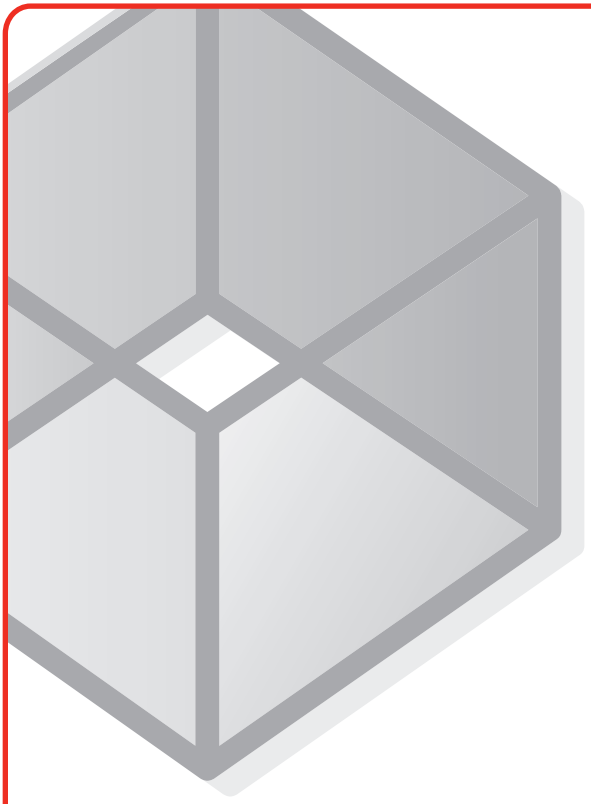
Maximizer™ CRM11



User's Guide
for Maximizer Web Access

Maximizer Software
Simply Successful CRM

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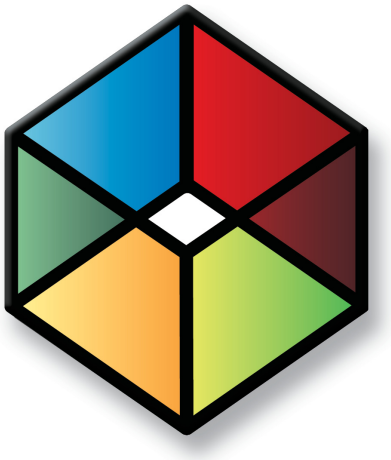


CHAPTER 1

Getting Started

Introducing Maximizer CRM

In this chapter...

"Maximizer CRM" on page 2
"Maximizer on the Web" on page 3
"Maximizer Interface" on page 6
"Lists of Entries" on page 10
"My Work Day" on page 12

Maximizer CRM

Maximizer CRM is specifically designed for small and medium-sized businesses and corporate divisions of large companies. By integrating sales, marketing, and customer service tools into one affordable solution, 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 CRM, enterprise contact management, marketing automation, and other related applications to meet the sales, marketing, and customer service 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.
- Pursuing a sale using a structured sales strategy and team-based selling.
- Managing customer service and your knowledge base operations.
- Promoting your product through automated campaigns.
- Sending email messages to one or many recipients.
- Organizing and accessing your sales and marketing literature in a shared library.
- Generating reports from any of the lists—Address Book entries, opportunities, customer service cases, Hotlist tasks, and additional information you keep on your entries.

Maximizer on the Web

For many organizations, it's impractical to send an entire database to each remote machine—the database may be too large; there may be concerns about distributing valuable lead and customer information; or there may be a concern about connection times and the amount of data being sent.

Maximizer's web access sites give remote users access to the central Maximizer database via the web. Remote users can access and work with Address Book entries as they would in Maximizer at the office.

Remote users need only a web browser, Maximizer user ID, and password. A travelling business person could step into a web café or borrow someone's computer to quickly connect to the home office Address Book. Once online, it's easy to work with contact data, check Hotlist tasks and calendar appointments, customer service cases, and opportunities.

The web access sites provide Maximizer database access to people who don't have Maximizer installed. A company could have its distributor list in Maximizer and allow web access to that list so any other member of the channel—with the proper password—could go online and browse the distributor directory.

Accessing Maximizer Web Access

You can access Maximizer Web Access by entering the site's URL directly in a browser. If you are accessing Maximizer Web Access from a computer where Maximizer server or workstation is installed, you can also access Maximizer Web Access from the Start menu.

You can access the sample Escona Tutorial Address Book using "jnapoli" as the user ID and "maximizer" as the password.

➤ To access Maximizer Web Access

1. To access Maximizer Web Access through its URL, enter the URL in any web browser.

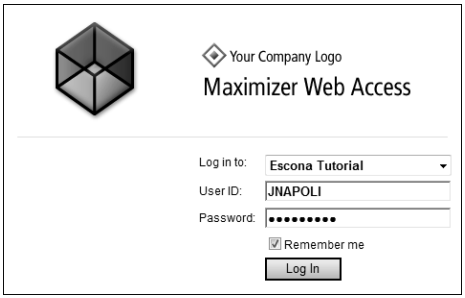
   The URL is set by your system administrator. Typically, the URL would look like the following:

   http://[YourServerName]/MaximizerWebAccess/Default.aspx

   – or –

   To access the site through the Start menu, select **Start > Programs > Maximizer CRM > Web Access > Maximizer Web Access**.

2 Select the Address Book you want to open, and enter your **User ID** and **password**.



Configuring Browsers for Maximizer Web Access

Maximizer Web Access runs in Microsoft Internet Explorer and Mozilla Firefox. For an up-to-date list of supported browsers, visit the Maximizer website:

www.maximizer.com

If you use Internet Explorer, you may need to adjust your security settings to access the full functionality of Maximizer Web Access. In Internet Explorer, you must add the Maximizer Web Access server to the Trusted sites zone with the security level set to Medium-low.

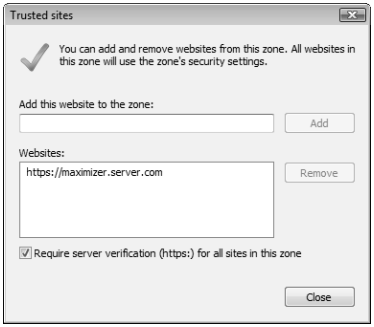
➤ To configure Internet Explorer to use Maximizer Web Access

1 In Internet Explorer, select **Tools > Internet Options**, and select the **Security** tab.

2 Select the **Trusted sites** security zone, and click **Sites**.

3 If necessary, clear the **Require server verification (https:) for all sites in this zone** checkbox.

4 Enter the URL for the Maximizer Web Access server and click **Add**.



5. Click **Close**.

   Maximizer Web Access is added to the Trusted sites security zone.

6. With the Trusted sites zone still selected, click **Custom Level**.

7. In the **Reset custom settings** area, select **Medium-low** from the **Reset to** drop-down list.

8. Click **OK** to save the changes in the Security Settings dialog box, and click **OK** again to save your Internet options.

Navigation Tips

Because Maximizer Web Access runs inside your browser, you navigate its pages the same way you navigate a website. Here are some tips for navigating Maximizer Web Access:

- To move back a page, click the **Back** button on your browser's toolbar. Click the **Forward** button on the browser's toolbar to move forward. (On the keyboard, you can move backwards and forwards by pressing Alt + left or right arrow key.)
- If you repeatedly run Maximizer Web Access from the same computer, create a **Favorite** or **Bookmark** to the Login page so you never have to re-enter the URL.

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 pages in Maximizer. You can easily move from page to page to access different types of entries.

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

1. Select or open **entries** in the list to view information and perform tasks on the entries.
2. Use the **menus** to access all tasks that are available in the current page.
3. Select an **icon** in the icon bar to move to a different page.
4. At the top of the icon bar, use the button with the **arrows** on it to hide or display the icon bar view.
5. Use the **view bars** in a page to filter your list and access common tasks and the column setup.
6. Hover your mouse over an entry and click the **Summary** icon to view additional information on the entry in a **pop-up** window.
7. Use the **controls** at the bottom of a list to choose the number of entries displayed on a page and to navigate from page to page.

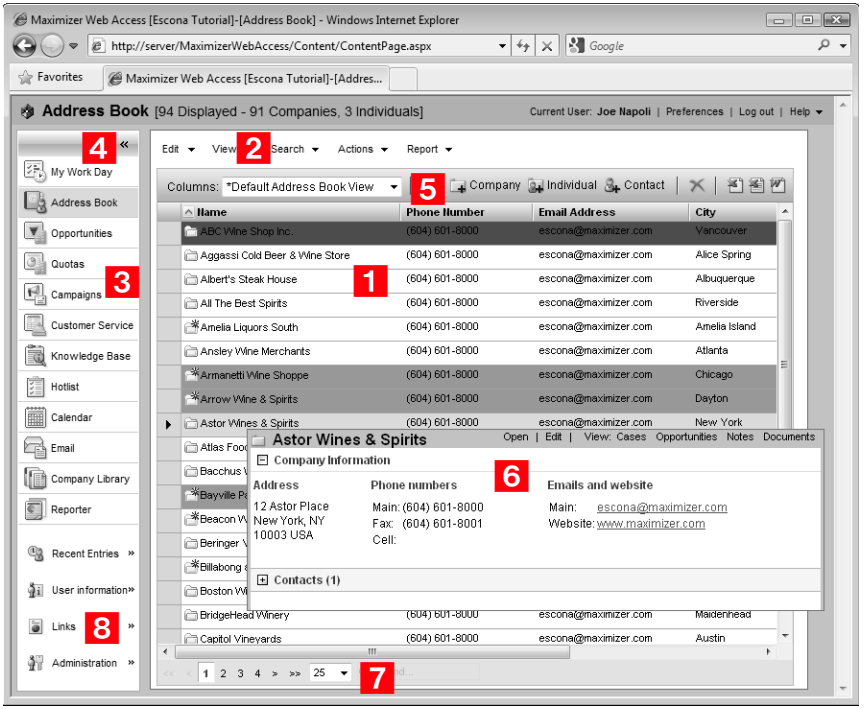
   Click on a page number to move to a different page. The arrow buttons take you to the next and previous pages, as well as to the first and last page. The ellipsis buttons take you to the next and previous 10 pages.
8. Hover your mouse over the links in the left navigation pane to access additional commands in pop-ups including the following:

   Recent Entries to select an Address Book entry that you recently accessed.

   User Information to view phone lists and status of other Maximizer users.

   Links to access external links.

Administration to access administrative tasks.



Maximizer Pages

The main Maximizer page is the Address Book page, which lists the Companies, Individuals, and Contacts in your Maximizer database (Address Book). The following list provides a brief description of each main page 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, appointments, and company announcements, as well as access to dashboards.

Address Book

The Address Book page 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, customer service cases, opportunities, documents, and user-defined fields.

Opportunities

The Opportunities page helps you and your colleagues manage complex sales that involve the participation of more than one person in the buying decision and require the support of a sales team.

Quotas

The Quotas page allows you to keep track of your sales quotas. You can view the forecast, weighted, and won revenue of your opportunities compared to your quota for each month, quarter, or year.

Campaigns

The Campaigns page allows you to create and manage automated campaigns. Marketing efforts are easily coordinated amongst your marketing teams. And, through the use of campaign templates, you can create campaigns quickly by modifying the campaign elements.

Customer Service

The Customer Service page supports and enhances your existing customer service business processes. All Address Book entry issues can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner. The Customer Service page is tightly integrated with the Knowledge Base page. When a case is resolved, you can enter an explanation of how the case was resolved and save the article in the Maximizer Knowledge Base.

Knowledge Base

The Knowledge Base page provides you with a library-style tool to manage your customer service solutions. The page is tightly integrated with the Customer Service page. An article is typically created for each case solution, answered question, or guideline relating to your products or services.

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 page 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 page 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 merge fields to customize mail-outs to multiple Address Book entries.

Company Library

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

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 pages, 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 page 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.

Filters are available for every page 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 page.

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

- "Types of Entries" on page 10
- "Selecting Entries" on page 11
- "Displaying Entries" on page 11

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.
- **Customer service cases –** Entries to keep track of customer service information, they are associated with Address Book entries.
- **Campaigns –** Entries to keep track of traditional and automated campaigns.

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.

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.

➤ To select entries

- Click on the gray box to the left of an entry.
- To select or clear all entries in the current list, click the gray box in the top-left corner of the list. Or select **Edit > Select All in Current Page**.

- To clear selected entries, select **Edit > Deselect All**.
- To reverse which entries in the list are selected, select **Edit > Invert Selection in Current Page**.

Displaying Entries

Some actions can be performed on the entire list of entries in a page. 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. Select **Edit > Make Selected List Current**.

   The other entries are removed from the list.

➤ To remove all entries from a list

- Select **View > Clear List**.

My Work Day

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

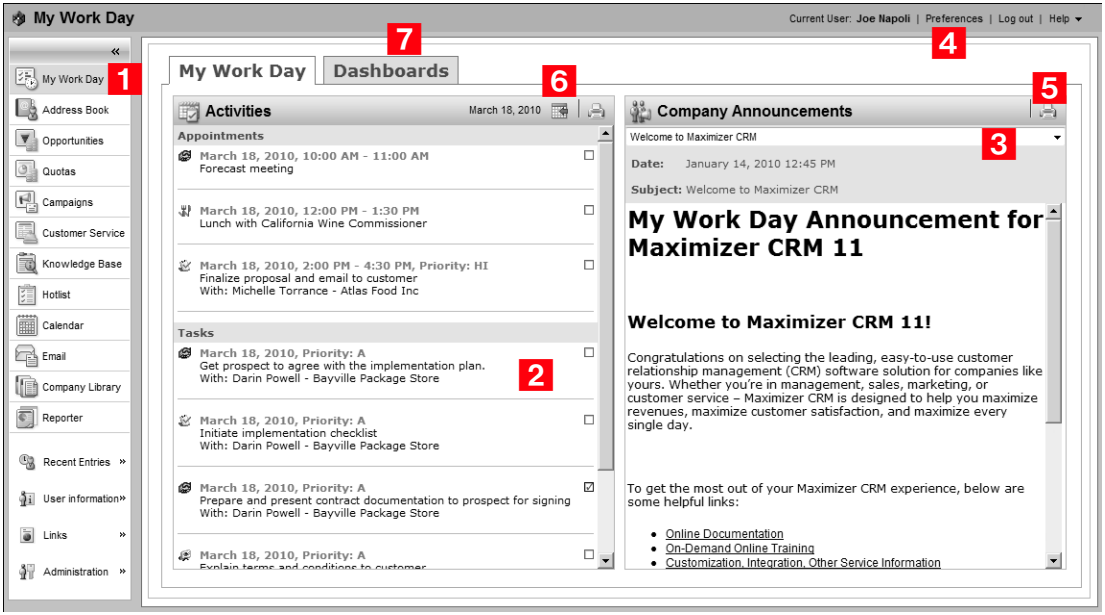
1. Select the **My Work Day** icon to open the My Work Day page.
2. Click on an **appointment** or a **Hotlist task** to view details of the activity.
3. Select a **company announcement** from the drop-down list to display it in the page.

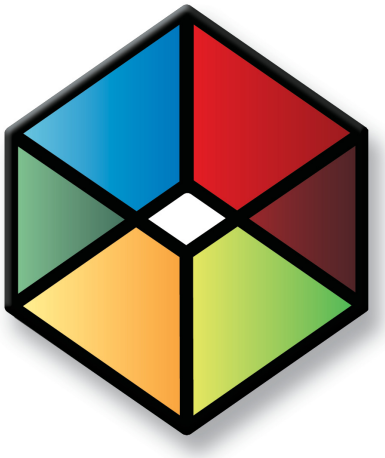
   To add an announcement to the list, insert the announcement as a note, or as a text or an HTML document in the Company Announcements folder in the Company Library.

You must be part of the Company Announcement Authors security group for your documents to display in the announcements list.

4. Click **Preferences**, click **Other Preferences**, and select the **Overview Page** tab to show or hide company announcements, tasks and appointments, or dashboards.
5. Select the **Print** icons to print activities or company announcements for the day.
6. Select the **Calendar** icon and select a date to display tasks and appointments for a different day.

7 Select the **Dashboards** tab to view your dashboards.





CHAPTER 2

Address Book Entries

Keep Track of Companies and Contacts

In this chapter...

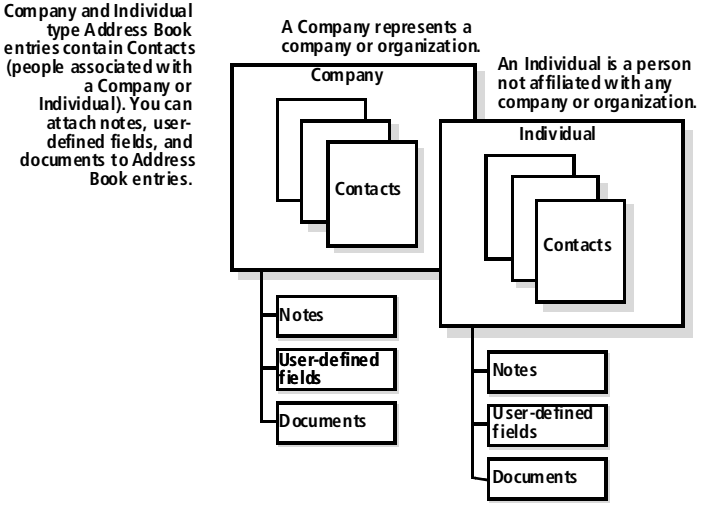
"About Address Book Entries" on page 16
"Adding Address Book Entries" on page 20
"Modifying Address Book Entries" on page 24
"Territory Management" on page 28
"Drawing Maps of Address Book Entries" on page 32
"Logging Phone Calls with Address Book Entries" on page 33

About Address Book Entries

Maximizer's focus is on Address Book entries—Companies, Individuals, and Contacts. Address Book entries can also be designated as sales leads to help you organize your information.

The Address Book page 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.



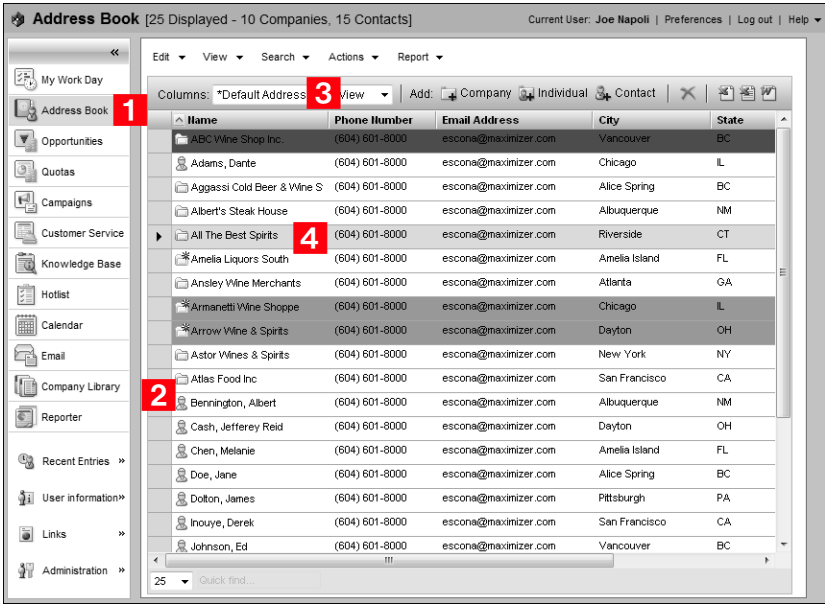
The following sections contain information on working with Address Book entries:

- "Address Book Page" on page 17
- "Choosing an Address Book List" on page 18
- "Viewing Address Book Entries" on page 18

Address Book Page

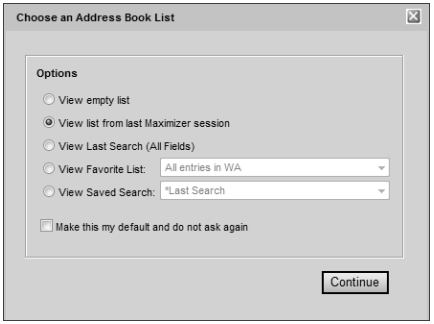
Typically, most of the activities on your Address Book entries are completed in the Address Book page. Keep the following points in mind when working in the Address Book page.

1. Select the **Address Book** icon to open the Address Book page.
2. Differentiate the **types** of entries with the icons representing Companies, Individuals, Contacts, Company Sales Leads, Individual Sales Leads, and Contact Sales Leads.
3. Use the **Columns** drop-down list to select a column setup and change the fields displayed in the page.
4. Click on an Address Book entry to open it.



Choosing an Address Book List

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



If you clear the "Ask at Address Book startup which list to view" option in the Personal Preferences dialog box, an empty Address Book list is displayed each time you open the Address Book page. (To open this dialog box, in the top-right corner of the page, click Preferences.)

The following options are available for viewing an Address Book:

- An empty list (no Address book entries displayed)
- The list from your last Maximizer session
- Your last search (All Fields)
- A Favorite List
- A saved search

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 personal 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 page, click on the entry to open it.

   – or –

   In an open opportunity or customer service case, select the **View in Address Book** icon.

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

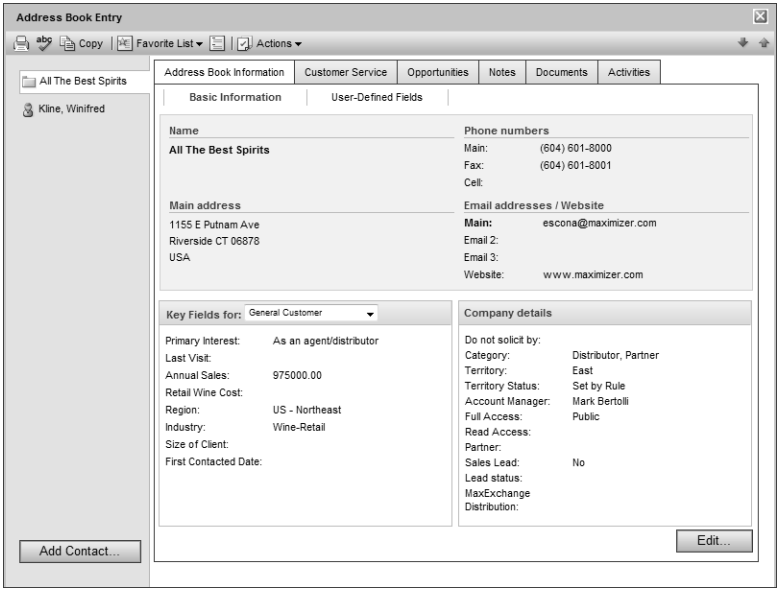
2. To send an email message or visit an Address Book entry's website, click the related link in the **Email addresses/Website** section of the entry.

3. To modify the details of the entry, click **Edit**.

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

   You can also view the customer service cases, opportunities, notes, and documents attached to the entry.

5. If necessary, click **Save** to save changes made to the Address Book entry.



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 20
- "Adding Contacts" on page 21
- "Adding Address Book Entries from Email" on page 22
- "Access Rights for Address Book Entries" on page 22

Adding Companies and Individuals

When you add entries for Companies and Individuals, you must specify all of the details on the entry. You can add Companies and Individuals as regular entries or as sales leads.

➤ To add a Company or an Individual

1. Select the **Address Book** icon to open the Address Book page.
2. Select **Edit > Add Company/Individual** or **Company/Individual Lead**.

   The Address Book Entry 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. 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.

   If this entry is marked as a Sales Lead, and you would like the entry accessible to a partner, make sure you set the category to partner.

6. Select the **User-Defined Fields** tab and specify values for any additional user-defined fields.

   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 **Save** 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. You can add Contacts as regular entries or as sales leads.

➤ To add a Contact

1. In the Address Book page, select or open the Company or Individual entry.
2. Select **Edit > Add Contact for** or **Add Contact Lead for**.

   – or –

   In an open entry, click the **Add Contact** button.

   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 **Save** to save the entry.

Adding Address Book Entries from Email

You can create Address Book entries from email messages in the Email page. 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 page, select the email message.
2. Select **Actions > Create New Address Book Entry from Current Email Message**
3. Select the type of Address Book entry, and click **OK**.
4. Enter the details for the new entry, and click **Save** to save the entry.
5. Close the Address Book entry

   The Add Email to Address Book Entry dialog box opens.
6. Enter properties of the document including the name, owner, category, and description.
7. 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. If you are using Maximizer CRM Group Edition, you can select a user, a group, or public from the Full Access and Read Access drop-down lists. If you are using Maximizer CRM Enterprise Edition, you can click the ellipsis button next to the Full Access or Read Access fields to select multiple users for full or read access rights.

Access rights for specific entries are granted in the Select Users for Full or Read Access dialog box. Keep the following points in mind when working in this dialog box:

The Select Users for Full or Read Access dialog box is available only in Maximizer CRM Enterprise Edition.

1. In the **Available users and groups** area, select a user or group to add to the list of users and groups with access to the entry.

   Users are grouped by the departments, divisions, groups, and teams to which they belong if you have the "Display users by groups" option enabled in your preferences.

2. Click a type of group to view different groups of users.

3. Click the right arrow to move the user or group to the Selected users and groups list.

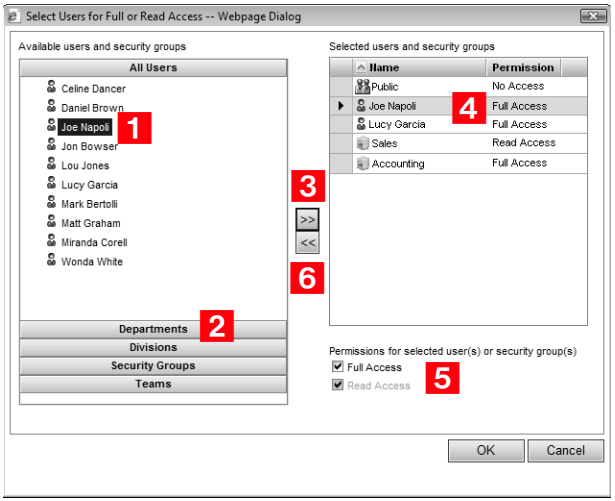
   If you accessed the dialog box from the Read Access field, the user or group is automatically assigned read access. If you accessed the dialog box from the Full Access field, the user or group is automatically assigned full access.

4. In the **Selected users and groups** area, select a user or group to modify the access rights for the user or group.

5. Select or clear the **Full Access** or **Read Access** checkbox to modify the access rights for the selected user or group.

6. Click the left arrow to remove the selected user or group from the list, stripping all access rights for the user or group.

   Public cannot be removed from the list. Public access rights are automatically changed when users or groups are given access rights to the entry.



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, moving Contacts to other Companies or Individuals, and converting Individuals to Companies and Contacts to Individuals.

The following sections contain information on modifying Address Book entries:

- "Adding Alternate Addresses for Address Book Entries" on page 24
- "Moving Contacts to Other Companies and Individuals" on page 26
- "Converting Individuals to Companies and Contacts to Individuals" on page 27

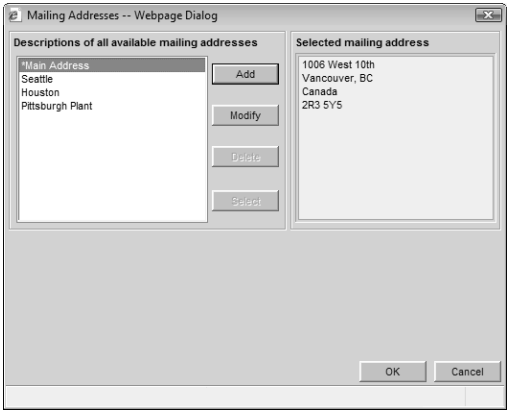
Adding Alternate Addresses for Address Book Entries

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 ellipsis button next to the **Address 2** field.

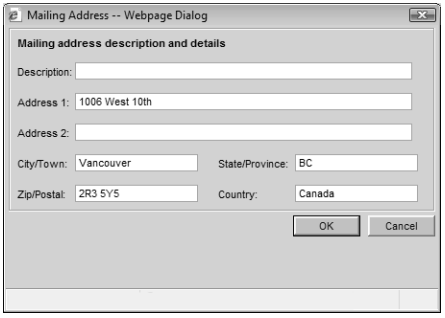
   The Mailing Addresses dialog box opens.



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.

Moving Contacts to Other Companies and Individuals

You can move a Contact from one Company or Individual to another Company or Individual. The Contact's notes, documents, and user-defined fields move with the Contact. Appointments and Hotlist tasks are updated to reflect the new location.

You have a number of options when moving a Contact:

- Change the Contact's address to the main address of the new Company or Individual.
- Prefix all of the Contact's notes with text indicating that the Contact has moved.
- Maintain the Contact's association with opportunities and customer service cases.
- Maintain relationships between the Contact and related entries.
- Update Favorite Lists containing the Contact to reflect the Contact's move.
- Update campaigns to reflect the Contact's new location.
- Delete or save the Contact's entry with the original Company.

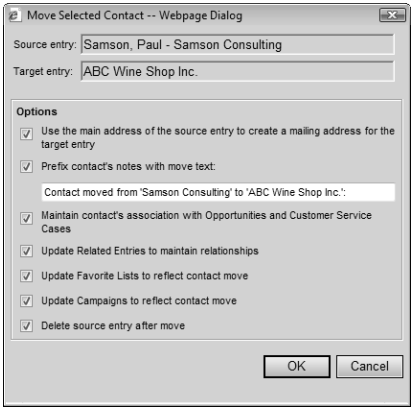
➤ To move a Contact to another Company or Individual

1. In the Address Book page, select the Contact.
2. Select **Edit > Move Selected Contact**.

   The Find Target Address Book Entry dialog box opens.
3. Enter the search criteria, and click **Search**.
4. Select the Company that the Contact is moving to, and click **OK**.

   The Move Selected Contact dialog box opens.

ⓘ The Move Selected Contact option is available only when a Contact is selected and for users with permission to insert, modify, and delete Address Book entries.



5 Select the options for the move, and click **OK** to complete the move.

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 Select **Edit > Convert Individuals to Companies** or **Convert Contacts to Individuals**.

3 Click **OK** to confirm the change.

Territory Management

Use Territory Management to set up territories and assign them to Company and Individual Address Book entries. You can assign the territories manually, or automatically through the application of territory rules.

Territory Management is available only in Maximizer CRM Enterprise Edition.

To use Territory Management, you must be assigned the Sales Manager user role.

Once territories are created and assigned, any Maximizer user can use the Territory and Territory Status fields in everyday tasks such as searching for entries, adding column setups, inserting merge fields, and creating reports.

Users who are not Sales Managers can manually assign territories while creating a new Address Book entry. They can also assign a territory to an existing entry if a territory is not assigned and the Account Manager field is blank. When a user assigns a territory, "Set by user" is displayed in the Territory Status field.

The following sections contain additional information on Territory Management.

- "Setting Up Territories" on page 28
- "Assigning Territories" on page 29
- "Aligning Territories" on page 30

Setting Up Territories

When you set up a territory, you can define rules that an Address Book entry must match to be assigned to the territory during an alignment. To build the rules, use fields such as City, Country, State/Province and Zip/Postal Code. You can also use user-defined fields.

During an alignment, entries are tested against territories in the order the territories appear in the Territory list. If an entry matches the rules of more than one territory, the territory appearing higher in the list is assigned to the entry.

All entries match a territory that does not contain any rules. So if you create such a territory, it is placed by default at the bottom of the Territory list. Otherwise, entries matching the rules of territories appearing after it would not be matched to these territories. Instead they would be matched to the territory without rules.

➤ To set up a territory

1. From the Address Book page, select **Edit > Territory Management**.

   The Territory Management dialog box opens.

The Territory Management command is available only to users with the Sales Manager role.

2. Click **Add**.

   The Add/Modify Territory dialog box opens.

3. Enter a territory name and a description of the territory.
4. From the **Account Manager** drop-down list, select an account manager.
5. Click **Add** to select the fields you need to define territory rules.
6. Specify whether Address Book entries must match all, or one or more of the territory rules.
7. Click **OK**.

   The new territory is added to the Territory list.

If an Address Book entry matches the rules of more than one territory, the territory appearing higher in the Territory list is assigned to the entry.

8. If required, use the **Move Up** and **Move Down** buttons to move the territory in the list.

Assigning Territories

Users can manually assign territories and account managers to Address Book Entries on the Basic Information tab of open entries.

Changes to territory status are logged to an entry's notes.

➤ To assign a territory to an Address Book entry

1. Open the Address Book entry to which you want to assign a territory.
2. Click **Edit**.
3. From the **Territory** drop-down list in the **Company details** area, select the territory you want to assign to the entry.

   The Territory status field now indicates that the territory is "Set by manager".

4. From the **Account Manager** drop-down list, select a user as the account manager.
5. Click **Save**.

Aligning Territories

Users with the Sales Manager role can automatically assign territories in the Alignment tab of the Territory Management dialog box. Changes made when you align territories override territories set by Sales Managers only if you select the "Overwrite territories set by manager" option.

Territories set by users are always overwritten by territory alignments.

If the alignment assigns a territory to an entry, the name of the territory is displayed in the Territory field, and the value "Set by rule" is displayed in the Territory Status field. If no territory is assigned to an entry (and one has not been set manually), the value in the Territory Status field is "Unassigned".

The value "Set by rule (unaligned)" is displayed in the Territory Status field when:

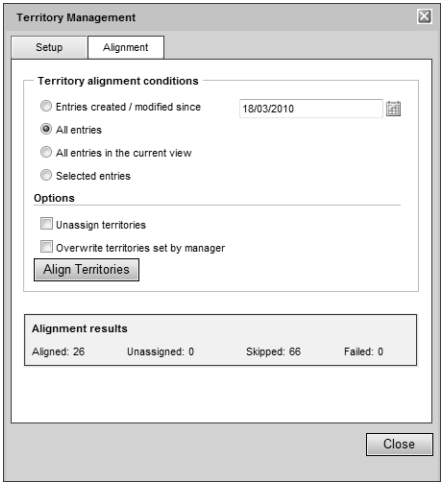
- An entry previously assigned to a territory no longer matches the territory rules. (The rules or the entry have changed.) However, if the entry matches the rules of another territory, it will be aligned to that territory.
- A territory that was set by a user at the time of the entry's creation does not match the rules of the territory it was assigned to or the rules of any other territory.
- A territory that was assigned to an entry by a Sales Manager does not match any territory rules, and the "Overwrite territories set by manager" option is selected.

➤ To align territories

1. From the Address Book page, select **Edit > Territory Management**.
2. Select the **Alignment** tab.
3. Specify the territory alignment conditions.

   For example, if you want territories aligned for all Address Book entries, select the All entries option.
4. Specify the alignment options.
   - Select **Unassign territories** to unassign territories from Address Book entries.
   - Select **Overwrite territories set by manager** to overwrite territories that were set by Sales Managers.

5 Click **Align Territories**.



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 or customer service case. 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 or open an Address Book entry, opportunity, or customer service case.
2. Select **Actions > Draw a Map**.

   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**.

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, customer service cases, 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.

➤ To log a phone call

1. Select or open the entry that you want to log the call with.
2. To log an outgoing call, select **Actions > Make a Call**.

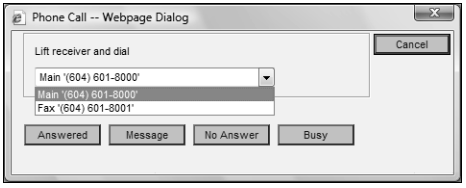
   – or –

   To log an incoming call, select **Actions > Receive a Call**.
3. If you are logging an outgoing call, select the phone number that you are calling, and select a response:

   If you select **Message**, **No Answer**, or **Busy**, the log is automatically saved in a note to the entry with the result of the call.

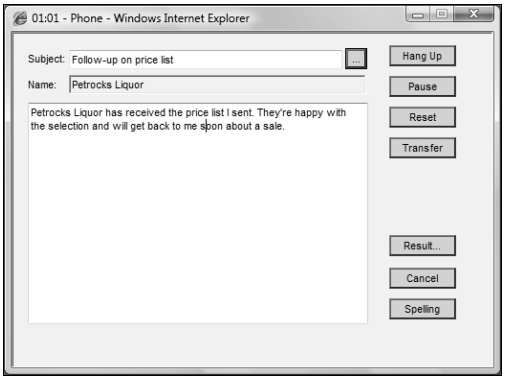
   If you select **Answered** or if you are logging an incoming call, the Phone dialog box opens timing the duration of the phone call.

The Message, No Answer, and Busy options are available only if you have phone call logging preferences set to create notes.



4. In the **Subject** field, enter a subject for the phone call, and record notes on your call as you talk.
5. When the phone call is finished, click **Hang Up**.

   The timer stops.



6 Edit the note, and click **Save**.

If your phone call logging preferences are set to show results on hang-up, you are prompted to select a result of the phone call. Select a value for the result.

You can also select a result of the phone call from the Phone dialog box. Click the Result button before saving the note.

7 Select whether or not you want to schedule a follow-up activity. If you select **Yes**, specify the properties of the follow-up activity.

CHAPTER 3

Maximizer Entries

Manage All Types of Information

In this chapter...

"User-Defined Fields" on page 36
"Setting Up User-Defined Fields" on page 40
"Formula User-Defined Fields" on page 47
"Default Entries" on page 60
"Searching" on page 61
"Global Edits" on page 69
"Favorite Lists" on page 72
"Column Setups" on page 76
"Coloring Rules" on page 79

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:

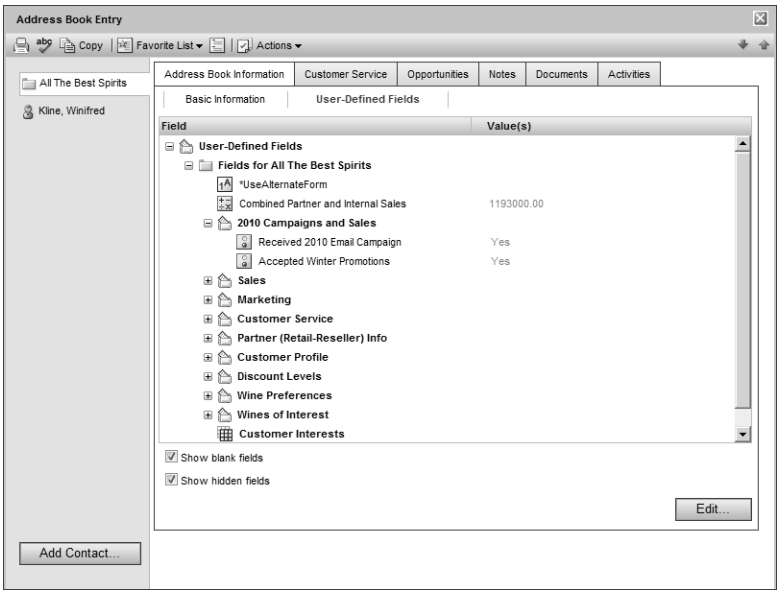
- **Address Book –** Classifies Address Book entries. You can view these fields in an open Address Book entry.
- **Opportunities –** Classifies opportunities. You can view these fields in an open opportunity.
- **Campaigns –** Classifies campaigns. You can view these fields in an open campaign.
- **Customer Service –** Classifies customer service cases. You can view these fields in an open customer service case.
- **Users –** Classifies Maximizer users. You can view these fields in the User Properties dialog box in Administrator.

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

- "User-Defined Fields Tab" on page 37
- "Types of User-Defined Fields" on page 37
- "Working with User-Defined Fields" on page 38
- "Mandatory, System, and Key Fields" on page 39

User-Defined Fields Tab

You can access user-defined fields for open Address Book entries, opportunities, campaigns, and customer service cases 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.

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

- **Date user-defined fields –** These fields store a specific date or an annually recurring date.
- **Formula user-defined fields –** These fields calculate values based on other basic or user-defined fields. You can set up these fields with formulas that create alphanumeric, date, or numeric values. Because they are calculated from values of other fields, values for formulas fields can be viewed in entries but cannot be set manually.

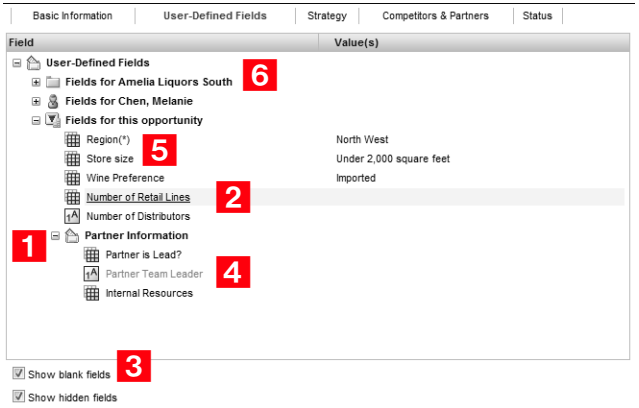
- **Numeric user-defined fields –** These fields record numeric values. You can specify a number of decimal places. For example, specify two decimal places to use this type of field for monetary values.
- **Table user-defined fields –** These fields enable you to select a value or values from a list. This type of field is very useful for multiple choice or multiple value fields. If you create a table 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.
2. 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 and customer service cases display the user-defined fields for the associated Address Book entries, as well as the user-defined fields for opportunities or cases.

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.

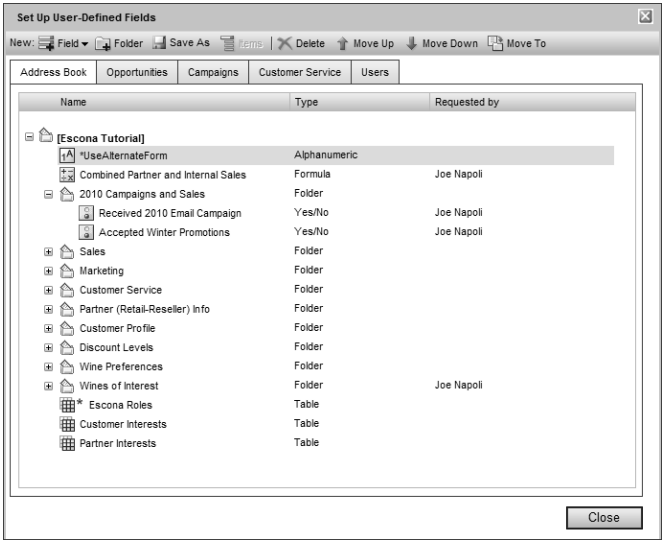
- **Mandatory Fields –** These fields must have values. System fields are set as mandatory in Administrator. User-defined fields are set as mandatory when creating the user-defined fields in the Set Up User-Defined Fields dialog box. Mandatory fields are denoted with an asterisk displayed after the field 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.

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 Administration section in the left navigation pane.

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 41
- "Creating Folders for User-Defined Fields" on page 41
- "Creating User-Defined Fields" on page 42
- "Modifying User-Defined Fields" on page 44
- "Adding Items to Table User-Defined Fields" on page 44
- "Modifying Items in User-Defined Fields" on page 45

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.

➤ To move a user-defined field or folder to another folder

1. In the left navigation pane, hover your mouse over **Administration**.
2. In the **Administration** pop-up, select **Set Up User-Defined Fields**.
3. Select the field or folder you want to move.
4. Click **Move To**.
5. From the **Folder name** drop-down list, select the folder you want to move the field or folder to, and click **Save**.

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. In the left navigation pane, hover your mouse over **Administration**, and select **Set Up User-Defined Fields** from the pop-up.

   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 –

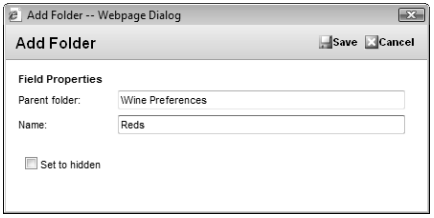
To create a folder within an existing folder, select the existing folder.

4 Click **Add Folder**.

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

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

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



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

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.

Creating User-Defined Fields

You can create user-defined fields for Address Book entries, opportunities, campaigns, customer service cases, and user accounts in the Set Up User-Defined Fields dialog box. Users can create user-defined fields only if they have insert permission for User-defined field setup.

➤ To create a user-defined field

1 In the left navigation pane, hover your mouse over **Administration**, and select **Set Up User-Defined Fields** from the pop-up.

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**, and select the type of user-defined field you want to add.

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

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

6. If you are adding a formula user-defined field, enter the formula in the **Formula** field.

   Click **Insert Field** to add basic or user-defined fields to the formula.

7. If you are adding a formula user-defined field, select the type of value the formula should return from the **Formula return type** drop-down list.

8. Specify the properties of the user-defined field.

9. Click **Save**.

   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. In the left navigation pane, hover your mouse over **Administration**, and select **Set Up User-Defined Fields** from the pop-up.

   The Set Up User-Defined Fields dialog box opens.
2. Click on the user-defined field.
3. Change the properties as required.
4. Click **Save** to save the changes.

Adding Items to Table User-Defined Fields

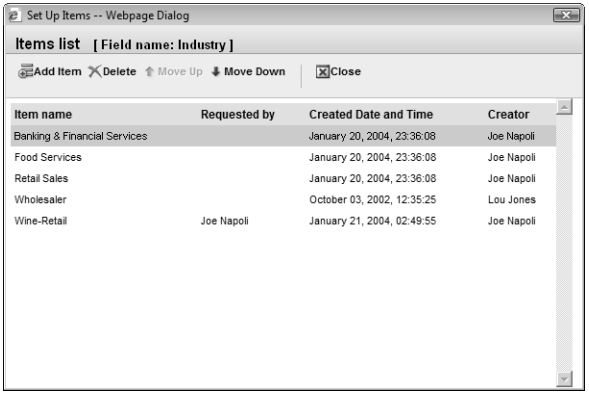
Table user-defined fields contain a list of similar items from which a user may select one or more items. As part of the process of creating a new user-defined field of this type, you should add the items to the table.

➤ To add items to a table user-defined field

1. In the left navigation pane, hover your mouse over **Administration**, and select **Set Up User-Defined Fields** from the pop-up.

   The Set Up User-Defined Fields dialog box opens.
2. Select the table user-defined field, and click **Items**.

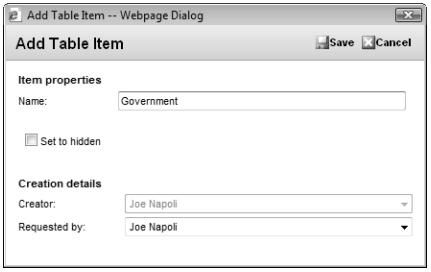
   The Set Up Items dialog box opens.
3. Click **Add Item**.



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

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

5. Click **Save**.



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. In the left navigation pane, hover your mouse over **Administration**, and select **Set Up User-Defined Fields** from the pop-up.

   The Set Up User-Defined Fields dialog box opens.

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

The Set Up Items dialog box opens.

3. Click the name of the item you want to 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 **Save**.

Formula User-Defined Fields

When you create a new or modify an existing formula user-defined field, you specify the formula for the user-defined field. You can write the formula using existing basic and user-defined fields. Click the Insert Field button to select fields to add to the formula.

You can add arithmetic expressions to your formulas. You can also add functions and conditional expressions to create more complex formulas.

Formula user-defined fields can return alphanumeric, date, or numeric values. You specify the type of return value while creating the user-defined field. The functions available depend on the types of fields that you want to manipulate.

The following sections contain information on writing formulas for user-defined fields:

- "Arithmetic Expressions" on page 47
- "Alphanumeric Functions" on page 48
- "Date Functions" on page 53
- "Numeric Functions" on page 56
- "Conditional Expressions" on page 58

Arithmetic Expressions

You can create basic arithmetic expressions for formula user-defined fields using the basic arithmetic symbols. Multiple expressions can be combined to create complicated arithmetic formulas.

To write arithmetic expressions for formula user-defined fields, you can use the following symbols:

- **+** for addition.

  You can add any numeric values to each other, add integers to date values, and add alphanumeric fields or strings separated with quotation marks to each other.

- **-** for subtraction.

  You can subtract any numeric values from each other, and subtract date values from each other. Date values return integers representing the number of days between the dates.

- ***** for multiplication.

You can multiple any numeric values together.

- **/** for division.

  You can divide any numeric values together

- **( )** for nested operations.

  You can use parentheses to create more complex operations on several numeric values.

Example: Numeric Values

Formula: ([Numeric field] + [Numeric field]) * [Numeric field]
Return value: Numeric

Example: Date Values

Formula: [Date 1] - [Date 2]
Return value: Numeric, the number of days between the two dates.

Example: Date and Numeric Values

Formula: [Date 1] + [Numeric field]
Return value: Date

Example: Alphanumeric Values

Formula: [FirstName] + " " + [LastName]
Return value: Alphanumeric, the two words listed together, separated by a space (FirstName LastName).

Alphanumeric Functions

Use alphanumeric functions to manipulate alphanumeric fields. When you use alphanumeric functions, you can insert alphanumeric fields as the parameters for the function or you can use any text strings. When you insert strings into functions, enclose the text of the string in quotation marks.

You can add the following functions to formulas using alphanumeric user-defined fields.

- **Len –** Returns the number of characters in a text string.
- **Mid –** Returns a specific number of characters from the text string starting at the position you specify.
- **Search –** Searches for text in a string and returns the position of the text.
- **Substitute –** Substitutes existing text with specified text.

- **Text –** Changes a numeric value to an alphanumeric text string. You can manipulate the returned string using any of the other alphanumeric functions.
- **Value –** Converts an alphanumeric value to a numeric value. Alphanumeric values beginning with alphabetical characters return a value of 0. You can manipulate the string using any of the numeric functions.

Len

Returns the length of a string.

Syntax

Len (Alphanumeric**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string to return the length of.

Example

Len ([Company])

This example returns the number of characters in the company's name.

Mid

Returns a specific number of characters from a text string starting at a specified position.

Syntax

Mid (Alphanumeric, StartInt, LengthInt**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string that you want to search through. Normally, this would be a merge field.
StartInt	Integer	The position of the first character in the string you want to return.
LengthInt	Integer	(Optional) The length of the string you want to return.

Example

Mid("First Last", 7)

This example returns the text starting at the 7th position in the field. In this case, it returns "Last".

Search

Searches a string for text and returns the position of the text in the string.

Syntax

Search (SearchString, Alphanumeric, StartInt**)**

Parameters

Parameter	Data Type	Description
SearchString	String	The text to search for in the string.
Alphanumeric	String	The string to search through.
StartInt	Integer	(Optional) The starting character to search.

Example

Search ("Wine", [Company_Name])

This example searches for the text "Wine" in the company name and returns the place in the name where the text starts as an integer.

Substitute

Substitutes existing text with specified text. This function returns the entire string containing the new text.

Syntax

Substitute (Alphanumeric, OldText, NewText**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string containing the text you want to change.
OldText	String	The text you want to change.
NewText	String	The text substituted into the string.

Example

Substitute([Address], "St", "Street")

This example returns the address with the abbreviation "St" substituted with the text "Street".

Text

Converts a numeric value to a string. You can then use the other alphanumeric functions to manipulate the returned string.

Syntax

Text (Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value that you want to convert.
DecPlace	Integer	(Optional) The number of decimal places to return.

Example

Text ([Revenue], 2)

This example returns the revenue as an alphanumeric string with two decimal places. If revenue, a numeric field, is 50000, the Text function in the above example returns 50000.00 as an alphanumeric value.

Value

Converts an alphanumeric value to a numeric value. If the value contains alphabetic characters, it returns 0. You can then manipulate the numeric value using any numeric functions.

Syntax

Value (Alphanumeric**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The alphanumeric string to convert.

Example

Value ([Contract Number])

This example returns the alphanumeric user-defined field, Contract Number, as a numeric value. If the field contains an alphabetical character, it returns 0.

Date Functions

Use date functions to manipulate date fields. When you use date functions, you can use date fields as the parameters for the function or you can supply date values for the functions. When you supply date values, use the Date function to format the values as dates.

You can add the following functions to formulas using date fields.

- **Date –** Converts integers to date values.
- **Day –** Returns the day of the month as an integer from a date value.
- **Dayofweek –** Returns the day of the week expressed as an integer.
- **Month –** Returns the month as an integer from a date value.
- **Year –** Returns the year as an integer from a date value.

Date

Converts integers to date values.

Syntax

Date (Year, Month, Day**)**

Parameters

Parameter	Data Type	Description
Year	Integer	The four-digit year.
Month	Integer	The one- or two-digit month.
Day	Integer	The one- or two-digit day.

Example

Date (2009, 7, 9)

This example returns July 9, 2009 as the date value.

Day

Returns the day of the month as an integer from a date value.

Syntax

Day(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	The date to return the day for.

Examples

Day(Date(2009, 7, 9))

This example returns 9 as the day of the month in the date value.

Day([Creation Date])

This example returns the day of the month that an entry was created.

Dayofweek

Returns the day of the week expressed as an integer for a specified date value, with 1 = Sunday, 2 = Monday, 3 = Tuesday, and so on.

Syntax

Dayofweek(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	The date value for which to return the day of the week.

Examples

Dayofweek(Date(2009, 7, 9)

This example returns 5, for Thursday, as the day of the week for the given date.

Dayofweek([Creation Date])

This example returns the day of the week that an entry was created.

Month

Returns the month as an integer from a date value.

Syntax

Month(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	The date from which to return the month.

Examples

Month(Date(2009, 7, 9))

This example returns 7, for July, as the month in the date value.

Month([Creation Date])

This example returns the month that an entry was created.

Year

Returns the year as an integer from a date value.

Syntax

Year(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	Date value for which to return the year.

Examples

Year(Date(2009, 7, 9))

This example returns 2009 as the year for the date value.

Year([Creation Date])

This example returns the year that an entry was created.

Numeric Functions

Use numeric functions to manipulate numeric fields. You can add the following functions to formulas using numeric fields.

- **Ceiling –** Rounds a number up to the nearest integer or up to a specified number of decimal points.
- **Floor –** Rounds a number down to the nearest integer or down to a specified number of decimal points.
- **Round –** Rounds a number to the nearest integer or to a specified number of decimal points.

Ceiling

Rounds a number up to the nearest integer or up to a specified number of decimal points.

Syntax

Ceiling (Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value to round.
DecPlace	Integer	(Optional) The number of decimal places to round up to.

Example

Ceiling(2.32, 1)

This example returns 2.4.

Floor

Rounds a number down to the nearest integer or down to a specified number of decimal points.

Syntax

Floor(Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value to round.
DecPlace	Integer	(Optional) The number of decimal places to round down to.

Example

Floor(2.36, 1)

This example returns 2.3

Round

Rounds a number to the nearest integer or to a specified number of decimal points.

Syntax

Round (Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value to round.
DecPlace	Integer	(Optional) The number of decimal places to round to.

Example

Round (2.45687, 2)

This example returns 2.46.

Conditional Expressions

You can create conditional expressions in your formula user-defined fields. Conditional expressions use the If expression to evaluate comparison statements and return values based on the results of the statements.

Conditional expressions use the following syntax:

If (Comparison Statement, True Value, False Value**)**

- **Comparison Statement –** Uses comparison operators to compare two values. It can be combined with logical operators (and, or, and not), as well as additional conditional expressions
- **True Value –** The value of the expression when the comparison statement is true. It can also be combined with other expressions.
- **False Value –** The value of the expression when the comparison statement is false. You can include other conditional statements to supply different answers for different values.

Comparison Statements

You can use symbols to create comparison statements for formula user-defined fields. You can compare any values including alphanumeric, date, and numeric values. Alphanumeric values are compared by checking the alphabetical order of the string.

You can create comparison statements with the following symbols.

- **==** to check that two values are equal to each other.
- **>** to check that the first value is greater than the next value.
- **<** to check that the first value is less than the next value.
- **>=** to check that the first value is greater than or equal to the second value.
- **<=** to check that the first value is less than or equal to the next value.

Comparison statements are often combined with logical operators to add multiple statements together. They're added to conditional expressions using If statements.

Logical Operators

You can use logical operators to help build comparison statements for your formula user-defined fields.

- **Or –** Combines two comparison statements where either one of the statements is true.
- **And –** Combines two comparison statements where both of the statements is true.
- **Not –** Negates a comparison statement.

Examples of Conditional Expressions

The following examples illustrate complex formula user-defined fields using conditional expressions.

Example 1

```
If ([Creation Date] > Date(2009, 7, 9), "New", "Old")
```

This example compares a date field with a constant date, using the Date function to format the date properly. The formula returns an alphanumeric value. If the date is later than the supplied date, the field has a value of "New". If the date is earlier than the supplied date, the field has a value of "Old".

Example 2

```
If (Dayofweek([Creation Date]) == 1, "Sunday",
    If (Dayofweek([Creation Date]) == 2, "Monday",
    If (Dayofweek([Creation Date]) == 3, "Tuesday",
    If (Dayofweek([Creation Date]) == 4, "Wednesday",
    If (Dayofweek([Creation Date]) == 5, "Thursday",
    If (Dayofweek([Creation Date]) == 6, "Friday",
    If (Dayofweek([Creation Date]) == 7, "Saturday", " ")))))))
```

This example uses the Dayofweek function to get the day of the week expressed as an integer value for a date field. It compares the value with integer values and outputs a string representing the day of the week in. If it does not have a value, it outputs an empty string.

Default Entries

You can set up default entries in the Address Book, Opportunities, and Customer Service pages. 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. Select **Edit > Default Entry**.

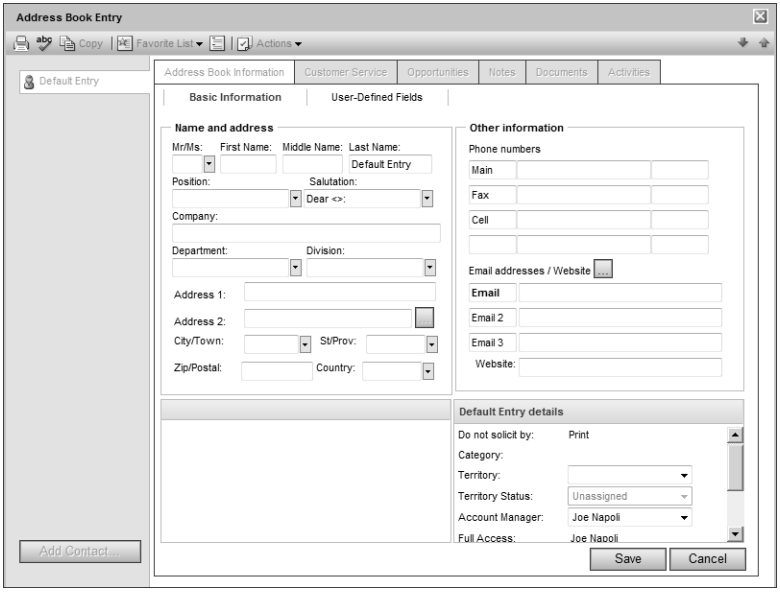
   The dialog box for the default entry opens.

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

   For the opportunity default entry, you can also select the **Sales Plan** and **Competitors & Partners** tabs to specify more default fields.

   For the customer service case default entry, you can also select the **Solution Information & Billing** tab to specify more default fields.

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



Searching

Many of the actions you can perform with Address Book entries, customer service cases, campaigns, and opportunities apply to the entire list of entries in the active page. For instance, when you print a report from the Address Book page, you are generally given a choice between printing the selected entry (or entries) or printing the entire 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 61
- "Searching by All Fields" on page 62
- "Saving Searches in the Search Catalog" on page 64
- "Retrieving Saved Searches from the Search Catalog" on page 65
- "Searching by Notes" on page 66
- "Searching by Documents" on page 67
- "Undoing Searches" on page 68

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, Team Leader, or Revenue for opportunities. The items in the Search menu vary depending on what page 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** menu, select the field you are searching for.

   For customer service cases, you can also select **Basic Fields** to search for entries matching multiple basic fields.

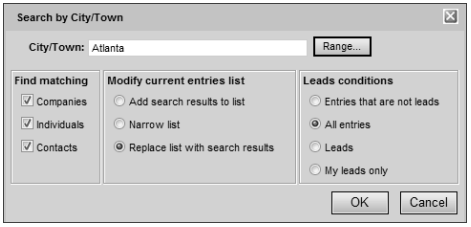
   The Search By [field] dialog box opens.

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



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 menu 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, opportunities, campaigns, and customer service cases.

In the Opportunities or Customer Service page, you can search by Address Book entry fields, as well as opportunity or customer service fields. The search returns opportunities or customer service cases associated with the Address Book entries matching the field values.

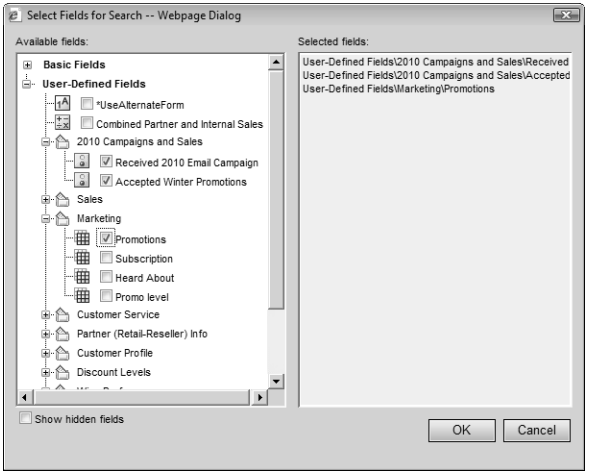
➤ To search by all fields

1. Select **Search > All Fields**.

   The Search by All Fields dialog box opens.
2. Click **Add.**

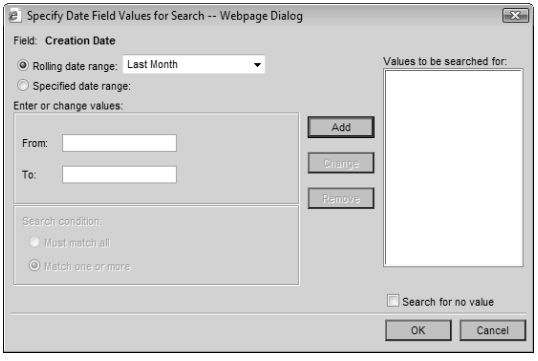
   The Select Fields for Search dialog box opens.
3. Select one or more fields and click **OK**.

To be able to select more than one field, you must have the Allow multi-selection in the Search by All Fields option enabled in the Personal Preferences. (In the top-right corner of the page, click Preferences.) This option is off by default.



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.

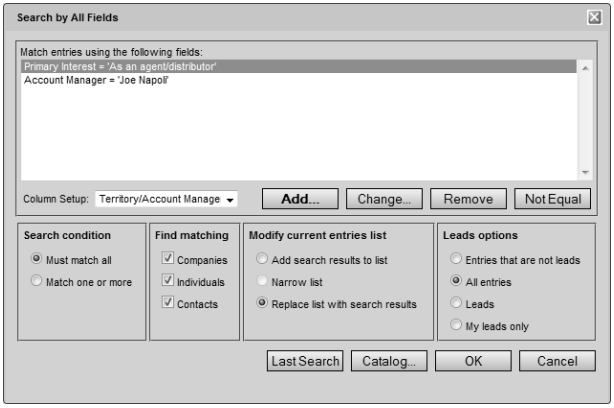
6 In the **Modify current entries list** area, select one of the options.

- **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.

You can choose to further narrow the search by specifying options to include or omit sales leads.

Use Last Search and Catalog for previously defined searches.

7 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. Select **Search > All Fields**.
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 menu. 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

- Select **Search > Last Catalog Searches**, and select the name of the saved search.

➤ To retrieve a search from the search catalog

1. Select **Search > All Fields**.
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.

Searching by Notes

You can search for entries that have notes matching search criteria you specify.

This option is available for full-text searching on notes only if you are using Microsoft SQL Server with the Full-Text Search component installed. See the *Maximizer CRM Administrator's Guide* and your system administrator for more information.

➤ To search for entries by notes

1. In a main page, select **Search > Notes**.

   The Search by Notes dialog box opens.

2. Specify your search criteria.

   - To search for entries with notes that contain a specific word or phrase, type the word or phrase in the **Text search** field.

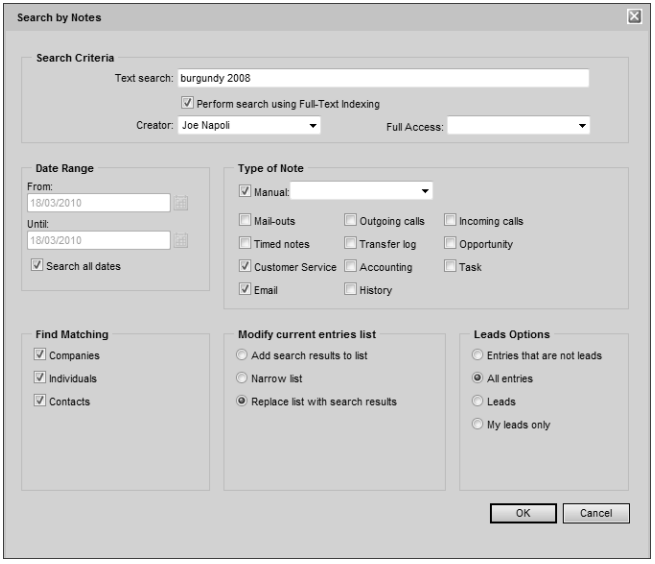
     If your system administrator has enabled full-text search, the **Perform search using Full-Text Indexing** checkbox is available. This option provides faster, and often more accurate, results. For more information, refer to the *Maximizer CRM Administrator's Guide* or your system administrator.
   - To search for entries with notes created by a specific user, select the user's name from the **Creator** drop-down list.
   - To search for entries with notes that are accessible by a specific user or security group, select the name of the user or group from the **Full Access** drop-down list.
   - To search for entries with notes that were created within a specific date range, enter the date range in the **From** and **Until** fields. Or select **Search all dates**.
   - To search for entries with notes of a specific type, select the type(s) to search for in the **Type of Note** section.
   - To search for a specific type of Address Book entry, select the type(s) to search for in the **Find Matching** section. To search for Address Book entries that are not leads, entries that are leads, all entries, or your own leads, select the applicable option in the **Leads Options** section.
   - To search for an opportunity or a case with a specific status, select the status in the **Find Matching** area.

3. In the **Modify current entries list** section, 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.

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



Searching by Documents

If your system administrator has enabled full-text search, you can search for entries that have documents matching the search criteria you specify. For more information about full-text search, refer to the *Maximizer CRM Administrator's Guide* or your system administrator.

You can search by the following types of documents: .doc, .xls, .ppt, .txt, and .htm. You may also be able to search by .rtf, .xml, .pdf, and other document types, depending on which document types your system administrator has configured for full-text search.

➤ To search for entries by documents

1 In a main page, select **Search > Documents**.

The Search by Documents dialog box opens.

2 Specify your search criteria.

- To search for entries with documents that contain a specific word or phrase, type the word or phrase in the **Text in document** field.

- To search for entries with documents that have a specific name, type the beginning of the name of the document in the **Name of document** field.

  The search looks for document names that begin with the characters entered.
- To search for entries with documents of a specific category, select the category from the **Category** drop-down list.
- To search for entries with documents created by a specific user, select the user's name from the **Creator** drop-down list.
- To search for entries with documents that are accessible by a specific user or security group, select the name of the user or group from the **Owner** drop-down list.
- To search for entries with documents that were created within a specific date range, enter the date range in the **From** and **Until** fields. Or, select **Search all dates**.
- To search for entries with documents that exceed a given file size, enter the minimum number of kilobytes in the **Documents larger than** field.
- To search for a specific type of Address Book entry, select the type(s) to search for in the **Find Matching** area.

3. 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.
4. Click **OK** to run the search.

Undoing Searches

You can quickly undo the most recent search in the Address Book, Opportunities, and Customer Service pages.

➤ To undo the most recent search

- Select **Search > Undo Search**.

  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.

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, opportunities, and customer service cases.

➤ 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.

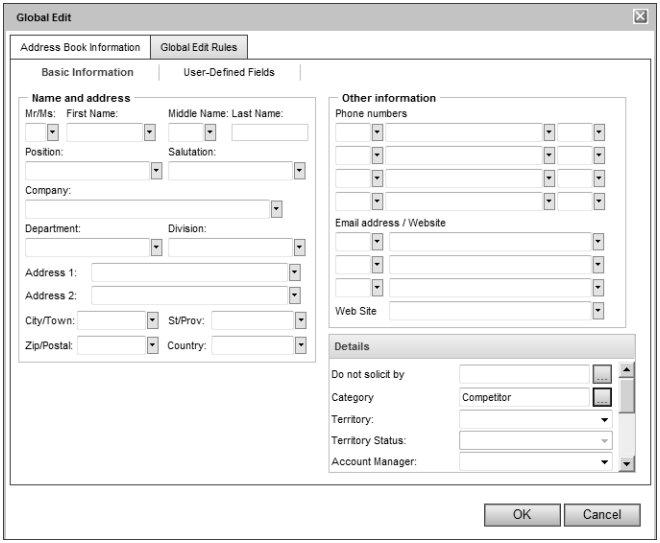
2. Select **Edit > Global Edit**.

   The Global Edit dialog box opens.

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

   You can also apply changes to the **Sales Plans**, **Competitors/Partners**, and **Status** tabs in opportunities.

   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.



4 Select the **Global Edit Rules** tab.

5 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.

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

7 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.

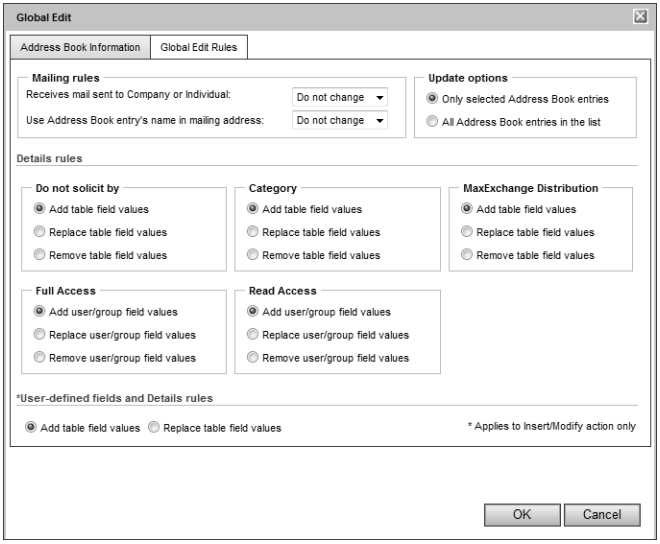
- To add the selected values to the existing values, select **Add table field values** or **Add user/group field values**.

- To replace the existing values with the selected values, select **Replace table field values** or **Replace user/group field values**.

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.

- 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.



8 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, opportunities, and customer service cases. 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 72
- "Retrieving Favorite Lists" on page 74
- "Adding and Removing Entries in Favorite Lists" on page 74
- "Retrieving Favorite Lists" on page 74

Creating Favorite Lists

You can quickly create a new Favorite List from a list of entries in the Address Book, Opportunities, or Customer Service page. 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

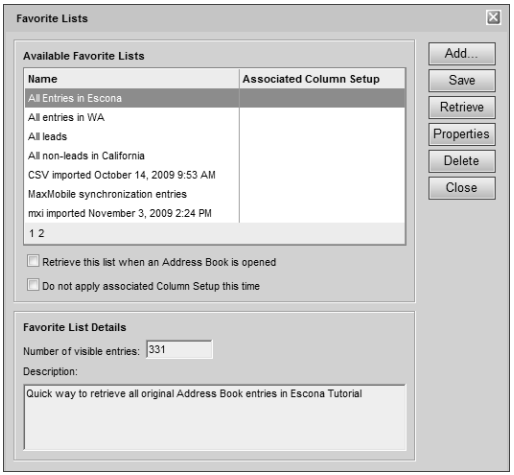
1. Create a list of the entries you want saved in the Favorite List.

   – or –

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

2. Select **View > Favorite Lists**.

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



3 Click **Add**.

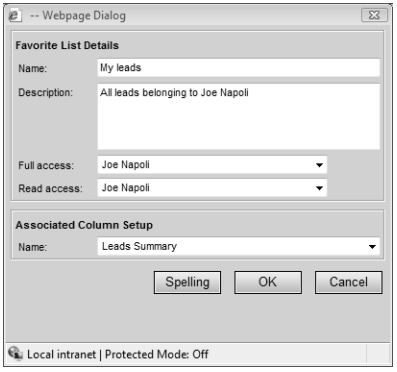
The Add Favorite List dialog box opens.

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 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 Favorite Lists dialog box.

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

   For Address Book entry Favorite Lists, this option overrides the "Ask at Address Book startup which list to view" setting in personal 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, Opportunities, and Customer Service pages.

➤ To retrieve a Favorite List

1. Select **View > Favorite Lists**,.
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, Opportunities, or Customer Service page, 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. Select **View > Add to Favorite List** or **Remove from Favorite List**.

   – or –

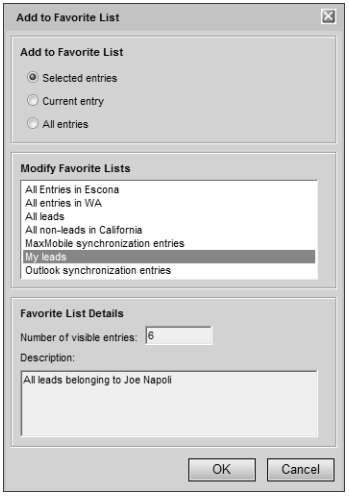
   In an open entry, select **Favorite List > Add to Favorite List** or **Remove from Favorite List**.

   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, opportunity, or customer service case 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, Opportunities, Campaigns, Customer Service, and Hotlist pages. 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 page. You can specify the fields displayed in each column of the page, as well as the width and heading of the columns.

In the Opportunities or Customer Service page, column setups can contain fields for Address Book entries, as well as for opportunities or cases. 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 76
- "Retrieving Column Setups" on page 78

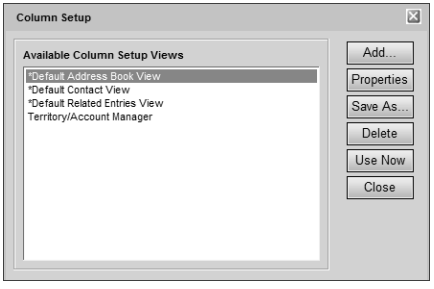
Creating Column Setups

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, Opportunities, Campaigns, Customer Service, and Hotlist pages.

➤ To create a column setup

1. Select **View > Column Setup**.

   The Column Setup dialog box opens.



2. Click **Add**.

   The Add Column Setup View 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 **Defined columns** area, click **Add**.

5. In the **Selected column details** area, click **Insert Field**.

   The Insert Fields dialog box opens.

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

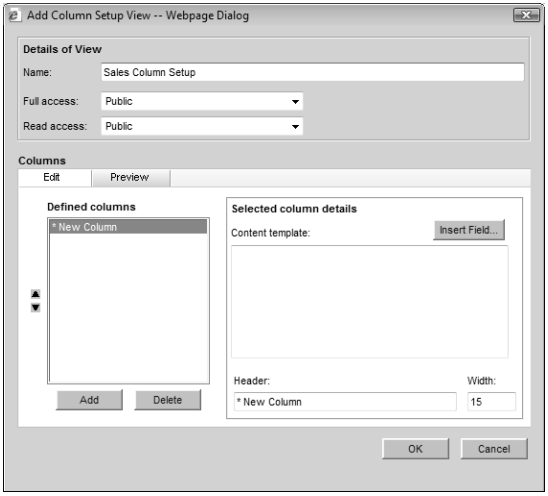
   You can repeat this step to add multiple fields to the selected column.

   Fields in the current column appear in display order in the Content template list. You can customize how fields are displayed in the column by adding spacing, punctuation, or labels between fields.

7. If necessary, 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.

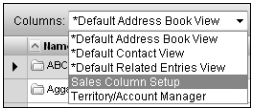


Retrieving Column Setups

You can retrieve existing column setups to change the fields displayed in the current page.

➤ To retrieve a column setup

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



- Select **View > Column Setups**. 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, Customer Service, and Hotlist pages. 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 79
- "Applying Coloring Rules" on page 81

Creating Coloring Rules

You can create coloring rules from the Address Book, Opportunities, Customer Service, and Hotlist pages.

➤ To create a coloring rule

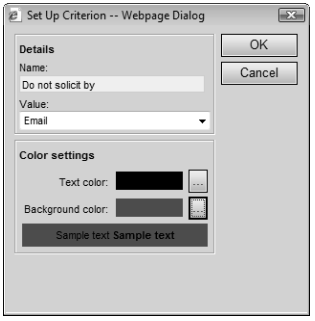
1. Select **View > Coloring Rules**.
2. Click **Add**.

   The Add Coloring Rule 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**.

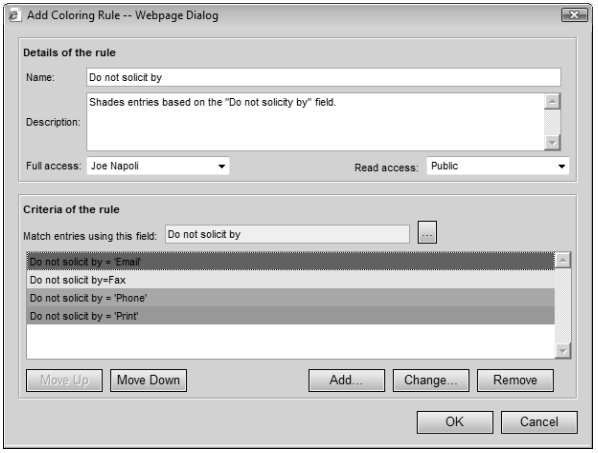
   The Set Up Criterion dialog box opens.
7. Select a **value** for the field, choose **text** and **background** colors, and click **OK**.

   In the Customer Service page, the text color of overdue cases is always red. To distinguish overdue cases from other cases, choose text colors other than red for values in customer service cases.



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, Customer Service, or Hotlist page.

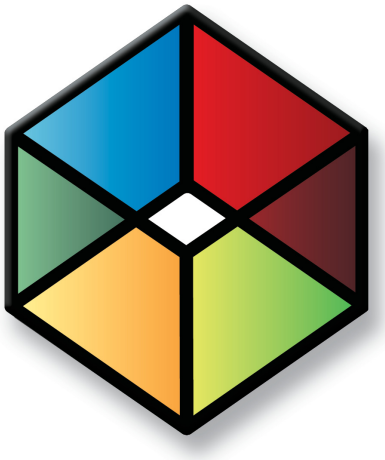
In the Customer Service page, the text color of overdue cases is always red, regardless of the text color assigned by the coloring rule. However, the background color of overdue cases matches the background color assigned by the coloring rule.

➤ To apply a coloring rule

1. Select **View > Coloring Rules**

   The Coloring Rules dialog box opens.

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



CHAPTER 4

Calendar and Hotlist

Track Your Appointments and Tasks

In this chapter...

"Hotlist Tasks" on page 84
"Calendar Appointments" on page 88
"Action Plans" on page 93
"Viewing Activities for Entries" on page 96

Hotlist Tasks

The Hotlist is a timeless "to-do" list of tasks and reminders. Tasks include calling and writing to customers. Use the Hotlist page 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.

Hotlist tasks can be associated with opportunities, campaigns, and customer service cases, as well as Address Book entries. When you schedule strategies for opportunities, Hotlist tasks are created for all of the activities in the opportunities. When you create new customer service cases, Hotlist tasks are created for the assigned users based on the follow-up deadlines of the cases.

The following sections contain information on working with Hotlist tasks:

- "Hotlist Page" on page 84
- "Viewing Hotlist Tasks" on page 85
- "Adding Hotlist Tasks" on page 86
- "Reassigning Hotlist Tasks" on page 87

Hotlist Page

You can view all of your Hotlist tasks in the Hotlist page. Keep the following points in mind when working in the Hotlist page.

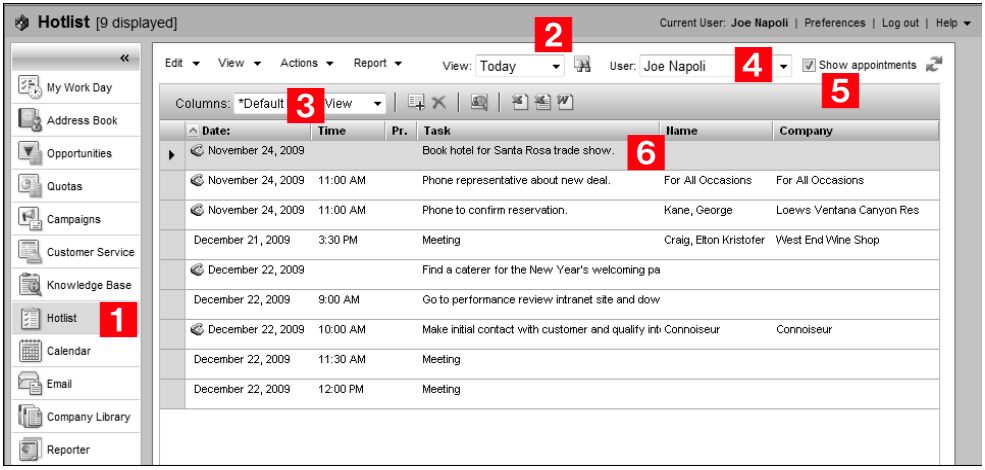
1. Select the **Hotlist** icon to open the Hotlist page.
2. Use the **View** drop-down list or click the **Build Hotlist** icon to select the date range you want to show.

Select View > Carry Forward Unfinished Tasks to view old tasks that are not yet complete in your current Hotlist.

3. From the **Columns** drop-down list, select a column setup.
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.

6 Click on a task to view its details.



Viewing Hotlist Tasks

You can click on a Hotlist task in the Hotlist page 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.

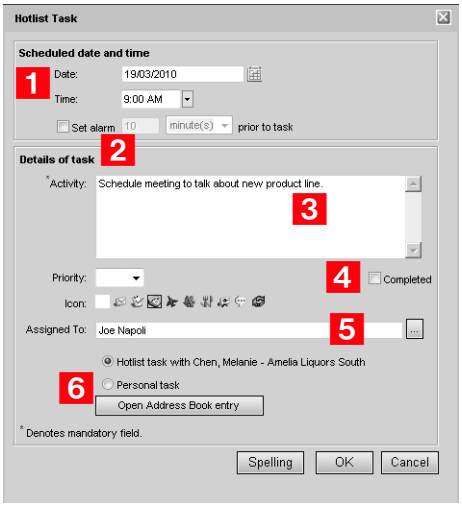
2 Select **Set alarm** to remind yourself of the task before the scheduled time.

3 Enter the **activity**.

4 Mark the task as completed when you are finished with the task.

5 Click the ellipsis button beside the **Assigned to** field to assign the Hotlist task to another user.

6 Select **Personal 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, and customer service cases. 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 page.

2 Select **Actions > Schedule a To-do**.

– or –

In the Hotlist page, select **Edit > Add Task**.

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 page. You can reassign one or multiple Hotlist tasks at the same time.

➤ To reassign Hotlist tasks

1. In the Hotlist page, select the tasks you want to reassign.
2. Select **Edit > Reassign**.

   The Reassign Hotlist Tasks dialog box opens. Users are displayed by group.
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, opportunities, campaigns, and customer service cases, or they can be personal.

The following sections contain information on working with Calendar appointments:

- "Calendar Page" on page 88
- "Viewing Appointments" on page 90
- "Adding Appointments" on page 91

Calendar Page

You can view, add, and modify your appointments in the Calendar page. 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 page.

1. Select the **Calendar** icon to open the Calendar page.
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 page.
   - 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.

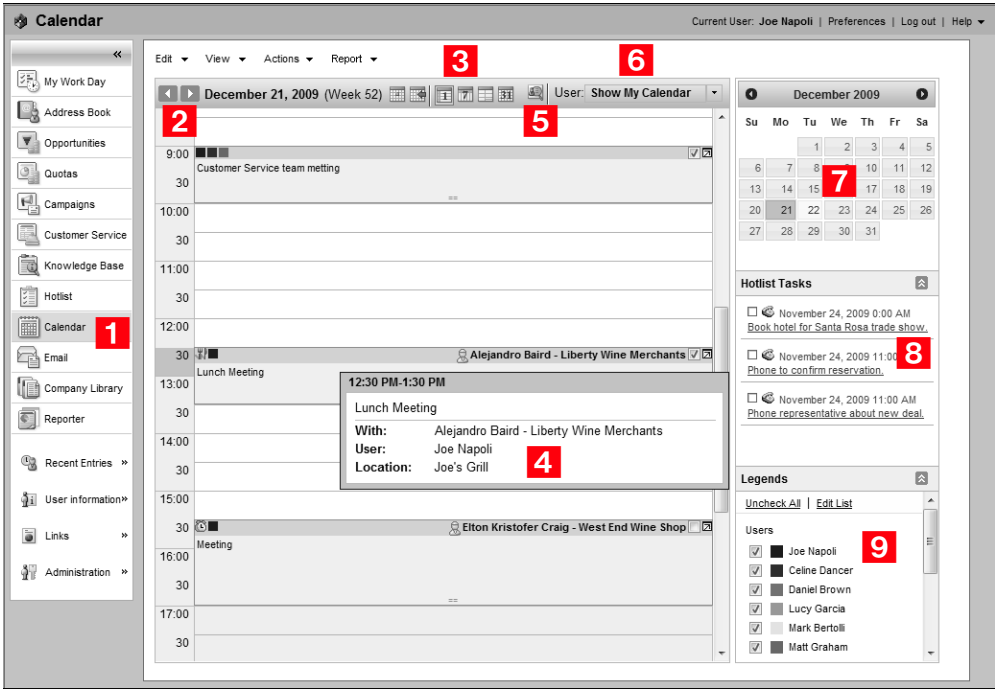
7 Select **dates** in the miniature calendar view to navigate to different dates in the calendar. Use the arrow buttons to move between months or years.

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 page. 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 email reminders, to specify that email reminders be sent to Address Book entries, 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, a case, or a campaign, the entry is displayed as a link in the appointment. You can click the link to open the 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.

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** and **Reminder** to set an alarm and to send email reminders to yourself and to selected users.

   You can click Options to specify that email reminders are also sent to Address Book entries.

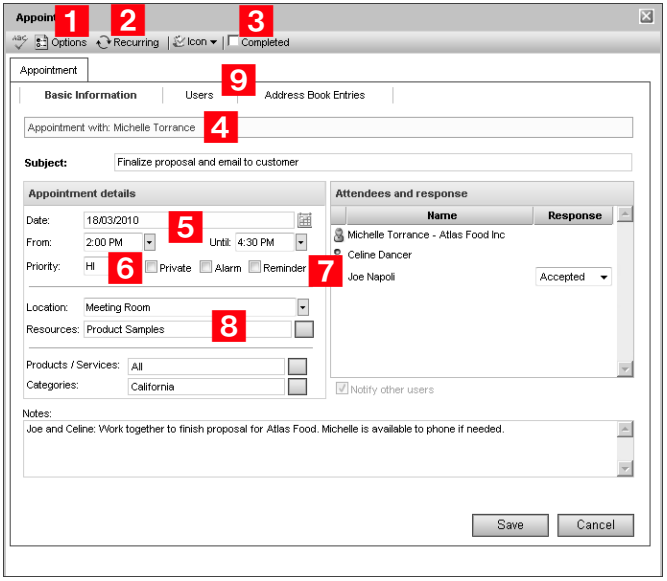
   This generic message lists the basic appointment details; you cannot edit this message. This feature is available only if the Maximizer Email Service is running.

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, Campaigns, Customer Service, or Calendar page. If you add an appointment from one of the main pages, the appointment is linked by default to the current entry. If you add an appointment from the Calendar page, it is by default created as a personal appointment.

➤ To add an appointment

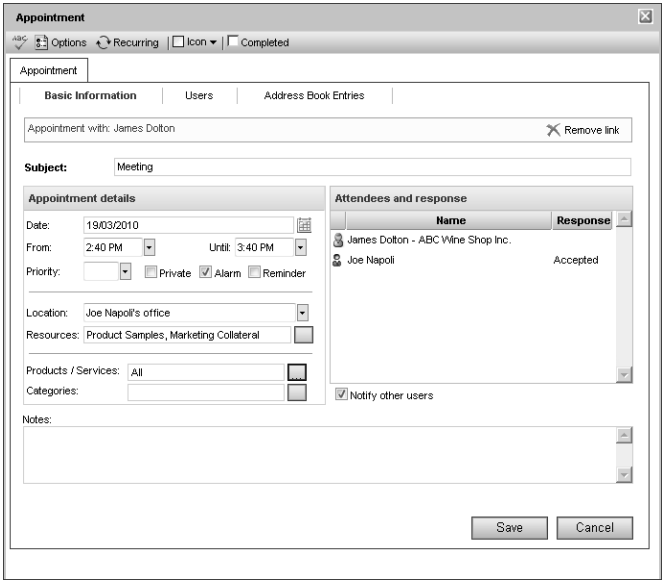
1. In the Calendar page, select a day, and select **Edit > Add Appointment**.

   – or –

   In a main page, select or open an entry, and select **Actions > Schedule a 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 Basic Information 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**.

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 for Address Book entries.

The following topics contain information on working with Action Plans:

- "Creating Action Plan Templates" on page 93
- "Scheduling Action Plans" on page 94

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. In the left navigation pane, hover your mouse over **Administration**, and select **Action Plan Library** from the pop-up.
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

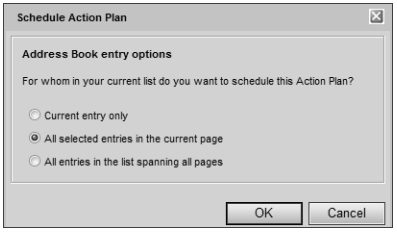
You can schedule Action Plans for Address Book entries. You can select a single entry or multiple entries. You can choose any existing Action Plan template for the Action Plan.

➤ To schedule an Action Plan for Address Book entries

1. Select or open the entry or entries to associate with the Action Plan.
2. Select **Actions > 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 in the current page, or with all entries in the list spanning all pages.

   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 the Calendar icon 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.

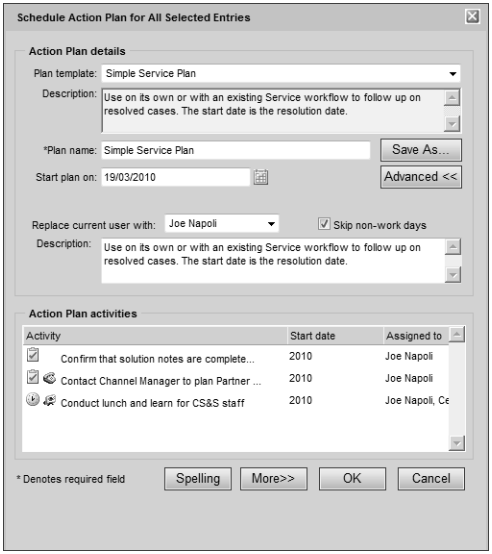
All template activities assigned to the current user are scheduled for the selected user. Template activities assigned for specific users continue to be scheduled for the users specified in the template.

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.



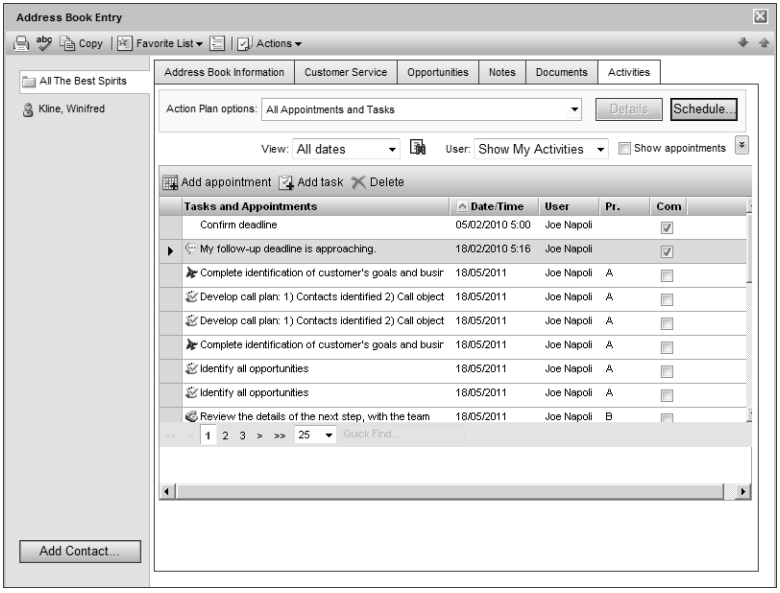
Viewing Activities for Entries

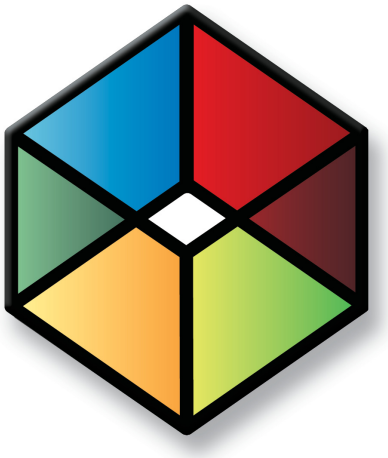
You can access all appointments and Hotlist tasks scheduled for specific entries directly in open entries. Appointments and tasks are displayed in the Activities tab for Address Book entries, opportunities, campaigns, and customer service cases. If activities are scheduled for opportunities and customer service cases, they are also listed in the associated 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.





CHAPTER 5

Notes, Documents, and Email

Store Notes and Documents in your Address Book

In this chapter...

"Notes" on page 98
"Documents" on page 103
"Company Library" on page 106
"Email" on page 111
"Merge Fields" on page 121
"Microsoft Office Integration" on page 123
"Microsoft Word Integration" on page 125
"Microsoft Outlook Integration" on page 129

Notes

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

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

- "Types of Notes" on page 98
- "Notes Tab" on page 99
- "Adding Notes" on page 100
- "Default Notes" on page 101

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. (In the top-right corner of the page, click Preferences. Click Other Preferences, and select the Logging tab.)

- **Accounting –** Created when you create or modify accounting transactions using Accounting Link.
- **Customer Service –** Created when you add a customer service case.
- **Email –** Created when you send an email message to one or more Address Book entries.
- **History –** Created when opportunities, cases, and campaigns 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.
- **Other –** Third-party or custom notes created by your system administrator. Also, notes created by web access sites.
- **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 notes –** Created when you use the Timer
- **Transfer log –** Created when you transfer entries between Address Books.

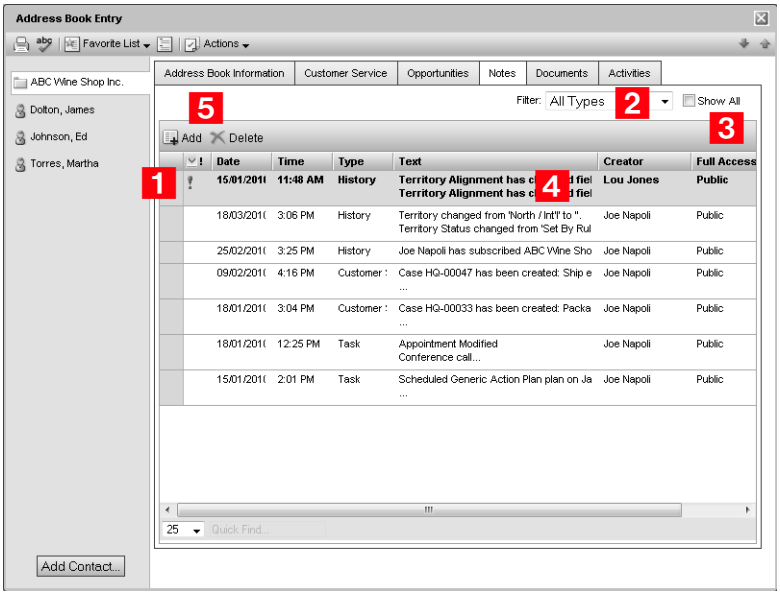
Notes Tab

The Notes tab in an open entry displays all of the notes for the entry. You can use the notes tab to view, modify, add, and delete notes in the entry.

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

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”).
3. 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.
4. Click on an entry to view the entire note.

5 Use the buttons at the top of the list to perform commands on the notes.



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 Open the entry to which you want to add the note.

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

3 Enter the content of the note.

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

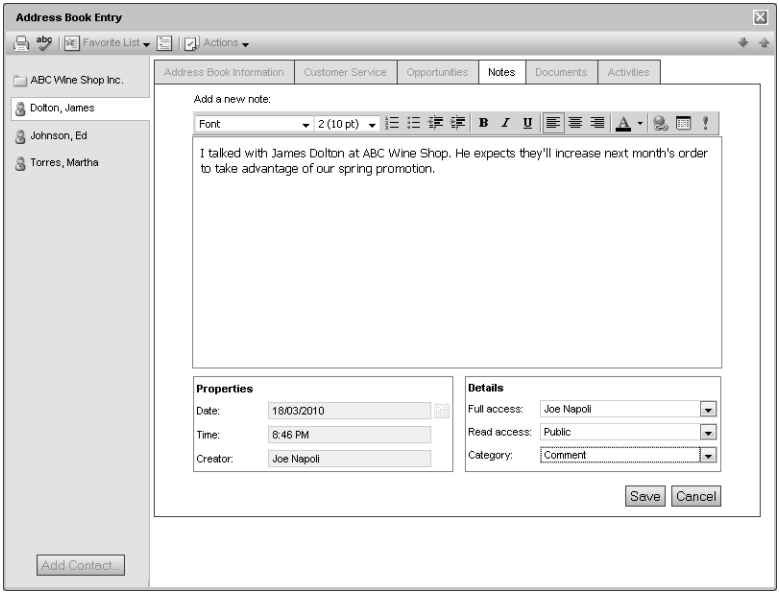
To view the HTML source of the note, select the **View Source/HTML** icon.

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.

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, Campaigns, and Customer Service pages.

➤ To add a default note

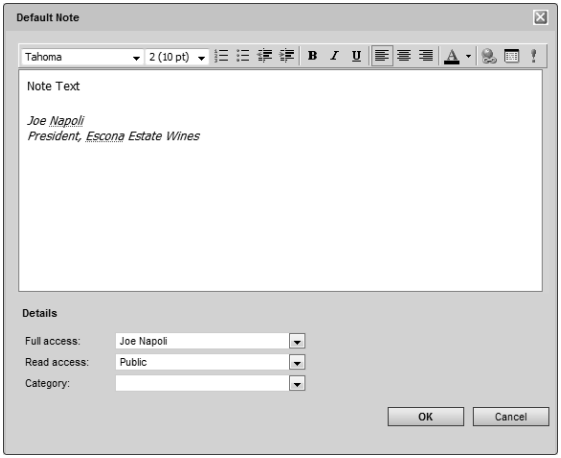
1 Select **Edit > Default Note**.

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.



Documents

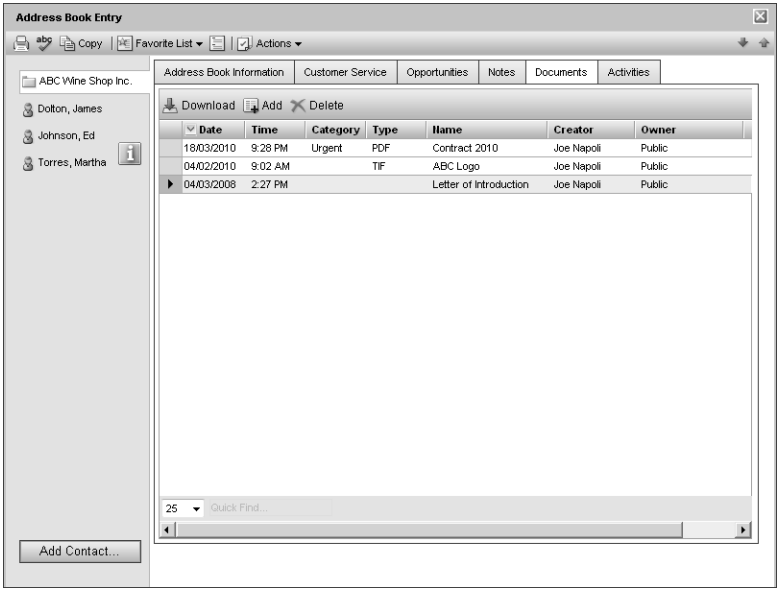
You can import into Maximizer files that are created in other applications. You can attach any files as documents to Address Book entries, opportunities, customer service cases, and campaigns. You can also save email messages to entries as documents directly from the Email page. The documents are stored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

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

- "Documents Tab" on page 103
- "Viewing Documents" on page 104
- "Adding Documents" on page 104

Documents Tab

You can view all of the documents attached to entries in the Documents tab in an open entry.



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 documents from Microsoft Internet Explorer, you should add Maximizer Web Access to the Trusted sites zone with the security level set to medium-low.

➤ To view a document

1. Open the entry to which the document is attached.
2. Select the **Documents** tab.

   All documents attached to the entry are displayed.
3. Select the document that you want to open, and click **Download**.

   You may be prompted to open or save the document. If you select Save, you must choose a location to save the file before viewing the document.

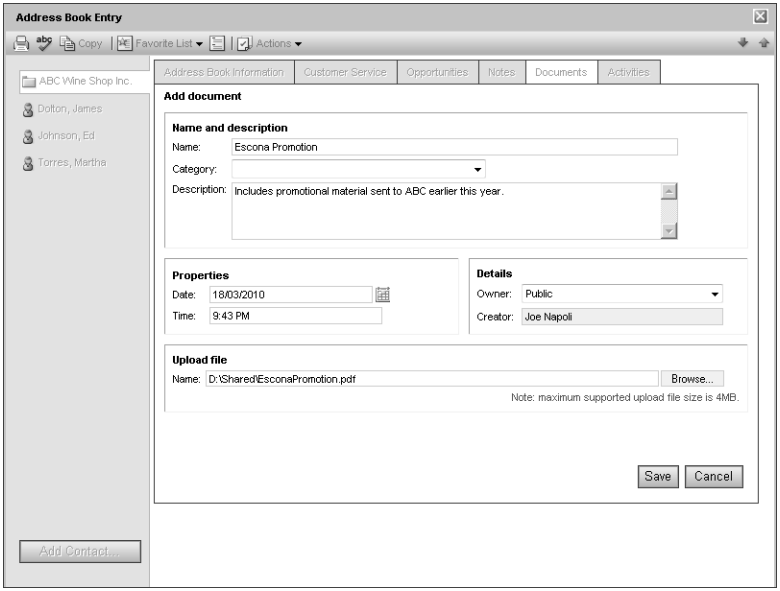
Adding Documents

You can add any type of files as documents in your Address Book entries, opportunities, customer service cases, and campaigns.

➤ To add a document to an entry

1. Open the entry to which you want to add the document.
2. Select the **Documents** tab, and click **Add**.
3. Specify properties for the document, such as **name**, **description**, and **owner**.
4. Click **Browse** and browse to the location of the file, and click **Open**.

5 Click **Save** to save the file with the entry.



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.

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

- "Company Library Page" on page 106
- "Organizing the Company Library" on page 107
- "Adding Documents and Notes to the Company Library" on page 109
- "Sending Documents by Email from the Company Library" on page 110

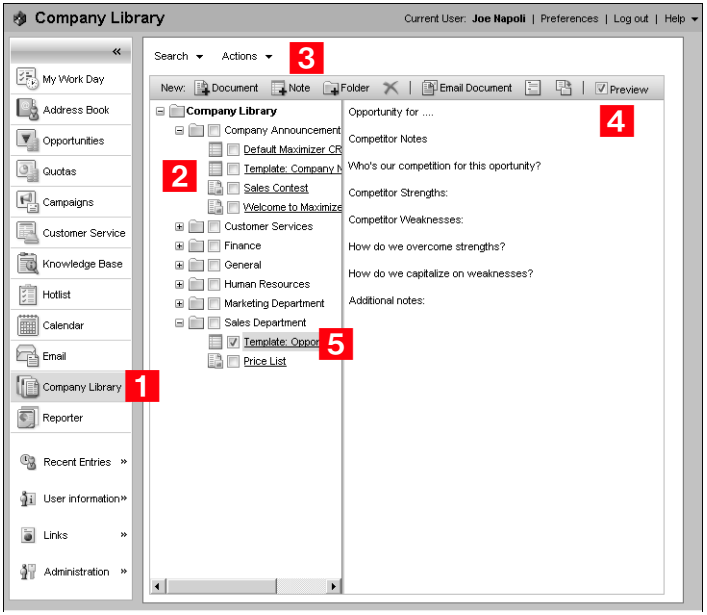
Company Library Page

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

1. Select the **Company Library** icon to open the Company Library page.
2. In the area on the left side of the page, 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 in the right part of the page.

5 Click on a document or note to open it.



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.

➤ To add a folder to the Company Library

1 In the Company Library page, 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 In the toolbar, click the **Add Folder** icon.

The Add Folder dialog box opens.

3 Enter the name for the new folder, and click **Save**.

➤ To move a document, note, or folder

1 In the Company Library page, click the checkbox next to the document, note, or folder that you want to move.

You can select multiple documents, notes, and folders to move a number of items to the same destination folder.

If you select a folder, all documents and notes in the folder are moved with it.

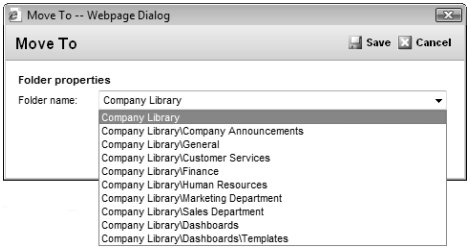
2 In the toolbar, click the **Move To** icon.

The Move To dialog box opens.

3 In the **Folder name** drop-down list, select the destination folder.

To move the item to the root level, select the **Company Library** folder.

4 Click **Save**.



5 If necessary, click **OK** at the prompt to confirm that you want to move all selected items.

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.

➤ To add a document to the Company Library

1. In the Company Library page, click on the folder to which you want to add the document.
2. In the toolbar, select the **Add Document** icon.

   The Add Document 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 **Save**.

➤ To add a note to the Company Library

1. In the Company Library page, click on the folder to which you want to add the note.
2. In the toolbar, select the **Add Note** icon.

   The Add Note dialog box opens.
3. Type the content of the note in the large text box at the bottom of the dialog box.
4. Specify a **Name**, **Category** (optional), and **Owner** for the note.
5. Click **Save**.

Sending Documents by Email from the Company Library

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

➤ To send documents by email from the Company Library

1. In the Company Library page, select the checkbox beside any documents and notes you want to send.

   You can also select a folder to attach all documents and notes in the folder to the email message.

2. In the toolbar, select the **Email Document** icon.

   The Send Email dialog box opens with the selected documents attached to the email message.

3. Enter the details of your email message.

4. Click **Send**.

Email

You can use the Email page to send and receive email using your existing email system. You can also send email to Address Book entries directly from the other main pages. When you create email messages in the Address Book page, you can insert merge fields into the message text.

Email preferences are set in Maximizer Web Access and in Administrator. To set email preferences, in the top-right corner of the page, click Preferences. Then, click Other Preferences, and select the Email tab.

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

- "Logging In to the Email Server" on page 111
- "Email Page" on page 112
- "Moving Email to Other Folders" on page 113
- "Viewing Address Book Entries from Email" on page 113
- "Saving Email to Entries" on page 113
- "Viewing Email from Entries" on page 115
- "Sending Email" on page 116
- "Sending Email to Address Book Entries" on page 117
- "Creating Appointments and Tasks from Email" on page 119

Logging In to the Email Server

You may need to log in to your email server before performing your email tasks.

➤ To log in to the email server

1. Select the **Email** icon.

   The login page opens.

2. If necessary, enter the name of the email server and/or your email server user ID.

3. Enter your email server password.

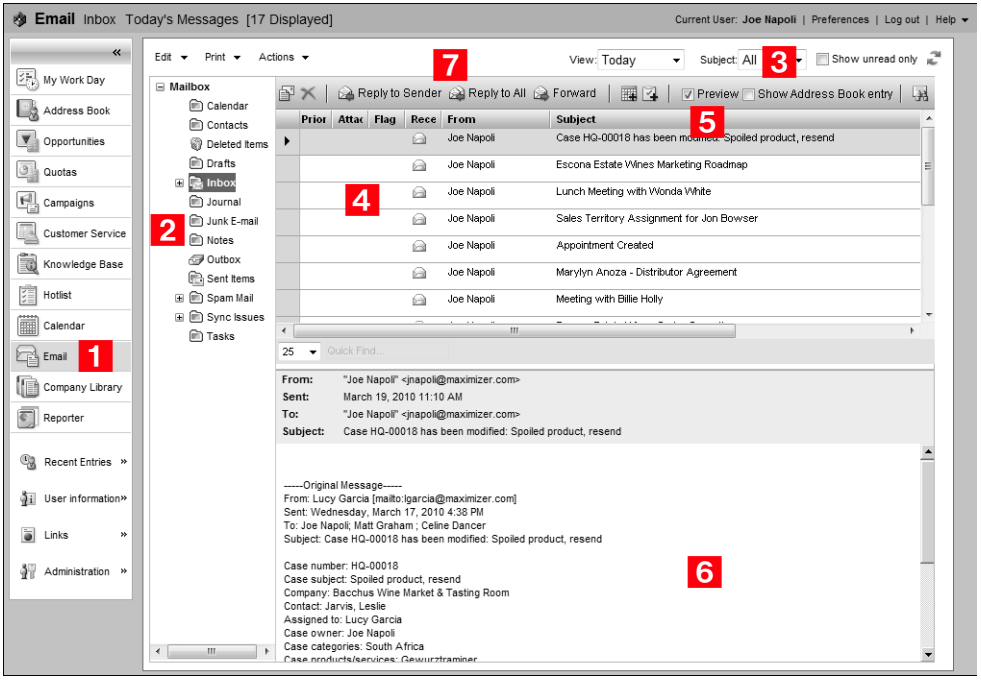
4. Click the **Log In** button.

Email Page

Use the Email page 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 page.

1. Select the **Email** icon to open the Email page.
2. Select email **folders** on the left side of the Email page.
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 page.
5. Toggle the preview pane on and off with the **Preview** checkbox in the top-right corner of the page.
6. View the currently selected email message in the **preview** pane.
7. Use the icons to perform common tasks—such as **reply** and **forward**—on the selected email message.



Moving Email to Other Folders

You can easily move your email messages from folder to folder in the Email page. You can move a single email message or multiple email messages.

➤ To move email messages to another folder

1. In the Email page, select the email messages that you want to move.
2. Select **Edit > Move to Folder**.

   The Move Items dialog box opens.
3. Select the folder you want to move the message to.

   The name of the selected folder is displayed in bold.
4. Click **OK**.

   The message is moved to the selected folder.

Viewing Address Book Entries from Email

You can open Address Book entries associated with email messages directly from the Email page. Email messages must be sent from addresses matching the email addresses of Address Book entries.

➤ To view an Address Book entry associated with an email message

1. In the Email page, select an email message associated with the Address Book entry.
2. Select **Edit > Open Address Book Entry**.

   The Address Book entry opens without leaving the Email page.

Saving Email to Entries

You can save email messages to existing Address Book entries or customer service cases. Email messages are saved as documents with the entries.

➤ To save an email message to an entry

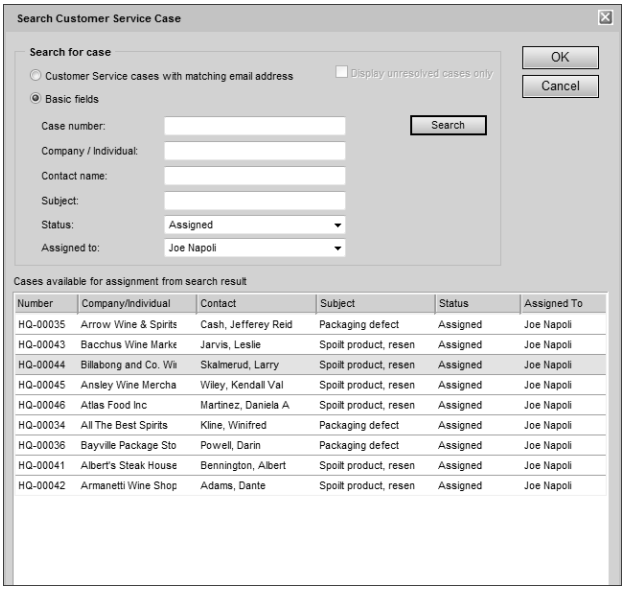
1. In the Email page, select the email message.
2. Select **Actions > Save Email Message to Address Book Entry/Customer Service Case**.

The Search Address Book or the Search Customer Service Case dialog box opens displaying entries with matching email addresses.

You can select one of the entries listed, or you can search for another entry.

3 To search for another entry, select **Last name** or **Company** for Address Book entries, or select **Basic fields** for customer service cases. Enter the search criteria, and click **Search**.

The dialog box updates to display the new list of entries.



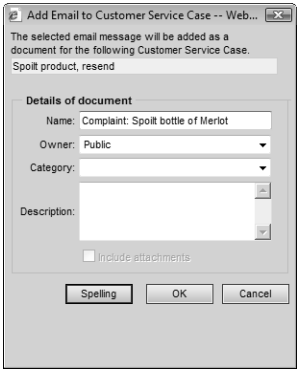
4 Select an entry and click **OK**.

The Add Email to Address Book Entry or the Add Email to Customer Service Case dialog box opens.

5 Enter properties of the document including the **name**, **owner**, **category**, and **description**.

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

6 Click **OK** to save the email as a document.



Viewing Email from Entries

You can open and view email messages that have been saved as documents to Address Book entries, opportunities, and customer service cases. You can also reply to, forward, and print the email messages.

➤ To view an email message from an entry

1 In the Address Book, Opportunities, or Customer Service page, open the entry the email message is saved to.

2 Select the **Documents** tab.

3 Select the email message you want to view and click the **Download** button.

The email message opens in the View Email dialog box.

You can use the icons at the top of the dialog box to reply, forward, or print the email message.

Sending Email

You can compose email messages in HTML or plain text format. To change the format, use the Format drop-down list. 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 page, select the **Compose New Email** icon.

   – or –

   In the Email page, select **Edit > Compose New Email**.

   The Send Email 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.

   The Add Email Recipient dialog box opens.

   - To select email recipients from the Address Book, select **Maximizer Address Book** in the **Search for recipients** drop-down list.

     You can search by last name or by company. For entries with multiple email addresses, select the desired address from the drop-down list in the row for the entry.

   - To select email recipients from your global address list, select **Global Address List** in the **Search for recipients** drop-down list.

     You can search by first name, last name, or group name.

3. Enter a subject and your email text.

   Do not use angle brackets, < or >, in the email editor. Any text between the brackets will be removed from the email message.

4. If required, change the priority level of the message to **Low** or **High**.

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

6. Click **Send**.

Sending Email to Address Book Entries

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

The From address is automatically retrieved from your user properties. If you do not have an email address, your email message will not be sent.

➤ To send an email message to Address Book entries

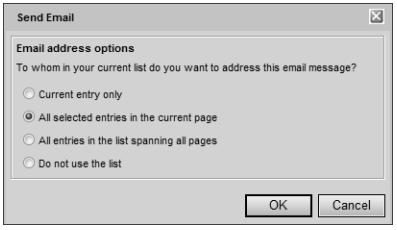
1. Choose the entry or multiple entries for the email message by doing one of the following:
   - Select the entries.
   - Open an entry.
   - Create a list of entries.
2. Select **Actions > Write an Email**.

   The Send Email dialog box opens. If an entry is currently open, skip to Step 4.

ⓘ You can also click the email address in an open Address Book entry.

3. Choose how to use the current list, and click **OK**.

   You can send the message to only the current entry, to all selected entries, to all entries in the list, or to none of the entries.



4. If you are sending the email message to multiple Address Book entries, choose an option from the **Send as** drop-down list.
   - Select **Separately** to send a separate email message to each Address Book entry.
   - Select **One email** to send one email message to all the selected entries at once.

In your email preferences, you can set a default setting for sending email separately when you are sending email to multiple Address Book entries.

5 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 as drop-down list.

6 Enter a **subject** and the text of the email message.

Do not use angle brackets, < or >, in the email editor. Any text between the brackets will be removed from the email message.

Use the toolbar icons and font drop-down lists 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.

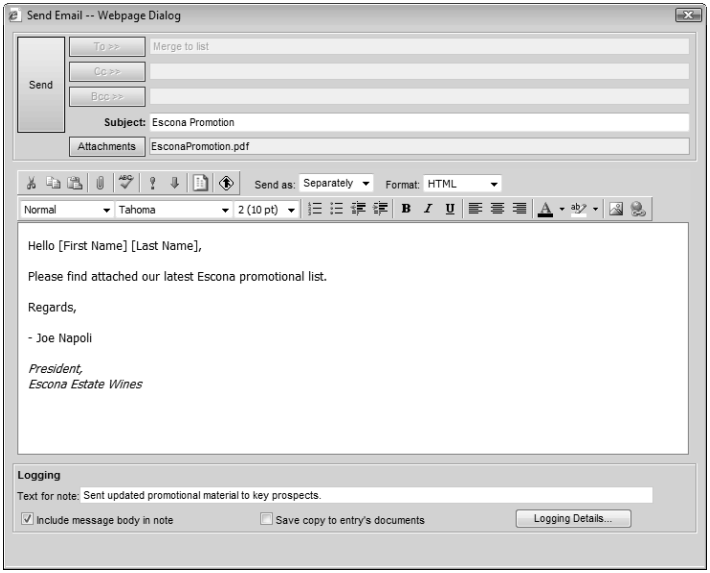
To add a merge field, select the **Insert Fields** icon and select the field from the **Available Fields** list. When the message is sent, the field value corresponding to the Address Book entry, opportunity, or customer service case is merged into the message.

7 Click the **Attach File** icon to select file attachments to send with the email message.

8 Set your logging options as follows:

- In the **Text for note** field, enter any additional text you would like to log as part of the note created by the email message.
- Select the **Include message body in note** option to save the message to the note created.
- Select the **Save copy to entry's documents** option to save the message as a document for the entry.
- Click the **Logging Details** button and then the **Assign More** button to log the email details to additional Address Book entries.

9 Click **Send**.



Creating Appointments and Tasks from Email

You can create appointments and tasks directly from the Email page. You can create the appointment or task for the Address Book entry associated with the email message. 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 page, select the email message you want to create an appointment or a task for.

2 On the toolbar, click the **Create Appointment/Task from Current Email Message** button.

– or –

Select **Actions > Create Appointment/Task from Current Email Message**.

The Search Address Book dialog box opens displaying the Address Book entries with matching email addresses.

3. If necessary, enter the search criteria and click the **Search** button.
4. Select the Address Book entry and click **OK**.
5. Enter the appointment/task details and click **OK**.

   The Add Email to Address Book dialog box opens notifying you that the selected email message will be added to the associated Address Book entry as a document.

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

1. In the Email page, select the email message you want to create an appointment or a task for.
2. Select **Actions > Create Personal Appointment/Task from Current Email Message**.
3. Enter the appointment or task details 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?}

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, opportunities, and customer service cases as well.

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

The following section contains additional information on working with merge fields in Maximizer:

- "Email Templates" on page 121

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, opportunities, or customer service cases when email messages are sent using the template.

➤ To create an email template

1. From the Address Book, Opportunities, or Customer Service page, select the entries to send the email to.
2. Select **Actions > Write an Email**.
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 the **Insert Fields** icon to insert merge fields in your template.
5. Select the **Email Template** icon.

   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.

Microsoft Office Integration

You can set up integrations with Microsoft Office applications directly in Maximizer Web Access. The Microsoft Word integration installs a toolbar in Word that lets you merge word documents with information from your Address Book. The Microsoft Outlook integration installs a toolbar in Outlook that lets you create and view Address Book entries directly from email and Contacts in Outlook.

The following section contains additional information on Microsoft Office integrations in Maximizer Web Access:

- "Installing Microsoft Office Integration" on page 123

Installing Microsoft Office Integration

If Microsoft Word or Microsoft Outlook integration is enabled, you can install Word or Outlook integration directly from Maximizer Web Access. For information on enabling Word and Outlook integration, see the *Maximizer CRM Administrator's Guide* or your system administrator.

This setup involves downloading Active X controls, which may be disallowed on some networks. Word and Outlook integration can also be installed from the Maximizer CRM CD. For more information, see the *Maximizer CRM Administrator's Guide*.

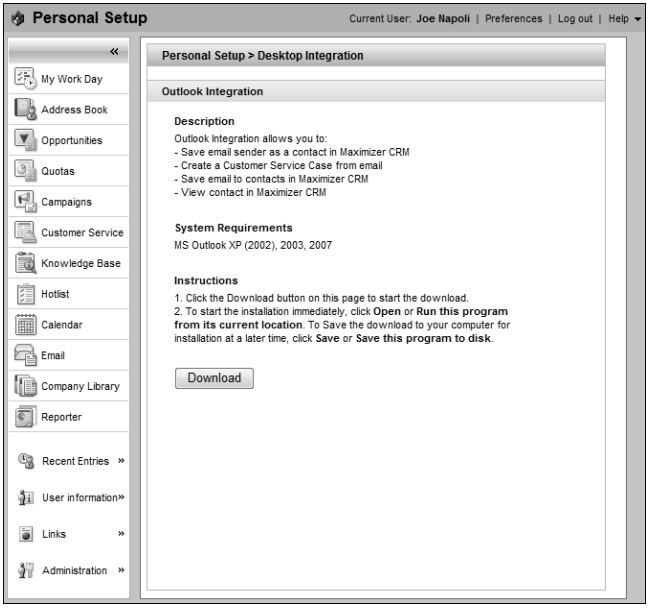
➤ To install Office integration

1. In the left navigation pane, hover your mouse over **Administration**, and select **Set Up Office Integration** from the pop-up window.

   The Personal Setup page opens.

2. Select **MS Word Integration** or **Outlook Integration**.

   The Personal Setup > Desktop Integration page opens describing the basic steps required to install the files.



3 Click **Download**.

A window opens giving you the option to run or save the file.

4 Click **Run** and follow the steps outlined in the setup wizard to install the files.

Microsoft Word Integration

You can use Microsoft Word 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.

Word integration is available only in Microsoft Internet Explorer.

Word integration installs a Maximizer Web Access toolbar menu in the word processor. The options in the Maximizer Web Access toolbar menu integrate Address Book entries in Maximizer with the word processor. This toolbar menu is different from the Maximizer toolbar, which integrates with Maximizer and not with Maximizer Web Access.

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

- "Microsoft Word Macros Security Settings" on page 125
- "Inserting Merge Fields in Microsoft Word" on page 126
- "Merging Microsoft Word Documents" on page 127
- "Sending Microsoft Word Documents to Printers" on page 127

Microsoft Word Macros Security Settings

Maximizer macros can operate in Microsoft Word with a "high" security setting. To adjust your macro security setting, go to Tools > Macro > Security in Word and make your selection in the Security Level tab.

The first time you open Word after installing Word Integration, you are prompted to trust the Maximizer macros. Simply select the "Always trust macros from this source" option and click the Enable Macros button. The dialog box will not appear again.

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.

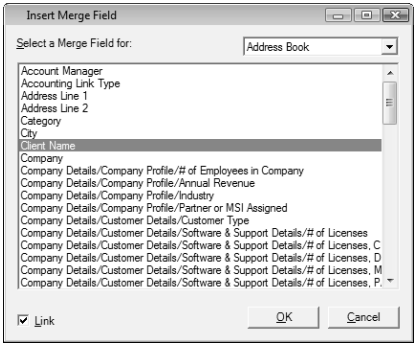
Word integration is available only in Microsoft Internet Explorer.

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 CRM Web Access** toolbar menu, select **Insert Merge Field**.

   The Insert Merge Field dialog box opens.
3. In the **Select a Merge Field for** drop-down list, 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.



Merging Microsoft Word Documents

You can merge your Microsoft Word documents with entries in your Maximizer Address Book. Merging a document replaces all merge fields in the document with values for the current Maximizer user, Address Book entry, opportunity, or customer service case.

Word integration is available only in Microsoft Internet Explorer.

➤ To merge a Word document

1. Open the document in Word.
2. Select the entry with which you want to merge in Maximizer Web Access
3. From the **Maximizer CRM Web Access** drop-down menu in Word, select **Merge Document**.

Sending Microsoft Word Documents to Printers

When you use Microsoft Word with Maximizer, you can send a Word document to the printer, 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 or with all selected entries in Maximizer. You can also log a note to all entries included in the merge.

Word integration is available only in Microsoft Internet Explorer.

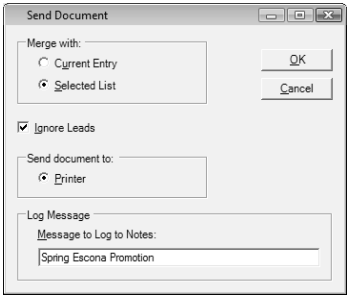
The document is automatically sent to the printer that is currently set up in Word.

➤ To send a Word document to the printer

1. Open the document in Word.
2. Select the entry or multiple entries in Maximizer Web Access.
3. From the **Maximizer CRM Web Access** toolbar menu 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.
5. To filter the current list so that it does not include Address Book entries marked as sales leads, select the **Ignore Leads** option.
6. Under **Log Message**, enter a note to log with each of the selected entries.

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



Microsoft Outlook Integration

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

To access Maximizer Web Access commands, the Maximizer Web Access Outlook Integration toolbar must be enabled. From the toolbar, you can complete the following tasks in Maximizer:

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

- Set Up Outlook Integration for Maximizer Web Access.
- Create Address Book entries.
- Create cases.
- 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 Web Access:

- "Setting Up Microsoft Outlook Integration" on page 129
- "Adding Address Book Entries from Microsoft Outlook" on page 131
- "Adding Customer Service Cases from Microsoft Outlook" on page 132
- "Saving Email from Microsoft Outlook" on page 133
- "Viewing Address Book Entries from Microsoft Outlook" on page 135

Setting Up Microsoft Outlook Integration

After installing Microsoft Outlook integration, you must configure the Outlook integration to communicate with your Address Book. You must specify the URL for the web access site, 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.

The Outlook Integration for Maximizer Web Access wizard opens automatically when you start Outlook, letting you choose the setting for the integration. After setting up Outlook integration, you can change these settings at any time by selecting the Maximizer Web Access Outlook Integration Options icon in Outlook.

➤ To set up Outlook integration

1. After installing Outlook integration for Maximizer Web Access, open Outlook.

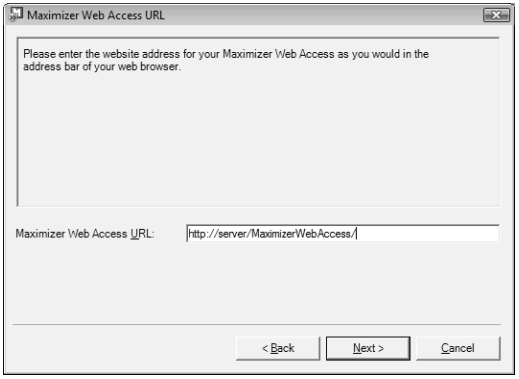
   The Outlook Integration for Maximizer Web Access wizard opens.

To prevent the wizard from opening every time you open Outlook, clear the "Show this wizard each time Outlook starts" checkbox.

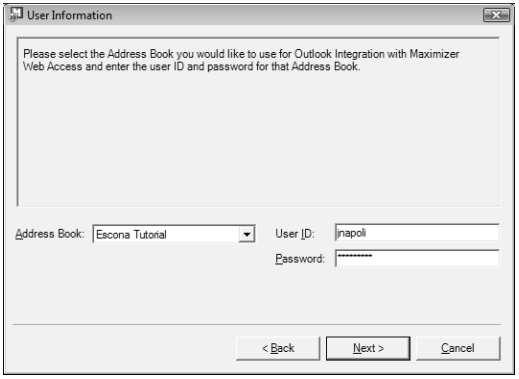
2. Click **Next**.
3. Enter the **URL** of the Maximizer Web Access site.

   By default, the Maximizer Web Access URL is in the following form:

   http://<servername>/MaximizerWebAccess/



4. Click **Next**.
5. In the **Address Book** drop-down list, select the Maximizer Address Book that you want Outlook to connect to.
6. Specify your Maximizer **User ID** and **Password**, and click **Next**.



7 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.

8 Click **Finish**.

Adding Address Book Entries from Microsoft Outlook

You can create Address Book entries in Maximizer Web Access 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 Web Access button in a contacts window or from the Save Sender As Contact to Maximizer Web Access 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 Web Access** or the **Save Sender As Contact to Maximizer Web Access** 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.

To enable or disable the "Confirm when creating Contact" option, select the Maximizer Web Access Options icon.

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.
5. Edit the information in the available fields as required.
6. Click **OK** to save the entry.

Adding Customer Service Cases from Microsoft Outlook

You can create customer service cases in Maximizer from email messages in Microsoft Outlook. You can create a new Address Book entry while creating the case or create the case for an existing Address Book entry.

You have a number of options when creating customer service cases in Outlook:

- Create a new contact and a new customer service case at the same time.
- Create a new case from a related Address Book entry. This option lets you search your Address Book for an entry.
- Create a case for the selected Address Book entry. This option is available only if an Address Book entry is currently selected in Maximizer.
- Save the email message to an existing customer service case. This option is available only if a customer service case is currently selected in Maximizer.

➤ To add a customer service case from Outlook

1. Select an email message in Outlook, and select the **Create Case in Maximizer Web Access** icon.

   The Maximizer Customer Service Case dialog box opens.

2. Select the type of entry you want to create, and click **OK**.

3. If you are creating a new Contact at the same time as the customer service case, enter the information for the Contact.

4. If necessary, select the Address Book entry to which you want to save the email message.

   If there is an associated Address Book entry for the selected email message, it is displayed in the Entries assigned for Case Creation list. If necessary, search for entries and assign them to the case.

5. Specify the most important information about the case.

   The Subject and Description fields default to the subject and content of the email message. To specify Products/Services or Categories for the case, select the ellipsis button next to the appropriate field and select values for the field.

   Other fields for the case must be specified in Maximizer.

Saving Email from Microsoft Outlook

You can save email messages in Microsoft Outlook directly to Address Book entries in Maximizer Web Access. 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.

➤ To save an email message to an Address Book entry from Outlook

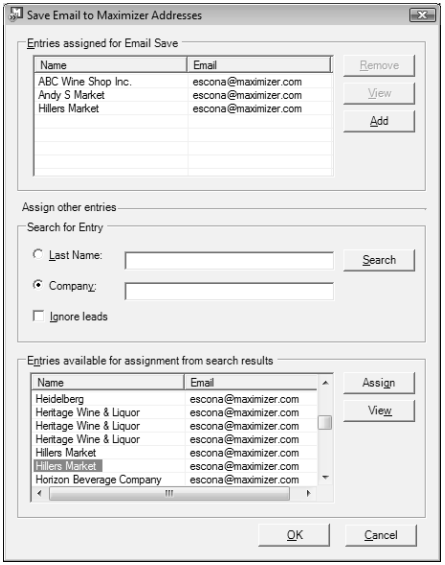
1. In Outlook, select the email message, and select the **Save Email to Contact in Maximizer Web Access** icon.

   – or –

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



To enable or disable the "Confirm when saving email" option, select the Maximizer Web Access Options icon.

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**.

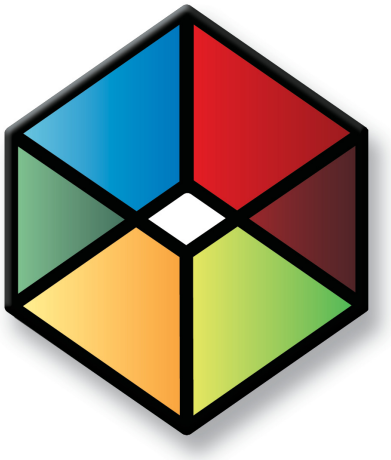
Viewing Address Book Entries from Microsoft Outlook

You can automatically open Maximizer Web Access to view Address Book entries from Microsoft Outlook. You can view Address Book entries associated with Outlook contacts or with email messages. The Address Book entries with an email address matching the email address in the email message or of the Outlook contact are displayed.

When you view Address Book entries from Outlook, a new instance of Microsoft Internet Explorer opens displaying the Address Book page in Maximizer Web Access. The page 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 Web Access** icon.



CHAPTER 6

Opportunities

Organize Your Sales with Opportunity Management

In this chapter...

"About Opportunities" on page 138
"Adding Opportunities" on page 142
"Sales Teams" on page 144
"Strategies" on page 145
"Email Notification for Opportunities" on page 150
"Quotas" on page 153

About Opportunities

Opportunity management helps you and your colleagues manage complex sales. Complex sales involve the participation of more than one person in the buying decision and require the support of a sales team. Prospects for complex sales can range from single businesses to multiple corporations or governments.

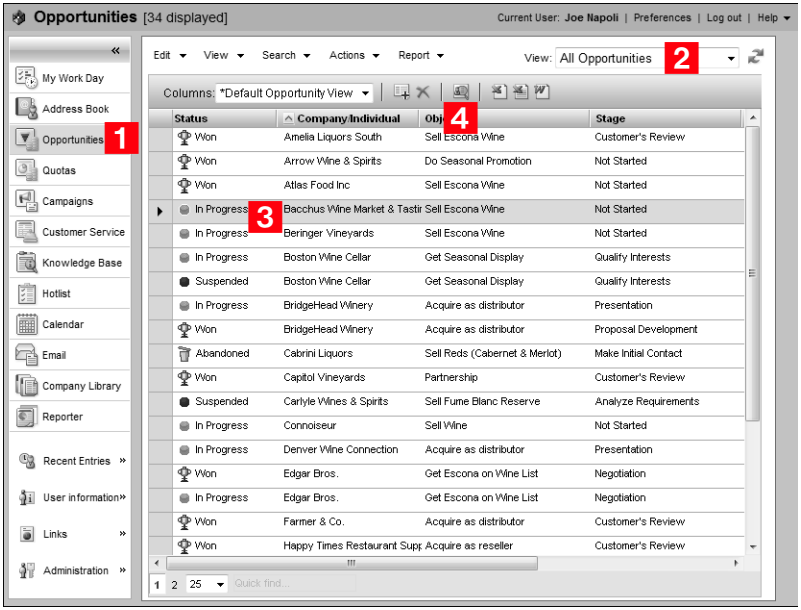
- Create strategies—detailed plans that identify the factors that influence a sale and the activities you must perform to close the opportunity.
- Apply these strategies to opportunities.
- Effectively schedule and coordinate the selling process among all members of your sales team.
- Ensure that all 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.
- Analyze the effectiveness of your strategies and create new ones for new opportunities.

In short, Maximizer helps you define and strengthen your selling methodology. Your sales team can define a strategy—what you need to do to close a sale and how to address the issues and obstacles involved—and then apply this strategy to opportunities.

Opportunities Page

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

1. Select the **Opportunities** icon to open the Opportunities page.
2. Use the **View** drop-down list to show all opportunities, team-updated opportunities, or current opportunities.
3. Click an **opportunity** to view or modify it.
4. Click the **Open Address Book entry** button in the View bar to view the Address Book entry associated with the current opportunity.



Viewing Opportunities

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

➤ To view an opportunity from the Opportunities page

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

The Opportunities page opens.

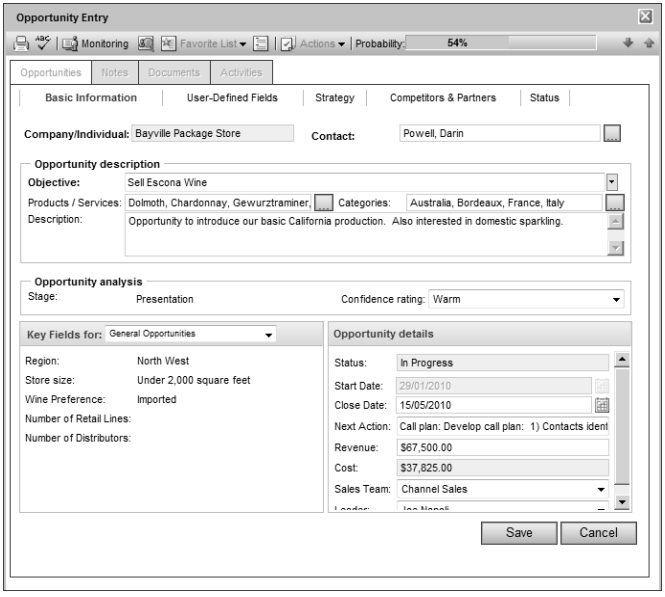
2 If necessary, select an option from the **View** drop-down list.

- **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.

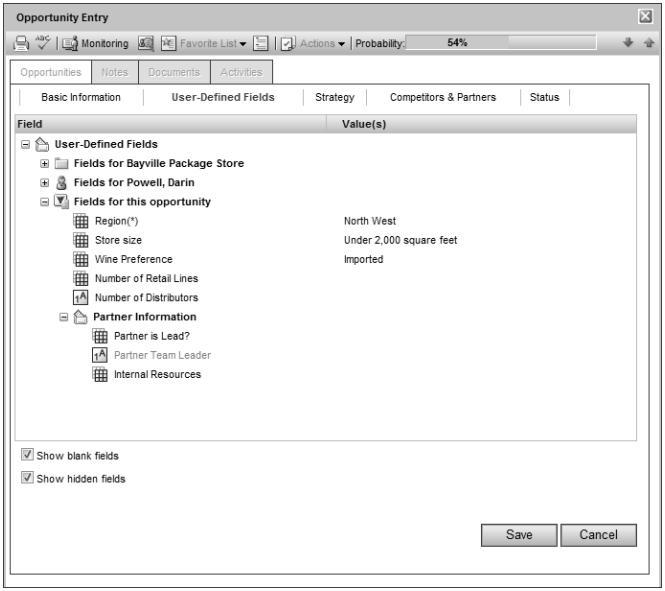
3 Click on an opportunity to open it.

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

You can click **Edit** to modify the opportunity.



4 Select the other tabs to view more information on the opportunity.

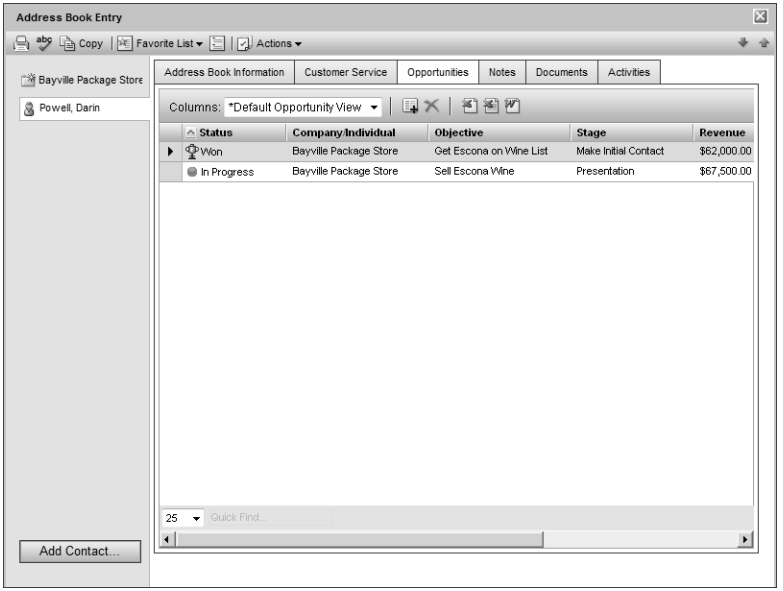


5 If necessary, click **Save** to save changes made to the opportunity.

➤ To view an opportunity from an Address Book entry

1. Open the Address Book entry.
2. Select the **Opportunities** tab.

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



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 page, then adding the new opportunity.

➤ To add an opportunity

1. Select or open the Address Book entry.
2. Select **Actions > Create an Opportunity**.

   – or –

   In an open Address Book entry, select the **Opportunities** tab, and click **Add**.

   A new opportunity dialog box opens.

   ⓘ You can also add an opportunity from the Opportunities page. Select Edit > Add Opportunity.

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.

     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. If you are using a strategy, this rating is updated automatically based on the completed success factors in the strategy (steps and activities). If you are not using a strategy, this field is set manually by selecting a stage.

     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.

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

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.

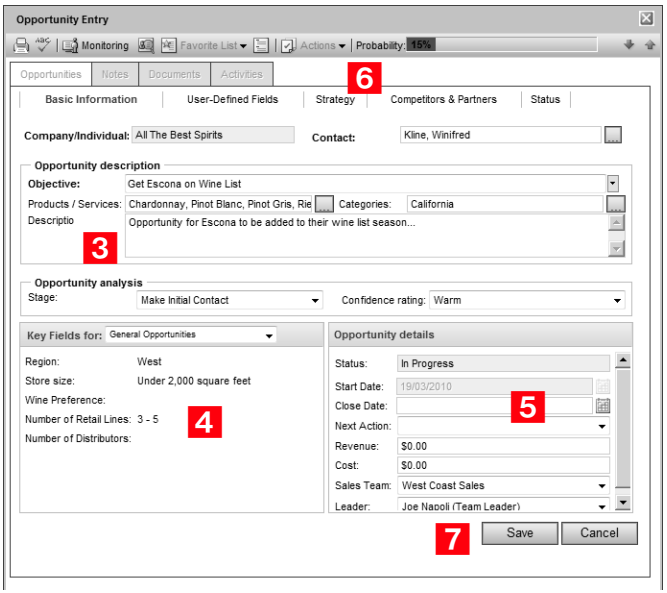
   ⓘ Mandatory opportunity fields are denoted by an asterisk.

5. Enter the opportunity's **details** such as the revenue, cost, sales team and leader.

If multi-currency is enabled for your Address Book and currencies other than the default currency have been set up, you can select a specific currency for the opportunity revenue field.

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

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



Sales Teams

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.

Strategies

Strategies use multiple factors to assess the probability of winning opportunities. They provide a way of forecasting based on defined metrics for the criteria of closing an opportunity. If your company has existing methods of calculating the probability of winning opportunities, they can be translated into strategies.

Strategies are most often used in complex projects involving large risk or long-term planning.

After you have gathered your organization's strategy information, you can enter this information into the Strategy Library. You can enter an unlimited number of strategies, and you can use the components of one strategy to build other strategies.

Strategies must be created in Maximizer. In Maximizer Web Access, you can only schedule strategies for your opportunities and add and modify strategy components in opportunities.

The following sections contain additional information on strategies:

- "Strategy Components" on page 145
- "Scheduling Strategies for Opportunities" on page 146
- "Progress Indicator" on page 149

Strategy Components

Strategies are made up of the following components:

- **Steps –** A step is a milestone in the strategy that reflects actions that must be taken when pursuing the opportunity. Each step represents one or more activities that must be accomplished before the step is considered complete.
- **Activities –** An activity is an action that forms the smallest building block in the strategy. As your organization works through an opportunity, activities are sent to the team members. An activity contains a description of the action, an estimate of the time it will take, and an estimate of its cost.
- **Roles –** A strategy probably will be applied to many different opportunities, so you may not know the names of the people who will directly influence the outcome of an opportunity. You should, however, identify the key roles that will be assumed by key people. You will then assign each role a weight in the same way that you assign weights to the strategy's success factors.
- **Success Factors –** Factors such as cost, features, and customer needs will influence the sale of your product or service. When you develop a strategy, choose success factors that you believe will play a large part in determining the successful outcome of an opportunity. Then assign each success factor a weight based

on your assessment of how much it will influence the outcome of the opportunity.

Scheduling Strategies for Opportunities

Once strategies are defined in the Strategy Library, you can schedule a strategy for an opportunity. This will ensure you keep up to date with all of the roles, success factors, and steps that influence an opportunity's success.

Note that if you change the scheduled strategy for an opportunity, all incomplete activities for the initial strategy are removed from the opportunity. Complete activities remain in the opportunity. After a different strategy is scheduled for an opportunity, the activities associated with that strategy are applied to the opportunity. If you had standings associated with roles in the previously scheduled strategy, the standings are carried over to the newly scheduled strategy.

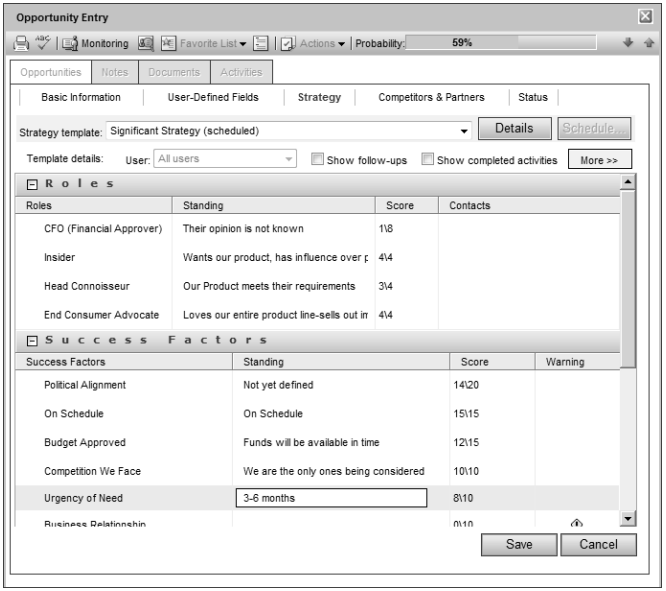
➤ To schedule a strategy for an opportunity

1. Open the opportunity, and select the **Strategy** tab.
2. Click **Edit**.
3. From the **Strategy template** drop-down list, select a strategy.

   You can click **Details** to view specific properties of the strategy such as the description and cost.
4. Click **Schedule** and specify the **Start date** for applying the strategy. Then, click **OK** to return to the Strategy tab.

5. For each role in the strategy, click in the **Standing** column and select a standing for the role. You can also click in the **Contacts** column to select a Contact for the role.

6 For each success factor in the strategy, click in the **Standing** column and select a standing for the success factor. Note that the "On Schedule" and "Political Alignment" success factors are calculated automatically.

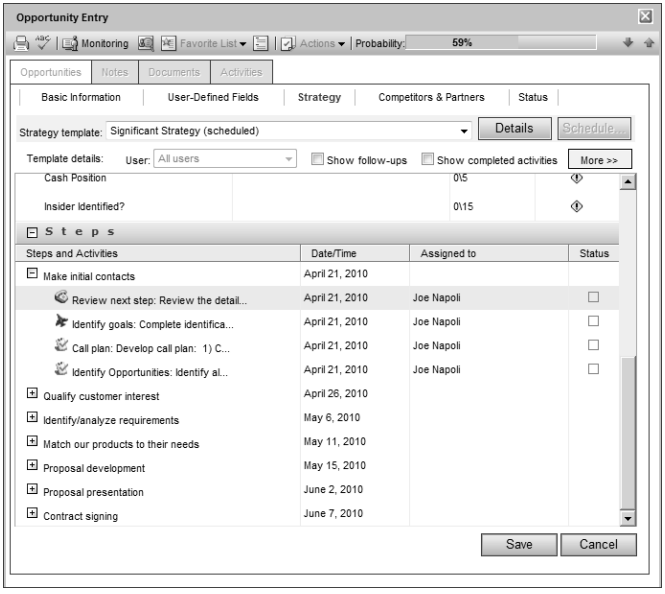


7 Select a step and click the **plus sign** to view all activities for this step.

8 If a team is assigned to the opportunity, delegate team members to specific activities in steps. Click on an activity and choose a user from the **Team member responsible for completion** drop-down list.

You can update the strategy as roles become more influential, success factors change, and steps are completed. The progress indicator changes automatically in alignment with the success of the opportunity.

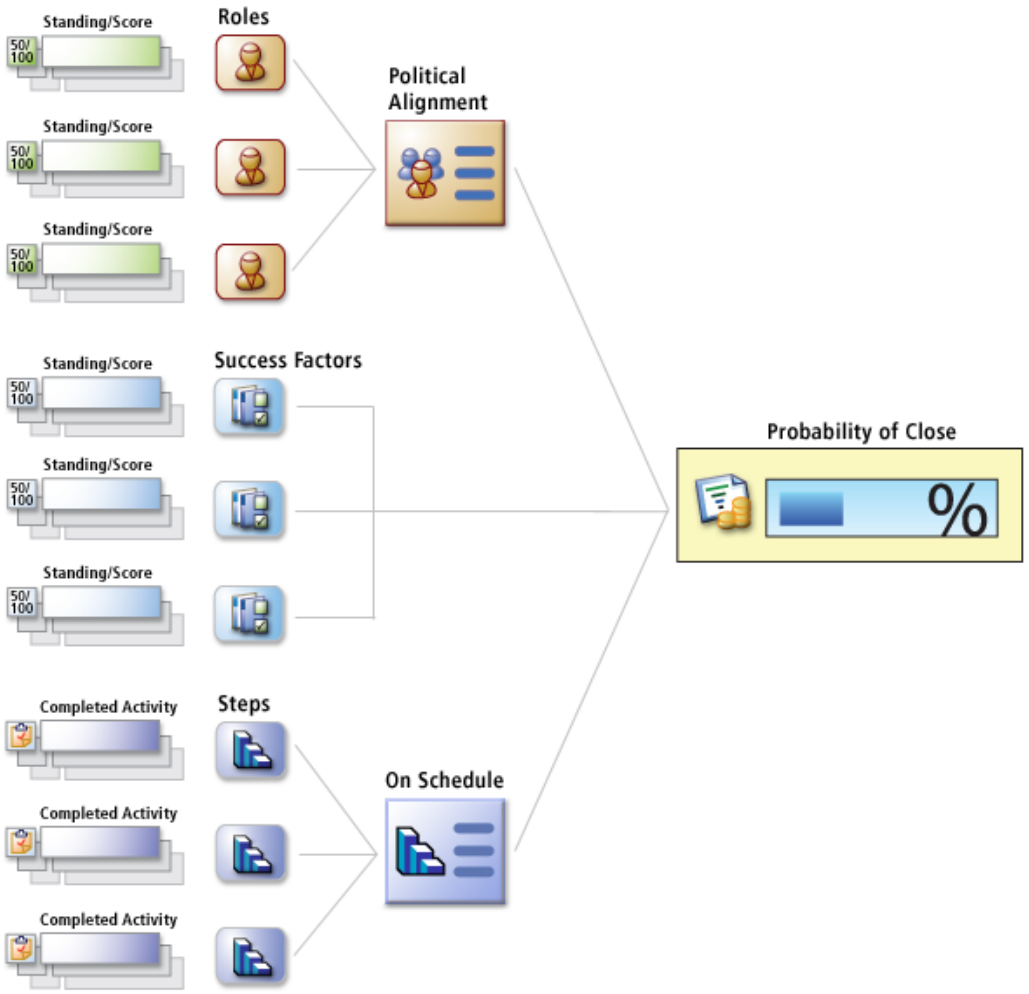
- To mark an activity as complete, click inside the box displayed after the activity. Overdue activities are denoted by a warning symbol after the activity.
- Use the **Show follow-ups** option to display follow-up activities related to an activity within a step.
- Use the **Show done** option to display completed activities. (Otherwise, completed activities are removed from the step.)
- Use the **More** button to add, modify, or delete roles, success factors, steps, and activities.



9 Click **Save** to save the changes to the opportunity.

Progress Indicator

The progress indicator for the probability of close is updated based on the weighted sum of the standing/score of the roles and success factors, as well as the number of completed activities within a step. The standings of the roles affect the Political Alignment success factor. The completed activities affect the On Schedule success factor. All success factors contribute to the probability of close.



Email Notification for Opportunities

When opportunities are created, modified, abandoned, lost, suspended, or won, email messages can be automatically sent to partners and users notifying them of the changes. Maximizer automatically inserts the basic details of the opportunity in the message so you don't have to write the email message with opportunity details each time.

To set up opportunity email notification, you must create email notification templates in Administrator. You can create separate templates for each action (create, abandon, lost, suspended, or won). Each action can also have separate templates for sending email to partners and users. User notification email is sent to the users identified as monitors for the opportunity.

For detailed information on how to create email templates for opportunity notification, see the *Maximizer CRM Administrator's Guide*.

Selecting Users for Opportunity Monitoring

A default list of opportunity monitors is set up in the opportunity preferences in Administrator. You can select this default list, or you can select any other users to monitor specific opportunities. You can also choose not to monitor a specific opportunity.

All users with modify permissions for opportunities can add or remove opportunity monitors. Opportunity monitoring access rights are not separate from general opportunity rights. If a particular user should not be modifying opportunity monitors, all opportunity modification rights can be removed in Administrator.

Opportunity monitors receive email messages based on templates set up in Administrator. You can create different templates for each type of action. See the *Maximizer CRM Administrator's Guide* for details.

You can also specify how to monitor new opportunities in the default opportunity entry.

➤ To select a user for opportunity monitoring

1. Select or open the opportunity.
2. Select **Edit > Opportunity Monitoring**.

   – or –

   In an open opportunity, select the **Monitoring** icon.
3. Select one of the opportunity monitoring options.

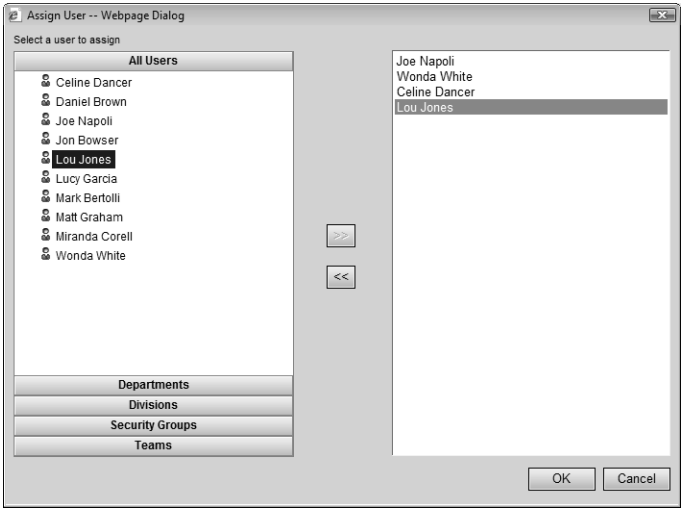
- Select **Do not monitor this opportunity** to remove all users from the list so no user receives email regarding this opportunity.
- Select **Use the system default opportunity monitoring user list** to display the users specified in the system default opportunity monitoring list.
- Select **Use the custom list below** to modify the list of users who monitor the opportunity.

4 If you select to use a custom list for opportunity monitoring, click **Add** to add a user to the list.

The Assign User dialog box opens. A list of available users is displayed on the left and the current list of opportunity monitors is displayed on the right.

5 Select a **user** from the list on the left and click the **right arrow** button to add the user to the list on the right.

6 Click **OK** to close the Assign User dialog box.



7 Click **OK** to save the changes to the opportunity monitoring list.

Quotas

You can manage sales quotas for teams, territories, and leaders assigned to opportunities. Sales quotas keep track of the revenue from opportunities compared to the quota applied to the team or leader assigned to the opportunities.

Quotas are available only in Maximizer CRM Enterprise Edition.

Sales managers can create quota templates. And all users with adequate quota permissions can apply quotas to sales teams, territories, and opportunity leaders.

The following sections contain information on working with quotas:

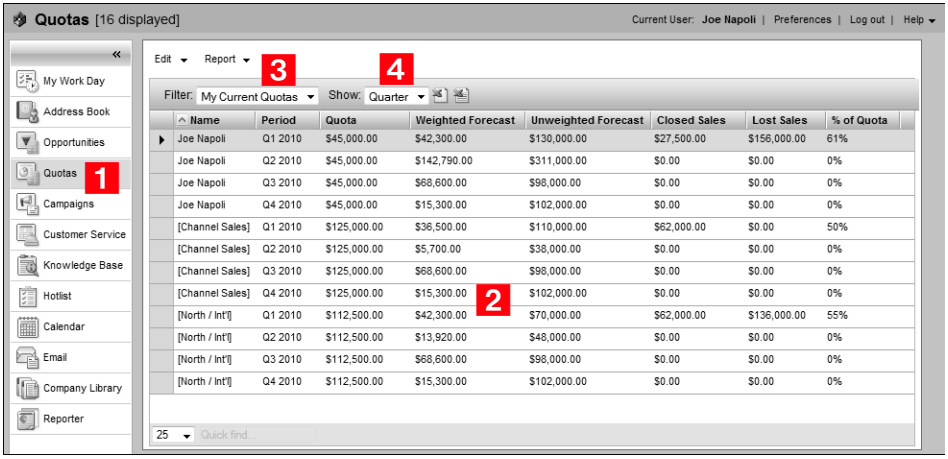
- "Quotas Page" on page 153
- "Creating Quota Templates" on page 154
- "Applying Quotas" on page 155

Quotas Page

You can view your current sales quotas in the Quotas page. Keep the following points in mind when working in the Quotas page:

1. Click the **Quotas** icon to open the Quotas page.
2. In the main area of the window, view the progress of opportunities for users, sales teams, and territories compared to the quotas.
3. Use the **Filter** drop-down list to display all of your quotas, all of your quotas for the current fiscal year, or all quotas that you have the right to view.
4. Use the **Show** drop-down list to display quotas by month, quarter, or year.

The year shown in the Period column refers to the fiscal year not the actual year. If the fiscal year does not begin in January, the year shown for the months before January refers to the next year, when the fiscal year ends.



Creating Quota Templates

Sales Managers can create quota templates that can be applied to many teams, territories, and leaders.

Maximizer users must have the Sales Manager user role to access quota templates.

➤ To create a quota template

1. In the **Quotas** page, select **Edit > Quota Templates**.
2. Click **Add.**
3. Specify a name for the quota template.
4. In the **Quota** field, enter the total amount of the quota for the fiscal year.
5. In the **Fiscal Year** drop-down list, specify the year that the quota applies to.

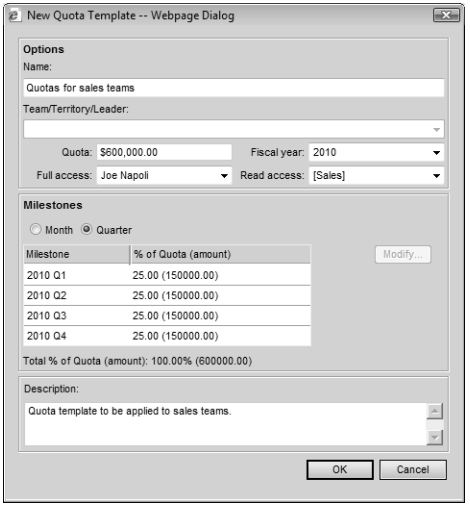
The beginning of the fiscal year is set in Administrator.

6. Under **Milestones**, select **Month** or **Quarter** as the milestones in the fiscal year.

   By default, an equal percentage of the quota is applied to each milestone.
7. To modify the percentage applied to a milestone, select the milestone, click **Modify**, and enter the new percentage.

   If you modify the percentage for one milestone, you must modify all other milestones, so that the percentages add up to 100.

8 Click **OK** to save the quota template.



Applying Quotas

You can apply sales quotas to teams, territories, and leaders. You can apply existing quota templates or create new quotas. Maximizer users must have the Insert permission for Quotas in order to apply quotas.

Only one quota can be applied to a team, territory, or leader for each fiscal year.

➤ To apply a sales quota

1 Select the **Quotas** icon to open the Quotas page.

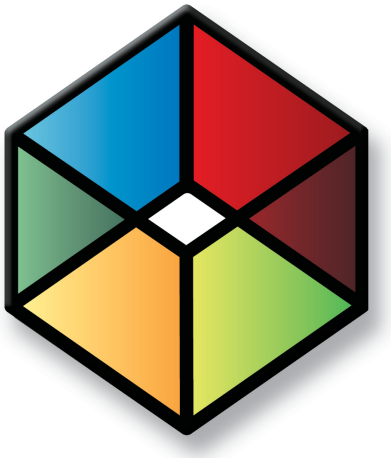
2 Select **Edit > Add Quota**.

3 In the **Template name** drop-down list, select a quota template to base the quota on.

4 Select the leader, team, or territory that the quota applies to.

5 If necessary, adjust the other properties of the quota.

6 Click **OK**.



CHAPTER 7

Campaigns

Market Your Products and Services

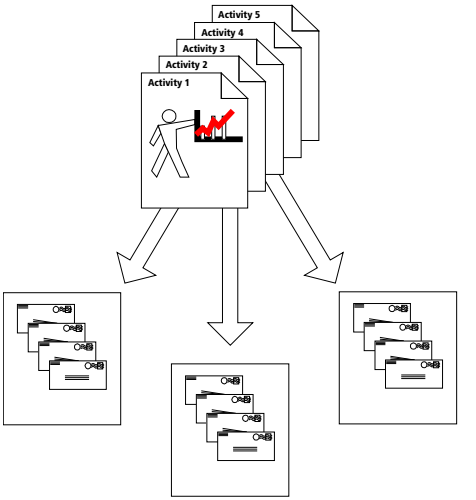
In this chapter...

"About Campaigns" on page 158
"Adding Automated Campaigns" on page 162
"Automated Campaign Messages" on page 166
"Adding Automated Campaigns" on page 162
"Activities in Automated Campaigns" on page 170
"Automated Campaign Subscribers" on page 174
"Status of Automated Campaigns" on page 177
"Testing Automated Campaigns" on page 179

About Campaigns

Campaigns help you and your colleagues promote your company and manage complex marketing campaigns.

With automated campaigns, you can broadcast your marketing message to anyone in your Address Book. A campaign can reach out to your entire Address Book or to a group of entries by email, fax, or print.



Automated Campaign Template

You can send out automated campaign message by email, fax, or printed document. An automated campaign template defines when and what is sent and can be reused for many automated campaigns.

Tracking campaigns helps you define and strengthen your marketing methodology. As a marketing team, you define campaign templates—what you need to do to launch a marketing campaign and how you will address the issues and obstacles involved. Then, you apply the campaign template to your campaign.

The following sections contain additional overview information about campaigns:

- "Automated Campaigns" on page 159
- "Automated Campaign Templates" on page 159
- "Campaigns Page" on page 160

Automated Campaigns

Use automated campaigns when you want to have Maximizer automatically send out email messages, faxes, or printed documents on a pre-defined schedule. An automated campaign is very useful if you want to inform customers of a new or upgraded product that you are marketing, encourage a repeat visit to your company's website, or even just to keep in contact with the customer.

Fax and print campaigns are available only in Maximizer CRM Enterprise Edition.

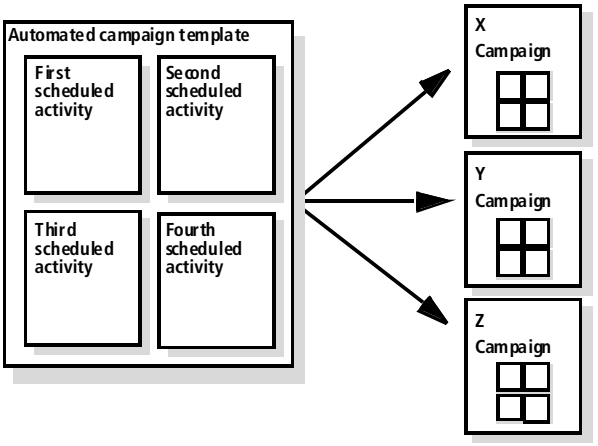
You can include merge fields in your outgoing campaign media so all recipients get messages that are customized with their names, companies, or any other fields in their Address Book entry information.

You can "broadcast" email to any number of Address Book entries to support your marketing campaign. Ask your Internet Service Provider if there is a limit on how many email messages that can be sent concurrently. You can control the cycle time check in the automated services preferences in Administrator.

Automated Campaign Templates

Creating automated campaigns requires that you first define campaign templates. Automated campaign templates define the actions that occur when you implement a campaign. Each template contains a series of scheduled activities that must be performed in order to complete the automated campaign. Automated campaign templates must be set up in Maximizer. When adding a campaign in Maximizer Web Access, you must select an existing campaign template created in Maximizer.

You can think of a campaign as a single implementation of one of your automated campaign templates. Each time you create an automated campaign, you are applying an instance of an automated campaign template. The same automated campaign template can be implemented over and over in the form of several campaigns.



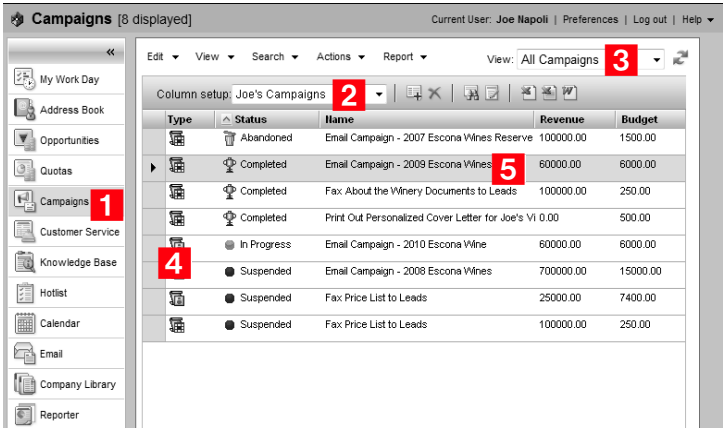
Campaigns Page

You can work with your campaigns in the Campaigns page. Like the other main pages, the Campaigns page is list-based, which means your entries are displayed as items in a list. All of your campaign-related activities are done in the Campaigns page.

Here are some tips for working in the Campaigns page:

1. Select the **Campaigns** icon to open the Campaigns page.
2. From the **Column setup** drop-down list, select a column setup and change the information displayed about each campaign.
3. Use the **View** drop-down list to filter the list of campaigns.
4. Use the icons in the **Type** column to quickly distinguish ongoing campaigns from fixed-date campaigns.

5 Click on a campaign to open it.



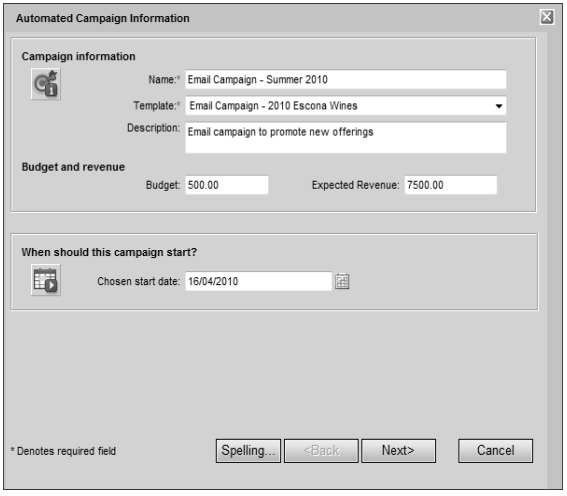
Adding Automated Campaigns

Automated campaigns are implementations of automated campaign templates. You can add as many campaigns as you like using the same campaign template and manage them in the Campaigns page.

When you create a new campaign, you can choose either a saved search or a Favorite List of Address Book entries to subscribe to the campaign. You can also choose to add no subscribers to the campaign.

➤ To add an automated campaign

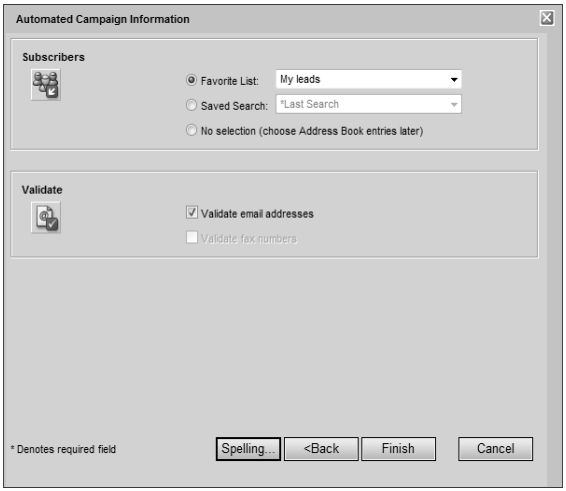
1. In the Campaigns page, select **Edit > Add Automated Campaign**.
2. Select the **template** on which this campaign is based. Enter the **name**, **description**, **budget**, and **expected revenue**. Specify the **start date** for the campaign. And click **Next**.



3. Select the **subscribers** to add to the campaign and select options for validating Address Book entries.

   You can select a Favorite List or a saved search from the search catalog.

   You can select the Validate email addresses and Validate fax numbers options to be notified of any blank email addresses or invalid fax numbers.



4 Click **Finish** to save and launch the campaign.

Viewing Automated Campaigns

You can view and modify the details of existing automated campaigns.

➤ To view an automated campaign

1 In the Campaigns page, click on the automated campaign.

The Campaign Entry dialog box opens at the Basic Information tab.

2 Click **Edit** to modify the campaign.

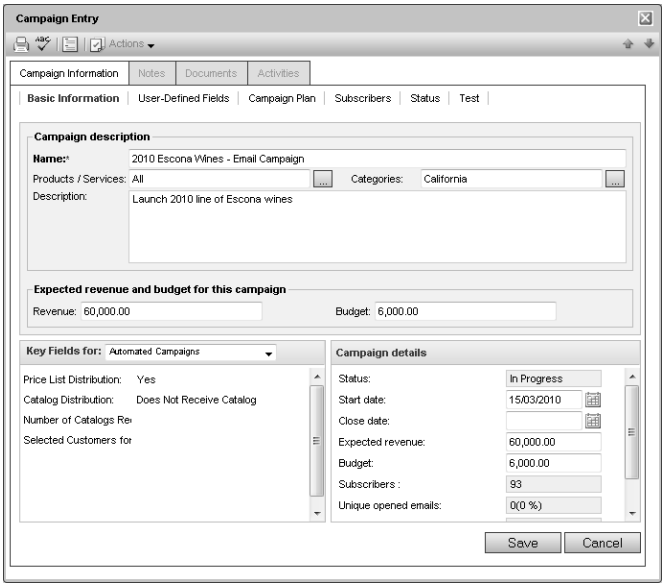
3 In the **Basic Information** tab, modify the campaign's basic information.

- Select **products/services** and **categories** related to the campaign.
- In the **Key fields** area, select values for important user-defined fields.
- In the **Campaigns details** area, view statistics on the campaign activities.

  Unique opened emails measures the number of subscribers that open one of the email messages in a campaign. A subscriber in a campaign can increment this count only once in a campaign.

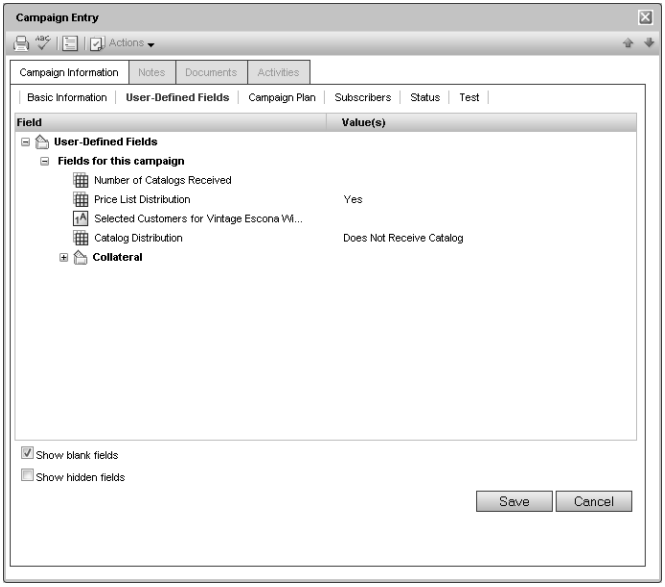
  Unsubscribes measures the total number of subscribers who have unsubscribed from the campaign in all activities.

Total unique clicks measures the number of unique visits to landing page URLs in the campaign by subscribers. A subscriber in a campaign can increment this count only once per landing page URL, even if the subscriber visits the landing page URL multiple times from different campaign activities.



4 Select the **User-Defined Fields** tab to view and modify the campaign user-defined fields.

These user-defined fields are specific to campaigns and are defined as user-defined fields for campaigns (the type is specified in the Set Up User-Defined Fields dialog box).



5 Select the remaining tabs to view more details on the campaign, and click **Save** to save changes made to the campaign.

Automated Campaign Messages

The principal action of an automated campaign is to send a message to one or more recipients by email, fax, or printed document. When you create automated campaign templates, you choose a message for each activity. You can also add messages to new activities in existing automated campaigns.

These messages are stored in the Message Body Library, accessible from the Campaign Message Editor, and from an activity in an existing automated campaign. You can create campaign messages using the Campaign Message Editor (.HTML and .TXT files), the Maximizer Word Processor (.ETF text files), a text editor (.TXT text files), an HTML editor (.HTML files), or Microsoft Word (.DOC files).

For email activities, Maximizer is capable of sending text and HTML email messages, in addition to the email template file (.ETF) format created by the Maximizer Word Processor. You can create HTML files in Maximizer, or you can use an editor of your choice to create HTML or text files.

Email messages can contain merge fields that are replaced with the recipients' information when the email message is sent. For example, your template's salutation might be "Dear {Mr_Ms?} {Last_Name?}" or "Dear {First_Name?}". These merge fields are replaced with a Contact's name, as in "Dear Ms. Kaworski".

The following sections contain additional information about automated campaign messages:

- "Creating Campaign Email Messages" on page 166
- "Campaign Message Editor" on page 167
- "Campaign Merge Fields" on page 168

Creating Campaign Email Messages

You can create email messages for your automated campaigns using the Campaign Message Editor in Maximizer Web Access. You can create a new message while adding or modifying campaign activities in existing campaigns. You can also click the Message Editor icon on the toolbar in the Campaigns page to launch the editor.

➤ To create an automated campaign email message

1. In the Campaigns page, select the **Message Editor** icon from the toolbar.

   The Campaign Message Editor dialog box opens.

2. From the **Format** drop-down list, select the format of the email message.

3. In the large text box in the center of the dialog box, compose the email message.

   You can use the toolbar icons to apply formatting and insert hyperlinks, images, and merge fields in the message.

4. Click **Save**.

   The Add Campaign Message dialog box opens.

5. Specify the properties of the campaign message, and click **OK**.

Campaign Message Editor

You can use the Campaign Message Editor to create email messages for your automated campaign email activities. You can open the Campaign Message Editor with the Message Editor icon in the toolbar on the Campaigns page.

The Campaign Message Editor lets you create messages in text or HTML format. You can add merge fields to messages in both formats. In HTML formal, you can add formatting, images, and hyperlinks to the email message. You can also edit the HTML source of the message.

Keep the following tips in mind when working in the Campaign Message Editor:

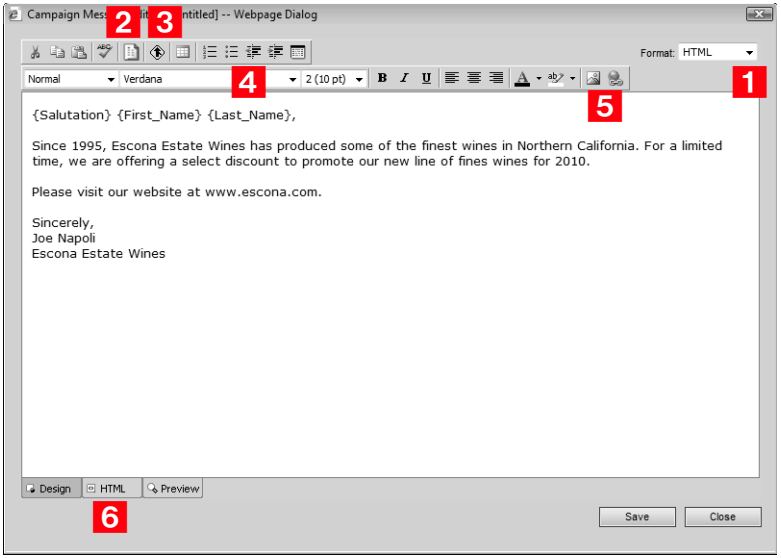
1. From the **Format** drop-down list, select the format of the email message: **Plain Text** or **HTML**.
2. Select the **Message Library** icon to retrieve an existing email message from the Message Library.
3. Select the **Insert Fields** icon to add merge fields to the message.
4. Use the toolbar to apply formatting to the content of the email message.

   These options are available only if you are creating an HTML message.

5. Select the **Insert Image** and **Create Link** icons to insert images and hyperlinks in your message.

   These options are available only if you are creating an HTML message.

6 Select the **HTML** tab to view and edit the HTML source of the email message.



Campaign Merge Fields

The campaign merge fields are specific to automated campaigns. These merge fields can be extremely useful for tracking customer information regarding resulting visits to your website and opened campaign email.

Although some of these merge fields can be used in .ETF and .TXT files, they are best suited for HTML.

- **Campaign_Opened_Email_Tracking_URL –** This merge field tracks the number of customers that have opened an automated campaign email message. It can be used with only HTML message templates. When a customer opens a campaign email message, the email opened count is updated in the automated campaign statistics.

  You should add the syntax for this merge field to an image tag in your HTML message.

- **Campaign_Redirect_URL –** This merge field tracks how many customers hit your website as a result of an automated campaign email message. The redirect URL calls an ASP page, which is installed and configured at the time of installing Maximizer. If necessary, the redirect script location can be modified in Administrator. When a customer clicks on the link, the URL visited count is updated.

  You can add up to five redirect URL merge fields to your campaign messages. You should add the syntax for this merge

field to a hyperlink in your HTML message. You specify the actual URL of the web page directly in the campaign template.

- **Campaign_Remove_Subscriber_URL –** This merge field unsubscribes customers from an automated email campaign. When a customer clicks on this URL, the Do Not Solicit By field is updated for the entry, so the customer's entry is marked to not be solicited by email.

  You should add this merge field to a hyperlink in your HTML message.

- **Service_Computer_Name –** This merge field identifies the automated services computer (Maximizer server) from which the automated email message was sent. Typically, you could use this internally through a hidden tag in your HTML. This field would be useful when you have more than one automated services computer running campaigns.

Activities in Automated Campaigns

All automated campaigns contain activities that are scheduled to occur during the campaign. Activities are email messages, faxes, or printed documents that are sent as part of automated campaigns. Activities are scheduled to occur a specified number of days after a campaign starts at a specific time. You can also associated personal activities such as Hotlist tasks and appointments with your automated campaigns.

The following sections contain additional information on automated campaign activities:

- "Adding Activities to Automated Campaigns" on page 170
- "Viewing Statistics on Campaign Activities" on page 172

Adding Activities to Automated Campaigns

You can add as many activities as you want to a campaign. When you add a new activity, you choose the file containing the body of the message, and you specify when the activity occurs during the campaign, as well as other details of the activity.

➤ To add an activity to an automated campaign

1. Open the campaign, and select the **Campaign Plan** tab.
2. Click **More** and select **Add Print**, **Add Fax**, or **Add Email**.

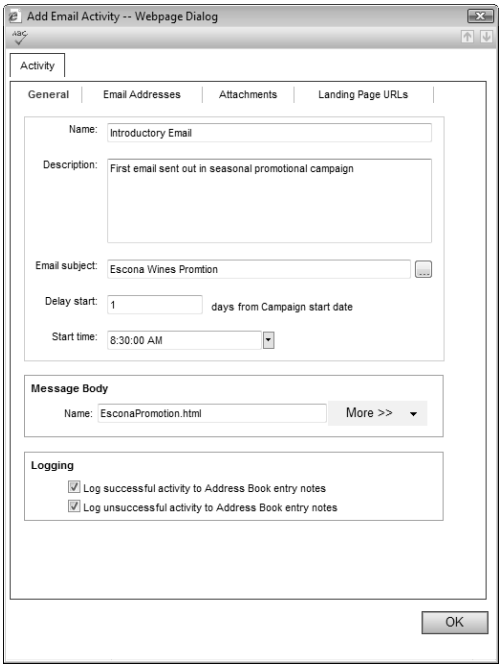
   The Add Print/Fax/Email Activity dialog box opens.
3. Enter the details of the activity.
   - Enter the **Name** and **Description**.
   - For fax and print campaigns, select a **printer**.

     The list includes all printers and fax applications installed on the Maximizer Automated Services computer (Maximizer server) that are initialized for the fax/print service through Administrator.
   - For email activities, enter an **Email subject**.

     You can click the ellipsis button to insert a merge field in the email subject.
   - Enter the delayed **start date**, which defines the number of days after the campaign template is launched that the activity occurs.
   - Specify the **start time**, which defines the time of day the activity occurs.

- Click **Select Message Body File** to access the list of saved templates (body files).
- Choose your **Logging options**.

  A note is created for the Address Book entries involved in the campaign if the campaign activity is successful or if the activity fails.



4 If you are adding a print or fax activity, click **OK** to finish adding the activity to the campaign.

If you are adding an email activity, continue with the remaining steps.

5 Select the **Email Addresses** tab, and specify the email addresses associated with the message.

- The **sender's** name and email address are visible in the email message.
- The **reply to** name and address are used when email recipients reply to the email message.
- The **Cc** and **Bcc** fields define a carbon copy or blind carbon copy recipient. Use these options to send a copy of the email message to someone in your company, as well as to the targeted recipients.

- Use the **Include in all the emails** or **Include in the first email only** options to specify that the cc and bcc recipients receive the message for each Address Book entry or for just the first Address Book entry in a batch.

6. Select the **Attachments** tab and click **Add** to add any attachments to the email message.
7. Select the **Landing Page URLs** tab, and specify up to five landing page URLs in the email message.

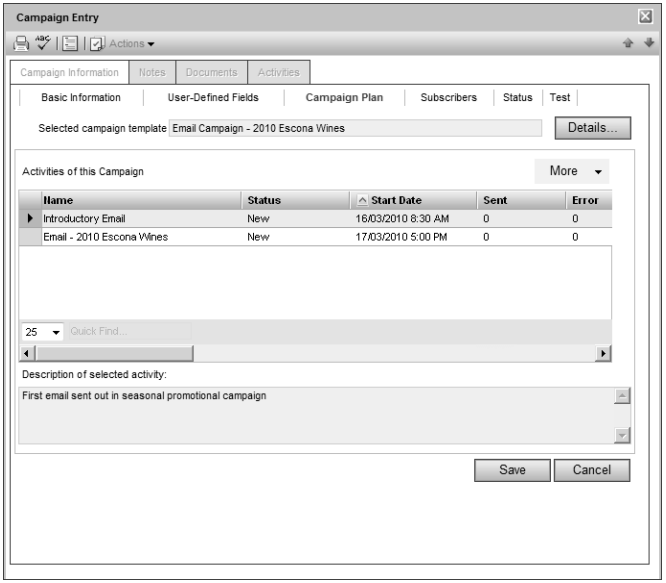
   If you include a Campaign_Redirect_URL merge field in your email message template, customers are redirected to a landing page URL when they click on the Campaign_Redirect_URL merge field.
8. Click **OK** to finish adding the email activity to the automated campaign.

Viewing Statistics on Campaign Activities

You can view statistics on all of the activities in your campaign from the Activities tab in an open campaign. The information you can view includes the number of messages that were sent and that had errors. For email messages, you can also view the numbers of subscribers who opened the email, who unsubscribed from the campaign, and who visited each of the URLs included in the email message.

➤ To view statistics on campaign activities

1. Open the campaign, and select the **Campaign Plan** tab.
2. Scroll to the right to view more statistics for the activities.



The **Email Opened** and **URL Visited** statistics display the total number of times all subscribers open the email or visit the URL.

The **Unsubscribed** statistic displays the number of subscribers who have unsubscribed from the campaign in this activity.

The **Email Opened Unique** and the **URL Visited Unique** statistics display the number of subscribers who have opened an email or visited the URL.

The **Total URL Visited** statistics add up the statistics for all URLs in the activity.

Automated Campaign Subscribers

Each automated campaign targets one or more Address Book entries. You can subscribe and unsubscribe Address Book entries to existing campaigns. You can also retrieve a list of Address Book entries that are subscribed to a campaign.

The following sections contain additional information on automated campaign subscribers:

- "Viewing Subscribers for Automated Campaigns" on page 174
- "Adding Subscribers to Automated Campaigns" on page 175
- "Removing Subscribers from Automated Campaigns" on page 176

Viewing Subscribers for Automated Campaigns

Each automated campaign targets one or more Address Book entries. You can quickly retrieve a list of the Address Book entries subscribed to a campaign and display it in the Address Book page.

You can also view lists of Address Book entries who have opened an email message for an automated campaign, clicked on a campaign landing page URL, and unsubscribed from an automated campaign. Yet another option is to view a list of Address Book entries for a selected campaign activity.

➤ To retrieve a list of subscribers for a campaign

- Select the automated campaign, and select **Actions > Retrieve Address Book Entries**.

  The Address Book page opens and displays the list of the Address Book entries subscribed to the campaign.

  You can also retrieve the Address Book entries for which the campaign was not successful by selecting **Retrieve Unsuccessful Address Book Entries**.

➤ To retrieve a list of subscribers who have opened email or clicked URLs

- Select the automated campaign, and select an item from the **Actions** menu as follows:
  - To retrieve Address Book entries who have opened email messages, select **Retrieve Opened Emails Address Book Entries**.

- To retrieve Address Book entries who have clicked on a landing page URL, select **Retrieve Clicked-Through Address Book Entries**.

Depending on the option you select, the Address Book page opens and displays a list of entries who have opened email or clicked on a landing page URL.

➤ To retrieve a list of entries who have unsubscribed from a campaign

- Select the automated campaign, and select **Actions > Retrieve Unsubscribed Address Book Entries**.

  The Address Book page opens and displays the list of entries who have unsubscribed from the automated campaign.

➤ To retrieve a list of subscribers for a campaign activity

1. Select the automated campaign, and select **Actions > Retrieve Address Book Entries by Activity**.
2. Select the activity, and select the subscribers you want to retrieve.

   Options for specifying which entries are retrieved include: **All subscribers**, **Unsuccessful entries**, **Opened email entries**, **Unsubscribed entries**, and **Clicked-through entries**.

   If you select **Clicked-through entries**, you can also specify which landing page URLs are visited.
3. Click **OK**.

Adding Subscribers to Automated Campaigns

You can add any Address Book entries as subscribers at any time to existing automated campaigns. You can search for an Address Book entry to add it individually, or you can add all Address Book entries from a Favorite List.

If you add a subscriber to a fixed-date campaign, all activities that are already completed in the campaign are sent at once to the Address Book entry. If you add a subscriber to an ongoing campaign, the campaign is run from the beginning and all activities are completed at their scheduled intervals.

➤ To add a subscriber to an automated campaign

1. Open the campaign, and select the **Subscribers** tab.
2. Click **Add** and select **Search for Address Book Entries** or **Add from Address Book Favorite List**.
3. Search for an Address Book entry by **last name** or **Company name**, select the entry, and click **OK**.

   – or –

   Select a Favorite List, and click **Retrieve**.

Removing Subscribers from Automated Campaigns

You can remove Address Book entries that are already subscribed to a campaign. You can select entries to remove from the campaign directly in the Subscribers tab, or you can remove all entries in a Favorite List.

You can flag Address Book entries to not be included in specific types of campaign activities by using the "Do not solicit by" field on the Basic Information tab.

➤ To remove subscribers from a campaign

1. Open the campaign, and select the **Subscribers** tab.
2. Select the subscribers that you want to remove.
3. Click **Remove**, and select **Remove Selected Entries**.

➤ To remove subscribers in a Favorite List from a campaign

1. Open the campaign, and select the **Subscribers** tab.
2. Click **Remove**, and select **Remove Based on Address Book Favorite List**.
3. Select the Favorite List, and click **Retrieve**.

Status of Automated Campaigns

You can view the current status of your automated campaigns in the Status column in the Campaigns page. You can also change the status and view more details on the status of campaigns in the Status tab of an open campaign.

The following sections contain additional information on the status of automated campaigns:

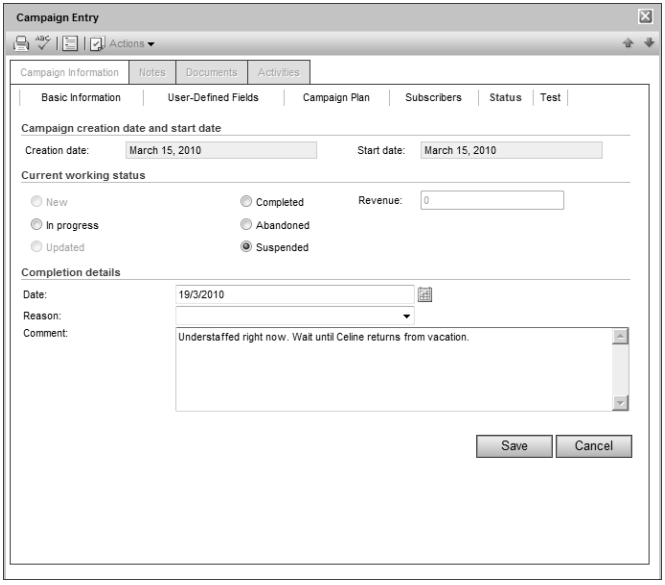
- "Suspending Automated Campaigns" on page 177
- "Resuming Automated Campaigns" on page 178

Suspending Automated Campaigns

You can suspend automated campaigns that are in progress at any time. When a campaign is suspended, all of the activities in the campaign are also suspended.

➤ To suspend an automated campaign

1. Open the campaign, and select the **Status** tab.
2. Click **Edit**.
3. In the **Current working status** area, select **Suspended**.
4. Optionally, in the **Completion details** area, specify the **date** and **reason**, and enter a **comment**.



5 Click **Save**.

Resuming Automated Campaigns

You can resume any existing automated campaigns that are completed, abandoned, or suspended at any time. Any incomplete activities in the campaign also resume.

➤ To resume a campaign

1 Open the campaign, and select the **Status** tab.

2 Click **Edit**.

3 In the **Current working status** area, select **In progress**.

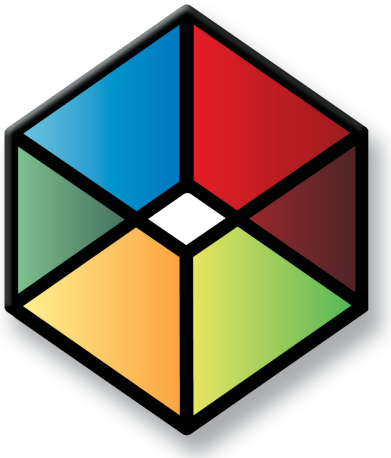
4 Click **Save**.

Testing Automated Campaigns

You can add subscribers that test all of the activities in the automated campaign at once. When you run the test, all of the activities in the campaign are sent to the subscribers ignoring the date and start time of the activity.

➤ To test an automated campaign

1. Open the campaign, and select the **Test** tab.
2. If necessary, add Address Book entries to the test:
   - Click **Add** and select **Search for Address Book Entries** or **Add from Address Book Favorite List**.
   - Search for an Address Book entry by **last name** or **Company name**. Or select a Favorite List and click **Retrieve**.
3. Click **Run Test**.



CHAPTER 8

Customer Service

Provide the Key to Success with Customer Service

In this chapter...

"Customer Service Cases" on page 182
"Adding Customer Service Cases" on page 186
"Status of Customer Service Cases" on page 189
"Email Notification for Customer Service Cases" on page 192
"Knowledge Base" on page 196
"Adding Articles to the Knowledge Base" on page 200

Customer Service Cases

The customer service features in Maximizer help support and enhance your existing customer service business processes. All Address Book entry customer service communication can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner.

The following sections contain overview information on working with customer service cases:

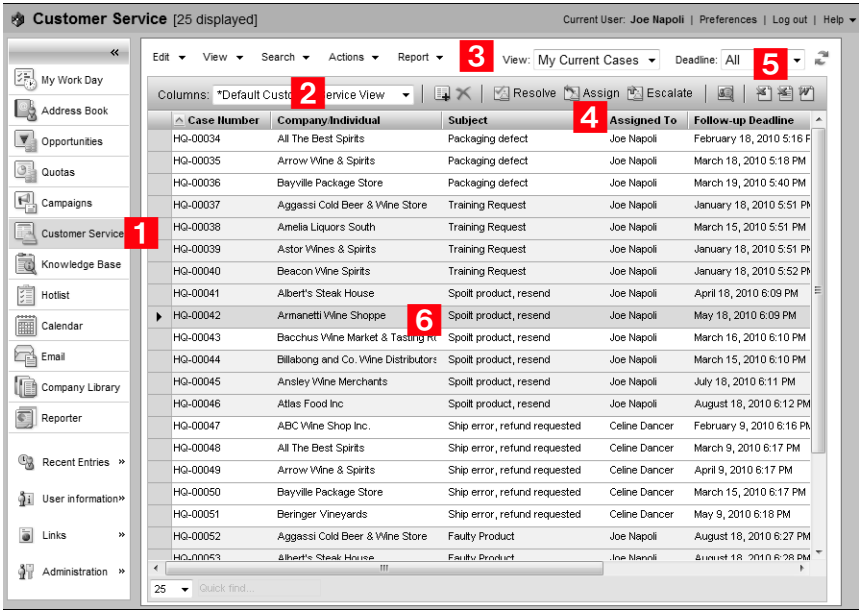
- "Customer Service Page" on page 182
- "Viewing Customer Service Cases" on page 183

Customer Service Page

The Customer Service page is list-based like the other Maximizer pages. Keep the following points in mind while working with the Customer Service page:

1. Select the **Customer Service** icon to open the Customer Service page.
2. Use the **Columns** drop-down list to change the displayed column setup.
3. Use the **View** drop-down list to display cases assigned to you or show other queues.
4. Use the **View bar** buttons to resolve, assign, and escalate cases.
5. Use the **Deadline** drop-down list to view cases according to deadline.

6 Click on a **customer service case** to view or modify it.



Viewing Customer Service Cases

You can view and modify existing customer service cases in your Address Book from the Customer Service page or from the Address Book entry associated with the customer service case.

➤ To view a case from the Customer Service page

1 Select the **Customer Service** icon to open the Customer Service page.

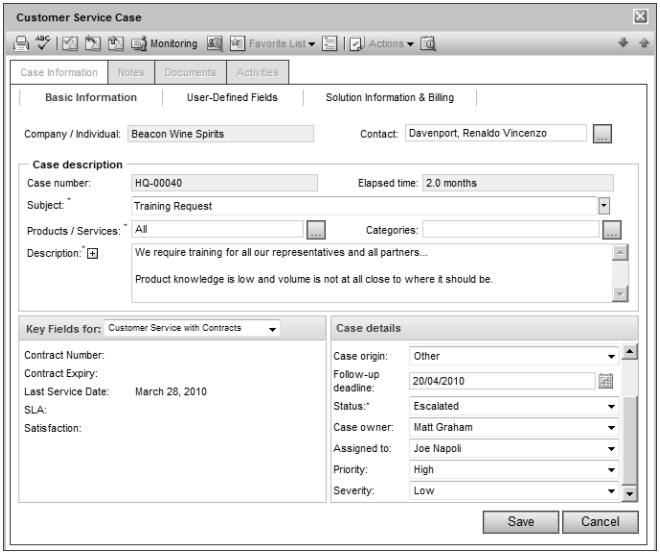
The Customer Service page opens.

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

3 Click on an entry to open it.

The Customer Service Case dialog box opens displaying the details of the case.

You can click **Edit** to modify the customer service case.



4 Select the other tabs to view more information on the case.

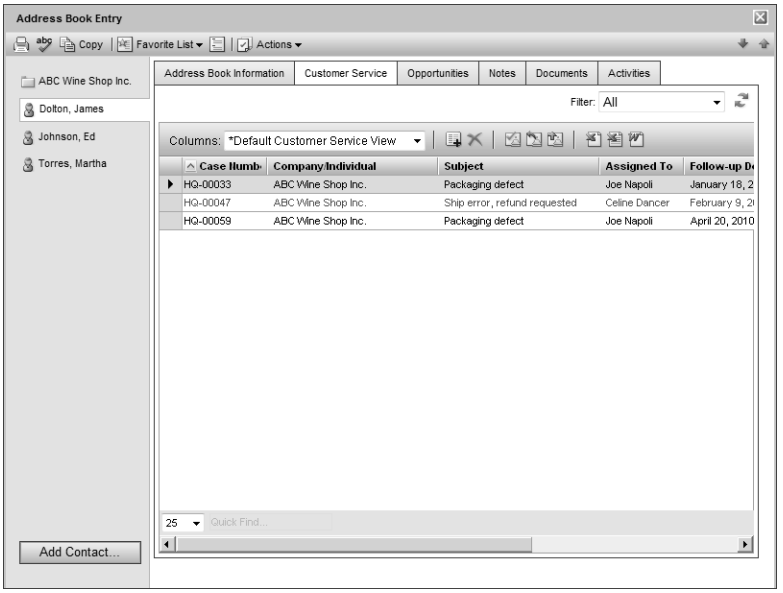
5 If necessary, click **Save** to save changes made to the case.

➤ To view a case from an Address Book entry

1 Open the Address Book entry.

2 Select the **Customer Service** tab.

All customer service cases for the current Address Book entry are displayed in the list.



3 Click on a customer service case to open it.

Adding Customer Service Cases

You can create customer service cases to track and resolve customer service issues. Customer service cases are always associated with Address Book entries. When creating a new case, you can select an Address Book entry or select an existing customer service case associated with the Address Book entry.

➤ To add a customer service case

1. Select or open the Address Book entry.
2. Select **Actions > Create a Customer Service Case**.

   The Customer Service Case dialog box opens.

ⓘ You can also add a case from the Customer Service page. Select Edit > Create a Customer Service Case.

3. If necessary, click the ellipsis button next to the **Contact** field to search for a Contact for the case.

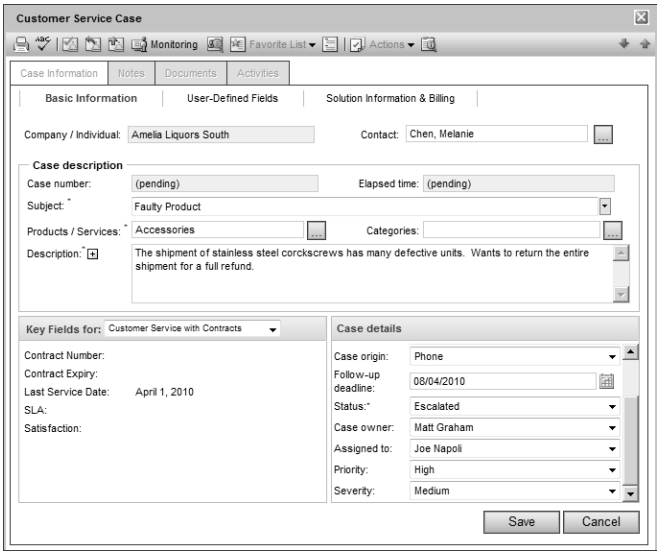
   The Contact can be associated with any Company or Individual in the Address Book, and not only with the selected Address Book entry.

4. Specify the basic fields for the customer service case.
   - Select the applicable **Products/Services** and **Categories** for the case.
   - Enter a **Subject** and a **Description** of the case.
5. Select a **Key Fields** list and select the appropriate key fields for the customer service case.

   Key Fields are important user-defined fields specific to customer service cases 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 customer service user-defined fields for each list.
6. Specify the remaining **case details**.
   - In the **Follow-up by** field, select the follow-up deadline for the case.
   - In the **Case Owner** field, select the Maximizer user who is ultimately responsible for the closure of the case.
   - In the **Assigned to** field, select the Maximizer user who the case is assigned to.

     A Hotlist task, based on the follow-up deadline, is automatically created for the assigned user. The task is automatically modified when the follow-up deadline or

assigned user is modified. And when the case is resolved, the task is marked as complete.



7 Select the **User-Defined Fields** tab to specify additional values for case fields.

The User-Defined Fields tab contains Address Book user-defined fields in the Fields for [Address Book entry] folder and Customer Service user-defined fields in the Fields for this case folder.

If you cannot see one of the user-defined fields you need, select the **Show blank fields** checkbox to display all fields.

8 Click **Save** to save the new customer service case.

Adding Customer Service Cases from Email

You can create customer service cases related to existing or new Address Book entries right from the Email page.

➤ To add a customer service case from an email message

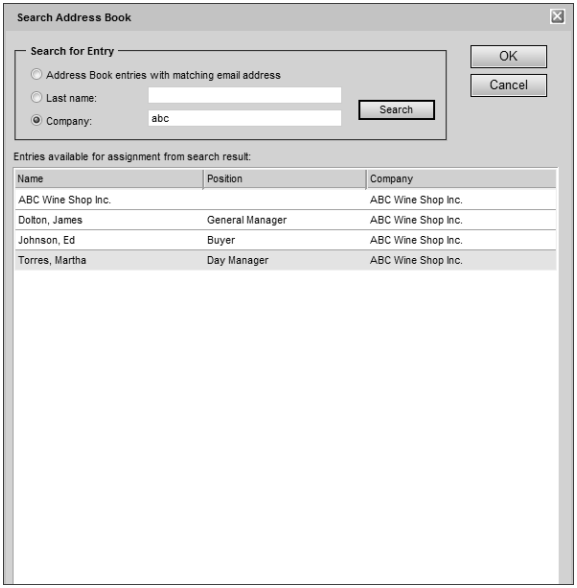
1 In the Email page, select the email message.

2 Select **Actions > Create Customer Service Case from Current Email Message**.

The Search Address Book dialog box opens. If there is an associated Address Book entry for the selected email message, it

is displayed in the Entries available for assignment from search results list.

3 Search for the Address Book entry to associate with the case, select the Address Book entry, and click **OK**.



4 Enter the case details.

By default, the email subject becomes the case subject, and the email body becomes the case description.

5 Click **Save** to save the customer service case.

The Add Email to Customer Service Case dialog box opens. You can use this dialog box to save the email message as a document with the customer service case.

Status of Customer Service Cases

You can change the status of a customer service case at any time. When you assign a case to another representative or escalate a case to a manager, you can specify a new status for the case. The status also changes when you resolve a cases.

You can also set up custom statuses for cases and select which statuses are available when you assign, escalate, and resolve cases in the customer service preferences in Administrator.

The following sections contain additional information about the status of customer service cases:

- "Assigning and Escalating Customer Service Cases" on page 189
- "Resolving Customer Service Cases" on page 190
- "Recording Case Solutions" on page 191

Assigning and Escalating Customer Service Cases

Customer service cases should be assigned to the customer service team member who is best able to handle the type of issue. A customer service team member is categorized in Administrator as a customer service representative or a customer service manager, though a manager can serve both roles. Cases are assigned to representatives and escalated to managers when representatives are unable to resolve the cases.

Cases can be assigned and escalated as often as required. When a case is assigned or escalated, you can type a message to record why the case is assigned or escalated. This message is then included in the logged note.

You can send email to the user who is now responsible for the case when you assign or escalate a case. The email message is system-generated and cannot be edited in Maximizer or Administrator.

The customer also can be notified by email when a case is assigned or escalated so the customer always knows who is handling the case although the owner of the case is the person who is ultimately responsible for the closure of a case. If a Contact is associated with the case, the email message is sent to the Contact. Otherwise, the message is sent to the Company/Individual.

➤ To assign or escalate a customer service case

1. Select or open the customer service case.
2. Select the **Assign** or **Escalate** icon.

   The Assign Case or the Escalate Case dialog box opens.

3. In the **Assign to** or **Escalate to** drop-down list, select a Maximizer user.

   To be listed in this dialog box and to access the Customer Service page, users must be assigned to the Customer Service Manager or the Customer Service Representative role in Administrator.

4. In the **Status** drop-down list, select the status of the case, or leave the default status.

   The default status is Assigned or Escalated. But you can select any status that is set up to display in Administrator.

5. Enter a **Note** about the case assignment or escalation.

6. In the **Actions** area, select the corresponding option to notify the assigned user and/or case owner.

7. Click **OK** to finish assigning or escalating the case.

Resolving Customer Service Cases

When you solve a customer's issue, you can resolve the customer service case in Maximizer. You can document the details of how the case is resolved, add a new solution (if any) to the knowledge base, and notify the customer and user to whom the case is assigned. You can perform these tasks right in the Resolve Case dialog box.

➤ To resolve a customer service case

1. Select or open the customer service case.

2. Select the **Resolve** icon.

3. Specify the billing information for the case.
   - Select a **Billing type**.
   - Specify the number of hours worked on the case in the **Billable time (hrs)** field.
   - Enter the hourly rate in the **Billing rate** field.
   - If Maximizer prompts you to update the Case fee automatically by multiplying the Billing rate by the Billable time, click either **Yes** or **No** to specify your preference. Otherwise, enter the **Case fee**.

4. Enter the **Solution notes** for the case. These notes would include any specific information about how the case was resolved.

Note that you can include this information in automated email templates for customers by using the Case_Solution_Note merge field.

You can also select a knowledge base article to link to the case, or create a draft knowledge base article from the solution note.

5. If desired, select one or more of the options in the notification areas to send email to other Maximizer users who worked on the case or to the Address Book entry associated with the case.

6. Click **OK** to finish resolving the customer service case.

Recording Case Solutions

While resolving a customer service case, you can keep track of the solution to the case in the knowledge base. You can choose from the following options:

- **Solution involves information from an existing knowledge base article –** Select this option if an existing knowledge base article resolved the case. Enter the knowledge base article number.
- **Create a draft knowledge base article from solution notes and link it to this case –** Select this option if the case was resolved without the assistance of an existing knowledge base article. Type a concise, detailed explanation of how the case was resolved in the Solution notes text box. If the status is set to Abandoned, this option is unavailable.

Email Notification for Customer Service Cases

When customer service cases are created, assigned, escalated, or resolved, email messages can be automatically sent to customers and users notifying them of the changes. Maximizer automatically inserts the basic details of the case in the message so you don't have to write the email message with opportunity details each time.

To set up case email notification, you must create email notification templates in Administrator. You can create separate templates for each action (create, assign, escalate, or resolved). Each action can also have separate templates for sending email to customers/partners and users. Partners can receive the same email notification as their associated customer. User notification email is sent to the users identified as monitors for the case.

For detailed information on how to create email templates for case notification, see the *Maximizer CRM Administrator's Guide*.

The following sections contain additional information on email notification for customer service cases:

- "Selecting Users for Case Monitoring" on page 192
- "Customer Service Merge Fields" on page 194

Selecting Users for Case Monitoring

A default list of case monitors is set up in the Customer Service preferences in Administrator. You can select this default list, or you can select any other users to monitor specific customer service cases. You can also choose not to monitor specific customer service cases.

All users with modify permissions for cases can add or remove case monitors. Case monitoring access rights are not separate from general customer service rights. If a particular user should not be modifying case monitors, all case modification rights can be removed in Administrator.

Case monitors receive email messages based on templates set up in Administrator. You can create different templates for each type of action. See the *Maximizer CRM Administrator's Guide* for details.

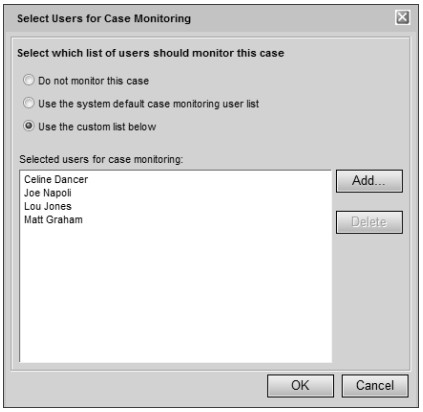
You can also specify how to monitor new cases in the default case entry.

➤ To select a user for case monitoring

1. Select or open the customer service case.
2. Select **Edit > Case Monitoring**.

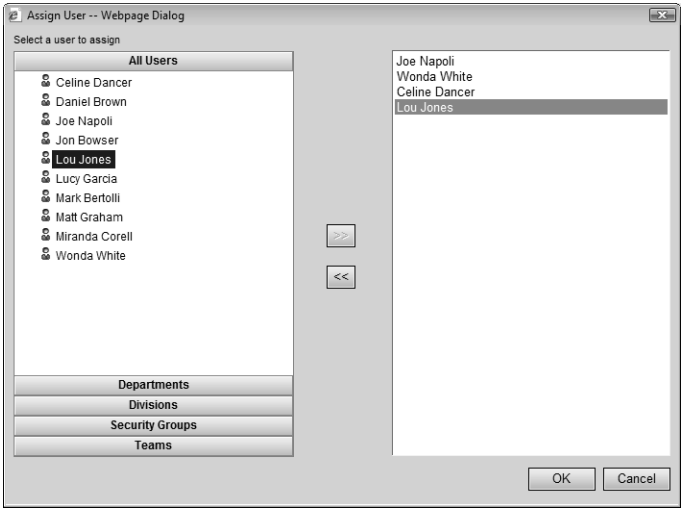
   – or –

   Select the **Monitoring** icon in an open customer service case.
3. Select one of the case monitoring options.
   - Select **Do not monitor this case** to remove all users from the list so no user receives email regarding this case.
   - Select **Use the system default case monitoring user list** to display the users specified in the system default case monitoring list.
   - Select **Use the custom list below** to modify the list of users who monitor the case.



4. If you select to use a custom list for case monitoring, click **Add** to add a user to the list.

   The Assign User dialog box opens. A list of available users is displayed on the left and the current list of case monitors is displayed on the right.
5. Select a **user** from the list on the left and click the **right arrow** button to add the user to the list on the right.
6. Click **OK** to close the Assign User dialog box.



7 Click **OK** to save the changes to the case monitoring list.

Customer Service Merge Fields

Merge fields in the email template personalize the message for each recipient by replacing the merge field code with the actual field value for that Address Book entry. For example, including the {First_Name?} merge field in an email template would replace that code with each email recipient's actual first name.

You can create templates in either .ETF (Maximizer Word Processor) or .HTML format. When creating templates in the Maximizer Word Processor, simply click the Merge Field button and select the merge field to insert into your email template. However, HTML templates are created in an HTML or text editor, which does not contain the Maximizer merge field selection dialog box. While you can manually type the merge field codes into your HTML document, it's easier to first create the template in the Maximizer Word Processor and then copy the template (including the merge field codes) into an HTML template.

The Maximizer Word Processor is available only in Maximizer. You cannot access the Maximizer Word Processor from Maximizer Web Access.

For a complete list of available merge fields to include in the email templates, see the Insert Merge Field dialog box in the Maximizer Word Processor. Press F1 when a field is selected to view its description. Commonly used customer service merge fields are described below:

The question mark in a merge field is used to alert users to not leave a space if no value is assigned to the related Address Book entry for the merge field.

- **{My_Name?} –** Full name of the logged-in user (first name, initial, and last name).
- **{My_Company?} –** Name of the logged-in user's company.
- **{CS.Case_Number?} –** Case number.
- **{CS.Client_Name?} –** Name of the associated Address Book entry (Company or Individual).
- **{CS.Contact_Name?} –** Name of the Contact associated with the case. Because this field is not mandatory in customer service cases, a value may not display in case notification emails.
- **{CS.Subject?} –** Case subject.
- **{CS.Assigned_To?} –** Name of the user who the case is assigned to. Applies to case assignment or escalation emails only.
- **{CS.Resolved_By?} –** Name of the user who resolved the case. Applies to case resolution emails only.
- **{CS.Resolved_Date?} –** Date when the case was resolved. Applies to case resolution emails only.
- **{CS.Resolved_Time?} –** Time when the case was resolved. Applies to case resolution emails only.
- **{Case_Solution?} –** Knowledge base article number associated with the case resolution. Applies to case resolution emails only.
- **{Case_Solution_Note?} –** Notes from the Solution Notes field in the Solution Information & Billing tab of the Case dialog box. Applies to case resolution emails only.

Knowledge Base

The knowledge base keeps track of the solutions to your customer service cases. Each separate case solution is stored in a knowledge base article. An article is typically created for each case solution, answered question, or guideline relating to your products or services.

Articles in the knowledge base are stored in a standard (text) format or in a document (file attachment) format.

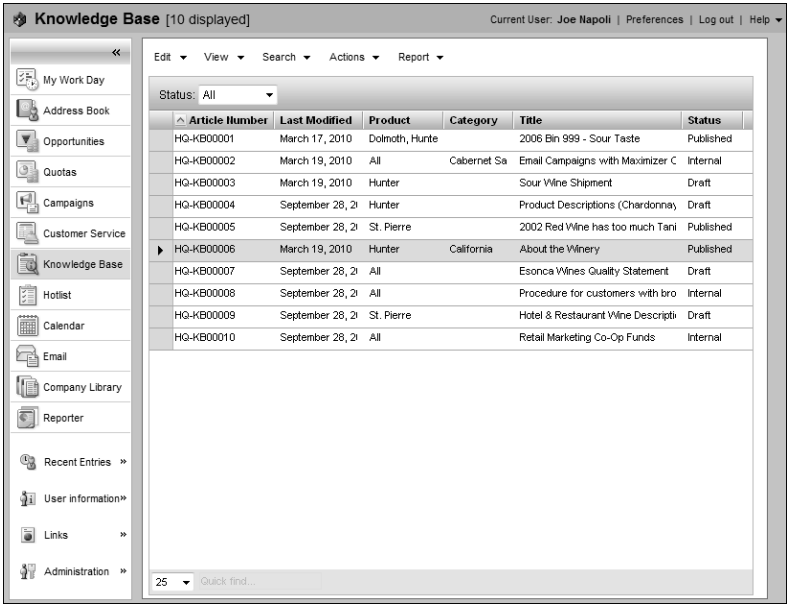
The following sections contain information about the knowledge base:

- "Knowledge Base Page" on page 196
- "Viewing Knowledge Base Articles" on page 197
- "Searching for Knowledge Base Articles" on page 198
- "Status of Knowledge Base Articles" on page 199

Knowledge Base Page

The Knowledge Base page provides you with a library-style tool to manage your knowledge base articles. The page is tightly integrated with the Customer Service page.

The Knowledge Base page displays articles according to number, last modified date, product, category, title, and status. Click on a column heading to sort the articles by the column subject matter.



Viewing Knowledge Base Articles

The knowledge base ensures that valuable case solutions are recorded, reviewed for quality assurance, and made available to the appropriate users. You can view and modify existing knowledge base articles as long as you have the required permissions.

➤ To view a knowledge base article

1. Select the **Knowledge Base** icon.

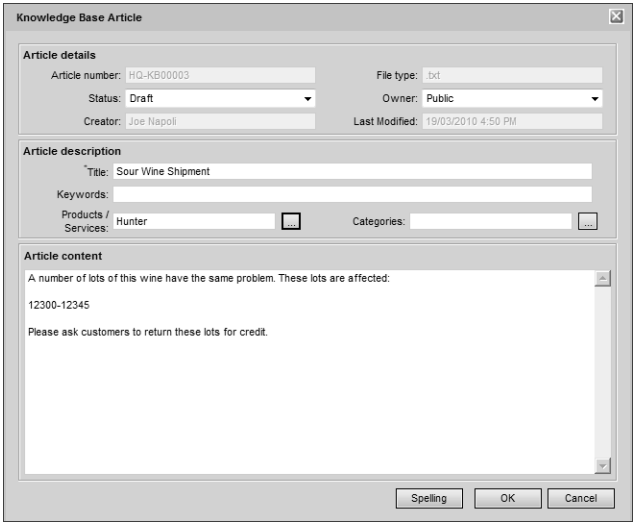
   The Knowledge Base page opens.

2. If necessary, select an option from the **Status** drop-down list to filter the list of articles.

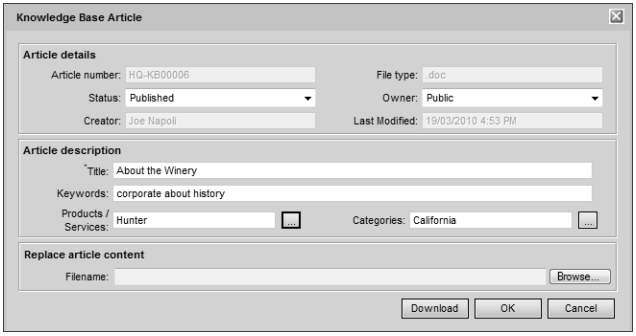
3. Click on an article to open it.

   The Knowledge Base Article dialog box opens displaying details on the articles.

   If the article is in standard format, the entire content of the article is displayed.



   If the article is in document format, only the article details are displayed.



4. To view the content of a document article, click **Download**.

   To replace the content of the article, click **Browse** and select the new article.

5. If you are modifying the article, click **OK** to save the changes.

Searching for Knowledge Base Articles

You can search the knowledge base for any article that matches the basic article fields you specify, such as creator, owner, and last modification date. To find all articles, leave all the fields blank.

You can also search for articles by phrase. Once selected, the three search options just described apply to the article content, as well as to the title and keywords. The Search by Phrase option searches the article title and keywords and can be fine-tuned using the following options:

- **Article contains all of the words in phrase –** Searches for every word you specify.
- **Article contains the exact phrase –** Searches for the words in the exact order you specify.
- **Article contains at least one of the words in phrase –** Searches for at least one of the words you specify.

You can choose to search the article content, as well as the title and keywords, using the "Include article body contents when executing search" option.

If you are running Maximizer on a SQL server, the Full-Text Search engine must be installed in order to search article content. If this option is grayed out, contact your system administrator or see the *Maximizer CRM Administrator's Guide* for information on how to enable the full-text search in SQL.

Status of Knowledge Base Articles

The status of knowledge base articles determines which users can read or modify articles. Articles can also have the following statuses:

- **Draft –** Articles can be viewed and modified by creators, owners (users or security groups), and approvers.
- **Internal –** Articles can be viewed by all users who have knowledge base read rights, excluding external web access users (customers and partners).
- **Published –** Articles can be viewed by all users who have knowledge base read rights, including external web access users (customers and partners), and modified by approvers.
- **Expired –** Articles can be viewed and modified by creators, owners (users or security groups), and approvers.

Adding Articles to the Knowledge Base

When you resolve customer service cases, you can create new knowledge base articles automatically from case solution notes. Cases are automatically linked to their new knowledge base articles. You can also add knowledge base articles directly to the Knowledge Base page. These articles are not linked to specific customer service cases, though you can link the articles to cases in the future.

You can add articles to the knowledge base in standard (text) format and in document (file attachment) format. If the article content is short and straightforward, standard format should suffice. However, if you want to carefully compose the article over a day or two, confirm data with an external source, or run a spell check, you may wish to write the document in Microsoft Word, for example, and then attach the article as a document.

A newly created article is assigned a draft status until it is opened and assigned a different status by the appropriate users.

The following sections contain information on adding articles to the knowledge base:

- "Adding Standard Knowledge Base Articles" on page 200
- "Adding Document Knowledge Base Articles" on page 201
- "File Formats for Document Knowledge Base Articles" on page 202

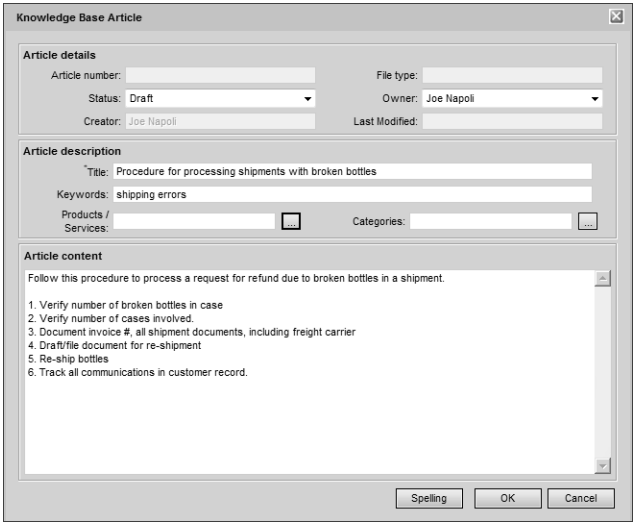
Adding Standard Knowledge Base Articles

Standard format knowledge base articles contain only text. You can specify all details and content of the article directly in the Knowledge Base Article dialog box.

➤ To add a standard knowledge base article

1. In the Knowledge Base page, select **Edit > Add Standard Article**.
2. Specify details on the article, including the **Title**, **Keywords**, **Products/Services**, and **Categories**.
3. In the **Article content** area, enter the complete content of the knowledge base article.

4 Click **OK** to save the article to the knowledge base.



Adding Document Knowledge Base Articles

You can add any type of file to the knowledge base as a document article. When attaching the file, you can browse to folders on your computer or network.

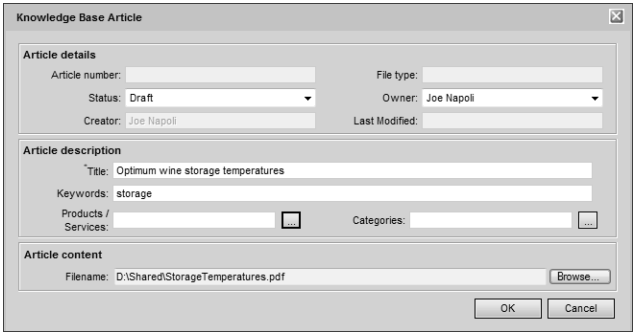
➤ To add a document knowledge base article

1 In the Knowledge Base page, select **Edit > Add Document Articles**.

2 Specify details on the article, including the **Title**, **Keywords**, **Products/Services**, and **Categories**.

3 Click **Browse**. Browse to and select the file, and click **Open**.

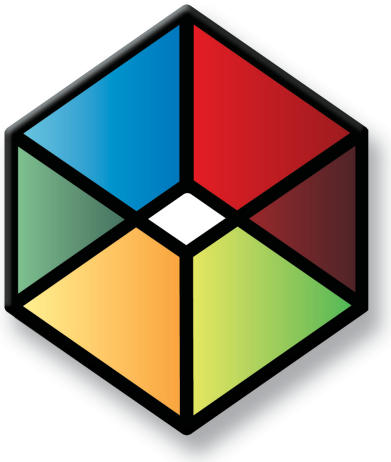
4 Click **OK** to save the article to the knowledge base.



File Formats for Document Knowledge Base Articles

Files of any format can be attached to the knowledge base as a document article. However, the content of only the following file formats can be searched:

- Microsoft Word (*.DOC)
- Microsoft Excel (*.XLS)
- Microsoft PowerPoint (*.PPT)
- Text (*.TXT)
- HTML (*.HTM or *.HTML)



CHAPTER 9

Reporting

Report on the Progress of Your Business

In this chapter...

"Dashboards" on page 204
"Reporter" on page 218
"Exporting Entries to Microsoft Excel" on page 223
"Printing Column Reports" on page 224

Dashboards

Designed for executives and upper management, dashboards shows up-to-the-second indicators of your company's performance. Like a car's dashboard, dashboard indicators monitor daily activities and events in real time, so you can see which areas are doing well and which areas need attention.

With this type of information on your screen at all times, you can see in a glance how your company is doing and even see the indicators register activity from moment to moment.

For important indicators, such as daily lost or won opportunities, you can configure Dashboard to notify you with an alarm when the indicator passes a certain mark. This helps to notify you when a critical situation has occurred that requires your attention, or when you surpass a goal that you set for your team.

The following sections contain information on working with dashboards:

- "Viewing Dashboard" on page 204
- "Setting Up Dashboards" on page 205
- "Creating Dashboards" on page 206
- "About Indicators" on page 207
- "Adding Indicators to Dashboards" on page 210
- "Customizing Indicator Controls" on page 214
- "Moving and Resizing Dashboard Indicators" on page 215
- "Modifying Dashboard Properties" on page 216
- "Importing Dashboards" on page 216

Viewing Dashboard

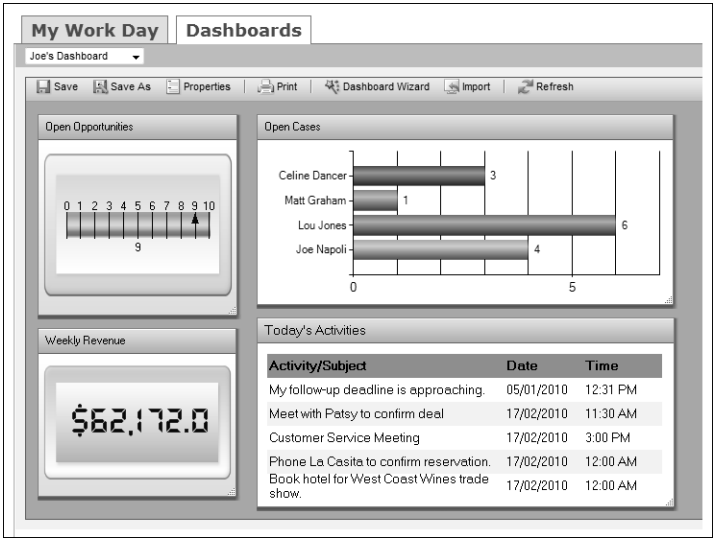
You can view dashboards from the Dashboards tab in the My Work Day page. If the dashboard you want to view is not displayed, select it from the drop-down list. Note that you must have read permission for Dashboards to access the Dashboards tab.

If the Dashboards tab is not displayed, click Preferences > Other Preferences > Overview Page and ensure the Show Dashboards checkbox is selected.

➤ To view a dashboard

1. Select the **My Work Day** icon, and select the **Dashboards** tab.
2. From the drop-down list, select the dashboard you want to view.

The selected dashboard is displayed in the My Work Day page.



Setting Up Dashboards

Setting up a new dashboard involves the following tasks:

1. Set up searches or SQL metrics for your dashboard indicators.

   For more information, see “About Indicators” on page 207.

2. Create the dashboard using the Dashboard Wizard.

   For more information, see “Creating Dashboards” on page 206.

3. Add indicators to the dashboard.

   For more information, see “Adding Indicators to Dashboards” on page 210.

4. Customize the appearance of the dashboard indicators.

   For more information, see “Customizing Indicator Controls” on page 214.

5. Resize and move the dashboard indicators.

   For more information, see “Moving and Resizing Dashboard Indicators” on page 215.

Creating Dashboards

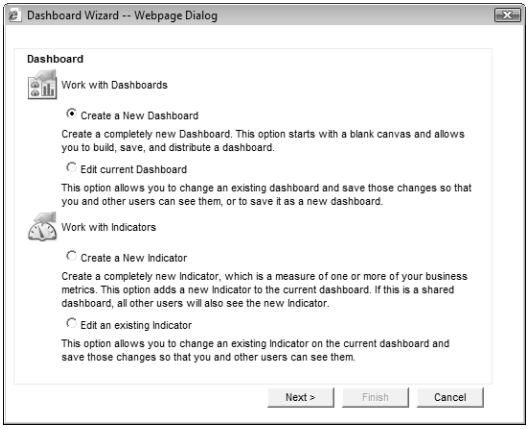
You can create new dashboards from the Dashboards tab of the My Work Day page. While creating the dashboard, you can add multiple indicators to the dashboard. The new dashboard is available to any user or group that you give read access to. When you create a dashboard, you have the option of publishing it to Wireless Access.

➤ To create a dashboard

1. In the Dashboards tab of the My Work Day page, select the **Dashboard Wizard** icon.

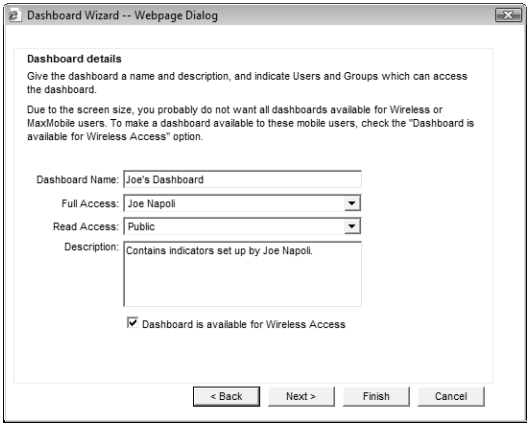
   The Dashboard Wizard opens.

2. Select **Create a New Dashboard** selected, and click **Next**.



3. Enter the basic information for the dashboard.
   - In the **Dashboard Name** field, specify a name for the dashboard.
   - In the **Full Access** and **Read Access** fields, specify the Maximizer user or group with access to the dashboard.
   - Select **Dashboard is available in Wireless Access** to make the dashboard available to Wireless Access users.

     If you don't select this option, the dashboard is available only in Maximizer and in Maximizer Web Access. You might want to clear this option if the dashboard is not set up to display well on smaller screens.



4 Click **Next**.

The Indicators screen opens.

5 Add an indicator to the dashboard.

For more information on adding indicators, see "Adding Indicators to Dashboards" on page 210.

6 When you are finished adding indicators, click **Finish** in the Dashboard Wizard to finish creating the dashboard and to view it in My Work Day.

About Indicators

Indicators display the information in your dashboards. Each dashboard can contain multiple indicators.

You can set up indicators to access information in your Address Books in the following ways:

- **Searches –** You can link indicators with existing searches in the search catalog. The indicator reports either the number of entries returned in the search or a calculation based on fields in the entries.
- **SQL metrics –** Your administrator can set up SQL queries that report on any information in your Address Book. While they are defined in Administrator, you can add any of these metrics to your dashboard indicators in Maximizer.

You can choose from a number of indicator controls to display the data. These controls format your Address Book data in charts, lists, and gauges.

While setting up your indicators, you can set up Click Throughs for the indicators. Click Throughs determine what happens when a Maximizer user clicks on an indicator.

Searches for Indicators

You can use the Search by All Fields command to set up searches in the Address Book, Opportunities, Customer Service, and Campaigns windows and then save the searches to the search catalog. When you create indicators, you can select any of these saved searches to access data for the indicator. You can also report on quotas, appointments, and Hotlist tasks in your indicators. While you cannot save searches for these types of entries, you can set up some search criteria while creating the indicator.

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.

SQL Metrics for Indicators

Your administrator can define any number of SQL metrics for dashboard indicators. You can specify any of these metrics when you create new indicators. When you create group indicators, you can define a number of SQL metrics for each indicator. For more information on setting up SQL metrics, see the *Maximizer CRM Administrator's Guide*.

Reporting on Data for Indicators

After setting up your search from the search catalog, you can decide how to report on the search. The indicator can report on the entries in the following ways:

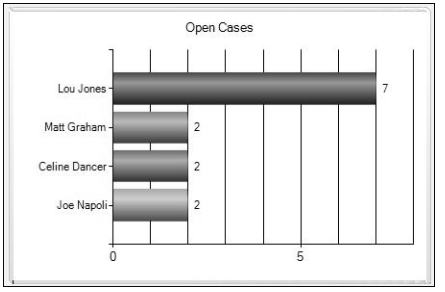
- **Average –** The indicator displays the average value of a selected numeric field for all entries returned in the search.
- **Minimum –** The indicator displays the minimum value of a selected numeric field for all entries returned in the search.
- **Maximum –** The indicator displays the maximum value of a selected numeric fields for all entries returned in the search.
- **Range –** The indicator displays the difference between the maximum and minimum values of a selected numeric field for all entries returned in the search.
- **Record count –** The indicator displays the number of entries returned in the search.
- **Sum –** The indicator displays the sum of a selected numeric field for all entries returned in the search.

Indicator Controls

When you set up your indicators, you can choose from a number of controls in which to display your indicator. The controls determine how information is displayed in the indicator.

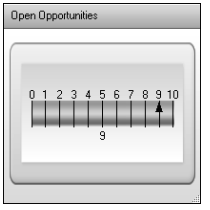
You can select the following types of controls:

- **Group indicators –** These controls display a number of values formatted as bar charts or pie charts.



- **List Control –** These controls format information in lists. They can report information directly from Maximizer records, or they can summarize information based on values from multiple entries.

- **Gauges –** These controls display a single numeric value for an indicator.



Click Throughs for Indicators

While setting up indicators, you can specify a Click Through for the indicator. Click Throughs link indicators to Maximizer records, reports, or other dashboards.

When you set up your Click Throughs, you can choose the following options:

- **No Click Through –** The dashboard indicator is not linked with any other information.
- **Use the existing Click Through –** The indicator is linked to an existing Click Through. You can select this option when you add indicators associated with SQL metrics or when you modify existing indicators. Your system administrator can link SQL metrics with reports in Administrator.
- **Produce a list in Maximizer CRM to work with –** The Address Book, Opportunities, Campaigns, Customer Service, Quotas, or Hotlist window opens displaying entries retrieved from the search associated with the indicator.
- **Run a report –** Reporter opens displaying a specified report. You must enter the URL of the report while setting up the indicator.
- **Open another dashboard –** A dashboard is displayed. You must specify the dashboard while setting up the indicator.

Adding Indicators to Dashboards

You can add indicators while creating dashboards, or you can add them to existing dashboards in the Dashboards tab of the My Work Day page.

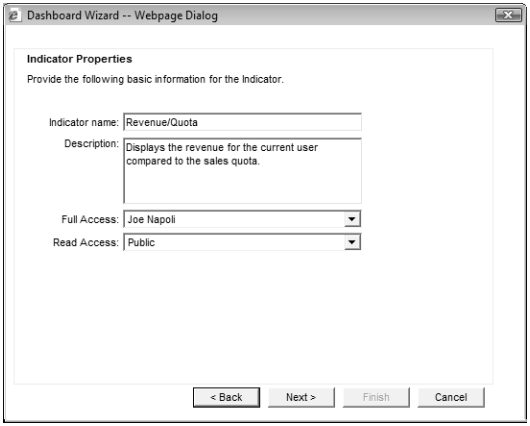
➤ To add an indicator to a dashboard

1. If necessary, select the dashboard from the drop-down list, and select the **Dashboard Wizard** icon. Then, select **Create a New Indicator**, and click **Next**.

   The Indicator Properties screen opens.

   If you are adding the indicator while creating a new dashboard, you should already be at the Indicator Properties screen.

2. Enter the basic information for the indicator, and click **Next**.
   - In the **Indicator name** field, specify a name for the indicator.
   - In the **Full Access** and **Read Access** fields, specify the Maximizer user or group with access to the indicator.



3 Select a control for the indicator, and click **Next**.

For more information on controls, see "Indicator Controls" on page 209.

The What to Report screen opens.

4 Select the catalog search or SQL metric to associate with the indicator, and click **Next**.

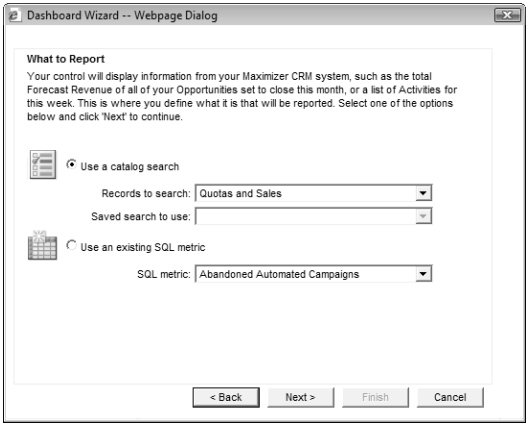
- To associate the indicator with a catalog search, select **Use a catalog search**. In the **Records to search** drop-down list, select the type of entry associated with the search. In the **Saved search to use** drop-down list, select the search from the search catalog.

  For more information on associating indicators with saved searches, see "Searches for Indicators" on page 208.

- To associate the indicator with information from activities (appointments and Hotlist tasks) or quotas, select **Use a catalog search**. In the **Records to search** drop-down list, select **Activities** or **Quotas and Sales**.

- To associate the indicator with a SQL metric, select **Use an existing SQL metric**. In the **SQL metric** drop-down list, select the metric.

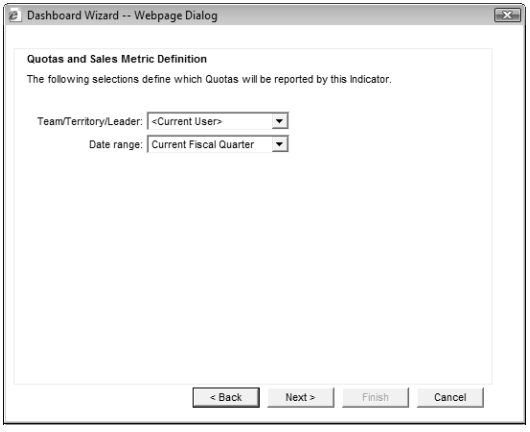
  For more information on SQL metrics, see "SQL Metrics for Indicators" on page 208.



5 If you are associating the indicator with activities or quotas, specify how to filter the information, and click **Next**.

If the indicator is associated with activities, you can filter the activities by type (appointment or Hotlist task), user, date, and other fields specified in the activity.

If the indicator is associated with quotas, you can filter the quotas by team, territory, or leader and by date range.



6 If you are creating a list control, specify the type of information to return.

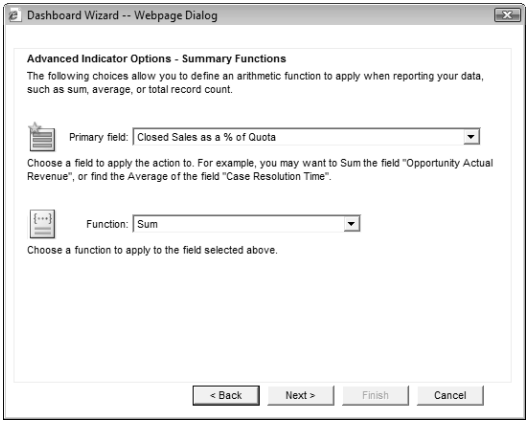
- To view information directly from entries, select **Report directly fields from your saved search results**.
- To view summary information based on the values of multiple entries, select **Top N records based on summarized data**.

7 If you are associating the indicator with a search, with activities, or with quotas, specify how to report the data, and click **Next**.

- In the **Primary field** field, select the numeric field that you want to manipulate.
- In the **Function** field, select the function to use on the field.

  If you select Record count, you don't need to specify a primary field.

  For more information on these options, see "Reporting on Data for Indicators" on page 208.



If you are creating a list control that returns information directly from entries, this screen does not appear.

8 If you are creating a group indicator or a list control with summary information, in the **Group by** field, select the field by which you want to organize the data, and click **Next**.

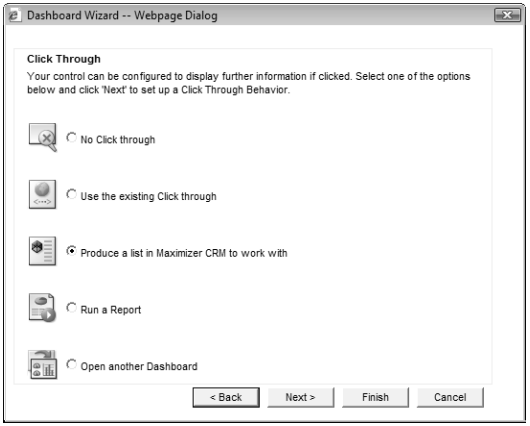
For example, to display data for each Maximizer user, you can select a field that displays a user name.

9 If you are creating a group indicator or a list control, specify the fields to display in the list (list control only), and specify how you want to sort the indicator, and click **Next**.

- In the **Sort By** field, select the field by which you want to sort the values. You can sort entries by the values of the primary field or by the field that is splitting up the data.
- In the **Sort order** field, select **Ascending** or **Descending** to determine in which order the values are sorted.

10 Specify the Click Through for the indicator, and click **Next**.

For more information on Click Throughs, see "Click Throughs for Indicators" on page 210.



If the Click Through runs a report or launches another dashboard, specify the report or dashboard for the click through, and click **Next**.

11 Click **Finish** to finish adding the indicator to the dashboard.

– or –

Select **Work with a different indicator** and click **Next** to add more indicators to the dashboard.

Customizing Indicator Controls

After adding indicators to dashboards, you can customize some of the properties of the indicator controls. For all controls, you can change the basic information, the SQL metrics associated with the controls, and the colors of elements in the controls. For gauge controls, you can change the style of the control and specify alarm levels. For list controls, you can change the formatting of the list.

While customizing the indicator controls, you can launch the Dashboard Wizard to modify some of the other properties of the indicator.

➤ To customize a dashboard indicator

1 In the Dashboards tab of the My Work Day page, select the dashboard containing the indicator from the drop-down list.

2 Right-click on the indicator that you want to customize.

The Properties dialog box opens.

3 In each tab of the dialog box, specify settings for the indicator.

- In the **Details** tab, specify the name, description, and access rights for the indicator.

- In the **Indicator Type** tab (gauge controls only), select the gauge type, scale, and style.
- In the **Alarm/Target Settings** tab (gauge controls only), enable an alarm for the indicator, and specify the alarm level.
- In the **Color Settings** tab (gauge controls only), specify the colors of elements in the indicator.
- In the **Gauge Settings** tab (list controls or gauge controls only), specify that gauges display currency symbols, or specify the field, width, and alignment for each field in a list control.

List controls cannot display currency symbols.

- In the **Metrics** tab, view the name of the metric associated with the indicator.

  If the indicator uses a SQL metric, you can select a different metric in this tab. If the indicator uses a search, you must specify the search criteria in the Dashboard Wizard.
- In the **Display Settings** tab (list controls) or **Settings** tab (group controls), specify the colors, font size, and font style for elements of the control.

  For group indicators, you can also specify the intervals for the charts and specify that the indicators display currency symbols.

In group indicators, currency symbols are displayed in the legend.

4. To modify the properties of the indicators, click **Wizard** to open the Dashboard wizard at the Indicator Properties screen.
5. When you are finished, click **OK**.
6. Click the **Save** icon to save the changes to the dashboard.

Moving and Resizing Dashboard Indicators

When you add an indicator to a dashboard, it's added at the bottom of the dashboard. But you can drag and drop the indicator to move it to any location in the dashboard. When you press Save, the location is saved with the dashboard.

You can also resize dashboard indicators. Click the bottom-right corner of the indicator and drag it to the desired size.

Modifying Dashboard Properties

You can quickly modify the properties of dashboards. You can change the basic information for the dashboard, change the background color, and add or remove indicators from the dashboard.

➤ To modify dashboard properties

1. In the Dashboards tab of the My Work Day page, select the dashboard from the drop-down list.
2. Click the **Properties** icon.

   The Dashboard Properties dialog box opens.
3. In the **General** tab, specify the basic properties of the dashboard.

   To change the background color, click the button next to the **Background Color** field, and select a color.
4. In the **Indicators** tab, view the indicators in the dashboard.
   - Select an indicator and click **Properties** to modify the properties of an indicator.
   - Select an indicator and click **Remove** to remove an indicator from the dashboard.
   - Click **Add** to open the Dashboard Wizard and add an indicator to the dashboard.
5. When you are finished, click **OK**.
6. Click the **Save** icon to save the changes to the dashboard.

Importing Dashboards

Dashboards created in previous versions of Maximizer are stored locally on users' computers in .KIN files. You can import these files into Maximizer to store the dashboards in the Maximizer Address Book so that they are accessible to other Maximizer users on any computer. You must import the .KIN files into the same Address Book they were initially created in.

The location of the .KIN files depends on your computer's operating system. You can search your hard drive for the .KIN file extension to locate the files.

➤ To import a dashboard created in a previous version of Maximizer

1. On the Dashboards tab of the My Work Day page, click the **Import** icon.

   The Import File dialog box opens.

2. Click **Browse**, browse to the .KIN file, and click **Open**.

3. Click **OK** to import the .KIN file.

   Once the .KIN file is converted to a new dashboard, it's displayed in the My Work Day window.

4. Click the **Save As** icon to save the new dashboard.

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

Reporter

The success of any marketing strategy or campaign depends on the ability to monitor your progress and some sort of a built-in improvement mechanism. Using the vast flexibility of Reporter, you are guaranteed increasing effectiveness. No matter where you are in the world, you have access to what's going on in your company and the ability to report on real-time statistics.

Reporter is available only in Maximizer CRM Enterprise Edition.

Reporter's flexibility allows you to generate reports from any Internet-connected computer. When you open Reporter in Maximizer, your list of reports is displayed inside the browser window. This is the normal mode of using Reporter and requires no additional setup by your system administrator.

Because Reporter is HTML-based, you can access your reports from anywhere in the world, provided you have met the following conditions:

- Your computer has an Internet connection and a web browser.
- Your system administrator has configured Microsoft Internet Information Server (IIS) to allow external access to Reporter.

Your list of reports appears in a web browser much as it does within the Reporter module.

You can get help while using Reporter by clicking Help in the top-right corner of the page.

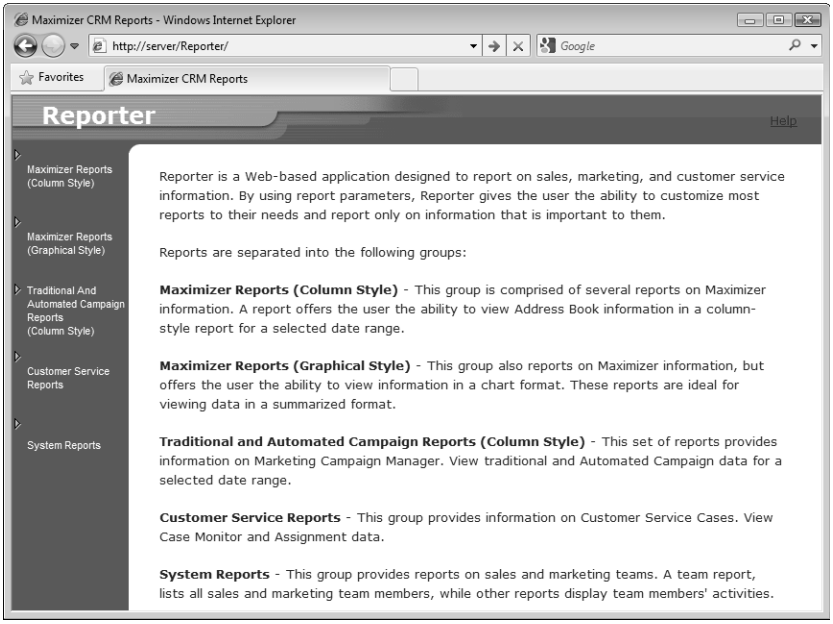
After generating a report, you can easily print the report to your local or network printer. You can also save your reports to a file in one of a few popular formats for later editing. These file formats include Crystal Reports, Microsoft Word, Microsoft Excel, and Rich Text Format.

The following sections contain additional information on Reporter:

- "Accessing Reporter" on page 219
- "Types of Reports in Reporter" on page 220
- "Generating Reports with Reporter" on page 220
- "Exporting Reports in Reporter" on page 221
- "Printing Reports in Reporter" on page 222

Accessing Reporter

You can access Reporter directly from Maximizer Web Access by clicking the Reporter icon.



Reporter is designed so you can generate reports on your data through the Internet or your company's intranet. You only need a computer with an Internet (or intranet) connection and a web browser, such as Microsoft Internet Explorer.

Contact your system administrator to find out the URL (the address) of Reporter.

In the case of Internet access, your system administrator must configure your Microsoft Internet Information Server (IIS) to allow external access to the "Reporter" virtual directory; otherwise, Reporter is only accessible internally (within your company's LAN).

Intranet Access

If you are on the same network (LAN) where your IIS server is located, you can open your browser and type the following into the Address field:

http://<Server Name>/Reporter/Start.asp

The "<Server Name>" is the computer name of the IIS server on your company's network. If you know the server's IP address, you can enter that in place of the server name.

Internet Access

Reporter is only accessible through the Internet if your system administrator has configured the IIS server to allow external access to Reporter. At an Internet-connected computer, type the following in your web browser's Address line:

http://<Server URL>/Reporter/Start.asp

The "<Server URL>" is the domain URL or IP address of your company's IIS server.

Types of Reports in Reporter

With the selection of pre-formatted reports available in Reporter, you can produce many sales and marketing related reports and graphs. The left-navigation bar organizes the many pre-formatted reports by subject. Reports are organized into the following categories:

- **Maximizer Reports –** These reports display information on Address Book entries and opportunities in column or graphical styles.
- **Traditional and Automated Campaign Reports –** These reports display information on marketing campaigns.
- **Customer Service Reports –** These reports display information on customer service cases.
- **System Reports –** These reports display information on sales and marketing teams and on different types of Maximizer records.

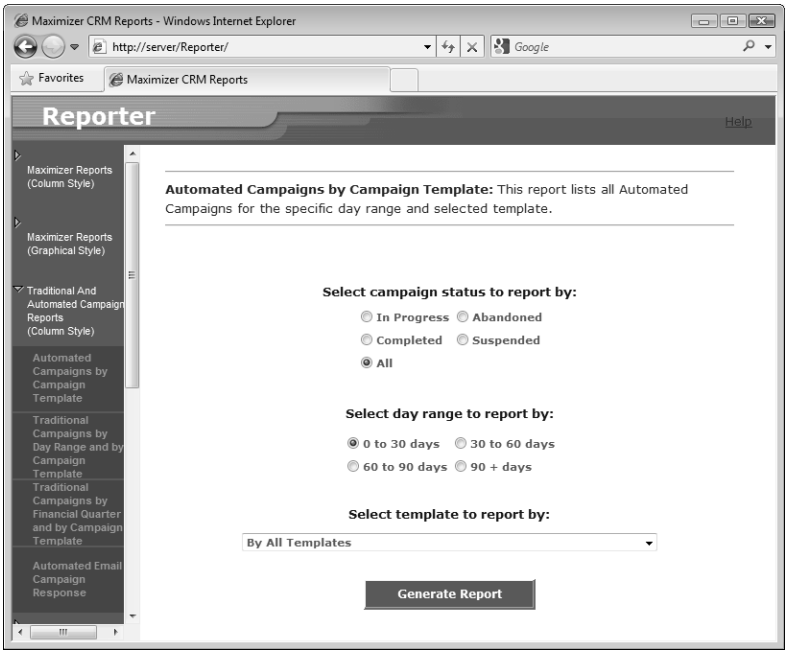
Generating Reports with Reporter

Reporter's browser-based window allows you to easily select and generate the report you want.

➤ To generate a report in Reporter

1. In Reporter, click a report heading to see the reports that are available.
2. Select the report that you want to generate.
3. For each report you generate, specify the report options.

Some reports require you to choose a financial quarter and a year, others—such as team reports—ask for opportunity status, team leader, or perhaps a date range.



4 Click **Generate Report**.

Exporting Reports in Reporter

After generating a report, you can export it as a file in one of the following formats:

- Crystal Report (rpt)
- Portable Document Format (pdf)
- Rich Text Format (rtf)
- Microsoft Word document, editable or data only (rtf)
- Microsoft Excel document, editable or data only (xls)

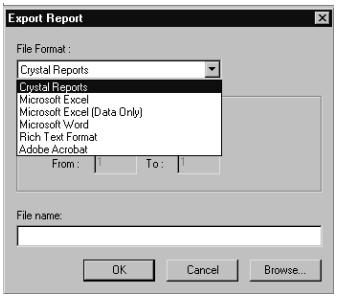
After exporting the report, you can edit it using other applications.

➤ To export a report using Reporter

1 With the generated report displayed in Reporter, click the **Export Report** icon in the report's toolbar.

The Export Report dialog box opens.

2. Browse to a location to save the file and enter a file name.
3. From the **Save as type** drop-down list, select the document format.



4. In the **Name** field, enter a filename for the report.
5. Click **Save**.

   If the export is successful, Reporter asks you if you would like to open the file. You must have an application associated with the exported file type to be able to open the file.

Printing Reports in Reporter

After generating a report, you can print it.

➤ To print a report in Reporter

1. With the generated report displayed in Reporter, click the **Print Report** icon in the report's toolbar.

   The Print options dialog box opens.
2. Select the printer and the printing options.
3. Click **OK** to print the report.

Exporting Entries to Microsoft Excel

Maximizer enables you to quickly and easily export selected entries from a Maximizer page to a Microsoft Excel spreadsheet. Maximizer exports the currently selected entries for the active page using the column setup and coloring rule displayed in that page. If no entries are selected, it exports all displayed entries.

Export to Excel and Advanced Export to Excel are available only in Microsoft Internet Explorer.

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. Click the **Export to Excel** icon or the **Advanced Export to Excel** icon (Excel 2007 or later) on the toolbar.
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.

Printing Column Reports

Column reports display information from the current column setup for entries in the current list. You can choose to include information for only the current entry, for selected entries, or for all entries in the list. Entries are displayed in the order that they appear on the screen using the colors in the current coloring rule.

To print background colors from the coloring rule, you may need to enable background colors in your browser's print settings.

You can print column reports from the Address Book, Opportunities, Campaigns, Customer Service, Hotlist, and Knowledge Base pages, as well as from the Notes, Documents, User-Defined Fields, and Activities tabs in open entries.

➤ To print a column report

1 From a main page, select a column setup and apply a coloring rule.

– or –

Open an entry and select the **Notes**, **Documents**, **User-Defined Fields**, or **Activities** tab.

2 Select the entries that you want to include in the report.

– or –

If you would like to include all entries in the current list, skip to the next step.

3 Select **Print > Column Report**.

– or –

In an open entry, select the **Print** icon.

The Print Column Report dialog box opens.

4 Specify the report details.

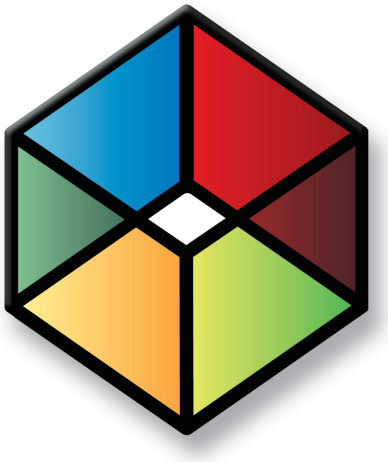
- Under **Print Column Report**, specify how you want to use the current list.
- Under **Report Options** and **Print Options**, specify the title and format of the report.

5. Click **OK**.

   The report is displayed in a new window.

6. In the top-right corner of the page, click **Print** or press **CTRL+p** to print the report.

7. Specify the printing properties, and click **Print**.



CHAPTER 10

Maintaining Your Address Book

Maintain Address Book Data

In this chapter...

"Preferences" on page 228
"Importing Data" on page 238
"Company Information" on page 240

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.

In Maximizer Web Access, you can set some of the Maximizer preferences. If you use the desktop application as well as Maximizer Web Access, these preferences are applied to the Address Book in both applications. You can also set personal preferences that affect only Maximizer Web Access.

The following sections contain information on setting preferences:

- "Setting Personal Preferences" on page 228
- "Setting your Time Zone" on page 230
- "Setting Maximizer Preferences" on page 231

Setting Personal Preferences

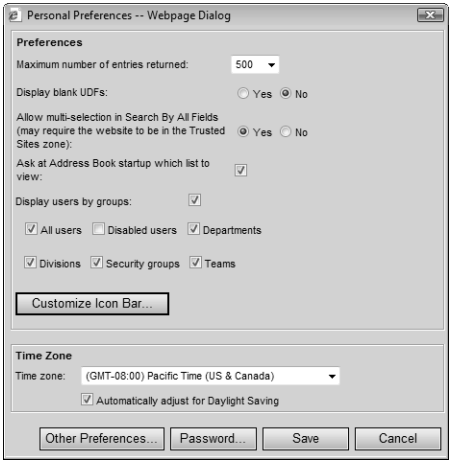
You can set personal preferences that affect the Maximizer Web Access interface. The preferences you set are applied only to the Address Book that is currently open.

➤ To set personal preferences

1. In the top-right corner of the page, click **Preferences**.

   The Personal Preferences dialog box opens.

2. Adjust the preferences, and click **Save** to save the changes.



Personal Preferences

This dialog box sets user preferences for Maximizer Web Access.

Preferences

- **Maximum number of entries returned –** Select the maximum number of records you want to search. The default number is 500; other options are 100, 1000, or 2000. If you increase the setting, and run Maximizer Web Access on a dial-up Internet connection, it may take considerable time to search the records.
- **Display blank UDFs –** Controls if employees can view user-defined fields that are in the Address Book, but do not yet have assigned values. A separate setting controls if user-defined fields are displayed in a tree-view or list-view.
- **Allow multi-selection in Search By All Fields (may require the website to be in the Trusted Sites zone) –** Controls the number of fields you can select when searching by all fields. If the option is selected, you can select more than one field. If the option is not selected, you can select only one field. The option is off by default.
- **Ask at Address Book startup which list to view –** Allows you to choose an Address Book list to view when you open the Address Book page. If you deselect this option an empty Address Book list is displayed when you open the Address Book page.
- **Check Address Book size at login –** Checks whether the Address Book you are logging in to is approaching or exceeding the maximum database size. This option is available only in Maximizer CRM Group Edition.
- **Display users by groups –** Allows you to display available users by group in dialog boxes such as Add Appointment. If you deselect this option, users will not be displayed by group. There will be only one user-selection list that displays all available users.

  Clear the checkbox for any group you don't want users displayed by in user-selection lists.

  This setting affects the System Default Preferences in Maximizer.
- **Customize Icon Bar –** Determines the icons displayed in the icon bar and the order of the icons.

  When you click the button, the Icon Bar Properties dialog box opens listing all of the available icons. Select the items that you want to appear in the icon bar, and clear any items that you want to hide. Use the Move Up and Move Down buttons to change the order of the icons.

Time Zone

Specifies the time zone used for scheduling appointments and Hotlist tasks.

- **Time zone –** Sets your time zone.
- **Automatically adjust for daylight savings –** Determines if times are adjusted for daylight savings.

Other Preferences

Opens the Preferences dialog box where you can specify your Maximizer preferences. For more information on these settings, see "Setting Maximizer Preferences" on page 231.

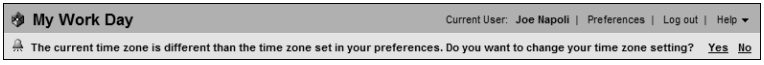
Password

Enables you to change your password.

If your Maximizer CRM database server is running on a Windows Server 2003 machine with Microsoft SQL Server 2005, user passwords may expire periodically, according to the domain password policy or local password policy configured by the system administrator. When your password expires, Maximizer prompts you to change it. Depending on the password policy configuration, new passwords may be required to be of sufficient complexity. For example, it may have requirements for minimum length, alphanumeric or special characters, etc.

Setting your Time Zone

Your time zone is specified in your personal preferences. When you log in to Maximizer Web Access, the time zone in your preferences is compared to the time zone set on your computer. If they do not match, a message appears in the top of the Maximizer page, prompting you to change your time zone setting.



You can click Yes to change the time zone in your preferences. Or you can click No to close the message bar without adjusting the time zone.

Setting Maximizer Preferences

You can set your overall Address Book preferences directly in Maximizer Web Access. These settings are applied to both Maximizer and Maximizer Web Access.

➤ To set your Maximizer preferences

1. In the top-right corner of the page, click **Preferences**.
2. Click **Other Preferences**.

   The Preferences dialog box opens.
3. Select the tab for the settings you want to edit.
   - Select **Logging** to specify how notes are logged for various actions.
   - Select **Calendar/Hotlist** to specify the default settings and access rights for the calendar and Hotlist.
   - Select **Email** to specify the default settings for sending email and the email server.
   - Select **Overview Page** to specify options for the My Work Day page.
4. Edit the settings and click **OK** to save the changes.

Logging Preferences

The Logging tab of the Preferences dialog box control what notes are automatically logged by Maximizer.

For each type of note, you can select one of the following options:

- **None** does not log any notes.
- **Notes** logs notes to an entry's Notes tab.
- **Journal** logs notes to the Journal Window in Maximizer.
- **Both** logs notes to the Notes tab and to the Journal window.

  The Journal window in not available in Maximizer Web Access. Select the Journal or Both option if you want to log notes to the Journal window in Maximizer CRM.

Documents

Determines if Maximizer logs a note for the active Address Book entry or active campaign when the user prints a document from the Maximizer Word Processor.

Opportunities

Determines if Maximizer logs a note for the active Address Book entry every time the user creates or changes an opportunity.

Labels

Determines if Maximizer logs a note for the active Address Book entry when the user prints a label.

Envelopes

Determines if Maximizer logs a note for the active Address Book entry when the user prints an envelope from the Maximizer Word Processor.

Timers

Determines if Maximizer logs a note for the active Address Book entry when the user turns on the Maximizer Timer.

Scheduled tasks

Determines if Maximizer logs the date and time when the user creates, modifies, or deletes a task or an appointment in the Calendar or Hotlist.

Completed tasks

Determines if Maximizer logs a note for the active Address Book entry each time the user marks a task as completed.

Customer Service

Determines if Maximizer logs a note for the active Address Book entry when a case is created, a basic field is modified, a user-defined field that pertains to customer service is changed, a case monitoring property is changed, or when a case is reassigned, escalated, abandoned, and resolved.

Campaigns

Determines if Maximizer logs a note for a campaign when it is processed, modified, or created. This includes logging a note when an activity is completed, a campaign is suspended, or a campaign activity fails, for example.

Phone calls

Determines if Maximizer logs a note for the active Address Book entry after the user logs a phone call. Logged notes are saved to the phone log as well as the Notes tab.

- **View result table on hang-up –** Determines if Maximizer automatically displays the Phone Call Result dialog box while logging a phone call.

Email

Determines if Maximizer logs a note for the active Address Book entry each time an email is successfully sent from the Email page.

Calendar/Hotlist Preferences

The Calendar/Hotlist tab of the Preferences dialog box controls the default preferences for the Calendar and the Hotlist pages.

Default Settings

- **Alarm lead time –** Enter the default amount of time before an appointment the alarm is to appear; choose minutes, hours, days, or weeks as the unit of measurement. You can change this lead time for individual appointments when you create or edit them.
- **Default interval –** Specify the length of time periods in the daily and weekly view of the Calendar. For example, if you want to schedule activities in half-hour intervals, select 30 minutes. This setting also controls the default appointment length in the Add Appointment dialog box.
- **Set alarm on when adding an appointment –** Select this option to turn on alarm sounds for appointments that you arrange for yourself and other users.
- **Default view –** Choose whether the Calendar displays the daily, weekly, weekly list, or monthly views by default. You can change the current view from the Calendar page.
- **First day of week –** Specify the first day of the week in the Calendar page.
- **Working hours from/to –** Select your working hours. Working hours are displayed in a different color from non-working hours.

Options

- **Ignore conflict checking –** Suppresses checking for appointments scheduled for the same time. Maximizer will not warn you when you create an appointment that conflicts with another.
- **Ignore all alarms and notifications –** Suppresses all Calendar alarms and appointment notifications. You will not be notified of upcoming appointments scheduled for you by yourself or other users.
- **Add or modify multi-user appointment –** Determines if you can schedule and modify appointments with other users. This option is enabled by default and controlled by your system administrator.
- **Do not display holidays –** Hides holidays in your Calendar. Holidays are displayed in red. If your Calendar displays too slowly, select this option to see if the display speeds up. To change the holidays that display in Maximizer, select Holiday Editor from Administrator's Utilities menu.
- **Carry forward unfinished activities –** Displays unfinished tasks in the Hotlist column of the Calendar.
- **Show non-work days in weekly view –** Allows you to see in the weekly Calendar view days you normally don't work.
- **Suppress follow-up activity prompt –** When you receive an appointment or Hotlist alarm in Maximizer and click the Complete button, it opens a Schedule Follow-Up dialog box prompting you to schedule a Hotlist task follow-up or Appointment follow-up. If you select the Suppress follow-up activity prompt option, you will not receive these follow-up activity prompts when marking appointments and Hotlist tasks as complete.
- **Include Address Book entries in appointment email reminders –** Sends appointment email reminders to Address Book entries as well as Maximizer users. You can change this setting in new or existing appointments by clicking the Options icon in the Add/Modify Appointment dialog box and selecting the option.
- **Show week number –** Displays week numbers in the Calendar window.
- **First week of year –** Determines when the first week of the year starts for the week numbering.
- **Email appointment notification –** Enables the immediate sending of an email message to selected users and Address Book entries when scheduling, modifying (including adding or removing attendees), or deleting an appointment.

An email address must be specified in your user properties to send email appointment notifications.

If your preference is set to Ask, each time you schedule, modify, or delete an appointment, Maximizer will ask you if you would like to notify the selected appointment attendees by email. Upon confirmation, the Compose Email Message dialog box opens displaying the basic appointment details and allowing you to edit the email message. If you select Always, the Compose Email Message dialog box will immediately open after setting the appointment. Selecting never does not use email notification.

Note that automatic email notification does not occur when you are using applications other than Maximizer or Maximizer Web Access, such as MaxAlarm and Maximizer Outlook Calendar Integration, to add, modify, or delete appointments.

Access to Calendar/Hotlist

You can choose who has rights to view or modify your Calendar appointments and Hotlist tasks. None is the default, though you can choose all users, an individual user, or a security group.

Tasks can be reassigned to other users (though not security groups) if they have given you permission using the "Full access" option below; appointments can never be reassigned.

- **Full access –** Gives the same access rights as you.

  For example, if you want your assistant to be able to set up and modify your appointments and tasks, choose the assistant's name from the drop-down list. Or, if you want to allow a team member to reassign tasks to yourself, choose the team member's name.

- **Read access –** Gives the selected users or security group the ability to view your Calendar and Hotlist. Users who are given read access can view your busy time periods and appointment details such as meeting subject and participants. They cannot, however, open your tasks and appointments.

Work Days

Choose the days of the week designated as work days. Non-work days are displayed in red in your Calendar.

Email Preferences

The Email tab of the Preferences dialog box determines settings for the email server and for the Email page.

Options

- **Show unread messages in blue –** Displays your unread messages in blue inside the Email page.
- **Save copy of message to entry's Documents –** Sets the default to save the email as a document for the related Address Book entry. You can change this default setting in the Send Email dialog box.
- **Include message body in email note –** Sets the default to include the message body in the note created when an email is sent. Your logging options for email must be enabled for notes in your logging preferences.
- **Display warning when logged email has no Address Book entries assigned for logging –** Displays a warning when you select to log an email to the Notes and/or Documents tab, but no address Book entries are assigned for logging.
- **When sending email from Documents tab, log only to the current entry by default –** Sets the default to log an email note only to the current entry when sending email from the Documents tab.
- **When sending email to multiple entries set the default as "Separately" (merging the recipients one at a time) –** Sets the default option in the Send Email dialog box to Separately when sending email messages to multiple Address Book entries. The Separately option sends a separate email to each entry rather than sending one email to all entries at once. You can change this option in the Send Email dialog box.
- **Delete message from email service provider after saving as a document –** Transfers an email message to the Deleted Items folder after it's saved as a document with a Maximizer entry.
- **Compose messages in HTML –** Sets HTML as the default format when composing mail messages.

Layout setting

- **Email folder column width –** Specify the width, in pixels, of the folder column in the Email page.

IMAP/SMTP Server Login Credentials

- **User ID –** Enter the user ID required to log in to the IMAP or SMTP server. This field is automatically updated when you log in to the email server in Maximizer Web Access.
- **Password –** Shows the encrypted password. The password is automatically updated when you log in to the email server in Maximizer Web Access.
- **Change Password –** Click this option to specify a new password.

  The Change Password dialog box opens. Enter the new password twice: in the New Password field and in the Confirm New Password field. Click OK to confirm the change.

AutoSignature

Click this option to add or change your AutoSignature.

The AutoSignature dialog box opens. Enter your AutoSignature and use the formatting toolbar to customize the appearance of the AutoSignature.

You can also select the following options for your AutoSignature.

- **Add AutoSignature to the end of outgoing messages –** Automatically appends the AutoSignature to the end of all email messages sent with the Maximizer Email Service.
- **Suppress AutoSignature when forwarding and replying –** Does not automatically add the AutoSignature when you forward or reply to messages.

Overview Page Preferences

The Overview Page tab of the Preferences dialog box determines settings for the My Work Day page.

Startup

- **When starting, go directly to My Work Day –** Automatically opens the My Work Day page when you log in to Maximizer Web Access.

Options

This section determines the contents of the My Work Day page.

- **Show Dashboards –** Includes the Dashboards tab in the My Work Day page.

- **Show Tasks and Appointments –** Includes sections for Tasks and for Appointments in the My Work Day page.
- **Show Company Announcements –** Includes company announcements in the My Work Day page. The documents are stored in the Company Announcements folder in the Company Library.

Importing Data

You can import Address Book entries, customer service cases, knowledge base articles, 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*.

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

In addition to the functionality in Maximizer Web Access, you can use Maximizer or Administrator to import data from comma-separated and tab-delimited files and from other contact management and CRM databases, including ACT! and GoldMine databases.

The following section contains additional information on importing data into Maximizer Web Access:

- "Importing from MXI or XML Files" on page 238

Importing from MXI or XML Files

You can import Address Book entries, customer service cases, and knowledge base articles from Maximizer XML Interface (MXI) or XML files into Maximizer Web Access.

When you import Address Book entries, the imported entries are saved to a Favorite List. The Favorite List is given a default name that includes the time and date of the import.

To import data into Maximizer, users must have the Allow import privilege. As well, users must have the required permissions for inserting and modifying entries for the import to succeed.

➤ To import data from a MXI or XML file

1. In the left navigation pane, hover your mouse over **Administration**, and select **Import** from the pop-up window.

   The Import dialog box opens.

The Import option is available only if you have the Allow import privilege.

2. Click **Browse**, and choose the MXI or XML file.
3. In the **Lead Handling** area, choose if you want to import Address Book entries as sales leads or not.
4. Optionally, edit the **name** of the Favorite List created on import.

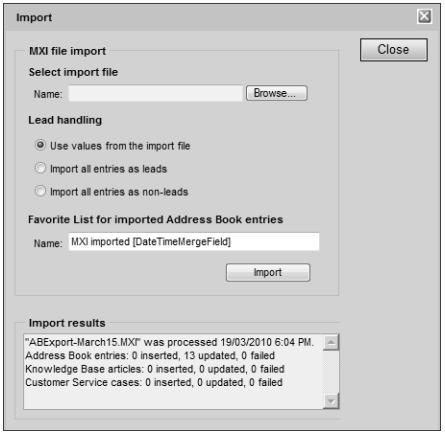
   If you do not want to create a Favorite List, delete the text in the Name field.

5. Click **Import**.

   The file is imported.

If you do not have insert or modify permissions, the import results will list the entries as "Failed."

When the import is finished, the Import results section updates to show the number of entries that were successfully inserted or modified and the number of entries that failed to be imported.



Company Information

You can quickly access information on other Maximizer users directly from Maximizer Web Access. You can view a phone list of Maximizer users in a printable format. You can also check the Peg Board to view the availability of your co-workers.

The following sections contain information on accessing company information in Maximizer:

- "Viewing Company Phone Lists" on page 240
- "Checking the Peg Board" on page 241

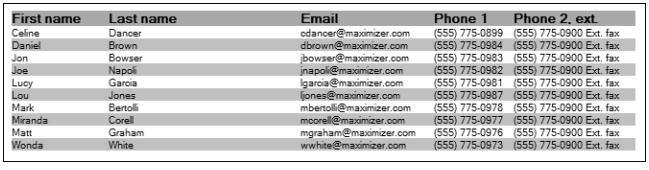
Viewing Company Phone Lists

You can view a phone list of all users in an Address Book. The short form of the phone list includes last names, first names, and phone numbers. The long form also includes the phone numbers listed in the Phone 2 field and email addresses. The phone lists are displayed in your browser in a printable format.

➤ To view a phone list of Maximizer users

1. In the left navigation pane, hover your mouse over **User information**.
2. In the pop-up, select **Short phone list** or **Long phone list**.

   The phone list is displayed in a separate browser window.



First name	Last name	Email	Phone 1	Phone 2, ext.
Celine	Dancer	cdancer@maximizer.com	(555) 775-0899	(555) 775-0900 Ext. fax
Daniel	Brown	dbrown@maximizer.com	(555) 775-0984	(555) 775-0900 Ext. fax
Jon	Bowser	jbowser@maximizer.com	(555) 775-0983	(555) 775-0900 Ext. fax
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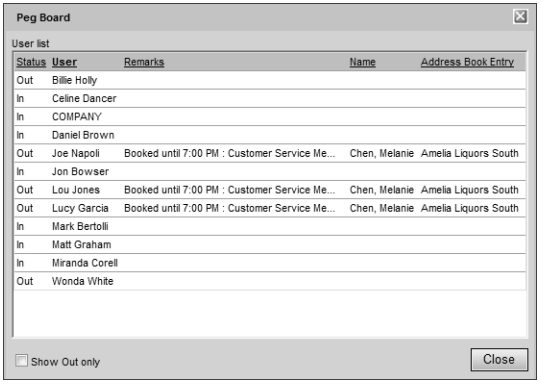
Checking the Peg Board

The Peg Board works with the calendar to show you each user's current status. At a glance, you can check to see if a specific user is in the office or is busy. You can also sign users in and out of the Peg Board.

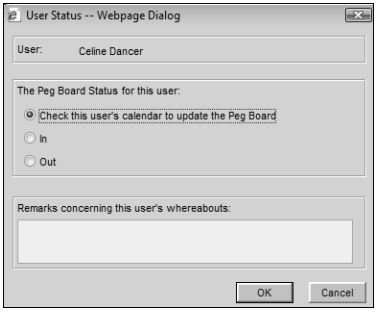
➤ To check the Peg Board

1. In the left navigation pane, hover your mouse over **User information**.
2. From the pop-up, select **WhereAbouts**.

   The Peg Board dialog box opens listing users and their current status.



3. To change a user's status manually, click on a user name and modify the status for the user.



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