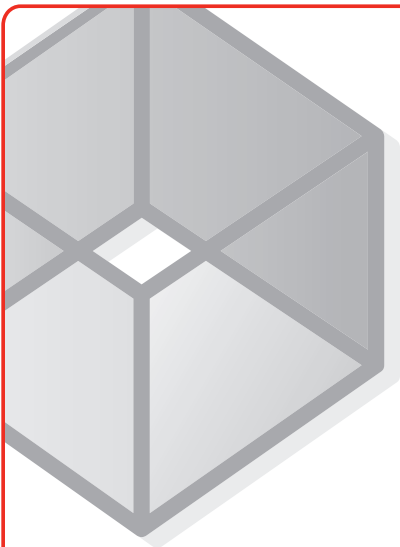# Maximizer® CRM12

Getting Started Guide
for Group and Enterprise Editions

Maximizer Software
Simply Successful **CRM**

Maximizer® CRM 12

Maximizer CRM 12 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 adaptable and affordable solution, Maximizer CRM 12 helps organizations realize their primary customer management goal of having many profitable and satisfied customers.

Throughout the customer life cycle, as prospects move from the marketing department to the sales department, and as they are passed onto service departments, Maximizer enables an organization to attract prospects, win new customers, and increase repeat business.

Installing Maximizer CRM

You can install Maximizer on one or more computers. If you have a previous version of Maximizer installed on your system, you should uninstall the older version and then install Maximizer CRM 12.

➢ **To install Maximizer**

1. Insert the Maximizer CRM disc. The server and workstation versions are on separate discs.

2. If the Setup window does not appear automatically, double-click the Autorun.exe file on the Maximizer CRM disc.

3. The Maximizer CRM Setup window appears. Select **Install Maximizer CRM Server/Workstation**. The Maximizer CRM Setup program starts.

4. Follow the on-screen instructions to complete the installation.

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

Working with Address Books

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

➢ **To open an Address Book**

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

2. Double-click on an **Address Book** name in the Open Address Book dialog box or select the **Address Book** and click **Open**.

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

Sample Address Book - Escona Tutorial

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

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

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

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

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

Maximizer CRM Basics

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

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

Creating Companies, Individuals, and Contacts

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

- **Company** – Represents a group of people such as an organization, association, or business. A Company often has associated Contact entries.

- **Individual** – Represents a person who may not be associated with a company or organization. Like a Company entry, an Individual entry can have associated Contact entries.

- **Contact** – Represents people associated with a Company entry or, less frequently, an Individual entry.

To further organize your information, Address Book entries can be designated as sales leads, and then assigned to partners through the Partner field on the basic information tab of the entry. Partners can access their assigned leads in Partner Access.

➢ To create an Address Book entry

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

- From the **Home**
  tab, select
  Address Book
  Entry from the
  Create group,
  and select one
  of the options.
 For example,
  choose
  Address Book Entry > Company.

- Right-click, choose **Add**, and select one of the **Address Book**
  entry options.

- Press the **Insert** key in the Address Book window to add a
  new Company.

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

Calendar

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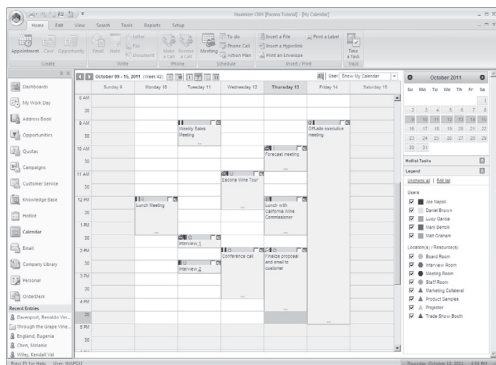
Email

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

Hotlist Tasks

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

Notes

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

User-Defined Fields

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

Documents

The Documents following window displays the document entries associated with the selected Address Book entry, customer service case, campaign, or opportunity in the controlling window. You can insert documents like invoices, sales sheets, letters, and faxes created with popular desktop products like Microsoft® Word and Excel. You can also add hyperlinks to documents stored outside of the Address Book. To insert a file or hyperlink, right-click in the **Documents** following window and choose **the corresponding menu item**.

Sales and 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.
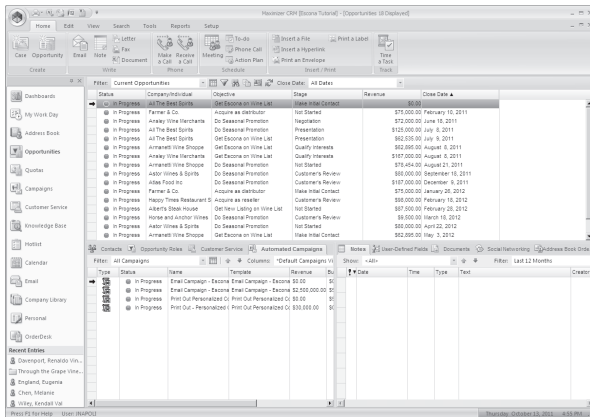
Using opportunities with strategies, you can define and strengthen your sales game plan. Your sales team defines a strategy—what you need to do to close a sale and how to address the issues and obstacles involved—and then the strategy can be applied to opportunities. Strategies are applied on the Sales Plans tab of an opportunity.

Refer to the Escona Tutorial sample Address Book for examples of strategies and opportunities that use strategies (in the **Opportunities** window). You can access strategies from the Strategy Library (on the **Setup** tab, select **Template Library > Strategy Library** from the **File Management** group). Once strategies are applied to opportunities, they determine the probability of close for the opportunity. Refer to the *Maximizer CRM User's Guide* for details on how the probability of close for an opportunity is calculated.

Maximizer users can be selected to monitor all or specified opportunities. Opportunity monitors receive email notifications when opportunities are created, modified, or closed. To select users to monitor a specific opportunity, select the Monitoring button in an open opportunity.

➤ To add an opportunity

1. Select the **Address Book entry** to which you want to add an opportunity. If you select a Contact, Maximizer adds the opportunity to the Company.

2. Drag and drop the Address Book entry or Contact to the **Opportunities** icon. Or, from the **Home** tab, select **Opportunity** from the **Create** group.

3. Enter the **opportunity details** working through the tabs from left to right. Press F1 in any of the tabs for detailed help on each field and tab.

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

Working with Sales Quotas

You can use Maximizer to manage sales quotas for teams, territories, and leaders assigned to opportunities. Sales quotas—available only in Maximizer CRM Enterprise Edition—keep track of the revenue from

opportunities compared to the quota applied to the team or leader assigned to the opportunities.

The Sales Pipeline

With a single click, you can view the current opportunities in the pipeline. The Opportunity Pipeline report graphically displays all opportunities that you select to include grouped by opportunity stage. The Opportunity Pipeline report can also be modified using Crystal Reports. To view the Opportunity Pipeline report, select the Display Opportunity Pipeline Report icon in the View bar of the

Opportunities window. You can select to generate the report for all opportunities in the Address Book or for only selected opportunities in the current list.
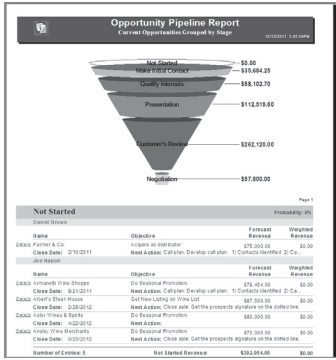
Marketing

Your marketing team can use the Campaigns module to perform, track, and measure cost-effective marketing campaigns that deliver more qualified leads to your sales people. You can create two types of campaigns—traditional and automated.

Traditional marketing efforts require you to coordinate your marketing team to reach a common goal—producing an ad in television, radio, or print, for example. Traditional campaigns help you and your team manage your marketing campaigns through assigned steps and activities.

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

Once you have a plan defined as an automated campaign template (on the **Setup** tab, select **Template Library > Automated Campaign Templates** from the **File Management** group), you can start adding activities. Refer to the Escona Tutorial for examples of campaign templates. Because the templates are specific to the industry they were created for, you should create your own.

Maximizer is capable of sending text and HTML emails. Use an editor of your choice or use the Campaign Message Editor to create your HTML or text files.

There are specific merge fields that make it simple to set up an automated campaign. The easiest way to use these merge fields in HTML is to create a message for an email activity using the Campaign Message Editor and insert the desired merge fields at the correct place in the message. There are merge fields that 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 emails. Refer to the *Maximizer CRM User's Guide* for more information on using these merge fields.
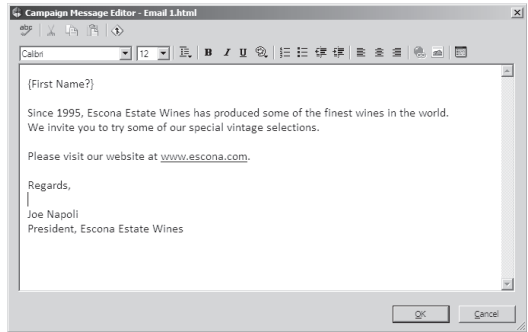
Automated and traditional campaigns are directly integrated with your Address Book entries so you can track lead sources, responses, and purchases through user-defined fields and the automatic creation of notes. To further analyze campaign results, use the detailed campaign reports.

➤ To launch an automated campaign

1. Open the **Campaigns** window.

2. On the **Home** tab, select **Automated Campaign** from the **Create** group, or right-click in the **Campaigns** window and select **Add Automated Campaign**.

3. Choose the type of campaign you want to create—**fixed-date** or **ongoing**.

4. Choose the **template** on which this campaign is based. Also, enter the **name**, **description**, **budget**, and **expected revenue**.

5. Choose the **Address Book entry campaign recipients**. The Favorite List option is effective for a large number of subscribers.

6. Select the **date** to begin the campaign.

7. Select the **Validate email addresses** option to be notified of any blank email addresses or those missing the @ symbol or choose Validate fax numbers to be notified of invalid fax numbers.

8. Click **Finish** to save and launch the campaign.
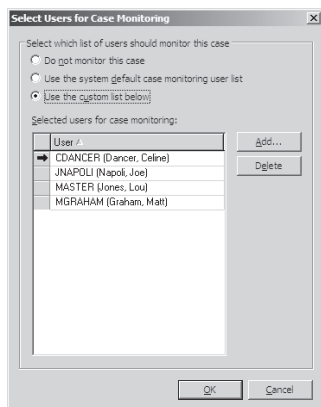
Customer Service & Support

Maximizer enables customer service representatives to track and respond to service calls relating to matters such as billing inquiries, product issues, and frequently asked questions. When entering the details of a customer service case, enter information such as the assigned representative, follow-up deadline, status, priority, and a description of the issue. Once a case has been created, you can assign and escalate issues to the appropriate expert or manager in the company with the automatic creation of Hotlist tasks, appointments, and email reminders.

The Customer Service window supports and enhances 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.

Maximizer users can be selected to monitor all or specified customer service cases. Case monitors receive email notifications when cases are created, modified, or resolved. To select users to monitor a specific case, select the Monitoring button in an open customer service case.

The Customer Service window is list-based like the other Maximizer windows. For quick access to frequently used options in the Customer Service window, use the View bar or dialog box buttons. For example, to quickly resolve a case, click the Resolve button in the case dialog box.

Increase your staff's efficiency and ensure total customer satisfaction by viewing timely reports and graphs on case status, case workload by representative, or incident details, for example.

1. Select the **Address Book entry** for which you want to add a case. If you select a Contact, Maximizer adds the case to the Company.

2. Drag and drop the Address Book entry or Contact to the **Customer Service** icon. Or, from the **Home** tab, select **Case** from the **Create** group.

3. Enter the **case details** working through the tabs from left to right. Press F1 in any of the tabs for detailed help on each field and tab.

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

   Based on the follow-up deadline, a Hotlist task is automatically created for the assigned user when a case is created. 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.

Share the Knowledge

Empower your staff and ensure they are armed with accurate information to answer your customer's toughest question. The knowledge base allows everyone to share technical articles, the answers to frequently asked questions, and other important customer service information in the form of knowledge base articles. Information is a click away with fast keyword searching. You can then send the article to a customer to resolve their outstanding issue.

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

Enable every staff member to create articles, complete with links to other documents, spreadsheets, and files, while enforcing management to sign off on publishing articles for internal or external viewing.

Reporting

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

Dashboards

Designed for executives and upper management, dashboards show up-to-the-second indicators of your company's performance. 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. To access dashboards, click on the Dashboards icon.

Web Access

Maximizer Web Access

Maximizer Web Access is a secure, web-browser interface to a Maximizer Address Book. Just like in Maximizer, you can work with Address Book entry information, notes, calendar appointments, Hotlist tasks, user-defined fields, customer service cases, campaigns, and opportunities. Maximizer Web Access can be customized through preferences providing access to critical company information, such as the company phone list, documents, and forms. Dashboards and reporting are also accessible through Maximizer Web Access.

Mobile Access

This site provides access to an Address Book through a wireless Internet-enabled device. You can access Address Book entries, opportunities, customer service cases, Hotlist tasks, appointments, user-defined fields, notes, the Company Library, and dashboards through Mobile Access. A list of supported browsers is available from the Maximizer supported products page at http://www.maximizer.com/support/products.html.

Maximizer Web Access Administrator

System administrators can use this web access site to create and configure Address Books, manage users and security, manage Maximizer application settings, and perform other administrative tasks. See the *Maximizer CRM Administrator's Guide* for more information.

Partner Access

Partner Access creates a two-way flow of information between your organization and your business partners. Organizations with an extended sales force of resellers or dealers need a way to distribute and monitor sales opportunities to these partners.

You can access Partner Access in the Escona Tutorial sample Address Book using **"Paul"** as the user ID and **"password"** as the password.

Customer Access

Customer Access offers customers a number of web-based services. Its functionality is very similar to Partner Access in that Customer Access can be customized to display information essential to your customers.

You can access Customer Access in the Escona Tutorial sample Address Book using **"Mary"** as the user ID and **"password"** as the password.

Administrator Module

Administrator is typically used by a system administrator or other technically proficient staff to configure and manage the entire Maximizer application. To install Administrator on a workstation, you must select the custom installation option and select Administrator as an installed component.

Manage Users

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

Manage Security Groups, and Teams

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

Web Access

Web Access site URLs can be defined in Administrator. By default, these URLs are set up during the installation of the Maximizer Web components, but the values can be modified in the Web Access dialog box.

MaxMobile Administration

Administrator is used to specify the MaxMobile Wireless Server URL and to initiate deployment of MaxMobile to users.

Importing and Upgrading Data

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

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

Document Administration

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

Time Zone Alignment

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

Additional Products

Mobile Access and MaxMobile

Mobile Access and MaxMobile for BlackBerry provide you with access to your customer information on the road. You can take notes, track sales opportunities and customer service cases, as well as check your schedule and make follow-up tasks for yourself.

MaxExchange Synchronization Server

MaxExchange is a suite of applications that allow you to synchronize Maximizer data between a server and an unlimited number of licensed remote computers. Contact Maximizer or your local business partner for more information.

MaxSync for Microsoft Exchange

MaxSync for Microsoft Exchange is a Maximizer add-on that mirrors select appointments and tasks between a Maximizer Address Book and a Microsoft Exchange Server. MaxSync for Microsoft Exchange can be installed on either the Maximizer server or on a workstation. However, it must be installed on a machine where Maximizer and a MAPI-enabled application, such as Microsoft Outlook, are installed.

Workflow Automation Powered by KnowledgeSync

Workflow Automation Powered by KnowledgeSync is a separate application that allows you to monitor business data within the Maximizer database and other systems. Using Workflow Automation, you can send real-time alert messages by email or fax. Lead qualification, lead assignment, and lead tracking can be completely automated.

Maximizer CRM Customization Suite

The Maximizer CRM Customization Suite includes additional guides for integrating with Maximizer. Maximizer Customization Suite enables customers and business partners to customize the Maximizer interface and to integrate with other front-office and back-office solutions.

Learn More About Maximizer CRM

- **Maximizer CRM Administrator's Guide & User's Guide** The Maximizer CRM manuals are available in Adobe® PDF format. You need to have the Adobe Acrobat Reader installed to be able to read the online guides. To download the reader free of charge, go to www.adobe.com and see the Acrobat products section of the website.

- **Online Contents Help** - How-to help is available in both Maximizer and Administrator providing you with step-by-step instructions for all areas of both applications.

- **Context Sensitive Help** - In Maximizer CRM, detailed help that pertains specifically to each window, dialog box, and tab is available by pressing the F1 key when the window, dialog box, or tab is open. In Maximizer Web Access, you can click on the question mark in the main windows and dialog boxes to access context sensitive help.

- **Online Training** - http://www.maximizer.com/education-training/online.html

- **Professional Services** - http://www.maximizer.com/professional-services/

- **Maximizer Website** - http://www.maximizer.com

- **Knowledge Base** - http://www.maximizer.com/knowledgebase

- **Online Demonstration** - http://www.maximizer.com/solutions/maxcrm/online-demo.html

- **Supported Products** - http://www.maximizer.com/support/products.html

Maximizer CRM Goes Green!

To help preserve our environment, we are no longer printing all of our documentation. Here are the environmentally friendly ways available to you for finding the online information you need to use Maximizer CRM.

- **From the DVD -** Documentation and installation instructions are available from the Maximizer CRM DVD. To view the files, insert the DVD into the DVD reader and click **View Documentation** on the **Autorun** screen.

- **From Maximizer CRM -** Online help and documentation in PDF format is available directly from Maximizer CRM. To access the files, click the **Maximizer** button in the top-left corner of the application window and choose one of the items from the **Help** menu. If you have questions about a specific function, dialog box, or window, press **F1** to receive context sensitive help.

- **From Administrator -** Online help and documentation in PDF format is available directly from Administrator. Access the files from the **File > Help** menu. Just like in Maximizer CRM, if you have questions about a specific function or dialog box, you can press **F1** to receive context sensitive help.

- **From the Windows Start Menu -** All Maximizer documentation can be accessed through the **Windows Start > Programs > Maximizer CRM > Documentation and Help** menu item.

- **From Maximizer Web Access -** Online help is available directly from Maximizer Web Access. Access it by clicking **Help** in the top-right corner of the application window.

- **On the Web -** The content on our support website is designed to provide you with as much information as possible in an environmentally friendly way. Free online Knowledge Base and FAQ articles are updated regularly on the technical support website:

  Knowledge Base: www.maximizer.com/knowledgebase

  Support: www.maximizer.com/support

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