dropdown is set to 'June' and is highlighted by a red box labeled '3'. Below the filter, a summary table is displayed for June 2010.

Account	June	YTD 2010
Income		
→ Total Income	\$0.00	\$0.00
Expenses		
Air fare	\$1,409.50	\$2,672.15
Meals	\$95.50	\$287.64
Office supplies	\$61.50	\$190.75
Total Expenses	\$1,566.50	\$3,160.54
Total Net Income	-\$1,566.50	-\$3,160.54

The following sections contain information on keeping track of income and expenses in Maximizer:

- “Adding Income and Expense Accounts” on page 177
- “Recording Income and Expenses” on page 178

Adding Income and Expense Accounts

Income and expenses are stored in accounts. Before recording income or expense items, you must set up the accounts. You can share accounts with other Maximizer users or keep them private.

➤ To add an account

- 1** Select the **Personal** icon, and select the **Expenses** tab to open the Expenses window.
- 2** On the **Home** tab, select **Account** from the **Create** group.

– or –

Right-click and select **Add Account**.

The New Income/Expense Account dialog box opens.



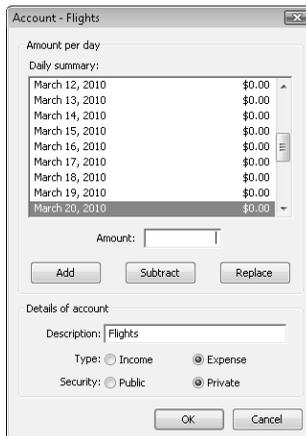
- 3** In the **Account** area, enter a name and a description for the account.
The description is the text that identifies the account in the Expenses window. The name is required but not displayed in the Expenses window.
- 4** In the **Type** area, select the type of account—**Expense** or **Income**.
- 5** In the **Security** area, select **Public** to share the account with other Maximizer users or **Private** to keep the account private.
- 6** Click **OK** to finish adding the account.

Recording Income and Expenses

Once you have set up your income and expense accounts, you can record income and expenses for specific days.

➤ To record an income or expense amount

- 1 Select the **Personal** icon, and select the **Expenses** tab to open the Expenses window.
- 2 If necessary, select a month for the expense/income.
 - From the **Filter** drop-down list, select a month in the current year.
 - Click the **Select Month and Year** icon and specify any year and month.
- 3 Double-click on the account to open it.
The Account dialog box opens displaying details of the account.



- 4 In the **Daily summary** list, select the day for the income/expense amount.
- 5 In the **Amount** field, enter the amount for the income/expense, and click **Add**.
You can enter multiple amounts to add them all to the selected day.
- 6 Click **OK** to save the change to the account.

OrderDesk

When you receive orders or inquiries from your website, you can manage them using the OrderDesk window. You can use the same OrderDesk window to enter, process, and manage orders that come to you by telephone, mail, or other methods.

Enabling OrderDesk

OrderDesk is unavailable only if OrderDesk is enabled in your preferences. After enabling or disabling OrderDesk, you must restart Maximizer for the change to take affect.

➤ To enable OrderDesk

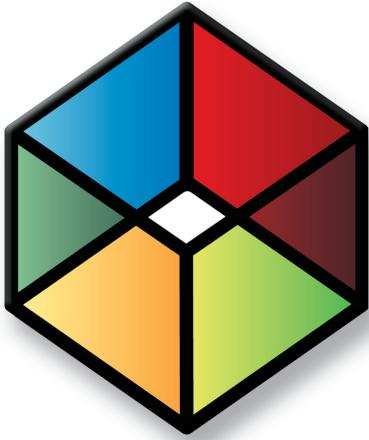
- 1** On the **Setup** tab, select **Preferences**.
- 2** Select **Enable OrderDesk** and click **OK**.

OrderDesk Window

The OrderDesk window displays all OrderDesk information in the Address Book. You can use the Address Book OrderDesk following window to view orders and inquiries associated with the selected entry in the Address Book or Opportunities window.

➤ To open the OrderDesk window

- In the icon bar, select the **OrderDesk** icon.



CHAPTER **Reporting** 10

Report on the Progress of Your Business

In this chapter...

"Crystal Reports" on page 182

"Printing Reports from Maximizer" on page 184

"Exporting Entries to Microsoft Excel" on page 186

"Graphing and Charting" on page 188

Crystal Reports

i Crystal Reports supports up to 256 linked views when using Microsoft SQL.

The Crystal Reports viewer is installed automatically with Maximizer and is accessible from the Reports tab. To create or modify reports, you must have the full Crystal Reports program installed.

Maximizer installs a set of standard Sales reports, but you can also create your own custom, shared reports and save them in the MaximizerReports folder (in My Documents) where they can be accessed from the Reports tab in Maximizer.

The following sections contain information on using Crystal Reports with Maximizer:

- “Launching Crystal Reports” on page 182
- “Creating and Accessing Personal Reports” on page 182

Launching Crystal Reports

i In order to launch Crystal Reports from Maximizer, you must be part of the Crystal Report Users security group. See the *Maximizer CRM Administrator's Guide* for more information.

You can launch Crystal Reports from Maximizer. You can also open Crystal Reports outside of Maximizer from the Start menu.

➤ To launch Crystal Reports

- On the **Reports** tab, select **Crystal Reports > Personal > Custom Report**.

Creating and Accessing Personal Reports

Maximizer installations create the local folder ...My Documents\MaximizerReports. This local folder is the default location for your personal report templates. You can create new report templates, edit existing report templates, and view reports using existing report templates directly from Maximizer.

➤ To create and access a personal Crystal Report from Maximizer

1 On the Reports tab, select **Crystal Report > Personal > Custom Report** to launch Crystal Reports and create the report.

2 When you are prompted, enter a report name.

By default, the report is saved in ...My Documents\MaximizerReports.

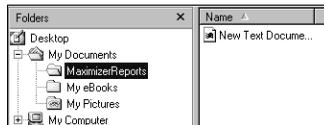
i In order to launch Crystal Reports from Maximizer, you must be part of the Crystal Report Users security group. See the *Maximizer CRM Administrator's Guide* for more information.



- 3** Create the report in Crystal Reports and save the report file in the MaximizerReports folder on your local drive.

If you are prompted with a login screen, enter your Maximizer user name and password.

- 4** In Maximizer, on the **Reports** tab, select **Crystal Report > Refresh**.

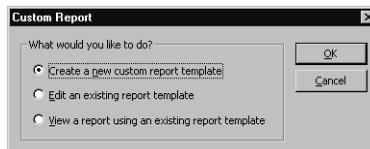


- 5** To access the report, on the **Reports** tab, select **Crystal Report > Personal**, and select the name of the report.

– or –

On the Reports tab, select **Crystal Report > Personal > Custom Report**, and select the **View a report using an existing report template**.

If you would like to edit the report template, choose **Edit an existing report template**.



Printing Reports from Maximizer

Column reports are a fast way to print Maximizer information as it appears in your current list, while a Detailed report lets you print more detailed information. Other reports, such as the Notes, and Name/Address/Telephone reports, allow you to print specific information about your Address Book entries and opportunities.

You can print your calendar appointments as a Calendar Book or Appointment Calendar. You can print a Personal Organizer from the Address Book, Contacts, Related Entries or Hotlist window.

You can print reports from the Reports tab or from the Print group in the Home tab. The Reports tab gives you access to every type of Maximizer report, irrespective of the window that is open. For example, if you are in the Address Book window, and want to print an opportunity report, on the Reports tab, select Opportunities > [type of report]. The Opportunities window automatically opens and the report extracts information from the current opportunities list. The Print group on the Home tab prints reports strictly related to the window that is currently open.

While all Maximizer reports can be sent to a printer, you can additionally generate .RTF (Rich Text Format), .PDF files (Portable Document Format) for most reports in Maximizer. You can also preview most Maximizer reports.

The Reports tab allows you to print reports on the following Maximizer information:

- Address Book entries
- Contacts
- User-defined fields
- Notes
- Opportunities
- Documents
- Hotlist
- Calendar
- OrderDesk
- Journal entries
- Expenses
- Related entries
- Activities
- Phone log

Types of Reports

You can create the following types of reports in Maximizer:

- **Column Report** – Displays the same information you see displayed in a controlling window, such as names and addresses or opportunity information.
- **Detailed Report** – Includes mailing address information, appointments, Hotlist tasks, user-defined fields, Contacts, document summaries, and notes for an Address Book entry or opportunity.
- **User-Defined Field Report** – Lists the user-defined fields attached to each of your Address Book entries.
- **Forecast Analysis** – Provides a summary of the probability of a successful close, the potential sales revenue, and the weighted amount associated with each active opportunity in the opportunity file.
- **Analysis Reports-Detail** – Lists the opportunities by status with a revenue total.
- **Analysis Reports-Summary** – Reports the number of opportunities by status with total revenue.
- **Activities** – Lists the notes, Hotlist tasks, and appointments created or completed by Maximizer users in a specific date range.

Exporting Entries to Microsoft Excel

Maximizer enables you to quickly and easily export selected entries from a Maximizer window to a Microsoft Excel spreadsheet. Maximizer exports the currently selected entries for the active controlling or following window using the column setup and coloring rule displayed in that window. If no entries are selected, it exports all displayed entries.

To be able to export entries to Microsoft Excel, you must have the "Allow export" privilege and Excel must be installed on the current computer.

If the column setup includes multiple fields in a single column, each field is displayed in a separate column in Excel, with each column named after the Maximizer field name. For example, if the column setup includes a column named "Details", which contains the fields "Contact Name", "Next Action", and "Last Modified Date", the Excel spreadsheet would contain three columns named "Contact Name", "Next Action", and "Last Modified Date".

If the column setup includes a table user-defined field, multiple table items are combined into a single cell in Excel. For example, if the column setup includes a column for the "Partner Interests" table user-defined field, and the "General Information", "Press Releases", and "Technical Bulletins" table items are selected, the Excel spreadsheet would include a column named "Partner Interests" containing "General Information, Press Releases, Technical Bulletins" in a single cell.

If you use Excel 2007 or later, you have the option of performing an advanced export to Excel. This option lets you apply conditional formatting to numeric user-defined fields. You can choose the same data bars, color scales, and icon sets that are available in Excel. See the Excel documentation for more information on conditional formatting.

Note that reports exported to Excel are not dynamic, meaning they do not automatically update when changes to the exported entries are made. To update an exported report, repeat the export process.

➤ To export entries to Excel

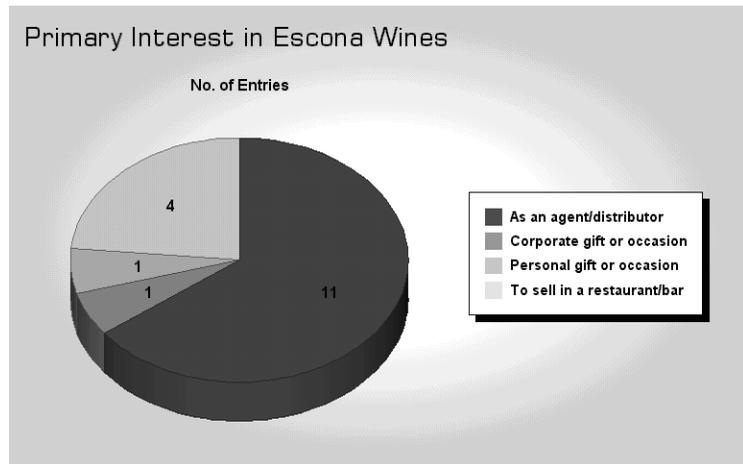
- 1** Create a list of entries or select specific entries to export.
- 2** Select a column setup and apply a coloring rule to use for the export.
- 3** On the **Tools** tab, select **Export to Excel** or **Advanced Export to Excel** from the **Office** group.

- 4** If you are performing an Advanced Export to Excel, select the conditional formatting to apply to each column, and click **OK**.
Only columns that display numeric user-defined fields are listed.
To apply the conditional formatting to total cell, as well as the summed cells in the column, select **Include Totals**.
Excel opens and displays the selected entries.
- 5** To keep the report, save it to your computer with a unique file name.

Graphing and Charting

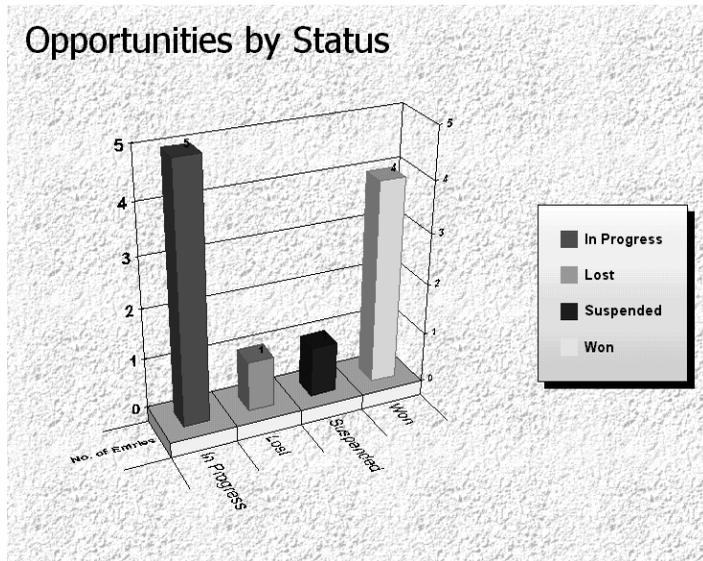
Creating a good presentation is about having good information and presenting it well. When you need to create attractive and meaningful graphs or charts for your presentation, and you need them quickly, Maximizer can do the job.

Maximizer gives you the ability to track your customers and find out who they are. Gathering relevant customer information is a key component of successful marketing and e-commerce initiatives. With the creation of meaningful graphs and charts on your Address Book data, you benefit from complete, detailed intelligence to evaluate the performance of your business.



When you graph your entries, you generate the graph using the entries listed in the Address Book or Opportunities window. For example, if your Address Book window currently lists all Address Book entries between A and M, only those entries will be graphed.

Once your list contains the entries you are trying to graph, choose the Graphing command from the Tools tab to begin the process of constructing your graph. You can graph any table or date field in your Address Book, such as City/Town, State/County/Province, Opportunity Status, to name only a few, and any table or date user-defined field.



Maximizer creates graphs and charts for all kinds of purposes. You can print your completed graph from Maximizer or save it as a high-quality image file that you can use in documents and presentations.

If you often create the same type of graph, you can save a graph template to a catalog, which you can retrieve at any time. You can even add a custom button to your Maximizer toolbar that instantly creates a graph from one of your saved templates.

The Chart wizard walks you through the steps of creating a graph or chart. You can then edit the final product to make it look attractive.

The following sections contain additional information on graphing and charting in Maximizer:

- "Creating Graphs" on page 190
- "Selecting Fields and Values for Your Graphs" on page 191
- "Defining the Appearance of Graphs" on page 193
- "Title and Footnote Merge Fields" on page 194
- "Customizing your Graphs" on page 195
- "Using Graphs in Other Applications" on page 196
- "Saving Graph Settings" on page 197

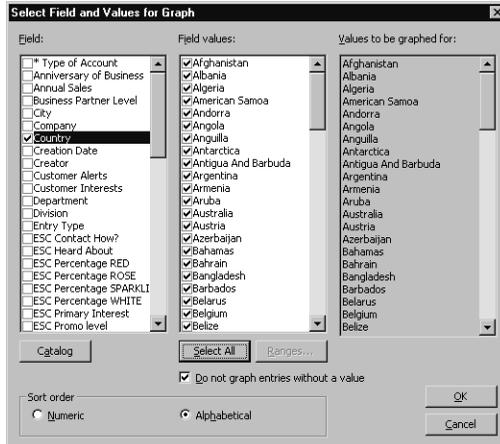
Creating Graphs

You can create graphs using information from your Address Book entries and opportunities.

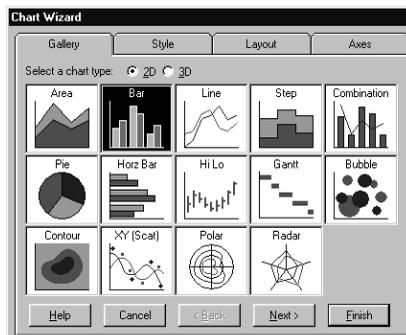
► To create a graph

- 1** In the Address Book or Opportunities window, create a entries to graph.
- 2** On the **Tools** tab, select **Graphing** from the **Other** group.
- 3** Choose the fields and values you are graphing.

For example, you could graph Address Book entries by the City/Town or State/County/Province field. Defining the values lets you narrow the range or selection of values to graph.

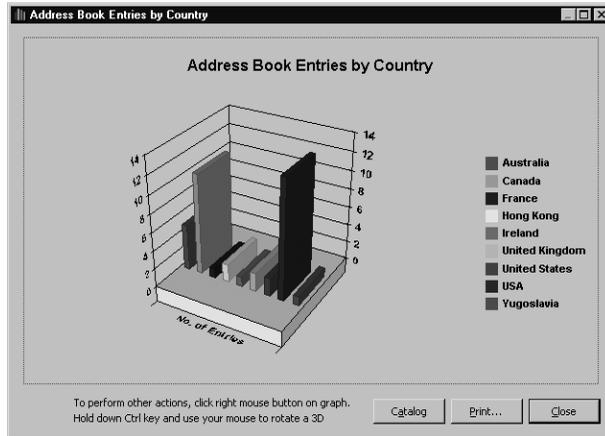


- 4** Use the Chart wizard to choose the graph type, style, and layout.



5 Edit your graph in the Graphing window.

You can change the appearance of your graph and edit the data. From this window, you can also save your graph as an image file.

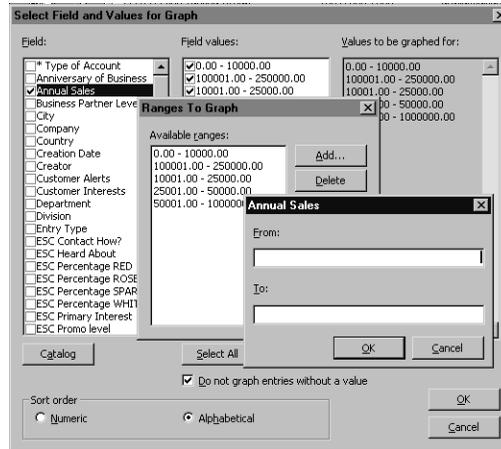


Selecting Fields and Values for Your Graphs

When you select the Graphing command, Maximizer prompts you to choose a field to graph. Your choice of fields depends on the type of entries you are graphing. If the Address Book window is active when you begin graphing, you choose from Address Book entry and user-defined fields, such as Company, City, or State. If the Opportunities window is the active window, you choose from opportunity fields and user-defined fields, as in the Status, or Objective. You can graph any Address Book entry or opportunity field. Some field types require that you specify a range to graph, as in a range of amounts for “Annual Sales”.

Maximizer lets you choose a range of values to graph for the field you select. For a table field, such as City/Town, you simply select the table items you want to include in the graph. Other field types—alphanumeric, numeric, or date fields—require you to enter a range.

For example, if you select “Anniversary of Business”, you would have to provide the date ranges to include in the graph. This allows you to include only the area of interest.



Each range you provide becomes an item on the X-axis of your graph. If you defined your ranges for the “Anniversary of Business” user-defined field as January-June and July-December, you would have two columns in a bar graph (or two wedges in a pie graph).

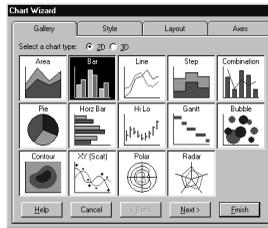
Finally, choose numeric or alphabetical as the sort order:

- **Numeric** – Displays charted values in numeric order, from lowest to highest. For example, if you choose a bar chart to graph the values of the City/Town field, the city/town (value) assigned to the least number of Address Book entries is shown on the left of the chart while the city/town assigned to the most number of entries is shown on the right. The legend will list the cities/towns in numeric order.
- **Alphabetical** – Displays charted values in alphabetical order, from A to Z. For example, if you choose a bar chart to graph the values of the City/Town field, any city (value) that starts with A is shown on the left of the chart while any city/town starting with Z is shown on the right of the chart. The legend will list the cities in alphabetical order.

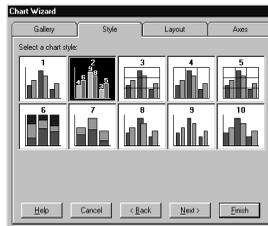
Defining the Appearance of Graphs

After you choose the field and values for your graph, the Chart wizard opens so you can define the characteristics of your graph. The Chart wizard has four tabs for defining your graph appearance:

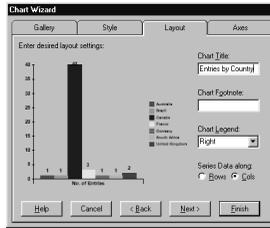
- **Gallery** – Choose flat (2D) or perspective (3D), and the chart type (Area, Bar, Pie, etc.).



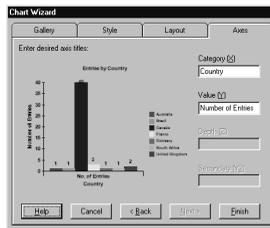
- **Style** – Choose the style based on the chart type you chose in the Gallery tab.



- **Layout** – Specify the title, footnote, and legend settings.



- **Axes** – Label your graph's axes.



These are only the basic characteristics of your graph—after the graph is generated, you can make additional changes to its appearance and even edit the graph data.

Title and Footnote Merge Fields

When you save a graph to the Graph Catalog, you can insert title (header) and footnote (footer) merge fields that display information such as the current date and time, the total number of entries, and other information.

For example, inserting “date” in the title of the graph and then saving the graph to the catalog as a template tells Maximizer to display the current day’s date the next time you generate the graph.

The following fields are available for footers and headers:

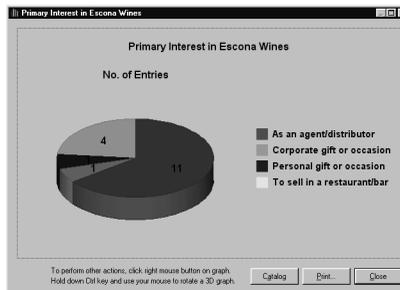
- **[count]** – The total number of entries graphed.
- **[date]** – The date the graph is generated.
- **[login]** – The user ID of the logged-in user.
- **[time]** – The time the graph is generated.
- **[user]** – The name of the user specified in the Users dialog box in Maximizer.

➤ **To insert a title or footnote merge field**

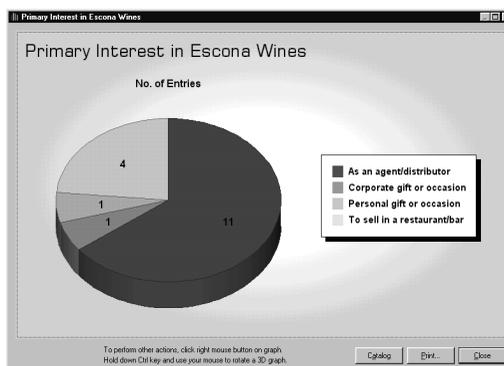
- 1** Start a new graph.
- 2** In the Chart wizard, select the **Layout** tab.
- 3** In the **Chart Title** and **Chart Footnote** fields, enter any fields you want to appear in the title and footnote of the graph.
Remember to surround the field with square brackets, [like this].
- 4** Finish creating your graph and save it to the Graph Catalog.
The first time you create the graph, the field name will display, not the value (i.e., [user] instead of “Bob Smith”). The next time you generate the graph, the value will display correctly.

Customizing your Graphs

At first, your completed graph may not look like much—by default, it has a plain gray background and the graph’s colors are chosen for you.

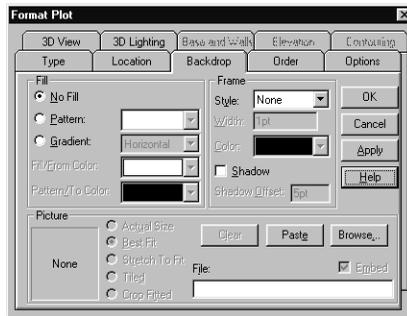


You can easily add your own touches to your graph by editing it in the Graphing window.



You can select and edit each element in the graph, such as the title, legend, or even the bars in a graph. The background, for example, can be a solid color of your choice, a gradient, or a “wallpaper” image. Simply select and double-click the element that you want to edit to display a setting dialog box. You can also right-click inside the graph to display a pop-up menu.

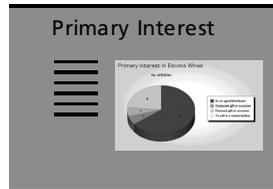
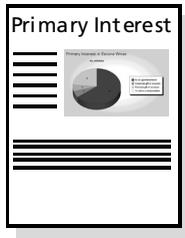
A background color can make a plain graph look attractive. To change the background properties, double-click within the area of the graph (but not on the graph itself) so that “selection handles” appear around the graph. The Format Plot dialog box lets you make many changes to your graph.



You can use this same procedure to change many of the graph elements. Try single-clicking different elements to see which ones show the selection handles. If selection handles appear, you can double-click it to edit the element.

Using Graphs in Other Applications

If you are making a presentation, you will probably want to use your graph in handouts or in an on-screen presentation. You can save your graph as an image file that you can use in other applications, such as word processors, spreadsheets, presentation software, and more.



When you save your graph, you have a choice of two image file types: Windows Metafile or Windows Bitmap. If you think you will have to resize the image when you insert it into your document or presentation, you might want to use the Windows Metafile format, as it is “scalable”—you can resize it without getting any jagged edges.

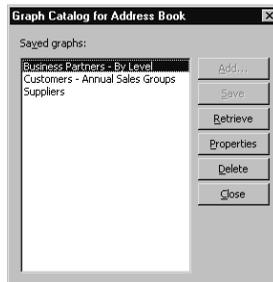
Saving Graph Settings

If you find yourself often creating the same type of graph, you can save yourself some time by saving the graph settings as a graph template in the Graph Catalog. After you generate the graph, use the Catalog button to save your graph template. Once your graph template is saved to the Graph Catalog, you can use the template when you next create a graph.

Graphs for Address Book entries and opportunities are stored in separate catalog. The available catalog depends on whether the Address Book or Opportunities window is selected.

➤ To add graph settings to the Graph Catalog

- 1** In the Graphing window, click the **Catalog** button to open the Graph Catalog.
- 2** Click **Add** to add your graph to the catalog.

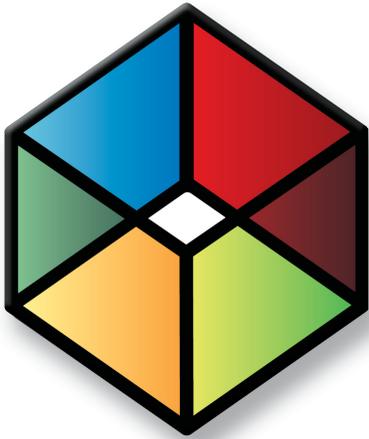


- 3** Type a descriptive name and specify a Maximizer user or group as the owner of the graph.
To make the template available to all users, choose Public as the Owner.
- 4** If you have a search saved in the search catalog, select it in the search list to have Maximizer perform the search before generating the graph.

i Ensure that access rights to the saved search are adequate. If users do not have read access to the search, they will not be able to generate the graph.

5 Click **OK** to save the graph settings to the Graph Catalog.

The screenshot shows a dialog box titled "Saved Graph Properties". It has a close button in the top right corner. The dialog is divided into two sections. The first section, "Name and owner", contains a "Name" text box with the value "Suppliers" and an "Owner" dropdown menu currently set to "Public". The second section, "Name of saved search to execute prior to displaying graph", contains a "Search" dropdown menu currently set to "Suppliers". At the bottom of the dialog are two buttons: "OK" and "Cancel".



CHAPTER **1 1**

Administration for Maximizer

Manage your Address Book

In this chapter...

“Backing Up Address Book Data” on page 200

“Exporting Address Book Data” on page 203

“Importing Address Book Data” on page 208

“Transferring Entries Between Address Books” on page 213

“Enabling TAPI” on page 216

“Updating Maximizer with Live Update” on page 221

“Changing Languages for the Maximizer Spell Checker” on page 222

Backing Up Address Book Data

You can back up and restore Maximizer Address Book data. If your Address Book uses a custom dictionary or holidays you must back up this data separately from the Address Book. After creating backup copies of your Address Book, you can restore the Address Book using Administrator.

The following backup procedures are available in Maximizer:

- **Regular Backup** – This backup procedure requires the Address Book to be closed and must be done in Administrator. See the *Maximizer CRM Administrator's Guide* and Administrator Help for assistance
- **Quick Backup** – This backup procedure is performed on an open Address Book. You can perform a Quick Backup from either Administrator or Maximizer. If security is enabled, you will need access to the MASTER user password.

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

- "Quick Backup" on page 200
- "Backing Up the Dictionary and Holiday Files" on page 202

Quick Backup

You can use the Quick Backup command in Maximizer. The advantage of using Quick Backup over a regular backup is that you can perform frequent backups of any open Address Book.

By default, the backup is saved to the current Address Book folder. If you don't want to save the backup to this location, you can browse to another one.

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, 2010. (The backup was saved to the following default location).

```
C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial_20100815_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:

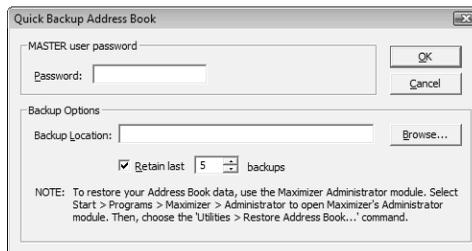
```
C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial_20070815_02.BAK
```

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 In the top-left corner of the window, click the **Maximizer** button, and select **Quick Backup**.

The Quick Backup Address Book dialog box opens.



- 3 Enter the MASTER user password.

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

- 4 Select the backup folder:

- To save the backup file to the default location (Address Book folder), leave the **Backup Location** field blank.
- To save the backup file to a different location, click **Browse**. Select a folder 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**.

Backing Up the Dictionary and Holiday Files

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

i Holiday files are created in Holiday Editor in Administrator. The holidays listed in the Holiday Editor appear in the Calendar in Maximizer. You can use Administrator to modify or delete existing holidays, or add new holidays.

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:

C:\Program Files\Maximizer\MaData6\Userdict.lex
Holiday File Location:

C:\Program Files\Maximizer\MaData6\Mxzhol.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.

Exporting Address Book Data

 Encrypted user-defined fields cannot be exported.

You can export Address Book entries from Maximizer, 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 Address Book data from Maximizer:

- “Exporting Address Book Entries in XML Format” on page 203
- “Exporting Address Book Entries in Text Format” on page 205
- “Selecting Fields for Export” on page 207

Exporting Address Book Entries in XML Format

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 then easily import this file into another Maximizer Address Book.

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

You can optionally export the following additional information:

- **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, and select the Companies and Individuals to export.

– or –

Don't select any entries to export all entries currently displayed in the Address Book list.

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 **XML**.

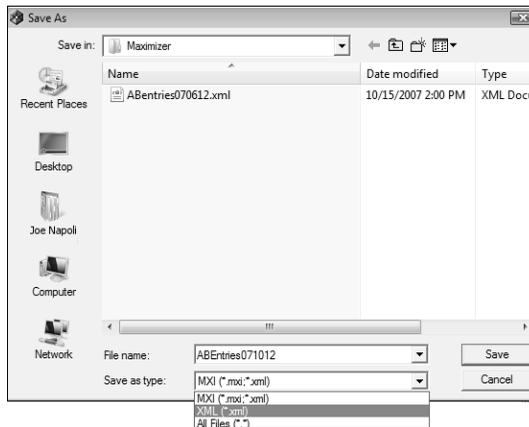
4 Click **Browse**.

The Select Export File dialog box opens.

5 Specify the destination location and file name for the exported file.

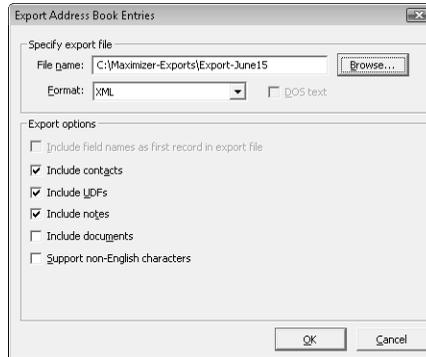
6 In the **Save as type** drop-down list, select either **MXI** or **XML**.

7 Click **Save**.



8 Select any of the Export options, as needed.

9 Click **OK**.



Exporting Address Book Entries in Text Format

You can export Address Book entries in the following text formats: comma-separated values (CSV) and tab-delimited. 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.

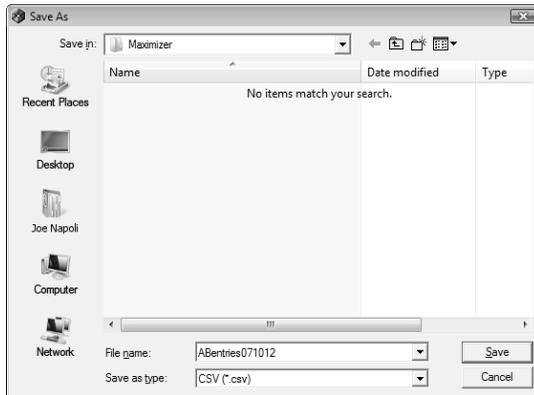
3 From the **Format** drop-down list, select **Comma Separated Value** or **tab-delimited**.

4 Click **Browse**.

The Select Export File dialog box opens.

5 Specify the destination location and file name for the exported file, and click **Save**.

You can verify that the format you selected previously appears in the **Save as type** field.

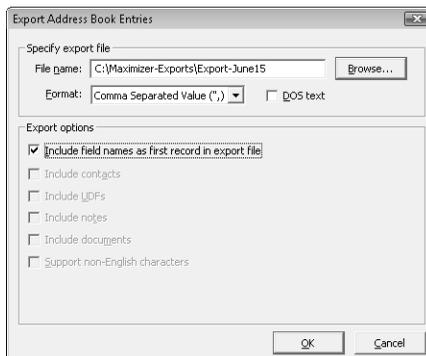


6 Specify the remaining export options.

- To export data that is in DOS standard ASCII, select the **DOS text** checkbox.

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

- To export the field names 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.



7 Click **OK**.

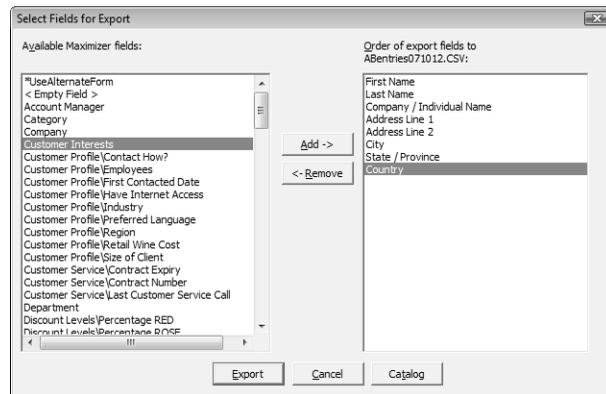
The Select Fields for Export dialog box opens.

8 From the **Available Maximizer fields** list, select each field and clicking **Add**.

– or –

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

For more information, see “Selecting Fields for Export” on page 207.

**9** Click **Export** to begin the export process.

Selecting Fields for Export

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

Use Administrator or Maximizer to import Address Book information from other sources. Some import methods are available only through Administrator.

After importing Address Book entries into Maximizer, a list of imported Address Book entries is stored in a Favorite List named according to the file format and import date and time.

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

- **MXI or XML Files** – This method imports Address Book entries and other data from MXI (Maximizer XML Interface) or XML Files. These MXI and XML files may have been created by exporting from Maximizer or by exporting the information from another source and converting it to XML using the Maximizer XML schema. For more information about the Maximizer XML Schema, refer to the *Maximizer CRM Administrator's Guide*.
- **Address Book Entries** – This method imports entries from a text file that is created when you export from 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.
- **ACT! or GoldMine Database** – Importing an ACT! or GoldMine database is straightforward as Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. This import method is available through Administrator or Maximizer if you are logged in as the MASTER user. For information about importing from ACT! or GoldMine, refer to the *Maximizer CRM Administrator's Guide*.
- **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. or GoldMine database version and map the fields automatically. This import method is available through Administrator or Maximizer if you are logged in as the MASTER user. For information about importing from other contact manager databases, refer to the *Maximizer CRM Administrator's Guide*.

The following sections contain information on importing Address Book data into Maximizer:

- "Importing Address Book Entries" on page 209
- "About Two-Tier Imports" on page 210
- "Field Mapping" on page 211
- "Importing MXI and XML Files" on page 211

Importing Address Book Entries

The Import Address Book Entries command 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.

If you import a Company record, and an existing Company record in the database has an identical value in the “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.

Note that 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.

i Always back up the Address Book before importing.

➤ To import Address Book entries

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

The Import Address Book Entries dialog box opens.

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

3 Under **Type of import**, select the type of Address Book entries you want to create from the import—**Companies / Individuals** or **Contacts**.

If you are performing a two-tier import, first select the Companies / Individuals. Then, after completing this procedure, repeat it a second time to import the Contacts.

4 Click **OK**.

The Select Fields for Import dialog box opens.

5 Map the Maximizer fields with the fields in the file.

- In the **Available Maximizer fields** column, select the field that best corresponds to the first field in the **Fields from file** column, and click **Add**.

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

- To exclude a field from being imported into Maximizer, add **<Skip Field>** to the middle column for that field position.
- Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

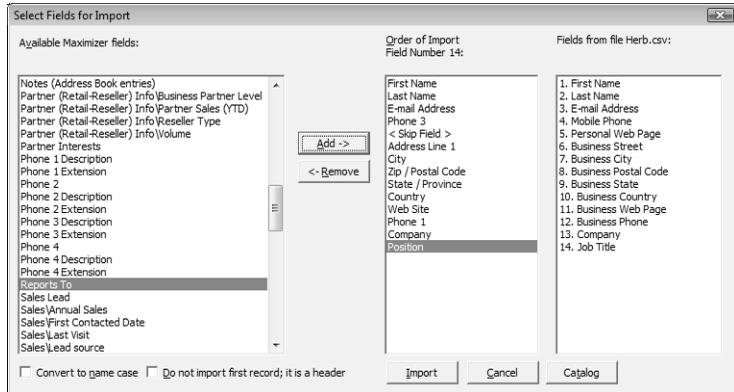
6 Specify the remaining settings for the import.

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

- To convert text that is in capital letters (uppercase) into mixed case, select the **Convert to name case** option.
- To exclude the first line from being imported, select the **Do not import first record; it is a header** option.

Many comma-delimited data files use the first line as a column header.

7 Click **Import**.



About Two-Tier Imports

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)

In a two-tier import, you first import Company entries as Companies/Individuals Address Book entries, and then you import the people as Contacts.

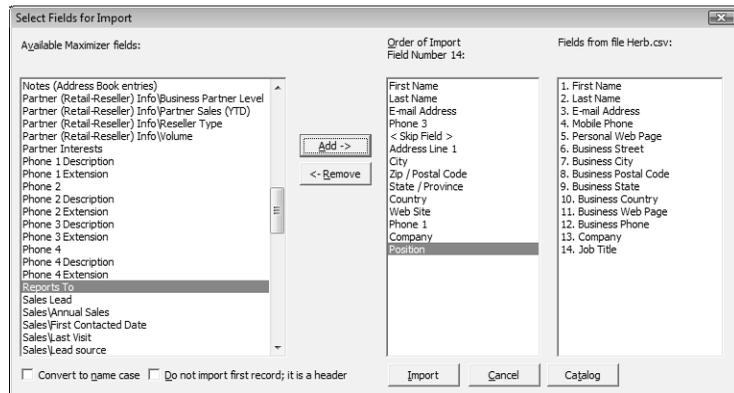
Two-tier importing is only applicable to comma-separated value (CSV) files, tab-delimited files, dBase III, III+, or IV, or XML files using the Import Address Book Entries command.

Field Mapping

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 Microsoft Outlook and “Company or Individual” in Maximizer.

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

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.



Importing MXI and XML Files

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.

i Always back up the Address Book before importing.

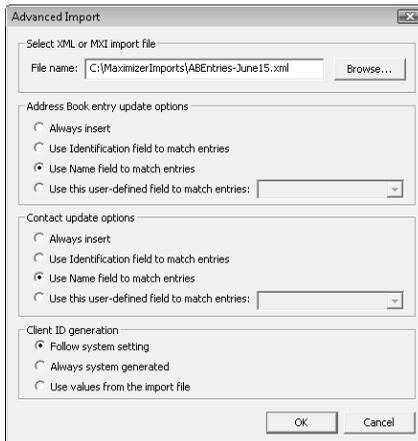
➤ To import from an MXI or XML file

1 In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Advanced Import**.

2 Next to 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 to create a log file with the same name and location as the import file.

- 3** To change the default Log File, click **Browse** and provide an alternate log file location and/or name.
- 4** In the **Log Level** drop-down list, specify how much detail to include in the log file.
- 5** Specify any additional import options.
- 6** Click **OK** to begin the import.



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

- 7** Click **OK** to close the message box.

Transferring Entries Between Address Books

i Encrypted user-defined fields cannot be transferred 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.

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

You can transfer entries by direct access between Address Books or by email.

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

- “What happens During Transfers?” on page 213
- “Transferring Address Book Entries” on page 214
- “Transfer Summary Reports and Logging” on page 215

What happens During Transfers?

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:

i Note that each Address Book entry has a unique ID.

- **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.

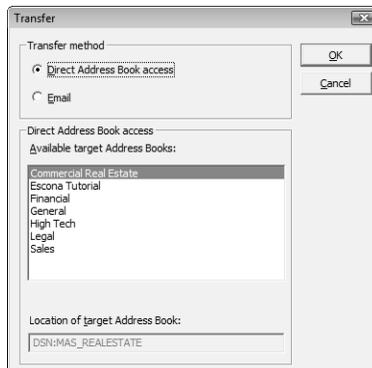
Transferring Address Book Entries

By default, when you transfer Companies or Individuals, the following are included—all associated Contacts, user-defined fields, notes, files, appointments, Hotlist tasks, orders (not available for SQL), and opportunities. Encrypted user-defined fields cannot be transferred.

► To transfer Address Book entries

- 1** In the Address Book window, select the entries you want to transfer.
- 2** In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Address Book Entries**.
- 3** Select **Direct Address Book Access** or **Email** as the transfer method.

If you are transferring your Address Book entries using direct Address Book access, select the target Address Book.

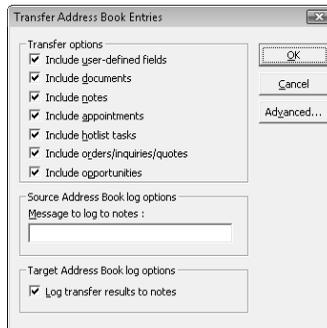


- 4** Click **OK**.
The Login dialog box opens.
- 5** Type your user ID and password to log in to the target Address Book, and click **OK**.
The Transfer Address Book Entries dialog box opens.
- 6** Select the transfer options.
For example, you can choose to include or not include user-defined fields, documents, notes, appointments, Hotlist tasks, orders, and opportunities.

You can also click **Advanced** to set the advanced options, click the **Advanced** button.

7 Enter a note to be logged for each Address Book entry affected by the transfer if necessary.

8 Click **OK** to begin.



When **Maximizer** finishes, the **Transfer Summary** displays the results of the transfer.

If you are sending the data by email, **Maximizer** prepares the transfer file (with an **.MET** extension) as an email file attachment and displays the **Compose Mail Message** dialog box.

9 Enter the email address where you would like the transfer sent, and send the 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.

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.

The following sections contain information on using TAPI with Maximizer:

- "Requirements for Caller ID" on page 216
- "Phone Number Matching with TAPI" on page 217
- "Configuring Maximizer to Use TAPI" on page 219

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 MSG-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 MSG 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.

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	Yes	Yes
1-604-732-2314	Yes	Yes
403-732-2314	Yes	Yes
732-2314	Yes	Yes
497-2314	Yes	No
2314	Yes	Yes

Address Book entry phone number	Does the incoming four-digit phone number (2314) match?	Does the incoming seven-digit phone number (732-2314) match?
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.

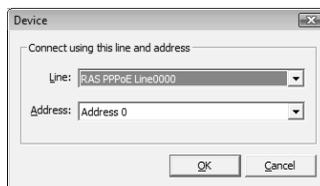
Address Book entry phone number	Does the incoming four-digit phone number (2314) match?	Does the incoming seven-digit phone number (732-2314) match?
9-604-732-2314	No	No
1-604-732-2314	No	No
403-732-2314	No	No
732-2314	No	Yes
497-2314	No	No
2314	Yes	No
3514	No	No
14	No	No

Configuring Maximizer to Use TAPI

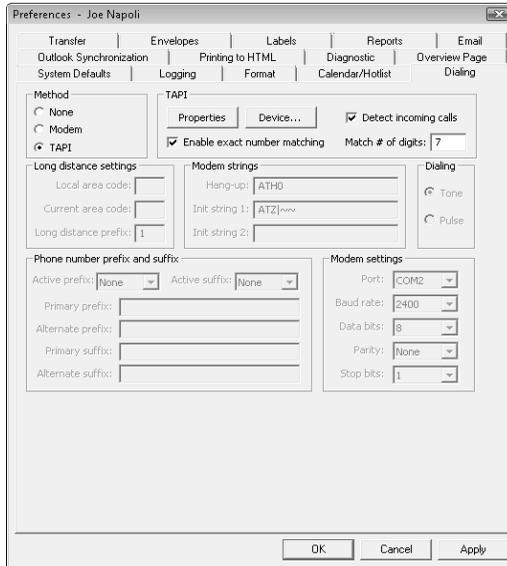
Before you can configure Maximizer to use TAPI, you must have a TAPI-enabled telephone system, and your computer's modem must be configured to use TAPI. You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information,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

Updating Maximizer with Live Update

The Live Update Wizard on Maximizer workstations connects to the Maximizer Live Update Server and downloads any available updates.

After downloading the software updates, the downloaded executable file should launch immediately to start the installation. If you need to locate the downloaded file, it is in the user's Application Data folder (typically C:\Documents and Settings\\Application Data\Maximizer\Live Update).

If the Enable automatic Maximizer Live Update notification option is selected in the Live Update options in Administrator, a message box you when new updates are available. You can also check for updates at any time from Maximizer or Administrator.

i Live Update options are accessible through the Live Update button on the System Options preferences in Administrator. (Select File > Preferences.)

➤ To download software updates from the server

1 If you are notified that new updates are available, click **OK** in the message box to start the Live Update Wizard.

– or –

In the top-left corner of the Maximizer window, click the **Maximizer** button, and select **Help**. Then, under **About Maximizer**, select **Maximizer Live Update**.



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.

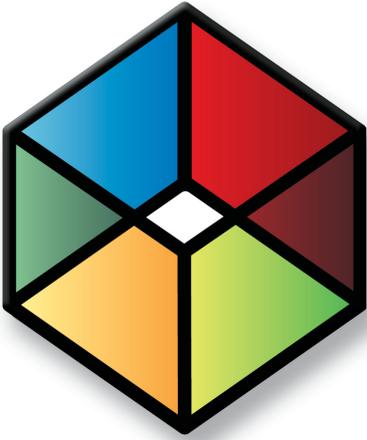
Changing Languages for the Maximizer Spell Checker

In many of the Maximizer dialog boxes, you can use the Maximizer Spell Checker to check the spelling of text. By default, the selected language is American English, but you can change this language to any other of the following languages:

- Brazilian Portuguese
- British English
- Canadian French
- Spanish

► To change the language for the Spell Checker

- 1** Open the Maximizer Word Processor.
- 2** Select **Tools > Options**.
- 3** In the **Spelling** tab, choose a language from the **Currently installed languages** list.



APPENDIX **A**

Maximizer CRM 11 Ribbon Interface

Find the locations of commands in Maximizer CRM 11

In this chapter...

"The Maximizer CRM Ribbon Interface" on page 224

"Finding Commands in Maximizer CRM 11" on page 225

"Keyboard Shortcuts" on page 238

The Maximizer CRM Ribbon Interface

Maximizer CRM 11 has an improved interface where all commands are available on tabbed ribbons. In previous versions of Maximizer, the commands were available in menus and toolbars. This section lists the menu commands from the previous version of Maximizer CRM and the new locations of the commands in the Maximizer CRM 11 ribbon interface.

The following terms refer to elements in the Maximizer CRM 11 interface:

- 1 Tabs** – The ribbons where commands are displayed. Tabs are displayed at the top of the Maximizer screen. The content of the tabs changes depending on the controlling or following window currently in focus.
- 2 Groups** – The sections separating different commands within the tabs.
- 3 Maximizer button** – The button in the top-left corner of the window. When you click the button, a menu containing additional commands is displayed.



Finding Commands in Maximizer CRM 11

The following sections list the commands in Maximizer CRM 10 along with a description of how to find the commands in Maximizer CRM 11.

- “File Menu” on page 225
- “Edit Menu” on page 228
- “View Menu” on page 230
- “Search Menu” on page 231
- “Actions Menu” on page 233
- “Web Menu” on page 234
- “Tools Menu” on page 234
- “Reports Menu” on page 236
- “Window Menu” on page 236
- “Help Menu” on page 237

File Menu

You can access most commands from the File menu in Maximizer CRM 10 by clicking the Maximizer button in Maximizer CRM 11. You can also access commands on the Home and Setup tabs.



The following commands appear on the File menu in the Address Book window in Maximizer CRM 10.

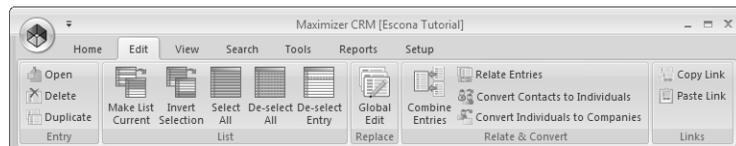
In Maximizer CRM 10, select File >	In Maximizer CRM 11
New Address Book	Click the Maximizer button, and select New Address Book .
Connect to Address Book	Click the Maximizer button, and select Connect to Address Book .
Open Address Book	Click the Maximizer button, and select Open Address Book .
Close Address Book	Click the Maximizer button, and select Close Address Book .
Login	Click the Maximizer button, and select Login .
Administrator	Click the Maximizer button, and select Administrator .
Page Setup	This command is unavailable in Maximizer CRM 11.
Print > Merge Documents	Click the Maximizer button, and select Print > Merge Documents .
Print > Envelopes	Click the Maximizer button, and select Print > Envelopes .
Print > Labels	Click the Maximizer button, and select Print > Labels .
Print > Column Report	Click the Maximizer button, and select Print > Column Report .
Print > Detailed Report	Click the Maximizer button, and select Print > Detailed Report .
Print > Name/Address/ Telephone Report	Click the Maximizer button, and select Print > Name/Address/Telephone Report .
Print > Note Report	Click the Maximizer button, and select Print > Note Report .
Print > Personal Organizer	Click the Maximizer button, and select Print > Personal Organizer .
Print > Custom Report	Click the Maximizer button, and select Print > Custom Report .
Send Email	On the Home tab, select Email from the Write group.
vCard > Import	Click the Maximizer button, and select Import/Export/Transfer . Then, under vCard , select Import .
vCard > Export	Click the Maximizer button, and select Import/Export/Transfer . Then, under vCard , select Export .

In Maximizer CRM 10, select File >	In Maximizer CRM 11
vCard > Send	Click the Maximizer button, and select Import/Export/Transfer . Then, under vCard , select Send .
Set Up User-Defined Fields	On the Setup tab, select User-Defined Fields .
Preferences	On the Setup tab, select Preferences .
Users	On the Setup tab, select Manage Users from the User Management group.
Security Groups	On the Setup tab, select Security Groups from the User Management group.
MaxMobile Administration	On the Setup tab, select Administration from the MaxMobile group.
Action Plan Library	On the Setup tab, select Template Library > Action Plan Library from the File Management group.
Import > Address Book Entries	Click the Maximizer button, and select Import/Export/Transfer . Then, under Import , select Address Book Entries .
Import > Advanced Import	Click the Maximizer button, and select Import/Export/Transfer . Then, under Import , select Advanced Import .
Import > Vertical Templates	Click the Maximizer button, and select Import/Export/Transfer . Then, under Import , select Vertical Templates .
Export Address Book Entries	Click the Maximizer button, and select Import/Export/Transfer . Then, under Export , select Address Book Entries .
Transfer > Address Book Entries	Click the Maximizer button, and select Import/Export/Transfer . Then, under Transfer , select Address Book Entries .
Transfer > Column Setups	Click the Maximizer button, and select Import/Export/Transfer . Then, under Transfer , select Column Setups .
Transfer > Document Templates	Click the Maximizer button, and select Import/Export/Transfer . Then, under Transfer , select Document Templates .
Transfer > User-Defined Fields	Click the Maximizer button, and select Import/Export/Transfer . Then, under Transfer , select User-Defined Fields .
Transfer > Macros	Click the Maximizer button, and select Import/Export/Transfer . Then, under Transfer , select Macros .

In Maximizer CRM 10, select File >	In Maximizer CRM 11
Transfer > Drop-Down Tables	Click the Maximizer button, and select Import/Export/Transfer . Then, under Transfer , select Drop-Down Tables .
Document Administration > Convert Embedded Documents	On the Setup tab, select Document Administration > Convert Embedded Documents from the File Management group.
Document Administration > Move Linked Documents	On the Setup tab, select Document Administration > Move Linked Documents from the File Management group.
Quick Backup	Click the Maximizer button, and select Quick Backup .
Exit	Click the Maximizer button, and select Exit .

Edit Menu

You can access most commands from the Edit menu in Maximizer CRM 10 on the Edit tab in Maximizer CRM 11. You can also access commands on the Home and Setup tabs.



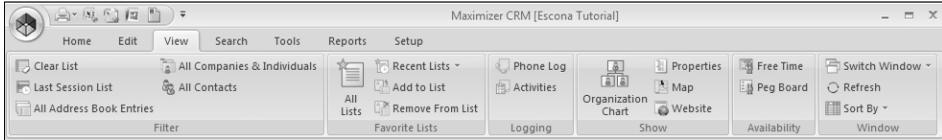
The following commands appear on the Edit menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Edit >	In Maximizer CRM 11
Add > Company	On the Home tab, select Address Book Entry > Company from the Create group.
Add > New Company and New Contact	On the Home tab, select Address Book Entry > New Company and New Contact from the Create group.
Add > Individual	On the Home tab, select Address Book Entry > Individual from the Create group.

In Maximizer CRM 10, select Edit >	In Maximizer CRM 11
Add > Contact	On the Home tab, select Address Book Entry > Contact from the Create group.
Open [Address Book Entry]	On the Edit tab, select Open from the Entry group.
Delete Selected Entries	On the Edit tab, select Delete from the Entry group.
Global Edit	On the Edit tab, select Global Edit from the Replace group.
Create Duplicate Entry	On the Edit tab, select Duplicate from the Entry group.
Default Entry	On the Setup tab, select Default Entry from the Default Entry group.
Default Note	On the Setup tab, select Default Note from the Default Entry group.
Select Entry	On the Edit tab, select Select Entry from the List group
Select All	On the Edit tab, select Select All from the List group.
De-select All	On the Edit tab, select De-select All from the List group.
Invert Selection	On the Edit tab, select Invert Selection from the List group.
Make Selected List Current	On the Edit tab, select Make List Current from the List group.
Combine Selected Entries	On the Edit tab, select Combine Entries from the Relate & Convert group.
Relate Entries	On the Edit tab, select Relate Entries from the Relate & Convert group.
Convert Contacts to Individuals	On the Edit tab, select Convert Contacts to Individuals from the Relate & Convert group.
Convert Individuals to Companies	On the Edit tab, select Convert Individuals to Companies from the Relate & Convert group.
Insert File	On the Home tab, select Insert a File from the Insert/Print group.
Links	This command is unavailable in Maximizer CRM 11.
Copy Link	On the Edit tab, select Copy Link from the Links group.

View Menu

You can access most commands from the View menu in Maximizer CRM 10 on the View tab in Maximizer CRM 11.



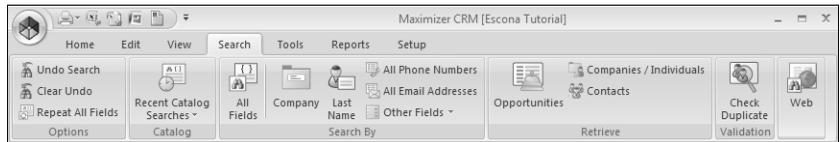
The following commands appear on the View menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select View >	In Maximizer CRM 11
Last Session List	On the View tab, select Last Session List from the Filter group.
Favorite Lists	On the View tab, select All Lists from the Favorite Lists group.
Recent Favorite Lists > Clear Recent Favorite Lists	On the View tab, select Recent Lists > Clear Recent Favorite Lists from the Favorite Lists group.
Recent Favorite Lists > [Favorite List]	On the View tab, select Recent Lists from the Favorite Lists group, and select a Favorite List.
Add to Favorite List	On the View tab, select Add to List from the Favorite Lists group.
Remove from Favorite List	On the View tab, select Remove from List from the Favorite Lists group.
Clear List	On the View tab, select Clear List from the Filter group.
Default Entries for All Users	On the View tab, select Default Entries from the Filter group.
Activities for [Address Book Entry]	On the View tab, select Activities from the Logging group.
Phone Log	On the View tab, select Phone Log from the Logging group.
Free Time	On the View tab, select Free Time from the Availability group.
Peg Board	On the View tab, select Peg Board from the Availability group.
Organizational Chart	On the View tab, select Organization Chart from the Show group.

In Maximizer CRM 10, select View >	In Maximizer CRM 11
Column Setup	On the Setup tab, select Column Setup from the Display group.
Toolbars	This command is unavailable in Maximizer CRM 11.
Sort by > [Column]	On the View tab, select Sort By from the Window group, and select a column.
Properties	On the View tab, select Properties from the Show group.
Refresh	On the View tab, select Refresh from the Window group.

Search Menu

You can access all commands from the Search menu in Maximizer CRM 10 on the Search tab in Maximizer CRM 11.



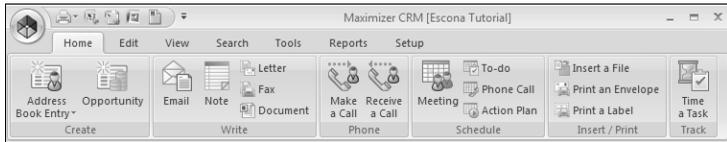
The following commands appear on the Search menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Search >	In Maximizer CRM 11
Undo Search	On the Search tab, select Undo Search from the Options group.
Clear Undo	On the Search tab, select Clear Undo from the Options group.
Repeat All Fields	On the Search tab, select Repeat All Fields from the Options group.
Last Catalog Searches > [Catalog Search]	On the Search tab, select Recent Catalog Searches from the Catalog group, and select a saved search.
Last Catalog Search > Reset Last Searches	On the Search tab, select Recent Catalog Searches > Reset Last Searches from the Catalog group.
All Fields	On the Search tab, select All Fields from the Search By group.

In Maximizer CRM 10, select Search >	In Maximizer CRM 11
Last Name	On the Search tab, select Last Name from the Search By group.
First Name	On the Search tab, select Other Fields > First Name from the Search By group.
Company	On the Search tab, select Company from the Search By group.
All Email Addresses	On the Search tab, select All Email Addresses from the Search By group.
City/Town	On the Search tab, select Other Fields > City/Town from the Search By group.
State/County/Province	On the Search tab, select Other Fields > State/County/Province from the Search By group.
Zip/Postcode	On the Search tab, select Other Fields > Zip/Postcode from the Search By group.
IDentification	On the Search tab, select Other Fields > IDentification from the Search By group.
All Phone Numbers	On the Search tab, select All Phone Numbers from the Search By group.
Notes	On the Search tab, select Other Fields > Notes from the Search By group.
Documents	On the Search tab, select Other Fields > Documents from the Search By group.
Other > [Field]	On the Search tab, select Other Fields from the Search By group.
Retrieve Contacts	On the Search tab, select Contacts from the Retrieve group.
Retrieve Companies/ Individuals	On the Search tab, select Companies/ Individuals from the Retrieve group.
Retrieve Opportunities	On the Search tab, select Opportunities from the Retrieve group.
Check [Column Name] Column for Duplicates	On the Search tab, select Check Duplicate from the Validation group.

Actions Menu

You can access all commands from the Actions menu in Maximizer CRM 10 on the Home tab in Maximizer CRM 11.



The following commands appear on the Actions menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Actions >	In Maximizer CRM 11
Create an Opportunity	On the Home tab, select Opportunity from the Create group.
Make a Call	On the Home tab, select Make a Call from the Phone group.
Receive a Call	On the Home tab, select Receive a Call from the Phone group.
Time a Task	On the Home tab, select Time a Task from the Track group.
Schedule a Meeting	On the Home tab, select Meeting from the Schedule group.
Schedule a To-do	On the Home tab, select To-do from the Schedule group.
Schedule a Call	On the Home tab, select Phone Call from the Schedule group.
Schedule an Action Plan	On the Home tab, select Action Plan from the Schedule group.
Write an Email	On the Home tab, select Email from the Write group.
Write a Note	On the Home tab, select Note from the Write group.
Write a Letter	On the Home tab, select Letter from the Write group.
Write a Fax	On the Home tab, select Fax from the Write group.
Write a Document	On the Home tab, select Document from the Write group.

In Maximizer CRM 10, select Actions >	In Maximizer CRM 11
Print an Envelope	On the Home tab, select Print an Envelope from the Insert/Print group.
Print a Label	On the Home tab, select Print a Label from the Insert/Print group.

Web Menu

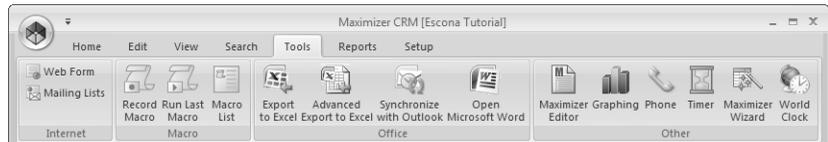
You can access commands from the Web menu in Maximizer CRM 10 on the View, Search, and Tools tabs in Maximizer CRM 11.

The following commands appear on the Web menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Web >	In Maximizer CRM 11
Draw a Map for [Address Book Entry]	On the View tab, select Map from the Show group.
Search for [Address Book Entry]	On the Search tab, select Web .
View Website for [Address Book Entry]	On the View tab, select Website from the Show group.
Create Web Form	On the Tools tab, select Web Form from the Internet group.
Mailing Lists	On the Tools tab, select Mailing Lists from the Internet group.
Visit Maximizer	This command is unavailable in Maximizer CRM 11.

Tools Menu

You can access most commands from the Tools menu in Maximizer CRM 10 on the Tools tab in Maximizer CRM 11.



The following commands appear on the Tools menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10.5, select Tools >	In Maximizer CRM 11
Phone	On the Tools tab, select Phone from the Other group.
Timer	On the Tools tab, select Timer from the Other group.
Graphing	On the Tools tab, select Graphing from the Other group.
Maximizer Word Processor	On the Tools tab, select Maximizer Editor from the Other group.
Maximizer Wizards	On the Tools tab, select Maximizer Wizard from the Other group.
World Clock	On the Tools tab, select World Clock from the Other group.
Record Macro	On the Tools tab, select Record Macro from the Macro group.
Run Last Macro	On the Tools tab, select Run Last Macro from the Macro group.
Macro List	On the Tools tab, select Macro List from the Macro group.
Synchronize with Outlook	On the Tools tab, select Synchronize with Outlook from the Office group.
Synchronize with MaxMobile	This command is unavailable in Maximizer CRM 11.
Reset MaxMobile	This command is unavailable in Maximizer CRM 11.
Export to Excel	On the Tools tab, select Export to Excel from the Office group.
Advanced Export to Excel	On the Tools tab, select Advanced Export to Excel from the Office group.
Open Microsoft Word	On the Tools tab, select Open Microsoft Word from the Office group.
Expert Advice	This command is unavailable in Maximizer CRM 11.

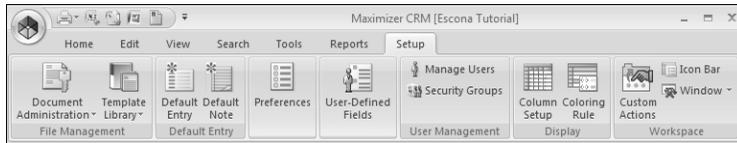
Reports Menu

You can access all commands from the Reports menu in Maximizer CRM 10 on the Reports tab in Maximizer CRM 11.



Window Menu

You can access the commands from the Window menu in Maximizer CRM 10 on the Setup and View tabs in Maximizer CRM 11.



The following commands appear on the Window menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Window >	In Maximizer CRM 11
Window Settings > Window Layout > [Layout]	On the Setup tab, select Window > Window Settings from the Workspace group, and select a layout.
Window Settings > Favorite Layouts	On the Setup tab, select Window > Window Settings > Favorite Layouts from the Workspace group.
Window Settings > Save Settings on Exit	On the Setup tab, select Window > Window Settings > Save Settings on Exit from the Workspace group.
Window Settings > Reset Default Layout	On the Setup tab, select Window > Window Settings > Reset Default Layout from the Workspace group.
Window Settings > Set Color > Current Window	On the Setup tab, select Window > Window Settings > Set Color > Current Window from the Workspace group.
Window Settings > Set Color > All Windows	On the Setup tab, select Window > Window Settings > Set Color > All Windows from the Workspace group.

In Maximizer CRM 10, select Window >	In Maximizer CRM 11
Window Settings > Set Font > Current Window	On the Setup tab, select Window > Window Settings > Set Font > Current Window from the Workspace group.
Window Settings > Set Font > All Windows	On the Setup tab, select Window > Window Settings > Set Font > All Windows from the Workspace group.
Window Management > [Option]	On the Setup tab, select Window > Window Management from the Workspace group, and select an option.
[Window]	On the View tab, select Switch Window from the Window group, and select a window.

Help Menu

You can access all commands from the Help menu in Maximizer CRM 10 by clicking the Maximizer button in Maximizer CRM 11.

The following commands appear on the Help menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Help >	In Maximizer CRM 11
Contents	Click the Maximizer button, and select Help > Local Contents or Online Contents .
Online Support	Click the Maximizer button, and select Help > Online Support .
Getting Started	Click the Maximizer button, and select Help > Getting Started .
MaxMobile User's Guide	Click the Maximizer button, and select Help > MaxMobile User's Guide .
Other Products > [Product]	Click the Maximizer button, and select Help > Other Maximizer Products .
Training	Click the Maximizer button, and select Help > Training .
About Maximizer CRM	Click the Maximizer button, and select Help > About Maximizer CRM .
Maximizer Live Update	Click the Maximizer button, and select Help > Maximizer Live Update .

Keyboard Shortcuts

Sometimes you will find it faster to use keyboard shortcuts instead of using your mouse. Keyboard shortcuts are available to change the focus of windows, to select commands from ribbons, to work with entries in lists, and to work in many other areas of the interface.

The following sections list the keyboard shortcuts available in Maximizer:

- “Keyboard Shortcuts: Windows” on page 238
- “Keyboard Shortcuts: Ribbons” on page 239
- “Keyboard Shortcuts: Dialog Boxes” on page 239
- “Keyboard Shortcuts: Entries” on page 240
- “Keyboard Shortcuts: Drop-Down Calendars” on page 240
- “Keyboard Shortcuts: Notes” on page 241
- “Keyboard Shortcuts: Phone Calls” on page 241
- “Keyboard Shortcuts: Macros” on page 241
- “Keyboard Shortcuts: Other Tasks” on page 242

Keyboard Shortcuts: Windows

The following keyboard shortcuts apply to Maximizer windows.

Press	To
Alt+spacebar, n	Minimize Maximizer.
Alt+spacebar, x	Maximize Maximizer.
Alt+-(hyphen),n	Minimize the current window.
Alt+-(hyphen), x	Maximize the current window.
Alt+-(hyphen), r	Restore the current window.
Ctrl+1	Open the Address Book window.
Ctrl+2	Open the Contacts window.
Ctrl+3	Open the User-Defined Fields following window.
Ctrl+4	Open the Notes following window.
Ctrl+5	Open the Documents following window.
Ctrl+6	Open the Hotlist window.
Ctrl+7	Open the Calendar window.
Ctrl+8	Open the Journal window.
Ctrl+9	Open the Expenses window.
Ctrl+0	Open the Opportunities window.

Press	To
Ctrl+A	Open the Opportunities following window.
Ctrl+D	Open the My Work Day window.
Ctrl+E	Open the Email window.
Ctrl+L	Open the Company Library window.
Ctrl+R	Open the Related Entries following window.
Ctrl+Q	Stop searching or list building.
Ctrl+F4	Close the current window.
Ctrl+F9	Open the Activities dialog box.
Ctrl+Tab	Move between open windows.
Ctrl+Shift+F	Move the focus to the View bar.
Shift+F4	Tile all windows vertically.
Shift+F5	Cascade all windows.
Shift+F6	Tile all windows horizontally.
Tab	Sort by next column.
Esc	Move the focus back to the window from a tab or drop-down list.

Keyboard Shortcuts: Ribbons

The following keyboard shortcuts apply to selecting tabs and commands in the ribbon interface.

Press	To
<i>Alt+highlighted letter</i>	Select a tab.
<i>highlighted letter</i>	Select a command from the current tab.
Esc	Select a different tab.
Shift+F10	Access the shortcut menu.

Keyboard Shortcuts: Dialog Boxes

The following keyboard shortcuts apply to working in dialog boxes.

Press	To
Tab	Move to the next field or button.
Shift+Tab	Move to the previous field or button.
Enter	Close the dialog box and accept entries in the dialog box.

Press	To
Shift+F10	Access the shortcut menu on edit fields.
Esc	Close the dialog box and optionally save changes.

Keyboard Shortcuts: Entries

The following entries apply to working with entries in a list.

Press	To
Home	Go to the first entry in the list.
End	Go to the last entry in the list.
Insert	Add an entry.
Enter	Open the current entry.
Delete	Delete the current entry.
Ctrl+spacebar	Select the current entry
Ctrl+/ (forward slash)	Select all entries.
Ctrl+\ (back slash)	Clear selection of all entries.
Ctrl+= (equal symbol)	Invert which entries are selected.
Shift+Down Arrow	Drag and select entries.
Alt+Enter	Show the properties of the selected entry.

Keyboard Shortcuts: Drop-Down Calendars

The following keyboard shortcuts apply to drop-down calendars that are available when you select a date.

Press	To
Down Arrow	Move ahead one week.
Up Arrow	Move back one week.
Page Down	Move ahead one month.
Page Up	Move back one month.
Ctrl+Page Down	Move ahead one year.
Ctrl+Page Up	Move back one year.

Keyboard Shortcuts: Notes

The following keyboard shortcuts apply to notes, including Journal notes.

Press	To
Right Arrow	Move right one character.
Left Arrow	Move left one character.
Up Arrow	Move up one line.
Down Arrow	Move down one line.
Home	Jump to the start of the line.
End	Jump to the end of the line.
Ctrl+Home	Jump to the top of the document.
Ctrl+End	Jump to the bottom of the document.
Page Up	Move up one screen.
Page Down	Move down one screen.

Keyboard Shortcuts: Phone Calls

The following keyboard shortcuts apply to using the phone call features.

Press	To
F7	Phone the current entry.
Shift+F7	Use the quick dial feature to phone the main phone number for the current entry.
Ctrl+F7	View the phone log.
Alt+F7	Receive a phone call.

Keyboard Shortcuts: Macros

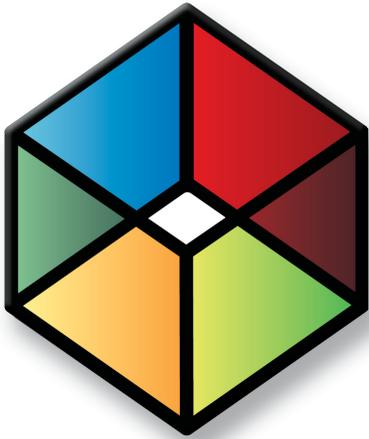
The following keyboard shortcuts apply to working with macros.

Press	To
F11	Record a macro.
Shift+F11	Run the last macro.
Ctrl+F11	View the list of macros.

Keyboard Shortcuts: Other Tasks

The following keyboard shortcuts apply to any other tasks in Maximizer.

Press	To
F1	View help for the current window or dialog box.
F8	Open the Maximizer Word Processor.
Shift+F9	Use the Timer.
Ctrl+W	Use a Maximizer Wizard.
Ctrl+Z	Undo the last search.
Alt+F4	Exit Maximizer.



APPENDIX **B**

Crystal Reports Database Views/Tables Reference

Maximizer Database Views/Tables Reference

In this chapter...

"Overview" on page 244

"Data Population for the Current Window" on page 244

"Database Views for User-Defined Fields" on page 245

"Database Driver Used to Create Crystal Reports" on page 245

"Filtering Data" on page 246

"Linking" on page 247

"Controlling Windows" on page 247

"Including Additional Views in Your Reports" on page 248

"SQL Views and Data Tables" on page 251

Overview

This chapter is a technical reference for using Crystal Reports with Maximizer data. It includes some examples and a list of some of the SQL views and tables commonly used in Crystal Reports.

Data Population for the Current Window

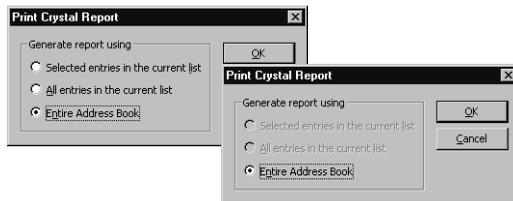
i For more information on user access rights for creating Crystal Reports, see the *Maximizer CRM Administrator's Guide*.

When you create a new report template or edit an existing report template, the default table/view for the report is based on the current Maximizer window. You are connected to the **MAS_[Address Book name] for Microsoft SQL** data source by default. If you want to link to additional tables, you must do so in the **Database Expert** dialog box in Crystal Reports. See "Linking" on page 247 for more information.

Following is a list of each controlling window and its associated default table and file names used for Crystal Reports.

Controlling Window	Views for Microsoft SQL
Address Book	AMGR_Client
Opportunity	Opp_View
Hotlist	AMGR_Hotlist

If you are not in the controlling window that corresponds with the type of report you choose, you are limited to running the report on all entries in the Address Book rather than a selected or current entry list.



Database Views for User-Defined Fields

When you create a user-defined field, a database view for that user-defined field is also created. You can use these views to report on user-defined fields in Crystal Reports. For example, when a new Address Book user-defined field called "Salary" is created, a new view named "A_Salary" is dynamically created. Based on the type of user-defined field, the view name is prefixed by a designated letter. The following table identifies the view name prefixes for each type of user-defined field.

Microsoft SQL View Prefixes

The Microsoft SQL driver creates database views for user-defined fields, using the following prefixes.

Prefix	Type of user-defined field
A_	Address Book
O_	Opportunity
U_	Users
S_	System

Database Driver Used to Create Crystal Reports

Maximizer uses the native SQL Server driver (MAS_DSN) exclusively to create Crystal Reports in this version of the software. However, Crystal Reports created in some previous versions of Maximizer were created using the Maximizer ODBC driver.

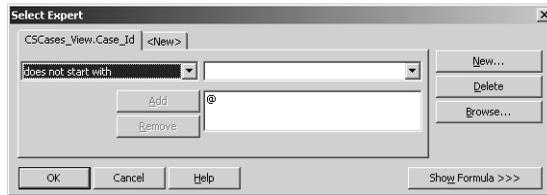
The Maximizer ODBC driver is still supported for compatibility reasons with previous versions of Maximizer. If you are creating new reports for use with Maximizer, use the SQL Server driver.

Filtering Data

In order to report on particular types of data, you need to use selections or filtering in Crystal Reports. Use the Select Expert (Report > Select Expert) to select or filter data for your report. In the case of the Address Book table/view, use the Record_Type field to select or filter Address Book entries. For example, to create a report that only shows Company records, use the Select Expert to return only those records where "Record_Type = 1".

You can also filter or select the data for the report using Maximizer. Once a report has been saved, populate the appropriate Maximizer windows with the desired information then run the personal report and select the all entries in the current list option.

Maximizer contains default records in many of the common modules. These are denoted by an "@" sign and can be filtered using the Select Expert by using the "does not start with" criteria as illustrated in the following graphic.



Address Book Entry Data Type	Record Type for Microsoft SQL
Company	Record_Type = 1
Individual	Record_Type = 2
Contact	Record_Type = 31
Individual Contact	Record_Type = 32
Default Entry	Record_Type = 5
Alternate Address for Contact	Record_Type = 41
Alternate Address for Individual	Record Type = 42

Linking

Linking determines how the report data elements are related. For example, to report all notes related to an Address Book Entry you would link the Client_Id and Contact_Number fields of the AMGR_Client view to the fields of the same name in Notes.

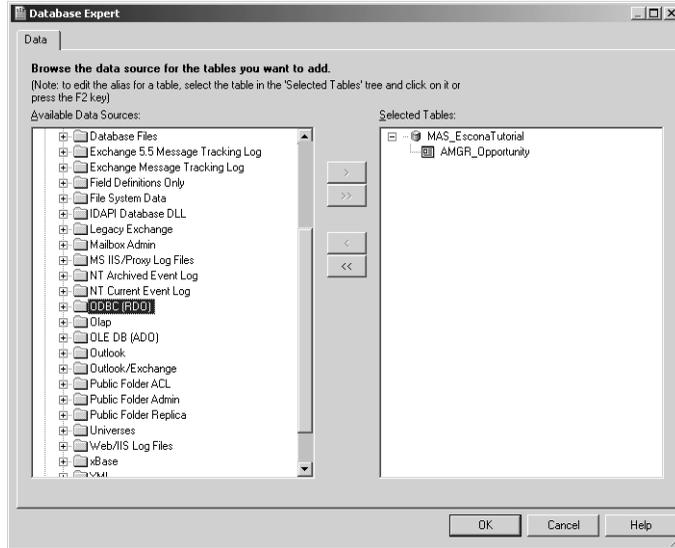
Crystal Reports enables you to specify the type of join and type of link you want to use when linking tables. Joins and links indicates how linked fields in two tables are compared when records are read. Join, enforce, and link options can be specified in the Links Options dialog box. Using the various join enforcement options can ensure that linked tables are included in the SQL query, even when none of the fields in the table are used in the report. The Crystal Reports help files contain more information on Linking options.

Controlling Windows

As mentioned previously, when you choose to create a new report template or edit an existing template, the default view for the report is based on the active controlling window. Following is an example of a controlling window in Maximizer outlining the associated view name, links, and common selections.

Including Additional Views in Your Reports

To include additional views in your reports, you must link them to the parent table of the controlling window. You do so through the Database Expert (Database > Database Expert) by linking to the data source.

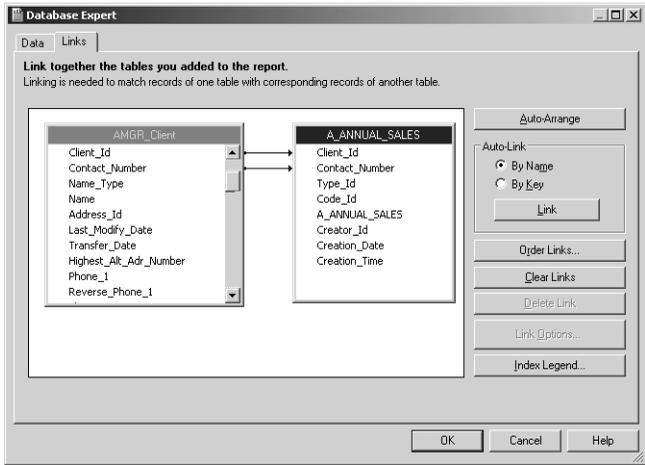


User-Defined Fields Example

When a new User-Defined Field is created, a new database table or view for that User-Defined Field is also created. User-Defined Fields can be associated with Address Book, Opportunity, and Users. Use the Database Expert (Database > Database Expert) to include a user-defined field and link it to the desired parent view/table.

The following example is using a user-defined field named "Annual Sales".

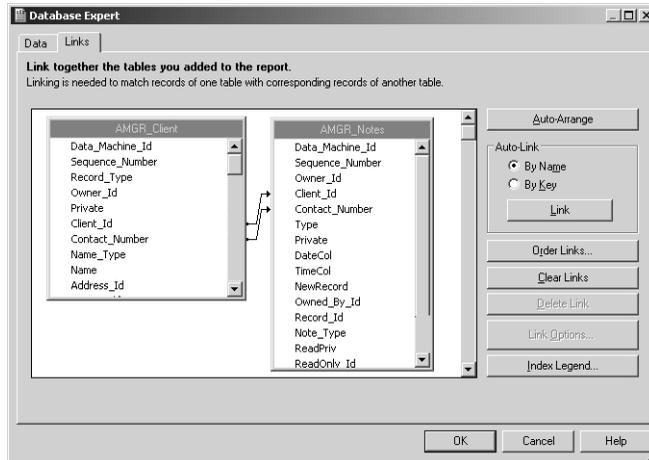
User-Defined Field	Microsoft SQL	Maximizer ODBC
User-defined field view name	A_<user-defined field name> example: A_ANNUAL_SALES	U_<user-defined field name> example: U_ANNUAL_SALES
Links	Client_Id => Client_Id Contact_Number => Contact_Number	Client_Id => Client_Id Contact_Number => Contact_Number



Notes Example

Each note created for an Address Book entry is a record in the view called Notes. To report on notes associated with Address Book entries, you must add the view and link it to the Address Book entry table according to the following table.

Note	Microsoft SQL
Notes view name	AMGR_Notes
Links	Client_Id => Client_Id Contact_Number => Contact_Number



SQL Views and Data Tables

Following is an appendix of the most common Maximizer SQL views and tables.

AMGR_Client View

The AMGR_Client View contains name, address, phone number, and email address information for Address Book entries, including Companies, Individuals, and Contacts, as well as alternate addresses and default entries. Many other tables in the database reference the Client_Id and Contact_Number fields of this table.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journaling.

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Type of Address Book entry: 1 = Company 2 = Individual 5 = Default entries 31 = Company Contact 32 = Individual Contact 41 = Company or Company Contact alternate address 42 = Individual or Individual Contact alternate address
Owner_Id	String	11		
Private	Integer	4		
Client_Id	String	23		Unique client identification string.
Contact_Number	Integer	4		Unique client identification number. 0 = Company or Individual record < 60,000 = Contact record > 59,999 = Alternate address
Name_Type	String	1		C = Company I = Individual, Contact, Default entry, or Alternate address

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Name	String	79		One of the following: <ul style="list-style-type: none"> • Company name • Individual last name • Contact last name • Alternate address description • Default Entry
Address_Id	Integer	4		0 = Use default address Value other than 0 = Contact_ Number of address to use for this Address Book entry.
Last_Modify_Date	DateTime	8		
Transfer_Date	DateTime	8		Date and time when the last transfer occurred.
Highest_Alt_Adr_ Number	Integer	4		Highest alternate address number in use.
Phone_1	String	21		
Reverse_Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_2	String	21		
Reverse_Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_3	String	21		
Reverse_Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_4	String	21		
Reverse_Phone_4	String	21		
Phone_4_Extension	String	21		
Highest_Contact_ No	Integer	4		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Receives_Letters	Integer	4		<p>Indicates whether Contact (Record_Type = 31 or 32) receives mail sent to the Company/ Individual:</p> <p>0 = Contact doesn't receive mail sent to Company/Individual 1 = Contact receives mail sent to Company/Individual</p> <p>Note:</p> <ul style="list-style-type: none"> • For Individual records (Record_Type = 2), this value is always 1. • For Company records (Record_Type = 1) and alternate addresses (Record_Type = 41 or 42), this value is always 0.
Use_Client_Name	Integer	4		<p>Applies to Contacts (Record_Type = 31 or 32) only. Indicates whether the Contact's Company/Individual name should be included in the address:</p> <p>0 = Do not include Company/ Individual name in address 1 = Include Company/Individual name in address</p>
First_Name	String	79		
Initial	String	79		Middle name or initials.
MrMs	String	79		
Title	String	79		
Salutation	String	79		
Department	String	79		
Firm	String	79		The Company Name of an Individual record. Applies to Individual (Record_Type = 2) records only.
Division	String	79		
Address_Line_1	String	79		
Address_Line_2	String	79		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		
Last_Client_Id	String	23		Last Client ID used for transfer.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Updated_By_Id	String	11	ADMN_User_Details.User_Id	User_Id of user who most recently updated the Address Book entry.
Reports_To_Contact_Number	Integer	4	AMGR_Client.Contact_Number	Contact_Number of Contact (Record_Type = 31 or 32) to whom this contact reports (e.g., contact's supervisor or manager). Applies only to Contact records (Record_Type = 31 or 32).
Assigned_To	String	11	ADMN_User_Details.User_Id	User_Id of user assigned to the Address Book entry as the Account Manager. Applies to Company (Record_Type = 1), Individual (Record_Type = 2), and Default Entry (Record_Type = 5) records only.
ReadPriv	Integer	2		
ReadOnly_Id	String	11		
Phone_1_Desc	String	21		
Phone_2_Desc	String	21		
Phone_3_Desc	String	21		
Phone_4_Desc	String	21		
Email_1_Desc	String	15		
Email_2_Desc	String	15		
Email_3_Desc	String	15		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Lead_Status	Integer	2		0 = Not a sales lead 1 = Sales lead Applies to Company (Record_Type = 1) and Individual (Record_Type = 2) records only.
Change_Bits	Binary	8		MaxMerge Change Field. Used by Maximizer.
Contact_Inherits_UDFs	Integer	2		"New contact inherits user-defined fields" checkbox in Company and Individual Address Book entries. 0 = Contact does not inherit UDFs 1 = Contact inherits UDFs
Territory_Status	Integer	2		Indicates how the territory was set. 0 = Unassigned 1 = Unaligned 101 = Set by user 102 = Set by rule 201 = Set by manager Note: Unaligned status is used when territory alignment moves an Address Book entry from a defined territory so that it no longer falls under any of the territory criteria. The old territory remains in the Territory_ID field.
Territory_ID	Numeric	10	AMGR_Territory.Territory_ID	Unique identification number.

Company View

The Company View includes fields from AMGR_Client for Company Address Book entries.

Note

This view is read-only.

Table 2 Company View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Record identifier.
Owner_Id	String	11		
Private	Integer	2		If modified, all contacts and addresses with the same Client_Id will also be modified.
Client_Id	String	23		Unique identification number. System generated if field is Null and "System to assign Address Book entries' Identification field values" option is selected in Administrator (File > Preferences > System Options). Must be unique. Non-modifiable.
Contact_Number	Integer	2		Always 0
Name_Type	String	1		Always C
Company_Name	String	79		Name of Company. Mandatory field.
Address_Id	Integer	2	AMGR_Client. (Client_Id, Address_Id)	Points to the address to use. 0 to use main address or must already exist in the Address table. >= 60000 means unsigned.
Department	String	79		
Firm	String	79		
Division	String	79		
Address_Line_1	String	79		

Table 2 Company View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Address_Line_2	String	79		
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		
Last_Modify_Date	DateTime	8		
Last_Modify_Time	DateTime	11		
Transfer_Date	DateTime	8		Date and time of transfer. If left empty, it defaults to the system clock.
Transfer_Time	DateTime	11		
Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_1_Desc	String	21		
Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_2_Desc	String	21		
Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_3_Desc	String	21		
Phone_4	String	21		
Phone_4_Extension	String	21		
Phone_4_Desc	String	21		
Change_Bits_Low	Binary	8		MaxMerge Change Field 1. Used by Maximizer. Do not use.
Change_Bits_High	Binary	8		MaxMerge Change Field 2. Used by Maximizer. Do not use.
Creator_Id	String	11		
Creation_Date	DateTime	8		Date and time when Company/ Individual record was created. Default value is current system date and time.
Creation_Time	DateTime	11		

People View

The People view includes fields from AMGR_Client for Individual and Contact entries.

Note

This view is read-only.

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Record type indicator.
Owner_Id	String	11		
Private	Integer	2		
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number)	Unique identification number. Valid values: 0–59999 <ul style="list-style-type: none"> • 0 = Individual • Value other than 0 = Contact Cannot modify. Pair (Client_Id, Contact_Number) must be unique.
Contact_Number	Integer	2		
Name_Type	String	1		
Last_Name	String	79		
Address_Id	Integer	2	AMGR_Client. (Client_Id, Address_Id)	Pointer to address record to use: <ul style="list-style-type: none"> • 0 = Use main address • >= 60,000 (unsigned) = Use alternate address
Department	String	79		
Firm	String	79		
Division	String	79		
Address_Line_1	String	79		
Address_Line_2	String	79		
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Last_Modify_Date	DateTime	8		
Last_Modify_Time	DateTime	11		
Transfer_Date	DateTime	8		Date and time of transfer.
Transfer_Time	DateTime	11		
Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_1_Desc	String	21		
Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_2_Desc	String	21		
Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_3_Desc	String	21		
Phone_4	String	21		
Phone_4_Extension	String	21		
Phone_4_Desc	String	21		
Receives_Letters	Integer	2		Applies to Contacts only. 0 = Contact does not receive mail 1 = Contact receives mail (default)
Use_Client_Name	Integer	2		Applies to Contacts only. 0 = Do not include Company/ Individual name in mailing address 1 = (Default) Include Company/ Individual name in mailing address
First_Name	String	79		
Initial	String	79		
Mr/Ms	String	79		
Title	String	79		
Salutation	String	79		Salutation (e.g., Dear:) to use in correspondence.

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Change_Bits_Low	Binary	8		MaxMerge Change Field 1. Used by Maximizer.
Change_Bits_High	Binary	8		MaxMerge Change Field 1. Used by Maximizer.
Creator_Id	String	11		
Creation_Date	DateTime	8		Date and time Individual or Contact was created. Default is current system date.
Creation_Time	DateTime	11		

AMGR_Appointments View

The AMGR_Appointments View includes both personal and Address Book-related appointments.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journaling. All times are stored in Coordinated Universal Time (UTC).

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11	AMGR_Resources.Resource_Id – or – ADMN_Users.User_Id	User, location, or resource that the appointment is scheduled with. (There is a separate record for each user, location, and resource participating in the same appointment.) If the Location field includes a location that is not in the AMGR_Resources Table (Owner_Type=101), the Owner_Id value is L@FREEFORM.
App_Date	DateTime	8		Start date and time of appointment. Mandatory field.
Lead_Date	DateTime	8		Date and time when the appointment notification should take place. Default is 10 minutes prior to App_Date.

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
End_Date	DateTime	8		End date and time of appointment. Default is 30 minutes after App_Date.
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_Number).	Client the appointment is associated with. If filled in, the entry must exist in the AMGR_Client View. Cannot modify.
Contact_Number	Integer	4		
Private	Integer	4		
Type	Integer	2		Identifies all records of a single appointment, group appointment, recurring appointment, or recurring group appointment. The value is 0 for a single-user appointment and is another unique value for a group, recurring, or recurring group appointment. Note: Recurring, group, and recurring group appointments consist of multiple records in the AMGR_Appointments Table—one for each user and one for each recurrence.
Alert_Flag	Integer	2		0 = Alarm not set 1 = Alarm set
Priority	String	4		Defines the priority text (e.g., Hi, MED, LOW).
Completed	Integer	2		0 = Appointment incomplete 1 = Appointment complete

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Icon_Type	Integer	2		Icon associated with the appointment: 0 = None 1 = Mail 2 = ToDo 3 = Phone 4 = Travel 5 = Sale 6 = Meal 7 = Presentation 8 = Speech 9 = Meeting Note: Icons can be viewed when an appointment is being created.
Rsvp	Integer	2		User's response to appointment invitation: 0 = No response 1 = User accepts appointment 2 = Declined 3 = Tentative response Cannot modify.
Recurring_Id	Integer	2		Unique recurring ID: <ul style="list-style-type: none"> • 0 = Not recurring • Other unique value = Identifier for records belonging to a recurring appointment
Appt_Rec_Freq	Integer	2		Frequency of recurring appointment: 0 = Daily 1 = Weekly 2 = Day of month (e.g., first Monday) 3 = Monthly (e.g., 14th) 4 = Yearly

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Appt_Num_Occur	Integer	2		Identifies relative day of recurring appointment (e.g., second Tuesday). Applies to weekly, day of month, and monthly appointments only. Weekly appointments: 0 = Every ___ 1 = Every second ___ 2 = Every third ___ ... 25 = Every 26th ___ Day of month appointments: 0 = Every 1st ___ of the month 1 = Every 2nd ___ of the month ... 31 = Every Last ___ of the month Monthly appointments: 0 = First ___ of the month 1 = Second ___ of the month 2 = Third ___ of the month 3 = Fourth ___ of the month 4 = Last ___ of the month
Appt_Day_Of_Week	Integer	2		Day of recurring appointment (e.g., Friday). Applies to weekly, day of month, and monthly appointments only. Weekly and Monthly appointments: 0 = Sunday 1 = Monday 2 = Tuesday 3 = Wednesday 4 = Thursday 5 = Friday 6 = Saturday Day of month appointments: 0 = Day 1 = Weekday

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Skip_Weekend	Integer	2		Applies to daily appointments only. 0 = Default 1 = Daily appointments do not occur on weekends.
Move_To_Weekday	Integer	2		Applies to yearly appointments only. 0 = Default 1 = If appointment occurs on a weekend, move to nearest weekday
Rec_Start_Date	DateTime	8		Appointment start date.
Rec_End_Date	DateTime	8		Appointment end date. Mandatory if Rec_Start_Date is used.
PegBoardState	Integer	2		Peg board state during appointment: 0 = Unknown 1 = Busy 2 = Out (Default)
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Snooze_End_Date	DateTime	8		Date and time when a snoozed appointment will display a reminder.
Email_Date	DateTime	8		Date and time to send email appointment reminder. Applies only if Email_Flag is set to True (1).
Email_Flag	Integer	2		0 = Don't send email reminder 1 = Send email reminder
Owner_Type	Integer	2		0 = User 1 = Location 2 = Resource 101 = Custom Location

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Plan_Id	String	23	AMGR_ActionPlanTemplate.(Plan_Id, Plan_Number)	Unique identification value of the Action Plan template, as defined in AMGR_ActionPlanTemplate.
Plan_Number	Integer	4		Sequential number of the activity in the plan.
Master_Id	String	23	AMGR_CSCases.(Case_Id, Case_Number) – or – AMGR_Opportunity.(Opp_Id, Opp_Number)	Identifies the customer service case or opportunity the appointment is associated with.
Master_Number	Integer	4		
Entity_Type	Integer	4		Type of record this template is applicable to. Entity_Type values correspond to the Client_Id/Contact_Number pair references on the right: 0 = Not specified (default for old notes) 1 = Address Book entry 2 = Opportunity 3 = Campaign 4 = User 5 = Customer service case 6 = Knowledge base 7 = Order 8 = Order item 9 = Default entry 100 = Custom Independent table 101 = Custom Child table
TextCol	String	1024		Text description of appointment.
Appointment_Id	String	24		Appointment identification string.
Appointment_Number	Integer	4		Appointment identification number.

AMGR_Hotlist View

The AMGR_Hotlist View includes both personal and Address Book related tasks.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journaling. All times are stored in Coordinated Universal Time (UTC).

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11		If originated from AMGR_Opportunity_Link, it is the Owner Id of the Team Member responsible for the opportunity.
Schedule_Date	DateTime	8		Date of task. Mandatory field.
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_Number)	Client who the task is associated with. Leave empty for a personal appointment. Otherwise it must already exist in the AMGR_Client table. Cannot modify. Contact_Number = 0-59999
Contact_Number	Integer	4		
Entry_Type	Integer	4		Flag for the source of the task. 0 = Manual task 1 = Task associated with follow-up deadline for customer service case 2 = Reserved system value. Do not use. 3 = Task created by a Date user-defined field that has the "Include in Hotlist" attribute 4 = Reserved system value. Do not use.
Original_Date	DateTime	8		Original date of the task. If left empty, it defaults to the system clock.
Type_Id	Integer	4		Pointer to date field in the Detail_List table. Cannot modify.

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules	
Status_Id	Integer	4		Not in use.	
Priority	String	4		Priority of task.	
Completed	Integer	2		0 = Not complete 1 = Complete	
Opp_Id	String	23	AMGR_ Opportunity_Link. (Opp_Id, Opp_ Number, Step_Id, Activity_Id)	Identifier of the associated opportunity related to the AMGR_ Opportunity_Link that the task originated from. Must already exist in the AMGR_Opportunity_Link table. Opp_Number = 0.	
Opp_Number	Integer	4			
Step_Id	Numeric	9			Must already exist in the AMGR_ Opportunity_Link table, unless it's a follow-up activity.
Activity_Id	Numeric	9			Must already exist in the AMGR_ Opportunity_Link table.
Alarm	Integer	2		0 = No alarm set 1 = Alarm set	
Icon_Type	Integer	2		Icon associated with the task: 0 = None 1 = Mail 2 = ToDo 3 = Phone 4 = Travel 5 = Sale 6 = Meal 7 = Presentation 8 = Speech 9 = Meeting Icons can be viewed when the Hotlist task is being created.	
Lead_Date	DateTime	8		Date when alarm is to sound. If left empty, defaults to Schedule_Date.	
End_Date	DateTime	8		Task end date.	
Record_Id	Integer	4			
Creator_Id	String	11			
Create_Date	DateTime	8			

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Snooze_End_Date	DateTime	8		Date and time when the alarm deferral ends.
TextCol	String	255		Text of task. Mandatory field.
Related_To	Integer	4		Type of record this template is applicable to: 0 = Undefined. Defaults to Address Book. 1 = Address Book entry 2 = Opportunity 3 = Campaign 5 = Customer service
Plan_Id	String	23	AMGR_ActionPlan Template.(Plan_Id, Plan_Number)	Unique identification value of the Action Plan, as defined in AMGR_ActionPlanTemplate.
Plan_Number	Integer	4		Sequential number of the activity in the plan.
TaskFlags	Integer	2		Determines if a Hotlist task is scheduled or timeless. 0 = Scheduled 1 = Timeless

AMGR_Resources Table

The AMGR_Resources table lists the users' display names (e.g., Joe Napoli), locations (e.g., Staff Room), and resources (e.g., Projector) available in the Appointments dialog box.

Table 6 AMGR_Resources Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Id	Integer	4		
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	Integer	4		Resource_Id's type: 1 = User display name 2 = Location 3 = Resource

Table 6 AMGR_Resources Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Resource_Id	String	12	ADMN_User_Details.User_Id	Depends on Record_Type: <ul style="list-style-type: none"> • If Record_Type = 1 (User), then Resource_Id = User_Id. • If Record Type = 2 (Location) or 3 (Resource), then Resource_Id is the unique ID of the location or resource.
Creator_Id	String	11		
Create_Date	DateTime	8		
Name	String	80		Friendly name of the user or resource (e.g., Joe Napoli, Staff Room, Projector). Mandatory field. Unique Name.

AMGR_Notes View

The AMGR_Notes View includes history and notes for Address Book entries, opportunities, campaigns, etc.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journaling.

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11		This field actually contains the Creator_Id, not the Owner_Id.
Client_Id	String	23	AMGR_Client.	Client_Id/Contact_Number or Opp_Id/Opp_Number of the record the Note is associated with. Associated record must already exist. Mandatory field. Must provide Client_Id/Contact_Number for insert. Cannot update.
Contact_Number	Integer	4	(Client_Id, Contact_Number) – or – AMGR_Opportunity (Opp_Id, Opp_Number)	

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Type ^a	Integer	4		Can insert. Can update. Valid values: 0–32,767 Standard Maximizer note types and Detail note types may be specified: 0 = Manual note 1 = Mail-out note 2 = Outgoing call note 3 = Timed note 4 = Transfer note 5 = Completed task or appointment 6 = Scheduled task or appointment 7 = Email sent note 8 = Opportunity created or opportunity status changes 9 = History note 10 = Reassign task note 11 = Reserved for future use 12 = Customer service 14 = Incoming call note
Private	Integer	4		
DateCol	DateTime	8		Date and time when note was created. Default is current system date and time. Can insert. Can update.
TimeCol	DateTime	8		
NewRecord	Integer	4		Maximizer system field. Do not use.
Owned_By_Id	String	11		
Record_Id	Integer	4		
Note_Type	String	20		Within Maximizer, this string is used only for display purposes to indicate a sub-type of note. If a standard type is defined in the Type field, this string is appended to the standard type name for display. In Maximizer, this field appears as Category on the Note dialog box for manual notes only. Can insert. Can update.

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
ReadPriv	Integer	2		
ReadOnly_Id	String	11		
SynchFlags	Integer	4		Do not use this field. It is reserved for use by MaxExchange.
Entity_Type	Integer	2		Specifies the type of parent record the note belongs to. Entity_Type values correspond to the Client_Id/Contact_Number pair references on the right: 0 = Not specified (default for old notes) 1 = Address Book entry 2 = Opportunity 3 = Campaign 5 = Customer service case 10 = Appointment 100 = Custom Independent table 101 = Custom Child table This field must be specified upon note insert, and it cannot be updated later.
TextCol ^b	Text	9216		Text of Note, without HTML tags. Can insert. Can update.
RichText<Superscript><TableFootnote>	Text	No limit		Text of Note, including HTML tags. Can insert. Can update.
NoteFlags	Integer	2		0 = Note is not flagged. 1 = Note is flagged as important.

- a. Some Maximizer functions, such as purging, searching, and MaxExchange synchronization, do not support user-defined note types, which have a Type value greater than 17.
- b. If both TextCol and RichText are populated, the value in the RichText field is used as the note. If the RichText field is not null and a note is inserted into the TextCol field or the TextCol field is updated, the information in the RichText field must be set to null.

ADMN_User_Details Table

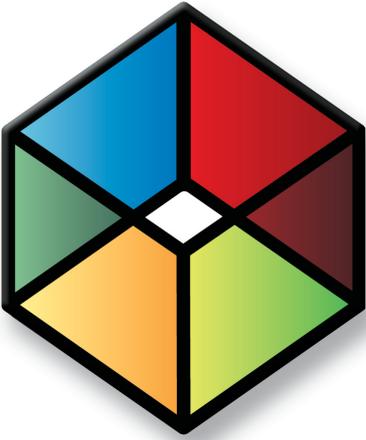
The ADMN_User_Details table contains personal information on Maximizer users.

Table 8 ADMN_User_Details Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Type	Integer	4		
User_Id	String	11		
Old_Password	String	511		
User_MrMs	String	80		
User_FirstName	String	80		
User_Init	String	80		
User_Name	String	80		
User_Title	String	80		
User_Salutation	String	80		
User_Firm	String	80		
User_Route	String	80		
User_Div	String	80		
User_AddressLine1	String	80		
User_AddressLine2	String	80		
User_City	String	80		
User_State_Province	String	80		
User_Zip_Code	String	80		
User_Country	String	80		
User_Phone_1	String	22		
User_Phone_1_Extension	String	22		
User_Phone_2	String	22		
User_Phone_2_Extension	String	22		
User_Phone_3	String	22		
User_Phone_3_Extension	String	22		
User_Phone_4	String	22		

Table 8 ADMN_User_Details Table (Continued)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
User_Phone_4_Extension	String	22		
User_Email_Address	String	120		
User_WebSite	String	120		
User_CustomField1	String	120		
User_CustomField2	String	120		
User_CustomField3	String	120		
User_CustomField4	String	120		
Creator_Id	String	12		
Create_Date	DateTime	8		
LastUpdate_Date	DateTime	8		
User_ReadAccess	Integer	4		
WindowLogin	String	33		
Display_Name	String	80		Not in use. Note: The user's display name is stored in the AMGR_Resources Table.
Record_Id	Integer	4		
Reports_To	String	12		The user ID of the person the user reports to. This information is used in organizational charts generated by Maximizer.



APPENDIX
Glossary of Terms **C**

Glossary of Terms

Use this list of terms to help familiarize yourself with the terminology of Maximizer CRM.

Access Rights – security settings for users. Access rights control each user's permissions to read, insert, modify, or delete various types of Maximizer entries. They also control general Maximizer privileges, user roles, and allowed printing destinations. Access rights are determined by the user's access settings and the access settings of any security groups the user belongs to.

Access Settings – there are two types of access settings: user access settings and group access settings. Combined user and group access settings determine a user's access rights.

Accounting Link – a Maximizer add-on that enables users to connect to QuickBooks through Maximizer. For more information, refer to the *Accounting Link User's Guide* or the Maximizer website.

Address Book – a Maximizer database.

Address Book entry – a Company, Individual, or Contact in the Maximizer Address Book.

Administrator – a Maximizer module in which the Address Book administrator can perform system configuration and maintenance for the Maximizer system and Address Books.

Advanced Import – importing an MXI or XML file into an Address Book.

Calendar – a Maximizer window in which you can manage your appointments.

Company – an Address Book entry used to record information for a company or organization.

Company Library – a shared library of company literature.

Contact – an Address Book entry used to record information for an individual person associated with a Company or Individual type of Address Book entry.

Controlling window – a main Maximizer window, such as the Address Book window, that determines what tabbed following windows are displayed. The contents of the following window depend on which entry is selected in the main controlling window.

Crystal Reports – a tool for generating reports. Crystal reports are available for viewing and generation through the Reports tab in Maximizer.

default entry – an entry (such as an Address Book entry) containing default field values that are propagated to new entries by default.

Escona – the Escona Address Book is a sample Address Book included with a typical installation of Maximizer. Using the example of a

fictitious vintner in the Sonoma Valley, this Address Book demonstrates many of Maximizer's possibilities.

Following window – a tabbed sub-window of a controlling window. The contents of the following window depend on which entry is selected in the main controlling window. For example, the Contacts window displays only those Contacts that belong to the selected entry in the Address Book window.

Global Edit – a Maximizer operation that enables you to apply the same change to multiple Maximizer entries simultaneously.

Holiday Editor – a tool in Administrator for adding holidays to the Maximizer Calendar window.

Hotlist – a window in Maximizer used to display tasks and appointments in a specific date range.

HTML – HyperText Markup Language. A document format used for displaying web pages in a browser.

intranet – an internal network—much like the Internet—that is self-contained with the local area network (LAN). Frequently, a web server is used to display pages that should be accessible only within the company.

IP address – a number used to uniquely identify a specific computer on a network. Every network-connected computer has an IP address.

list – a listing of entries in Maximizer. You can create a list using a search or by selecting specific entries and reducing the list to the selection. Most activities are performed for the current list or the current entry.

log in – the act of entering your user ID and password to gain access to a Maximizer Address Book. The Login dialog box prompts you for your user ID and password.

MASTER user – the Address Book administrator's user ID. This user ID permits access to Administrator.

merge field – text inserted into a document or template that is replaced by Address Book information during a mail merge. For example, a merge field can be a Contact's name, so you can customize a letter's salutation with the recipient's name.

note – a text document attached to Address Book entries, Contacts, and opportunities.

OLE – object linking and embedding (OLE) is a technology that allows you to insert files, portions of files, and links to files into a document or application. You can insert files in the Documents window and the Company Library. Double-clicking the file opens it in the associated (and installed) application.

online – information that is "online" is sometimes used to describe information on the Internet or on your computer screen. An "online"

user guide or "online" Help is documentation displayed on your screen.

opportunity – an entry in Maximizer used to record an opportunity to make a sale.

OrderDesk – a window in Maximizer used to manage orders and inquiries from your online catalog.

Outlook Synchronization – a Maximizer feature for synchronizing some Maximizer entries, such as Address Book entries, between Maximizer and Microsoft Outlook.

preferences – a collection of program options that allow users to customize how Maximizer functions. Some preferences are set in Administrator; some are set in the modules.

prospect – a potential customer. ListsNOW.com lets you acquire and import lists of prospects. You can then use the data for your sales prospecting activities.

related entries – an entry that records a relationship between two Address Book entries. For example, one Address Book entry might be an accountant for another Address Book entry, which could be recorded as a related entry in Maximizer.

sales team – a team created using Administrator to support team-based work on sales opportunities in Maximizer.

search engine – a website on the Internet that keeps a searchable index of websites. You can register your website with a search engine so customers can find your site by performing a search. Examples of search engines are Google and Yahoo!.

security group – a set of access settings for a subset of Maximizer users.

SMTP – an SMTP server is a server used for outgoing Internet email.

template – a file that outlines the design for a document, email message, or web page. Maximizer uses templates for word processor documents.

UNC – Universal Naming Convention. A kind of network path used to locate files and folders. An example of a UNC path is "\\Escona\MxServer\".

user-defined field – a custom field used to record additional "user-defined" information for Address Book entries, opportunities, and users.

user ID – a name that uniquely identifies a Maximizer user. Users must enter their user ID and password in order to gain access to a Maximizer Address Book.

wizard – a series of interactive screens that walk you through the steps necessary to perform an action or procedure in a program.

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