Maximizer® CRM 12

User's Guide
for Maximizer Web Access

Maximizer Software
Simply Successful CRM

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Applicability

This document applies to Maximizer CRM 12 Winter 2012 software.

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Getting Started

Introducing Maximizer CRM

In this chapter...

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 enables an organization to communicate with its customers through multiple channels, to share information, and to organize individual and team efforts.

Maximizer 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 gives 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.

Log In to Maximizer

Maximizer runs in Microsoft Internet Explorer and Mozilla Firefox. You can access Maximizer by entering the URL directly in your web browser

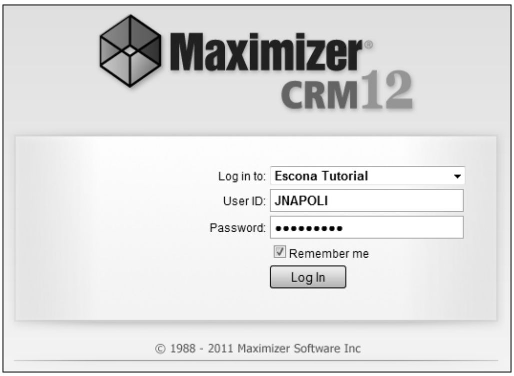
You can access the sample Escona Tutorial Address Book using "jnapoli" as the user ID and "maximizer" as the password.

1. Enter the Maximizer URL in a web browser.

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

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

2. From the ***Log in to*** drop-down list, select the Address Book you want to open.
3. Enter your ***User ID*** and ***password***.
4. Click ***Log In***.



Enable the Maximizer Add-On in Internet Explorer

If you use Internet Explorer to access Maximizer, you are prompted when you first log in with information about an add-on from Maximizer Software. The message is displayed at the top of your browser window. You should accept the add-on.

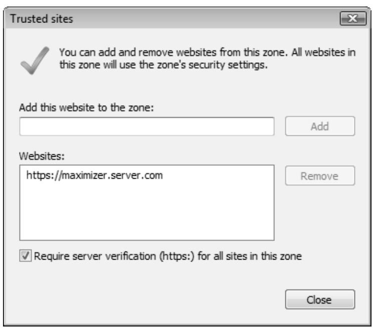
1. At the top of the browser window, click the message bar, and select ***Run add-on***.
2. Click ***Run*** to confirm the change.

Configure Internet Explorer to Use Maximizer

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

1. In Internet Explorer, select ***Tools > Internet Options***, and select the ***Security*** tab.
2. Select the ***Trusted sites*** security zone, and click ***Sites***.
3. In the ***Add this website to the zone*** field, enter the Maximizer URL.
4. Clear the ***Require server verification (https:) for all sites in this zone*** checkbox.
5. Click ***Add***.

   Maximizer is added to the list of sites in the zone.



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

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

9 If you use Windows Authentication, scroll down the ***Settings*** list, and under ***User Authentication > Logon***, select ***Automatic logon with current user name and password***.

This step is required only if Maximizer is configured to use Windows Authentication. It allows you to log in to Maximizer automatically using your Windows user account.

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

Enable Pop-Up Windows in Firefox for Maximizer

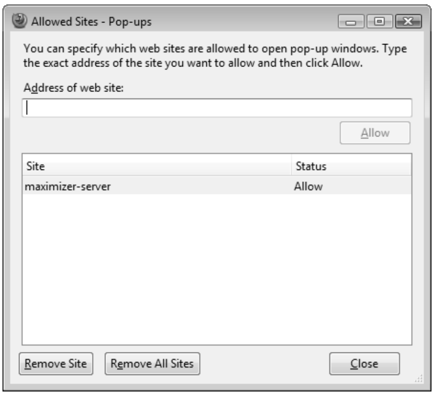
Pop-up windows must be enabled for Maximizer in your browser to access its full functionality. If you use Internet Explorer, pop-up windows are enabled when you add Maximizer to the Trusted sites zone. If you use Firefox, you may need to enable pop-up windows for the site.

If Firefox is blocking pop-up windows, you are prompted with a message at the top of the browser window when you try to access certain commands. The message states that Firefox is preventing Maximizer from opening a pop-up window.

1 In Firefox, select ***Tools > Options***, and select the ***Content*** tab.

2 Next to ***Block pop-up windows***, click ***Exceptions***.

3 In the ***Address of web site*** field, enter the Maximizer URL, and click ***Allow***.



4. Click ***Close***.
5. Click ***OK*** to save the changes to the Options dialog box.

Change your Password

After you first log in to Maximizer, you should change your password.

1. In the top-right corner of the page, click ***Preferences***.
2. Click ***Password***.

   The Change Password dialog box opens.
3. In the ***Old Password*** field, enter your current password.
4. In the ***New Password*** and ***Confirm New Password*** fields, enter your new password.
5. Click ***OK*** to close the Change Password dialog box.
6. Click ***Save*** to save the changes to your preferences.

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 View information and attached entries for the current entry in the tabbed ***following pane***.

3 Use the ***menus*** to access all commands that are available in the current page. You can also right-click to select common tasks from the shortcut menu.

4 Select an ***icon*** in the icon bar to move to a different page.

5 At the top of the icon bar, use the button with the ***arrows*** on it to hide or display the full icon bar.

6 Add icons to the ***Quick Access*** toolbar above the icon bar for one-click access to your saved searches and Favorite Lists.

7 Use the ***view bars*** in a page to filter your list and access common tasks and the column setup.

8 Hover your mouse over the links in the left navigation pane to access additional commands in pop-up windows including the following:

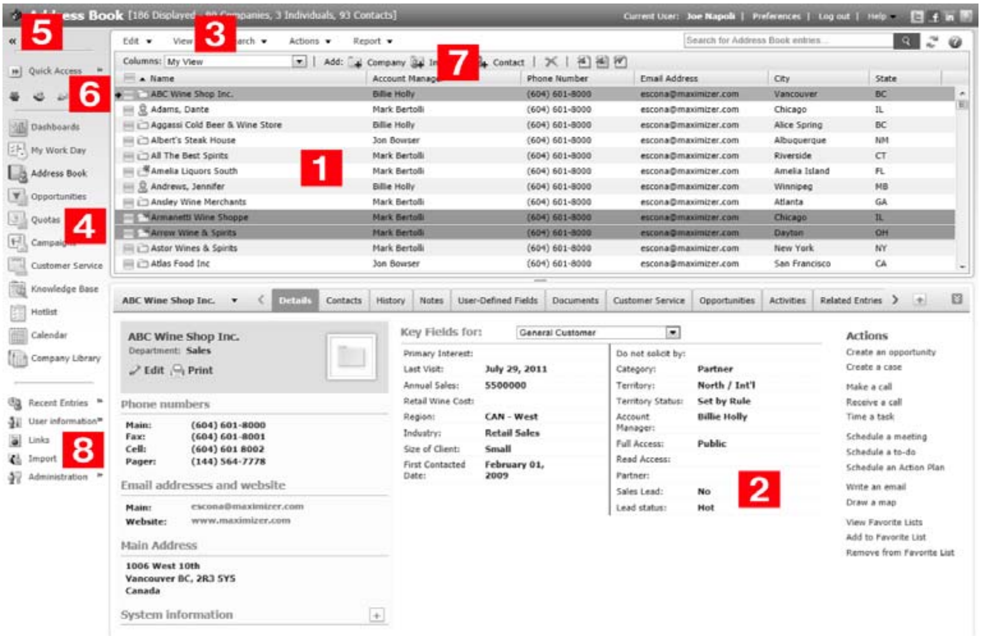
Recent Entries to select an Address Book entry that you recently accessed.

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

Links to access external links.

Import to import Address Book entries and other data from external sources.

Administration to access administrative tasks.



Main Lists and Tabbed Panes

The Maximizer interface displays entries in a main list and additional information in tabbed following panes. The contents of the tabs in the lower pane depend on the current entry in the main list. For example, the Notes pane displays only the notes attached to the current entry in the main list.

Keep the following points in mind when working in the tabbed followng panes.

1 Use the ***Filter*** drop-down list to filter the entries displayed in the list.

2 Click on a ***column heading*** to sort the entries in the list by the values in the column.

3 Select the other ***tabs*** to navigate to other panes and view additional information on the current entry.

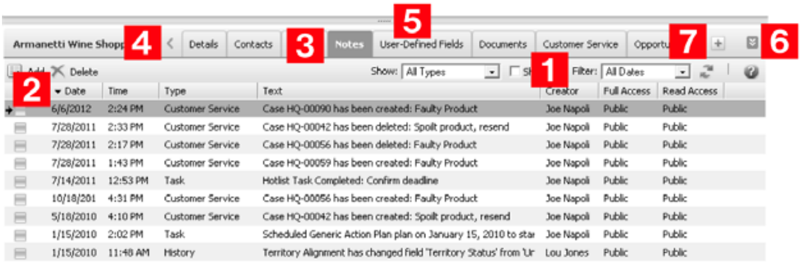
4 Use the ***right*** and ***left arrows*** to view hidden tabs if the screen is not wide enough to display them all at once.

5 Click and drag the ***top border*** of the lower pane to change its size.

6 Click the ***arrow*** in the top-right corner of the lower pane to minimize the pane.

7 Click the **+ *icon*** next to the tabs to customize which tabs are displayed in the tabbed pane.

8 Maximizer remembers which tab is selected when you switch between the main Maximizer pages, so that when you come back to a page the same tab is open as when you left.



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 page is an area where everyone in your company using Maximizer can view Hotlist tasks, appointments, and company announcements, as well as 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 tracks your sales opportunities. It helps you and your colleagues manage your sales processes. Opportunity management defines and strengthens your selling methodology to include all members of your sales teams.

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. Automated campaigns send out fax, print, and email messages to your Address Book entries on a pre-defined schedule and track how subscribers interact with the messages.

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.

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.

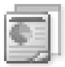
Calendar

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.

Company Library

The Company Library stores your company's sales and marketing information for everyone to access. The Company Library page allows you to download documents, to view notes and hyperlinks in the preview pane, and to send documents to Address Book entries.

Reports



The Reports page lets you access SQL Server Reporting Services reports stored on your server and create new reports using SQL Server Report Builder. SQL Server Reporting Services Integration must be enabled in the System Options preferences in Maximizer Administrator to access the Reports page.

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.

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.

Types of Entries

Almost all of the information displayed in Maximizer is displayed in a list, including notes and documents attached to entries, Hotlist tasks, 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 automated campaigns.

Sorting Entries

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, you must change the column setup.

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

The current sorting in a list is saved when you leave a page or close Maximizer. When you next view the list, the columns are sorted the same way as the last time you viewed the list.

Select Entries

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

The text in an entry is a link to open the entry. You must click in an empty part of the row to make the entry the current entry.

You can also select multiple entries to perform commands on many entries at the same time. Checkmarks are displayed to the left of selected entries. The current entry may or may not be one of the selected entries.

- Click the checkbox to the left of entries.
- Click on the entries one at a time while holding down the ***Control*** key.
- To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.
- To select or clear all entries in the current list, click the checkbox at the left of the heading row, above the checkboxes for the individual entries in the list. Or select ***Edit > Select All***.

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

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.

Remove All Entries from a List

- Select ***View > Clear List***.

Refresh a List of Entries

As other users update entries, the information displayed in your list of entries may get out of date. You can refresh the list of entries displayed in the Address Book, Opportunities, Campaigns, Customer Service, and Hotlist pages; in the Notes, User-Defined Fields, and Documents panes; and in the Notes, Documents, Customer Service, Opportunities, and Activities tabs in open entries.

If you refresh the list of entries in a main page, the information in the column setup updates, but not all of the information displayed in the tabbed panes. If you refresh a list in a tabbed pane, or in an open entry, only the information in the current tab is refreshed.

If you refresh the list in the Address Book, Opportunities, Customer Service, or Campaigns page, the current list of entries is maintained, and only the information displayed is updated. If you refresh the list in the Hotlist page, a tabbed pane, or in an open entry, the filter is reapplied and entries may be added or removed from the list.

- In the top-right corner of the list, select the ***Refresh*** icon.

  The information displayed in the list updates.

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.

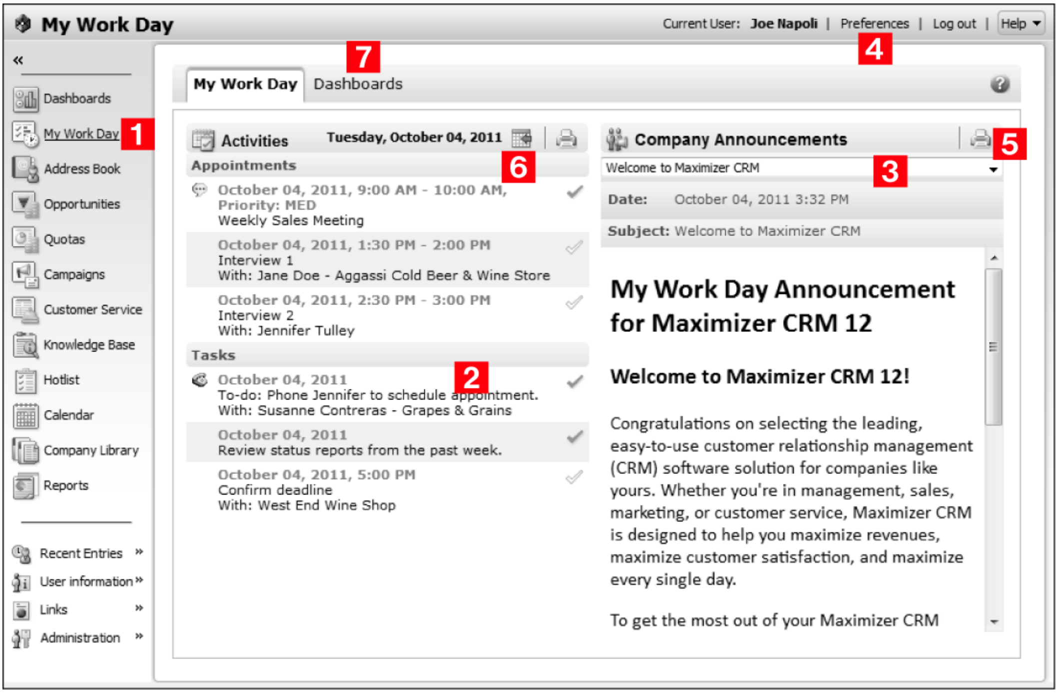
1. Select the ***My Work Day*** icon to open the My Work Day page.
2. Click on an ***appointment*** or a ***Hotlist task*** to view details of the activity.
3. Select a ***company announcement*** from the drop-down list to display it in the page.

   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 ***Startup*** tab to specify to open the My Work Day page when starting Maximizer and to show or hide company announcements, tasks and appointments, or dashboards in My Work Day.
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.



Getting Help

Maximizer Help is your comprehensive guide to working with the Maximizer modules. As you work with Maximizer, you probably already know what business task you want to accomplish—such as sending an email to many recipients and recording your contact management information. Maximizer's help and guides have the answers you are looking for.

The types of documentation you can expect to find to help you with Maximizer include:

- ***Online Help –*** Online step-by-step instructions with a table of contents, an index, and search.
- ***Online manuals –*** Printable version of the online help that you can read using Adobe Acrobat Reader.

Take a Tour of Maximizer

The Maximizer Welcome Tours provide you with quick video tours of Maximizer Web Access and Web Access Administrator and introduce you to some of Maximizer's key concepts and features.

- To access the Maximizer Welcome Tours, select ***Help > Take a Tour*** and choose the tour you wish to view.

Online Help

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

You can access the online help over the Internet or stored on your server. When you first open the online help, you are prompted to choose which version of the help you want to access. You can later change this setting in your preferences. The version of the online help on the Internet may contain more up-to-date information than the version stored on your server.

You can open the online help from the Help menu in the main window, or from help icons throughout Maximizer.

1. In the top-right corner of the page, select ***Help > Support Center***.

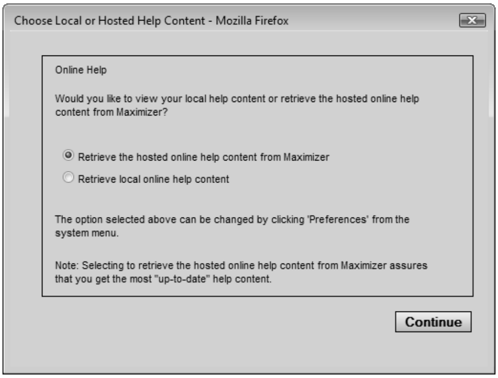
   – or –

   In the top-right corner of a page, following pane, or dialog box, select the ***Help on the current page*** icon.

If it's your first time accessing the online help, you are prompted to choose the source of the help content.

2 If necessary, select the source of the help content, and click ***Continue***.

- To view the most up-to-date content over the Internet, select ***Retrieve the hosted online help content from Maximizer***.
- To view content stored on your server, select ***Retrieve local online help content***.



If you're accessing the online help from a specific page or dialog box, information associated with that page/dialog box is displayed.

Video Help

Some pages and dialogs provide links to video tutorials that walk through how to make the most of the features in Maximizer. Video tutorials are available in any page, following pane, or dialog box where the Video help icon is displayed.

1 Select the ***Video Help*** icon.

A new browser window opens and displays the video tutorial.

Online Manuals

In addition to the online help, you can access a User's Guide in PDF format that you can read online using Adobe Acrobat Reader. The Maximizer CRM User's Guide contains similar information to the online help in a printable format. Like the online help, you can search the guide, and access hyperlinks from the table of contents, index, and cross-references to other places in the guide. You can also save the guide to your local computer to access at any time, offline.

You can access the User's Guide from the Maximizer Help menu.

1. In the top-right corner of the page, select ***Help > Support Center***.

Stay Connected with Maximizer

Click on the Twitter, Facebook, and LinkedIn icons to connect with Maximizer on your favorite social networking site. There you will be able to connect with Maximizer users and to hear the latest news about Maximizer CRM. You can also click the Feature Suggestions button to make suggestions for new features in Maximizer.

CHAPTER 2

Address Book Entries

Keep Track of Companies and Contacts

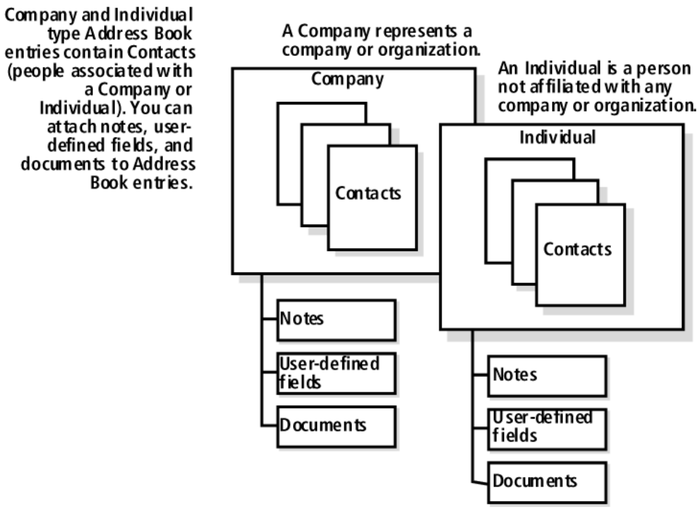
In this chapter...

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.



Types of Address Book Entries

There are three types of Address Book entries in Maximizer: Companies, Individuals, and Contacts.

- ***Companies –*** Entries that represent corporate entities such as businesses, associations, or organizations.
- ***Individuals –*** Entries that represent single, key people, like self-employed professionals or entrepreneurs. These entries are not associated with Companies.
- ***Contacts –*** Entries that represent the people attached to Companies or Individuals. These entries refer to the people inside organizations.

Companies and Individuals can exist on their own in an Address Book. Contacts are always attached to other Company or Individual entries.

Sales Leads

You can designate some of your Address Book entries as sales leads to help organize your entries. Leads are your sales prospects. By setting entries as leads, you can set them apart from your customers.

For many commands in Maximizer, you can specify whether you want to include or exclude leads. For example, when you search for Address Book entries, you can specify to search only for sales leads matching the search criteria.

When you add an Address Book entry, you can add the entry a sales lead. You can recognize if entries are sales leads directly in the Address Book page. A star in the entry type icon indicates that the entry is a sales lead. As well, the Sales Lead field is set to Yes.

Once a lead becomes a customer, you can change the value of the Sales Lead field to No, indicating that the entry is no longer a sales lead. If an opportunity is won for a sales lead, the entry is automatically converted to a regular entry.

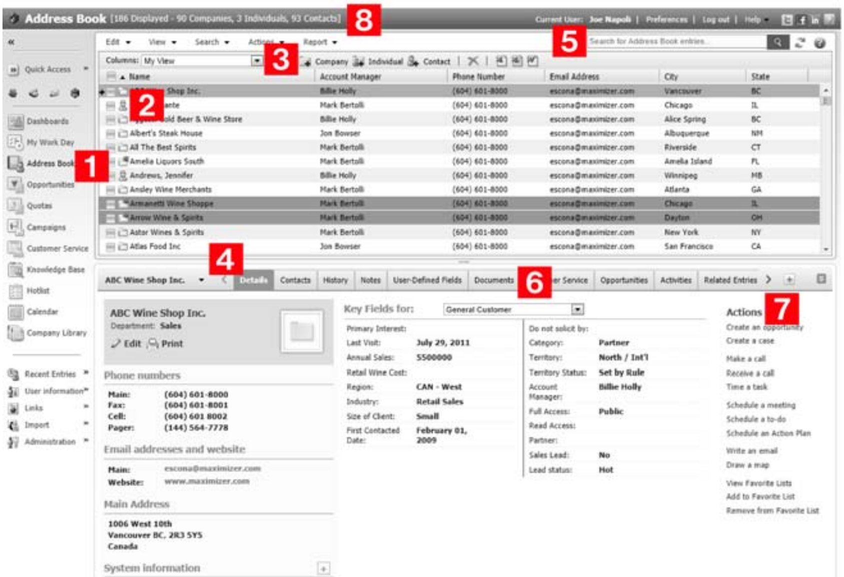
Address Book Page

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 make it the current entry and display its information in the ***Details*** following pane.
5. Search for an Address Book entry by entering a name in the ***Search for Address Book entries*** field.
6. Use the tabbed ***following pane*** to view more information and entries related to the current Address Book entry in the main window.

7 Use the ***Actions*** links to perform common actions with the current entry like scheduling a meeting or creating an opportunity.

8 In the title bar, view the number of each type of entry in the current list.



View Address Book Entry Details

To complete this procedure, you must have the Read permission for Address Book entries.

You can view and edit details of Address Book entries at any time. You can access an entry from the Address Book page or from a customer service case or an opportunity attached to the entry.

1 In the Address Book page, click on the entry to display its information in the ***Details*** following pane.

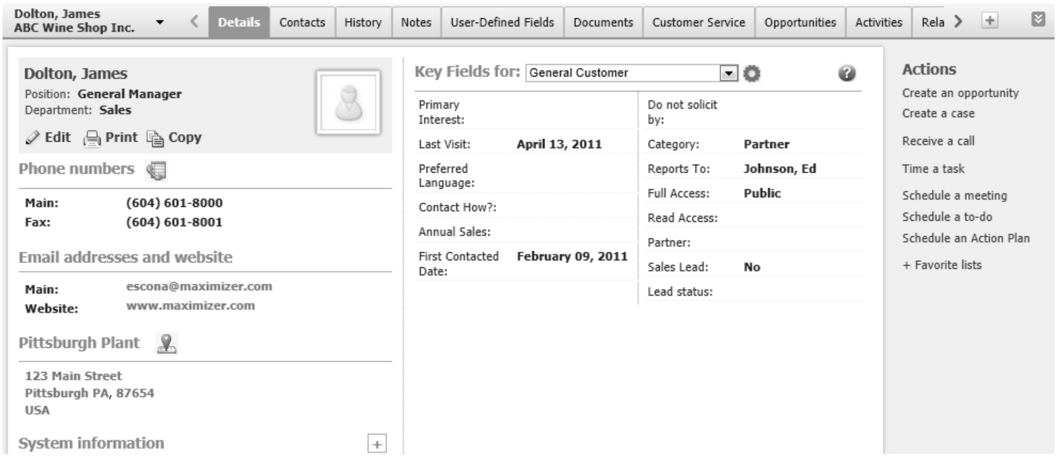
– or –

In the Opportunities or Customer Service page, select ***View in Address Book*** from the ***View*** menu.

The Address Book page opens with the entry's basic information and Key Fields displayed in the ***Details*** following pane.

2 To view and modify other information related to the entry, select the ***User-Defined Fields*** following pane.

You can also view the customer service cases, opportunities, notes, documents, and activities attached to the entry by selecting the corresponding following pane.



View Contacts Associated with Address Book Entries

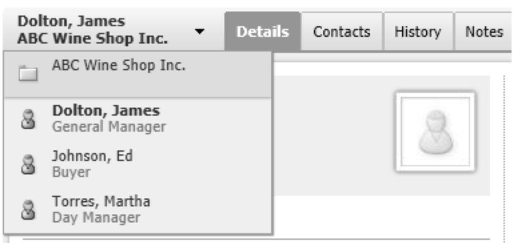
You can view a Contact associated with the current entry using the Contacts drop-down menu in the Details following pane. If the current entry is a Company or Individual, all of the associated Contacts appear in the Contacts drop-down menu. If the current entry is a Contact, all of the contacts associated with the parent Company or Individual appear in the menu.

1. In the ***Details*** following pane for the current entry, hover your mouse over the Contacts drop-down menu in the upper-left corner.

   The menu expands to reveal all of the contacts associated with the current entry.

2. Select the entry you want to view.

   The entry’s basic information and key fields are displayed in the Details following pane.



Retrieve Contacts Associated with Address Book Entries

You can retrieve the Contacts associated with Companies and Individuals to add the entries to the current list in the Address Book page. If you select a Contact, the other Contacts associated with the parent Company or Individual are retrieved.

You can retrieve the Contacts associated with a single Address Book entry, or you can select multiple Address Book entries to retrieve all Contacts associated with all selected entries at once.

1. Click on the Company, Individual, or Contact to make it the current entry.

   – or –

   Select multiple Address Book entries.

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

2. Select ***Search > Retrieve Contacts***.

   – or –

   Right-click, and select ***Retrieve Contacts***.

Retrieve a List of Opportunities for an Address Book Entry

You can quickly retrieve a list of the opportunities associated with an Address Book entry and display them in the Opportunities page.

- Select the Address Book entry in the Address Book page and select ***Search > Retrieve Opportunities***.

  The Opportunities page opens and displays the list of opportunities associated with the Address Book entry.

Retrieve a List of Cases for an Address Book Entry

You can quickly retrieve a list of the customer service cases associated with an Address Book entry and display them in the Customer Service page.

- Select the Address Book entry in the Address Book page and select ***Search > Retrieve Case***s.

  The Customer Service page opens and displays the list of cases associated with the Address Book entry.

Find an Address Book Entry with a Quick Search

To complete this procedure, you must have the Read permission for Address Book entries.

You can use wildcards to match any sequence of characters by entering an asterisk (*) character in your search. For example, searching for "J*n." would return Address Book entries named "Jon", "Joan", and "Johnson".

Maximizer makes it easy to search for Address Book entries directly from the Address Book page. When you search for Address Book entries using the quick search field, Maximizer retrieves any entries with a matching First Name, Last Name, or Company Name.

Maximizer also matches partial names that start with the search phrase. For example, searching for the name "John" would retrieve entries named "Johnathan Adams", "Samantha Johnston", and "Johnson Brothers Co".

You can also use the quick search field to search for Address Book entries by email address or phone number. If you enter all or part of an email address containing an @ symbol, the quick search returns Address Book entries with a matching email address. If you enter all or part of a phone number, the quick search returns Address Book entries with a matching phone number.

1. In the Address Book page, type the name, email address, or phone number you want to search for in the ***Search for Address Book entries*** field.
2. Click the magnifying glass icon.

The results of the search are displayed in the Address Book page.

Maximizer also has powerful search features accessible from the Search menu that allow you to search for entries by any combination of basic and user-defined fields. These features are useful when you want to search for entries based on fields other than just name, email address, or phone number. For more information about all of the search features available in Maximizer, see "Searching" on page 81.

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 have the Modify system tables access right, you can add, modify, and delete values for system table fields such as City by selecting the Edit List... item from the drop-down list. For a list of system table fields, see the *Maximizer CRM Administrator's Guide*.

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.

Add a Company or an Individual

To complete this procedure, you must have the Insert permission for Address Book entries.

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.

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

   – or –

   Next to ***Add*** in the view bar, click ***Company*** or ***Individual***.

   – or –

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

   The Details following pane opens with blank fields for your new entry.
3. Enter the basic information for the Company or Individual including ***name***, ***address***, ***phone numbers***, and ***email addresses***.

Mandatory fields that must be completed when creating a new entry are highlighted in red.

4. From the ***Key Fields for*** drop-down list, select a Key Fields list, and enter values for the fields in the list.

Key Fields lists contain system fields and user-defined fields. They are defined by your system administrator in the Key Fields preferences in Administrator.

5. Click ***Save*** to save the entry to the Address Book.

   After then entry is saved you can select the User-Defined Fields following pane to fill-in more information about the entry.

Add a Contact

To complete this procedure, you must have the Insert permission for Address Book entries.

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.

If you modify the address, you are prompted to change the current mailing address for the Company or to create a new mailing address for the Company. The new address is applied to the Contact, and you can later apply it to other Contacts associated with the Company.

1. In the Address Book page, click on the Company or Individual to make it the current entry.

2. Select ***Edit > Add Contact for*** or ***Add Contact Lead for***.

   – or –

   Next to ***Add*** in the view bar, click ***Contact***.

   – or –

   Right-click, and select ***Add > Contact*** or ***Contact Lead***.

   The Details following pane 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. Select the mailing address for the Contact if it differs from the main Company or Individual address. You can edit any of the existing addresses or add a new one.

   When you create a new address, it becomes available to the other Contacts associated with the Company or Individual. You can later select it as the current address for other associated Contacts.

Any changes you make to an existing address are also applied to the Company or Individual and any other Contacts using that address.

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

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 Key Fields area of the Basic Information tab in the entry. You may need to select a different Key Fields list to view the Full Access and Read Access fields. By default, these fields are included in the <Default Key Fields> list.

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 security groups*** area, select the users and security groups for which you want to add full or read access for this entry.

   - To select multiple users or groups, press ***Control*** while selecting the users/groups.
   - To select a series of users/groups, select the first user/group in the series, then press ***Shift*** and select the last user/group in the series.
   - Type the first letter in the item's name to jump to that item in the list.

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

2. Click the heading of a user grouping to view users and security groups in different groupings.

3. Click the right arrow to move the selected users or security groups to the Selected users and groups list.

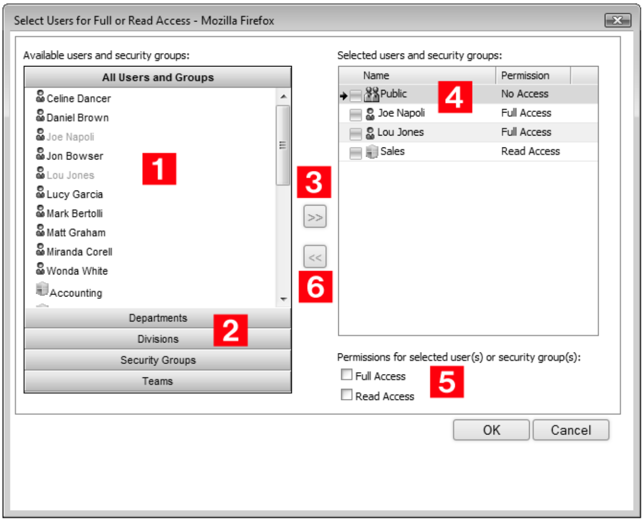
   If you accessed the dialog box from the Read Access field, the user or group is automatically assigned read access. If you accessed the dialog box from the Full Access field, the user or group is automatically assigned full access.

4 In the ***Selected users and security 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 security group.

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



Mailing Addresses

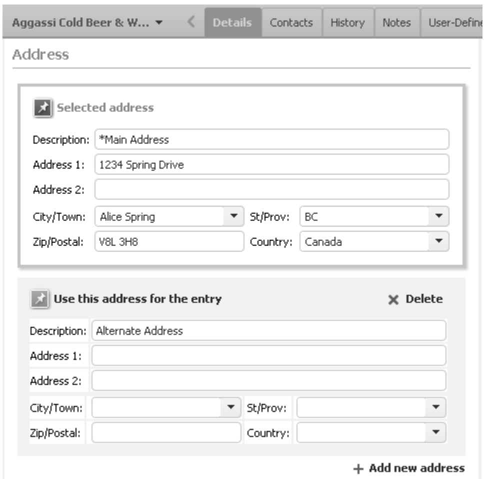
The main address of a Company or Individual is specified in the Address Book entry Details following pane. You can set up multiple addresses for companies and assign different addresses to specific Contacts in the company.

Add an Alternate Address for an Address Book Entry

Add alternate addresses for entries from the Details following pane. Entries may have as many alternate entries as you want, but only one address at a time can be selected as the current address for the entry.

1. Select the Address Book entry in the list.
2. In the Details following pane, click ***Edit***.
3. At the bottom of the ***Address*** area, click ***Add new address***.

   Fields for entering a new alternate address appear.



4. Enter the new address.
5. To use the address for the selected entry, click the pin icon or click ***Use this address for the entry***.

You can remove an old address from an entry by clicking the Delete link next to the address.

Modifying Address Book Entries

You can modify the details of Address Book entries at any time. 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.

Edit an Address Book Entry

To complete this procedure, you must have the Modify permission for Address Book entries and full access to the current entry.

The Details following pane in the Address Book page not only displays basic information and key fields for the current entry, but it also allows you to edit that information.

1. In the Address Book page, click on the entry to display its information in the ***Details*** following pane.
2. Click the ***Edit*** button below the entry's name in the Details following pane.

   The Details following pane expands and switches to edit mode, allowing you to modify the entry's information.
3. Update the fields of the entry as necessary, and click ***Save*** to save your changes to the entry.

Add an Image to an Address Book Entry

To complete this procedure, you must have the Modify permission for Address Book entries and full access to the current entry.

An image representing each Company, Individual, and Contact is displayed in the Details following pane of the selected entry. While viewing the Details for an entry, you can upload an image file to associate the image with the entry. The size of the file must be less than 4 MB. When you add the file, you can crop the image so it fits in the area provided in the Details following pane.

1. Select the entry.

   The current image for the entry is displayed next to the entry's name in the Details following pane. If no image has been associated with the entry a placeholder image is displayed.

2. Click the entry's current image next to the Name area of the Details following pane.

   The Upload Photo dialog box opens.

3. Click ***Browse***.

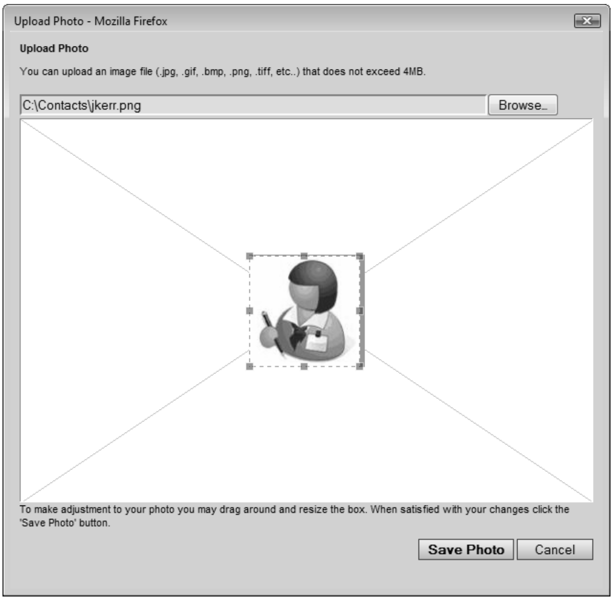
4. Browse to and select an image file on your computer, and click ***Open***.

5. Click and drag around a portion of the image to select the part of the image to include.

   Any portion of the image that is outside of the selection area is removed from the image when it's saved.

   If necessary, you can adjust the sides of the selection area. To fit the image without distorting its proportions, the width of the selection area is kept equal to the height.

6. Click ***Save Photo*** to associate the image with the entry.



Move a Contact to Another Company or Individual

To complete this procedure, you must have Insert, Modify, and Delete permissions for Address Book entries.

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.

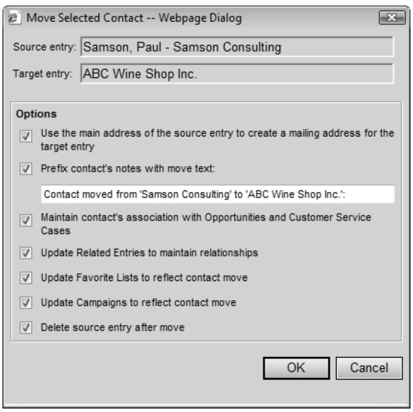
1. In the Address Book page, click on the Contact entry to make it the current entry.
2. Select ***Edit > Move Selected Contact***.

   – or –

   Right-click and select ***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.



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

Convert 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.

You can convert a single Contact or Individual, or you can select multiple Contacts or Individual to convert them all at the same time.

1. Click on the Individual or Contact entry to make it the current entry.

   – or –

   Select multiple Individual or Contact entries.

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

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

   – or –

   Right click and select ***Convert Individuals to Companies*** or ***Convert Contacts to Individuals***.

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

Using Maximizer with LinkedIn

Maximizer is integrated with LinkedIn so you can associate LinkedIn profiles with Maximizer Address Book entries. The integration is available in the Address Book, Opportunities, Customer Service, and Hotlist pages.

You can access the LinkedIn integration from the Social Networking following pane or from the Social Networking tab in an open entry.

When you first open the Social Networking following pane or tab, you are prompted to grant authorization to LinkedIn. You must use your own LinkedIn account credentials.

When granting authorization for Maximizer to access LinkedIn, your computer's time must be set within five minutes of the correct time or LinkedIn will not allow the authorization.

Associate an Address Book Entry with a LinkedIn Profile

You can link Companies, Individuals, and Contacts in Maximizer with company or person profiles in LinkedIn. When you link an entry from the Opportunities, Customer Service, or Hotlist page, the Address Book entry associated with the selected entry is linked to the LinkedIn profile.

1. In Maximizer, select the entry to associate with LinkedIn.
2. Open the ***Social Networking*** following pane.

   Maximizer automatically searches for a corresponding LinkedIn person or company profile. Matching profiles from LinkedIn are displayed in the right side of the window.

   If a Company is selected in Maximizer, the search is based on the company name. If a Contact or Individual is selected, the search is based on the person's name.
3. Move your mouse over the correct entry, and click ***Link***.

Social Networking Pane

You can view information from LinkedIn profiles in the Social Networking following pane or the Social Networking tab in open entries.

Keep the following points in mind when working with the Social Networking following pane:

- The left side of the following pane displays contact information for the entry in Maximizer.

  If the name of the entry in LinkedIn is different from the name in Maximizer, the LinkedIn name is displayed in parentheses.

- The bottom-left part of the following pane displays summary information from the LinkedIn profile.

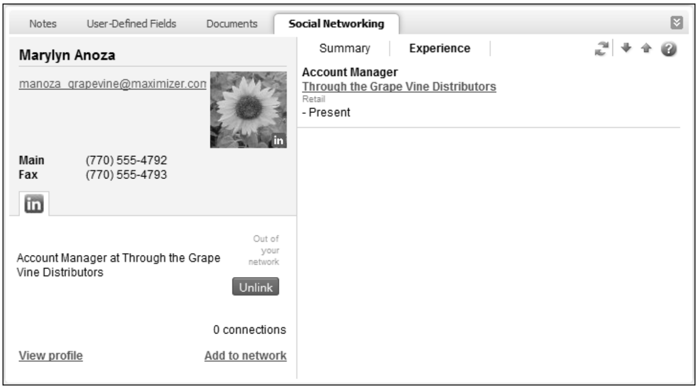
  Click ***Unlink*** to remove the association between the entry and the LinkedIn profile.

  Select the links to open LinkedIn and view the entry's profile, view the entry's connections, or send a message to the entry.

- Once you have linked to an entry, various tabs appear in the right side of the following pane. Select a tab to view the content from the LinkedIn profile.
  - ***Summary –*** Displays the summary from the associated LinkedIn profile for the selected Contact or Individual.
  - ***Experience –*** Displays the experience information of the associated LinkedIn profile for the selected Contact or Individual. If the entry is not a first connection in LinkedIn, only the entry's current position appears in this tab.
  - ***Education –*** Displays the education information of the associated LinkedIn profile for the selected Contact or Individual. If the entry is not a first connection in LinkedIn, the Education tab is not available.
  - ***Connections –*** Displays the connections of the associated LinkedIn profile for the selected Contact or Individual. Due to the limitations of LinkedIn, this tab is available only if a user

links their own LinkedIn profile to the current Maximizer entry.

- ***Employees –*** Displays the employees of the selected Company. You can view an employee's public profile by clicking on the person's name.



Remove the Maximizer Integration with LinkedIn

You can log in to LinkedIn and remove the integration with Maximizer to prevent Maximizer from accessing LinkedIn data with your account. If you later want to reverse the change, you can open the Social Networking following pane and grant authorization to your LinkedIn account once more.

1. In a web browser, log in to your LinkedIn account.
2. In the top-right corner of the page, hover your mouse over your user name, and click ***Settings***.
3. In the bottom half of the page, select ***Groups, Companies & Applications***.
4. Under ***Applications***, select ***View your applications***.

   The Authorized Applications page opens displaying a list of applications with access to your account.
5. Under ***External Websites***, select ***Maximizer CRM***.
6. Click ***Remove***.

Recording Relationships with Related Entries

In the course of business, it's common to have people and companies who are somehow related or connected to each other. For example, one of your contacts might be another's accountant. Relationships can be one-way or two-way. For example, if one of your contacts is a supplier for another contact that is a one-way relationship. However, if two of your contacts are sisters, that is a two-way relationship. Maximizer allows you to create and view these types of relationships in the Related Entries pane.

Any Address Book entry can be related to another. If an Address Book entry has entries related to it, these are displayed in the Related Entries following pane.

Relate Two Address Book Entries

1. Select one or both of the Address Book entries you wish to create a relationship for. Then, from the Edit menu, select Relate Entries.

   - or -

   Select the Address Book entry that you wish to create a relationship for. Then, in the ***Related Entries*** pane, click the ***Add a related entry*** icon.

   The Add a Related Entry dialog box opens.

2. Select the related ***Company / Contact*** and specify the details of the relationship between the two entries. Then click ***OK***.

Unlink Address Book Entries

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

1. In the ***Related Entries*** following pane, select the entry to unlink.
2. Click the ***Unlink the selected entries*** icon.

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 not available in all versions of Maximizer.

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.

Set Up a Territory

To complete this procedure, you must have the Sales Manager role.

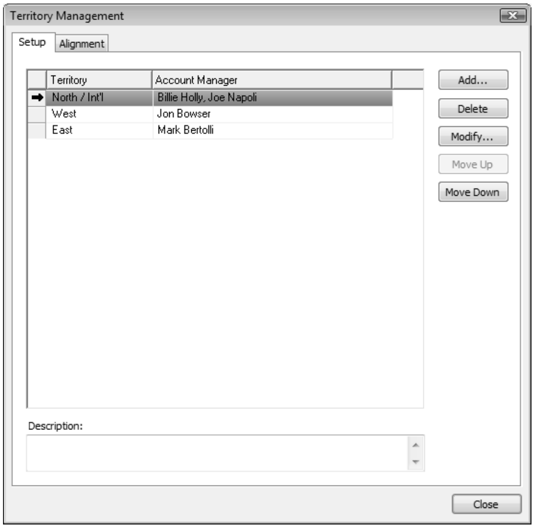
When you set up a territory, you can define rules that an Address Book entry must match to be assigned to the territory during an alignment. To build the rules, use fields such as City, Country, State/Province and Zip/Postal Code. You can also use user-defined fields.

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.

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

The Territory Management dialog box opens.



2 Click ***Add***.

The Add/Modify Territory dialog box opens.

3 Enter a territory name and a description of the territory.

4 Next to the ***Account Manager*** field, click the ellipsis, and select account managers for the territory from the list of available users.

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.

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

Assign a Territory to an Address Book Entry

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

Users with the Sales Manager role can always manually assign territories. When a sales manager assigns a territory, “Set by manager” is displayed in the Territory Status field.

Users without the Sales Manager role can manually assign territories while creating new Address Book entries. 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.

Users can always manually assign territories for Address Book entries to which they are assigned as account managers.

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

1. Select the Address Book entry to which you want to assign a territory.
2. In the Details following pane, click the ***Edit*** button below the entry’s name.
3. If necessary, from the ***Key Fields for*** drop-down list, select a Key Fields list that contains the Territory and Account Manager fields.

   By default, the Territory and Account Manager fields are included in the <Default Key Fields> list.
4. From the ***Territory*** drop-down, select the territory you want to assign to the entry.

   The Territory status field now indicates that the territory is “Set by manager” or “Set by user”.
5. Next to the ***Account Manager*** field, click the ellipsis, and select account managers for the entry from the list of available users.
6. Click ***OK***.

Align Territories

To complete this procedure, you must have the Sales Manager role.

Sales managers 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".

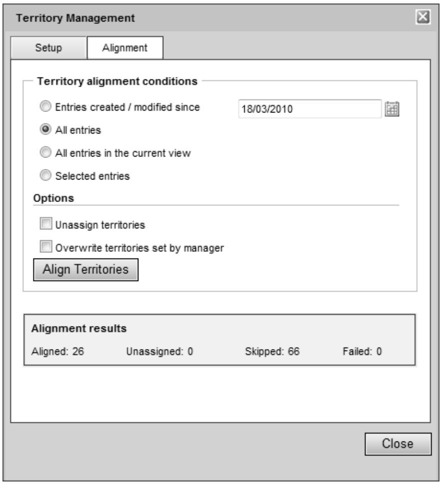
The value "Set by rule (unaligned)" is displayed in the Territory Status field when:

- 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.

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***.



Draw a Map of an Address Book Entry

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.

You can also click an entry's address in the Address Book Details following pane to go directly to a map of the address.

1. Click on the Address Book entry, opportunity, or customer service case to make it the current entry.

   – or –

   Open the opportunity, or customer service case.

2. Select ***Actions > Draw a Map***.

   – or –

   Right-click and select ***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***.

Phoning Address Book Entries

With Maximizer, you can track incoming and outgoing phone calls to Address Book entries. Depending on your logging preferences, notes may be automatically saved to the entries associated with the calls and to the Phone Log.

Users can transfer incoming calls to other users. If a note is logged for the phone call, the note includes the transfer information.

During the phone call, you can modify fields in the Address Book entry and the changes are logged directly in the phone note.

Phone an Address Book Entry

You can track outgoing phone calls from the Address Book, Opportunities, Customer Service, or Hotlist page. When you phone an Address Book entry from Maximizer, you can take notes while the call is timed. Depending on your logging preferences, an outgoing call note is automatically saved to the Address Book entry, customer service case, or opportunity associated with the call. In the Hotlist page, the note is saved to the Address Book entry associated with the appointment or task.

In the Hotlist page, you can log a phone call only from an appointment or task associated with a single Address Book entry.

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

1. Click on the Address Book entry, opportunity, customer service case, Hotlist task, or appointment to make it the current entry.

   – or –

   Open the opportunity or customer service case.

2. Select ***Actions > Make a Call***.

   – or –

   In the Address Book page, right-click and select ***Phone > Make a Call***.

   – or –

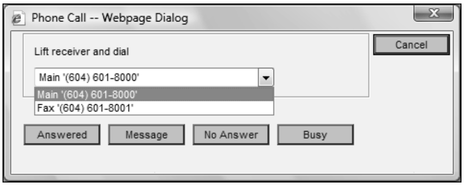
   In the Details following pane for an Address Book entry, click the ***make a call*** icon next to the entry's phone numbers.

3. Select the phone number that you are calling, and click one of the buttons at the bottom of the dialog box to select a response.

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

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

If you select ***Answered***, the Phone dialog box opens timing the duration of the phone call.



4 In the ***Subject*** field, enter a subject for the phone call, and record notes on your call as you talk.

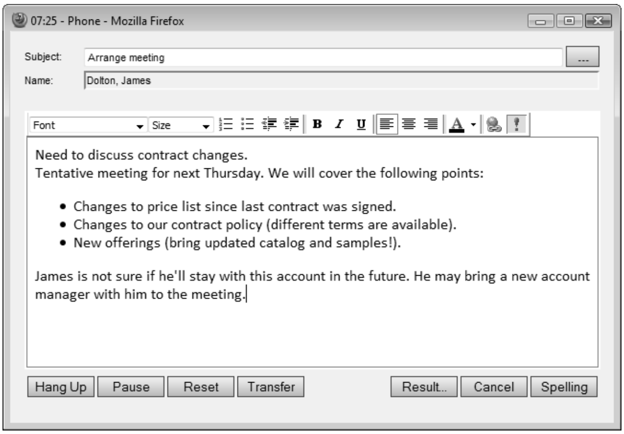
You can continue to work in Maximizer as you are logging the phone call.

If you are logging the phone call from the Address Book page, changes to user-defined fields and some basic fields in the Address Book entry are automatically added to the phone note.

5 When the phone call is finished, click ***Hang Up***.

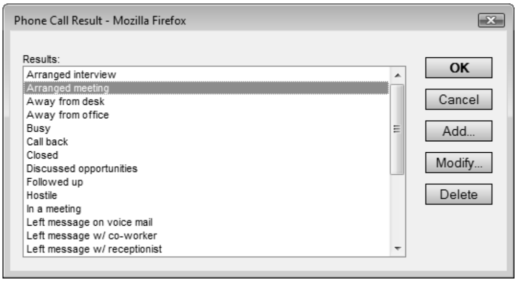
You can click Transfer and select another Maximizer user to log the transfer in the note.

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.

Receive a Phone Call

You can track incoming phone calls from the Address Book, Opportunities, Customer Service, or Hotlist page. When you receive a phone call in Maximizer, an incoming call note is automatically saved to the Address Book entry, customer service case, or opportunity associated with the call. In the Hotlist page, the note is saved to the Address Book entry associated with the appointment or task.

In the Hotlist page, you can log a phone call only from an appointment or task associated with a single Address Book entry.

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

1. Click on the Address Book entry, opportunity, customer service case, Hotlist task, or appointment to make it the current entry.

   – or –

   Open the opportunity or customer service case.

2. Select ***Actions > Receive a Call***.

   – or –

   In the Address Book page, right-click and select ***Phone > Receive a Call***.

3. In the ***Subject*** field, enter a subject for the phone call, and record notes on your call as you talk.

   You can continue to work in Maximizer as you are logging the phone call.

   If you are logging the phone call from the Address Book page, changes to user-defined fields and some basic fields in the Address Book entry are automatically added to the phone note.

4. When the phone call is finished, click ***Hang Up***.

You can click Transfer and select another Maximizer user to log the transfer in the note.

5. 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.

6. Select whether or not you want to schedule a follow-up activity.

   If you select ***Yes***, specify the properties of the follow-up activity.

Enable Logging for Phone Calls

When logging is enabled for phone calls, Incoming call and Outgoing call notes are created when you phone or receive calls from entries in Maximizer.

1. In the top-right corner of the page, click ***Preferences***.

   The Personal Preferences dialog box opens.

2. Click ***Other Preferences***.

   The Preferences dialog box opens to the Calendar/Hotlist tab.

3. Select the ***Logging*** tab.

4. Under ***Phone calls***, specify how you want to log phone calls.

   - ***Notes and phone log –*** Saves phone notes to the entry associated with the phone call. You can view phone notes from the phone log.
   - ***Journal –*** Saves phone notes to the Journal.
   - ***Both –*** Saves phone notes to the entry associated with the phone call and to the Journal.

   The Journal is available only in Maximizer, not in Maximizer. Journal notes are not created from phone calls in Maximizer.

5. To display the Phone Call Results dialog box automatically every time you log a phone call, select ***View result table on hang-up***.

6. Click ***OK***.

7. Click ***Save*** to save the changes to the preferences.

View the Phone Log

Use the Phone Log to view a history of your phone calls recorded in Maximizer to and from Address Book entries. By default, the Phone Log displays phone calls for the current day, but you can choose to view a list of calls for any other date. You must have phone call logging set to “Notes and phone log” in your logging preferences for phone calls to be displayed in the Phone Log.

From the Phone Log, you can retrieve the entries associated with selected phone calls to display the entries in the Address Book, Opportunities, or Customer Service page and record additional phone calls with the entries.

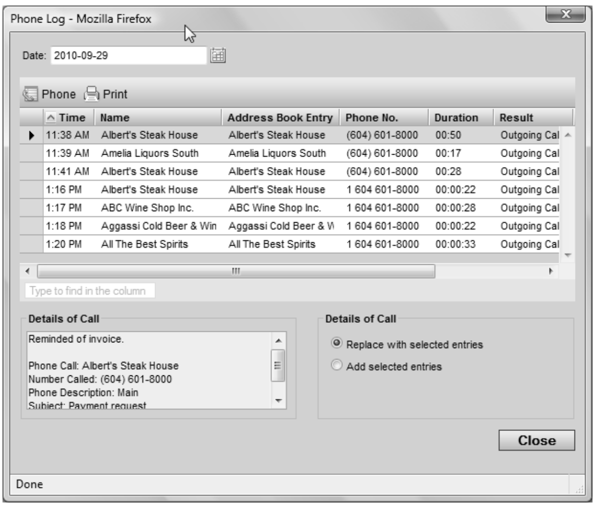
You can view the Phone Log from the Address Book, Opportunities, Campaigns, Customer Service, Knowledge Base, Hotlist, or Calendar page.

- Select ***View > Phone Log***.

  The Phone Log dialog box opens displaying the phone calls for the current user on the current date.

  - In the ***Date*** field, select a date to change the day for which phone calls are displayed.
  - Select entries in the list and click ***Phone*** to display the entries associated with the phone calls in the Address Book, Opportunities, or Customer Service page and record additional phone calls with the entries.

    Depending on the option selected in the ***Modify entry list*** area, the entries either are added to the current list or replace the current list in the main page.



CHAPTER 3

Maximizer Entries

Manage All Types of Information

In this chapter...

User-Defined Fields

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

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

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

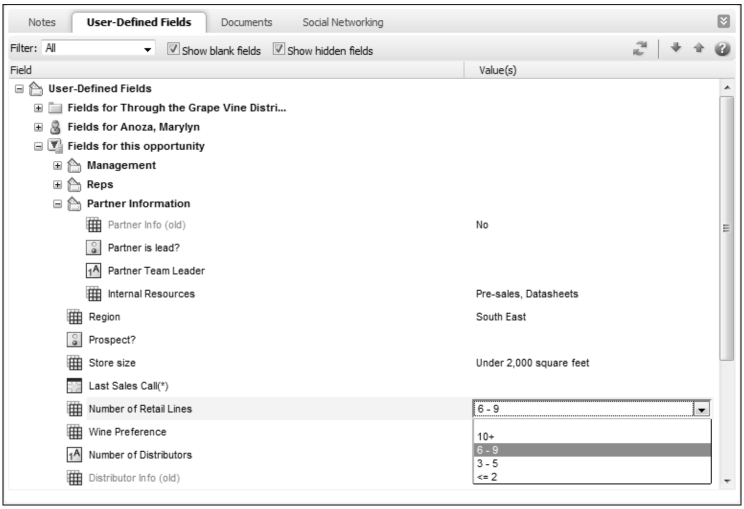
user-defined field with the “single value only” attribute, only one value can be selected from the list.

- ***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.

User-Defined Fields Pane

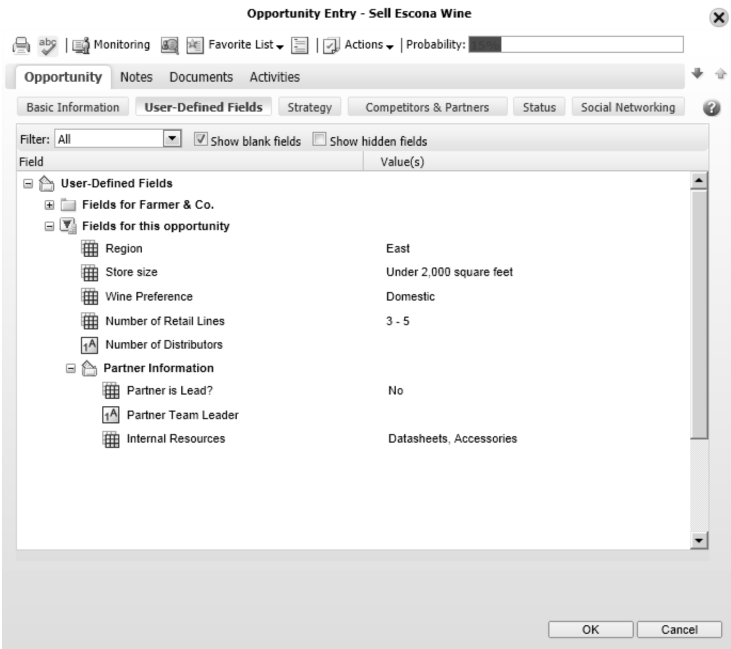
User-defined fields for the current Address Book entry, opportunity, campaign, or customer service case are displayed in the User-Defined Fields pane below the main list of entries.

In the Hotlist page, the User-Defined Fields pane displays fields for the Address Book entry associated with the selected task or appointment. User-defined fields are displayed for an appointment only if a single Address Book entry is associated with the appointment.



User-Defined Fields Tab

You can access user-defined fields for open 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.



Working with User-Defined Fields

Keep the following points in mind while you work in the User-Defined Fields pane or the User-Defined Fields tab in an open entry:

1. User-defined fields are displayed in a tree view, where fields are nested within folders.
2. Click in the ***Value(s)*** column next to a field to add or modify a user-defined field value.
3. Use the options in the ***Filter*** drop-down list to display only specific types of user-defined fields, for example table or formula fields.
4. When you select the ***Show blank fields*** option, all user-defined fields in the Address Book for the type of entry are displayed.

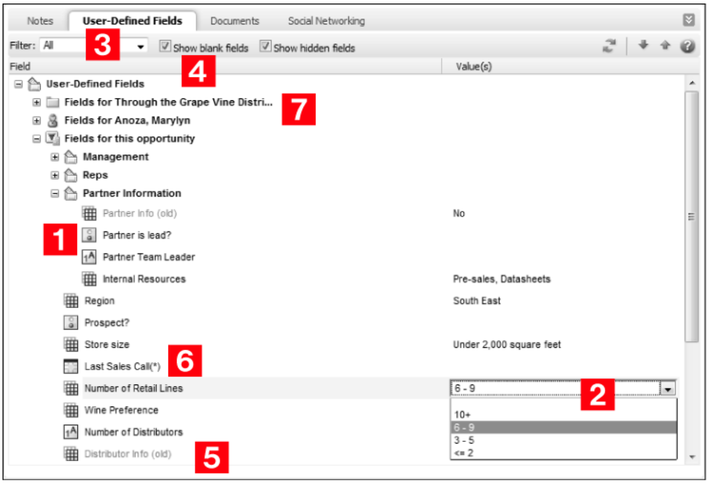
When you clear this option, only the fields with existing values are displayed.

5 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.

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

7 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, or with a red border.
- ***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 of the fields in Key Fields lists are system fields. As well, some fields in the User-Defined Fields tab are system fields. They are shown in bold, black text.

- ***Key Fields –*** These fields are displayed in an entry's Basic Information tab. Key Fields lists contain system fields and user-defined fields. They are defined by your system administrator in the Key Fields preferences in Administrator.

View User-Defined Fields for an Entry

1. In the Address Book, Opportunities, Customer Service, or Campaigns page, select the entry.
2. Select the ***User-Defined Fields*** pane.

   The user-defined fields for the current entry are displayed.
3. If necessary, select ***Show blank fields*** or ***Show hidden fields*** to display the empty or hidden fields.

Add a Value to a User-Defined Field

You can specify values for user-defined fields in the User-Defined Fields pane or in the User-Defined Fields tab of an open entry.

1. Click on the entry to make it the current entry.

   – or –

   Open the entry.
2. Select the ***User-Defined Fields*** pane or the ***User-Defined Fields*** tab.
3. If necessary, select ***Show blank fields*** to display the user-defined fields without values.
4. If necessary, open the folder containing the user-defined field.
5. Next to the user-defined field you want to edit, click in the ***Value(s)*** column.
6. Specify a value for the user-defined field.
   - ***Alphanumeric and numeric fields –*** Type the value.
   - ***Single-value table or yes/no fields –*** Select a value from the drop-down list.

- ***Multi-value table fields* –** Click the ellipsis, select checkboxes next to values, and click ***OK***.
- ***Date fields* –** Click the calendar icon and select a date.

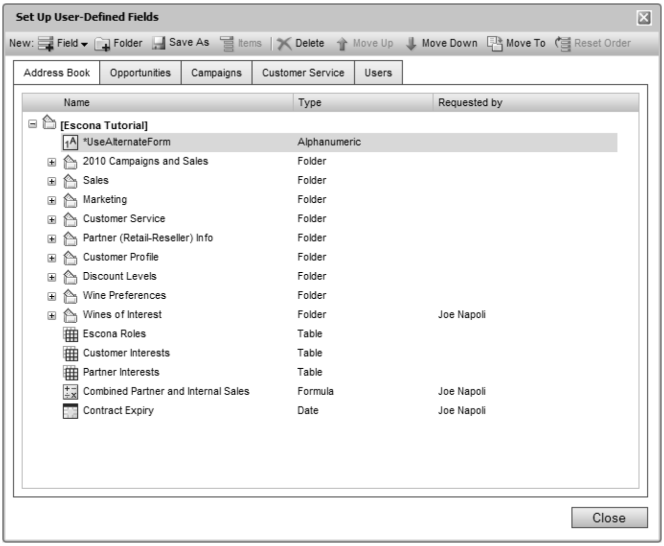
7 If you are working in an open entry, click ***OK*** to save the changes.

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 tabs for each category of user-defined field. The user-defined field structure can 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.



Sorting User-Defined Fields

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

Click the Move Up and Move Down buttons to move a field or folder up or down in the list. These buttons move fields only within their current folder level. You cannot use them to move items in or out of folders. You can select a folder and click the Reset Order button to sort any user-defined fields and folders in the folder in alphabetical order.

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***.

Create a Folder 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.

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

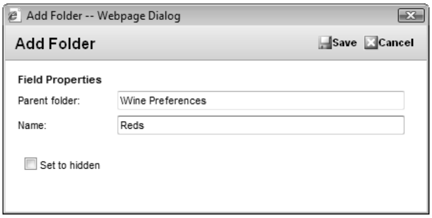
   The Set Up User-Defined Fields dialog box opens.
2. Select the tab for the category of user-defined fields you want to work with.
3. To create a top-level folder, select the Address Book name at the top of the list.

   – 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 (/ \ ).



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

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

Create a User-Defined Field

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.

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 –

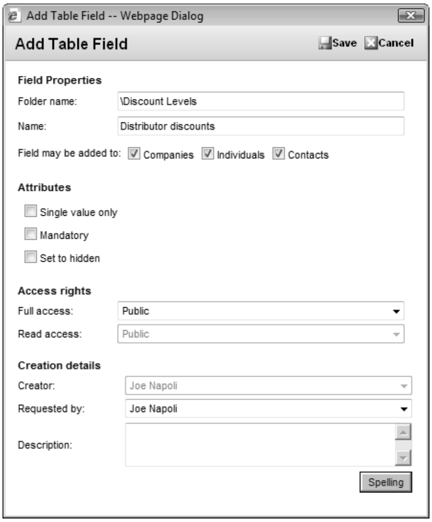
   Select a user-defined field to create the new field at the same level as the selected field.
4. Click ***Add Field***, and select the type of user-defined field you want to add.
5. In the ***Name*** field, type a name for the user-defined field.
6. If you are adding a formula user-defined field, enter the formula in the ***Formula*** field.

   Click ***Insert Field*** to add basic or user-defined fields to the formula.
7. Specify the properties of the user-defined field.
8. Click ***Save***.

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

You cannot insert other formula user-defined fields into the formula.

The user-defined field is added to the list.



Modify a User-Defined Field

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

Add Items to a Table User-Defined Field

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

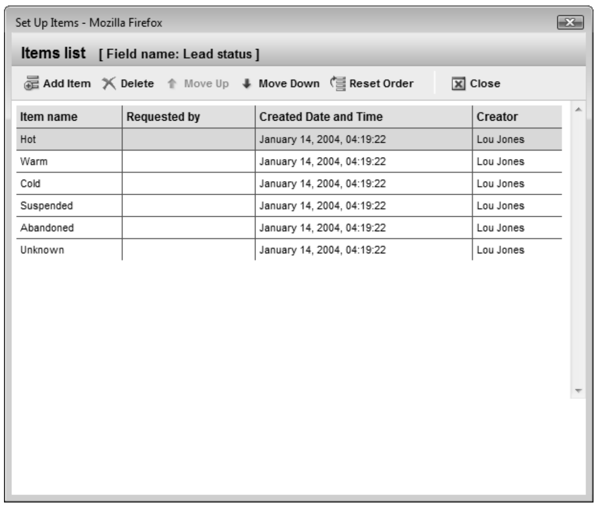
1. In the left navigation pane, hover your mouse over ***Administration***, and select ***Set Up User-Defined Fields*** from the pop-up.

   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.

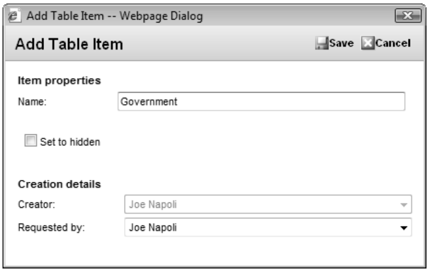
3. Click ***Add Item***.



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

5. Click ***Save***.

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



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

Modify an Item in a User-Defined Field

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.

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.

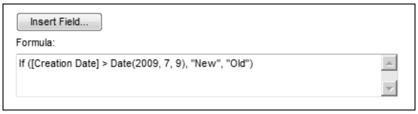
4 Modify the properties of the item.

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 cannot insert other formula user-defined fields into 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.

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 multiply 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

Any formula that supplies an invalid date to the Date function will result in a blank value. For example, the function "Date (2012, 4, 31)" is invalid since the month of April does not have 31 days. If this function is part of a larger compound expression, the entire expression will evaluate to blank.

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(Not(Search("Canada",[Country])>0 Or Search("USA",[Country])>0 Or
Search("Mexico",[Country])>0),"Other","North America")
```

This example inspects the Country field of an Address Book entry to determine if the entry is located in North America or not. It uses the alphanumeric Search function to look for the countries “Canada”, “USA”, or “Mexico”. If none of those strings are found in the entry's Country field, the formula evaluates to “Other”, but if one of those strings is found it outputs “North America”.

Example 3

```
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 a different set of default entries.

Modify a Default Entry

1. Select ***Edit > Default Entry***.

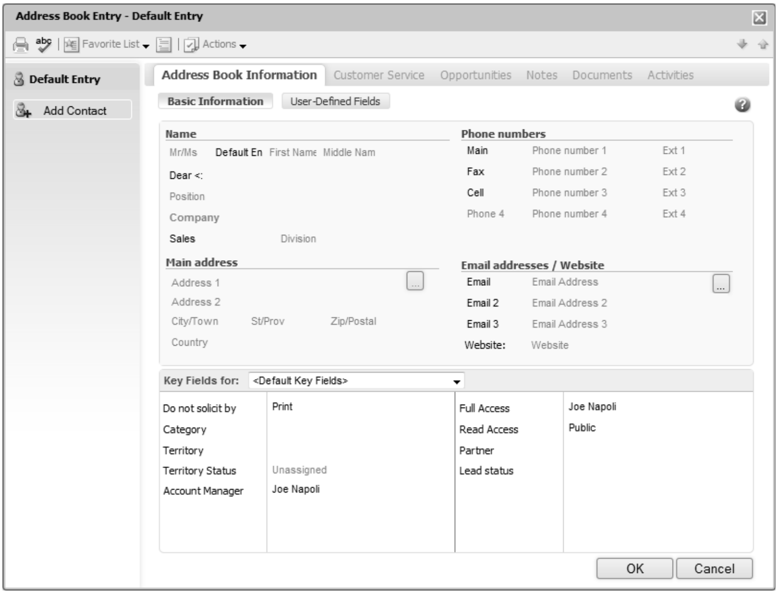
   The dialog box for the default entry opens.

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 ***Strategy*** 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 ***OK*** 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.

Search for Entries by a Field

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.

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.

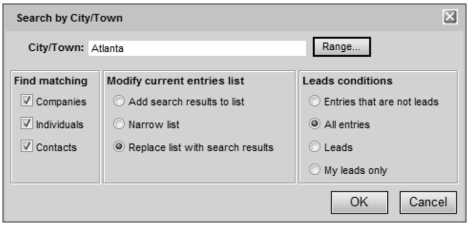
2. Specify the search criteria.

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.



Advanced Search

Maximizer's Advanced Search 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 Advanced Search dialog box, you can build complex search arguments and even save your search in the catalog for later use.

Use the Advanced Search 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 associated with the Address Book entries matching the field values.

1 Select ***Search > Advanced Search***.

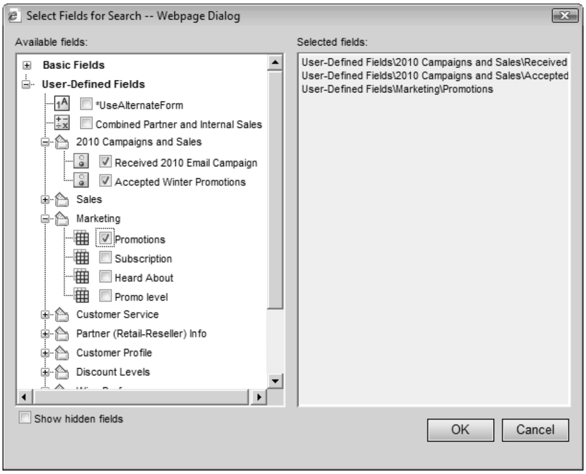
The Advanced Search dialog box opens.

2 Click ***Add.***

The Select Fields for Search dialog box opens.

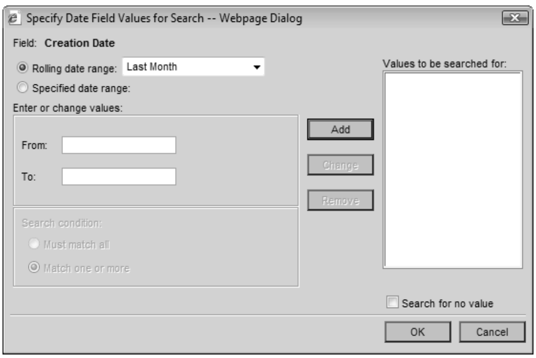
3 Select one or more fields and click ***OK***.

To be able to select more than one field, you must have the Allow multi-selection in the Advanced Search 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 Advanced Search 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.

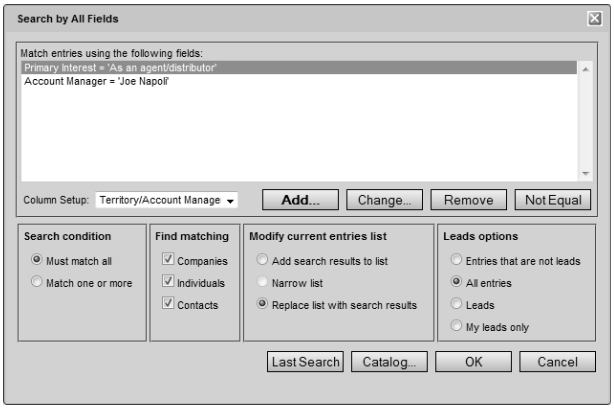
6 In the ***Modify current entries list*** area, select one of the options.

- ***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.



Search for Entries 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.

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.

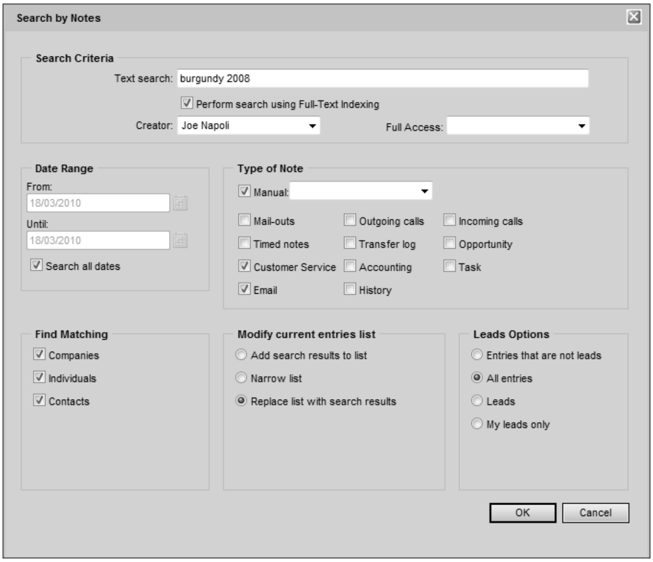
  If your system administrator has enabled full-text search, the ***Perform search using Full-Text Indexing*** checkbox is available. This option provides faster, and often more accurate, results. For more information, refer to the *Maximizer CRM Administrator's Guide* or your system administrator.

- 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.



Search for Entries by Documents

To complete this procedure, full-text search must be enabled for your database. For more information about full-text search, refer to the Maximizer CRM Administrator's Guide or your system administrator.

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

Your search criteria can specify text in the body of documents. Full-text search works for the following types of documents: .DOC, .XLS, .PPT, .TXT, and .HTM. You may also be able to search by .RTF, .XML, .PDF, and other files types, if your system administrator has configured full-text search for these types of files. You cannot run full-text search for Maximizer documents (.ETF), email messages, or hyperlinks.

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.

  The search returns only entries containing full words specified in the search text. If you search for text that is included in part of a word, the search does not return entries that contain that word. For example, if you search for "hedge", only entries containing the word "hedge" are returned. Entries containing the word "hedgehog" are not returned.

- 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.

Undo the Most Recent Search

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

- Select ***Search > Undo Search***.

  The entries in the current list are replaced with the entries in the previous list.

Search Catalog

The search catalog stores advanced searches so that you can retrieve the searches at a later time. Each saved search stores all of the information set up in the Advanced Search dialog box. 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.

Catalog searches are integrated with different features in Maximizer, including the following features:

- Retrieve entries from a saved search automatically when you first open the Address Book page.
- Subscribe Address Book entries retrieved from a saved search to new automated campaigns.
- Link a dashboard indicator to a catalog search.
- Link an icon on the Quick Search toolbar to a saved search.

Save a Search in the Search Catalog

You can save values in the Advanced Search 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.

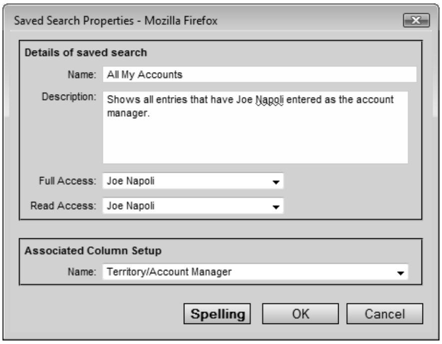
1. Select ***Search > Advanced Search***.

   The Advanced Search dialog box opens.
2. Enter your search criteria.
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.

     To select a column setup created by another user, you may first need to select ***Show All Column Setups*** at the top of the drop-down list.
5. Click ***OK***.

   The search is added to the search catalog.



Retrieve a Search from the Search Catalog

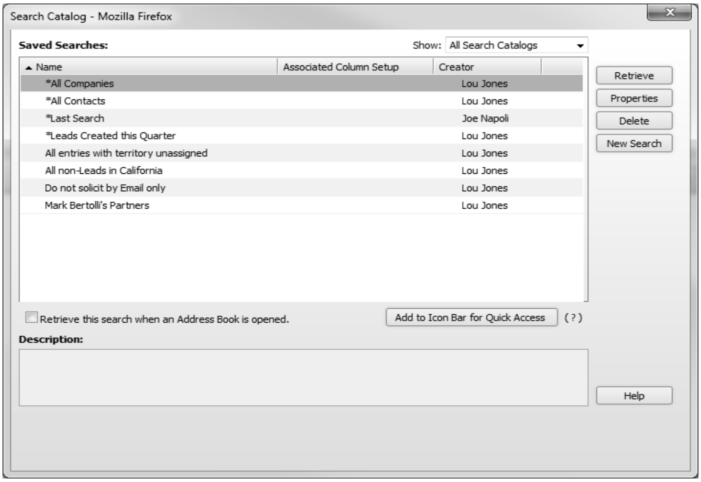
You can access saved searches from the Search Catalog dialog box. If the saved search has a column setup associated with it, the column setup is automatically displayed when the search is retrieved.

1. Select ***Search > Search Catalog***.

   The Search Catalog dialog box opens.
2. If necessary, from the ***Show*** drop-down list, select ***My Search Catalogs*** or ***All Search Catalogs*** to change the list of saved searches displayed.

   Click ***Add to Icon Bar for Quick Access*** to add the selected search catalog to your Quick Access toolbar.

3 Select the saved search, and click ***Retrieve***.



Retrieve a Recent Search from the Search Catalog

You can retrieve a recent search directly from the Search menu. If the saved search has a column setup associated with it, the column setup is automatically displayed when the search is retrieved.

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

Retrieve a Search Automatically

In the Address Book page, you can specify a default search from the Search Catalog. When you log in to Maximizer and open the Address Book page, the search is automatically run and the entries are displayed in the list.

When you set a default search, the “Ask at Address Book startup which list to view” option is cleared in the preferences, so you are not prompted to select an Address Book list when you first log in. If you also select a default Favorite List to retrieve when you log in, the option you select last takes priority over the option selected earlier.

1 In the Address Book page, select ***Search > Search Catalog***.

The Search Catalog dialog box opens.

2 If necessary, from the ***Show*** drop-down list, select ***My Search Catalogs*** or ***All Search Catalogs*** to change the list of saved searches displayed.

3. Select the saved search.
4. Select ***Retrieve this search when an Address Book is opened.***
5. Click ***Close*** to close the Search Catalog dialog box.

Global Edits

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

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

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

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

Modify Multiple Entries

To complete this procedure, you must have the Allow Global Edit privilege.

You can use the Global Edit command to modify multiple entries at once.

1. Create a list of entries to modify.

   – or –

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

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

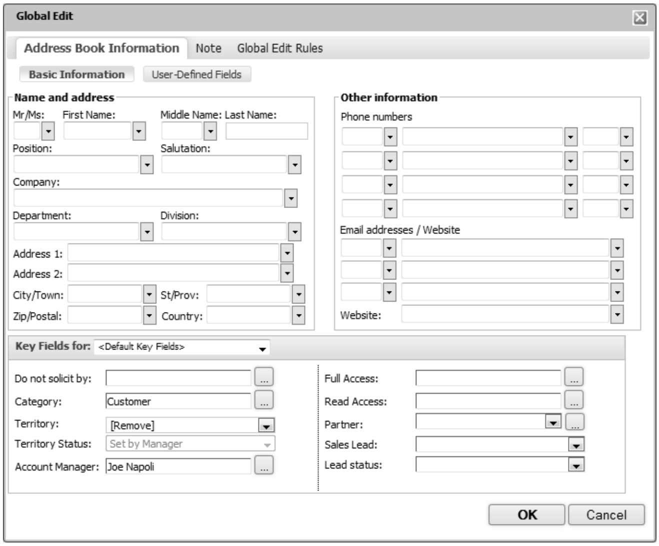
2. Select ***Edit > Global Edit***.

   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 ***Strategy***, ***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.

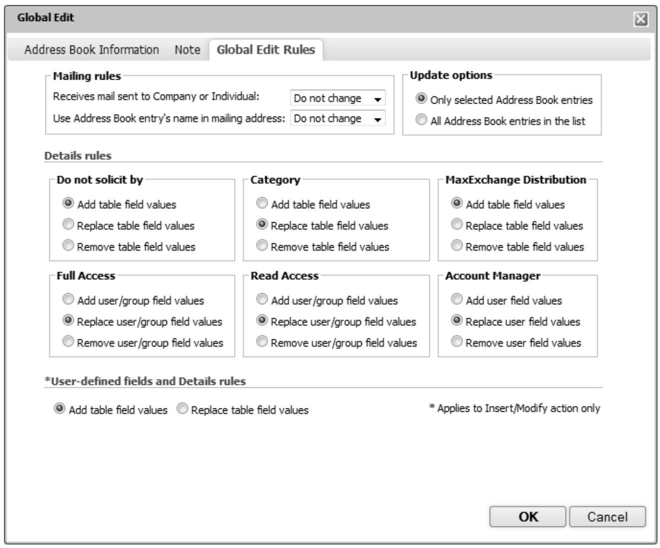
6. Under ***Update options***, specify how you want to use the current list.

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***.
- 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.

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.



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

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

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

Add Values to a Field in Multiple Entries

To complete this procedure, you must have the Allow Global Edit privilege.

You can use the Global Edit command to add specific values to fields in multiple entries at a time without replacing the existing values. This procedure applies to multiple-value table user-defined fields and to system fields that can take multiple values, such as products/services and categories.

1. Create a list of entries to modify.

   – or –

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

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

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

   The Global Edit dialog box opens.

3. If necessary, select a Key Fields list that contains the field or select the ***User-Defined Fields*** tab.

4. Locate the field, and select the value to add to the entries.

   If you are updating a user-defined field, ensure you select the value in the ***Insert/Modify*** column.

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

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

7. If you are updating a system field, under ***Detail Rules***, locate the field name and select ***Add table field values***.

   If you are updating a user-defined field, this option should be selected by default.

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

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

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

Remove Values from a Field in Multiple Entries

To complete this procedure, you must have the Allow Global Edit privilege.

You can use the Global Edit command to remove values from specific fields in multiple entries at a time. For fields that can take multiple values, you can select the specific values to remove from the fields. For most other fields, you can choose to remove all content from the fields.

1. Create a list of entries to modify.

   – or –

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

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

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

   The Global Edit dialog box opens.

3. Locate the field.

   - If you are removing values from a basic field, locate the field in the Basic Information tab.
   - If you are removing values from a user-defined field, select the ***User-Defined Fields*** tab and locate the field.
   - If you are removing values from any other system field, select a Key Fields list that contains the field.

4. Select ***[Remove]*** or select the specific values to remove from the field.

   - For single-value system fields, click the arrow next to the field and select ***[Remove]***.
   - For multiple-value system fields, select the specific values to remove from the fields.
   - For single-value user-defined fields, click in the ***Remove*** column next to the field, and select ***Remove***.
   - For multiple-value table user-defined fields, click in the ***Remove*** column, and select the specific values to remove from the fields.

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

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

7. If necessary, under ***Detail Rules***, locate the name of the field, and select ***Remove table field values***.

   This step is required if you are updating the "Products/Services" or "Categories" fields in opportunities or customer service cases and the "Do not solicit by", "Category", "Account Manager", "Full Access", or "Read Access" fields in Address Book entries.

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

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

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

Add a Note to Multiple Entries

To complete this procedure, you must have the Allow Global Edit privilege.

You can use the Global Edit command to add a note to multiple entries at a time.

1. Create a list of entries to modify.

   – or –

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

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

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

   The Global Edit dialog box opens.

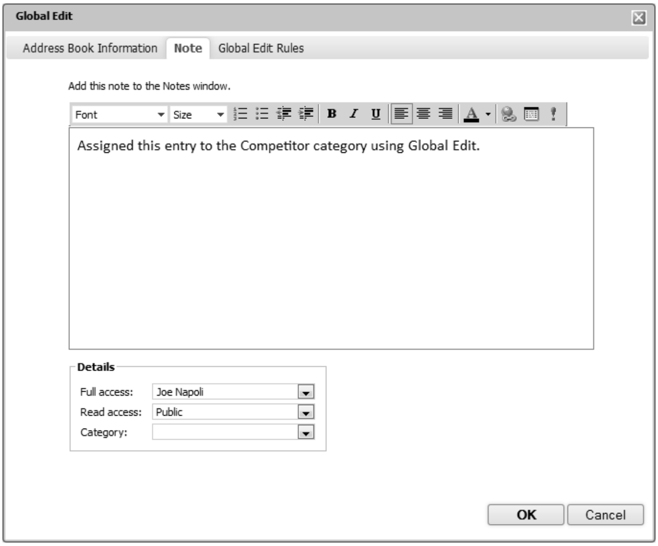
3. Select the ***Note*** tab.

4. Enter the content of the note.

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

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

6. 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.



7. Select the ***Global Edit Rules*** tab.
8. Under ***Update options***, specify how you want to use the current list.
9. Click ***OK*** to save the changes.

   You are prompted with a message to verify that you want to continue with the operation.
10. Click ***OK*** to run the global edit.

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 add shortcuts to your Favorite Lists to the Quick Access toolbar for one-click access to your frequently-used lists. You can also add and remove entries from existing Favorite Lists to keep track of changes to the list.

Create a Favorite List

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.

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.

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

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.

To select a column setup created by another user, you may first need to select ***Show All Column Setups*** at the top of the drop-down list.

5 Click ***OK***.

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

Retrieve a Favorite List

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, Customer Service, and Opportunities pages.

1 Select ***View > Favorite Lists***,.

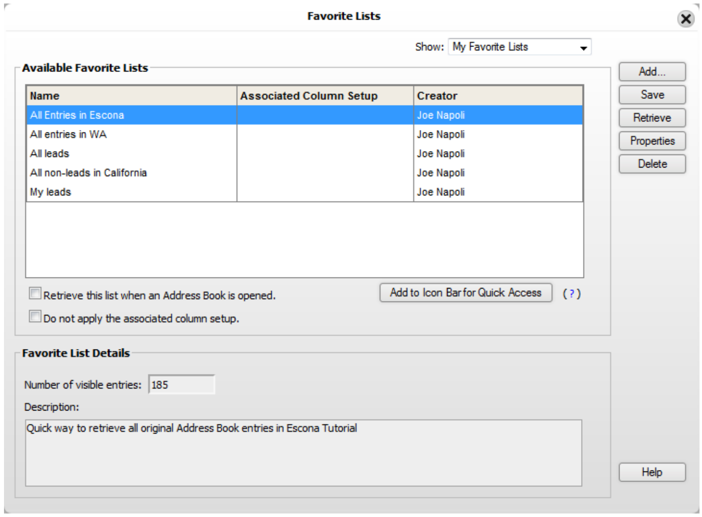
– or –

Select ***View > Recent Favorite Lists***, and select a Favorite List that you have recently accessed.

2 If necessary, from the ***Show*** drop-down list, select ***My Favorite Lists*** or ***All Favorite Lists*** to change the list of Favorite Lists displayed.

Click ***Add to Icon Bar for Quick Access*** to add the selected Favorite List to your Quick Access toolbar.

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



Retrieve a Favorite List Automatically

In the Address Book page, you can select a default Favorite List. When you log in to Maximizer and open the Address Book page, entries from the Favorite List are displayed in the list.

When you set a default Favorite List, the "Ask at Address Book startup which list to view" option is cleared in the preferences, so you are not prompted to select an Address Book list when you first log in. If you also select a default search to run when you log in, option you select last takes priority over the option selected earlier.

1 In the Address Book page, select ***View > Favorite Lists.***

2 If necessary, from the ***Show*** drop-down list, select ***My Favorite Lists*** or ***All Favorite Lists*** to change the list of Favorite Lists displayed.

3 Select the Favorite List.

4 Select ***Retrieve this list when an Address Book is opened***.

5 Click ***Close*** the close the dialog box.

Add or Remove Entries in a Favorite List

You can add entries from Favorite Lists and remove entries from Favorite Lists in the Address Book, Customer Service, and Opportunities pages. You can add or remove a single entry, or you can select multiple entries to add or remove all of the entries at the same time.

1. Click on the entry to make it the current entry.

   – or –

   Open the entry.

   – or –

   Select the entries.

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

2. Select ***View > Add to Favorite List*** or ***Remove from Favorite List***.

   – or –

   Right-click and select ***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***.

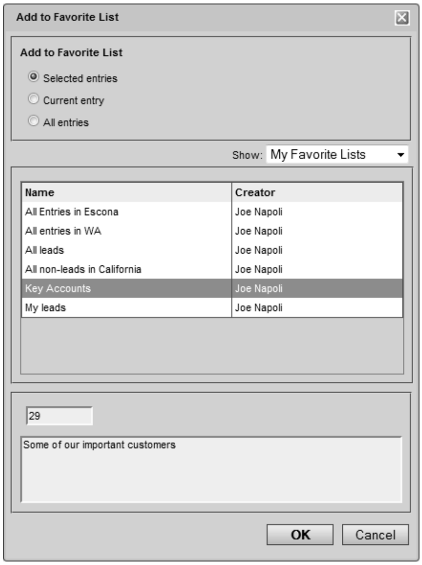
   The Add to Favorite List or Remove from Favorite List dialog box opens.

3. If necessary, from the ***Show*** drop-down list, select ***My Favorite Lists*** or ***All Favorite Lists*** to change the list of Favorite Lists displayed.

4. 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.

5 Click ***OK*** to save the changes to the Favorite List.



View a List of Favorite Lists for an Entry

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

1 Open the entry.

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

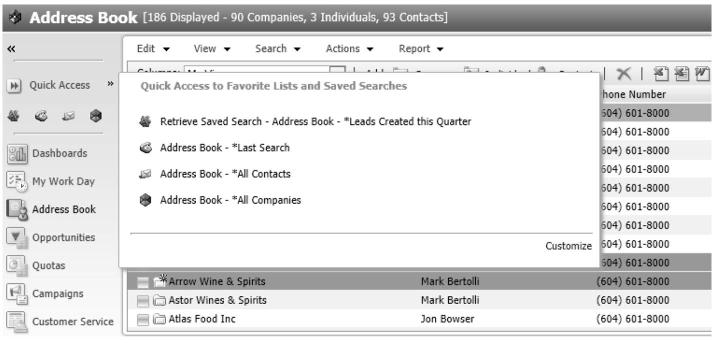
The View Favorite Lists dialog box opens listing all the Favorite Lists that the current entry belongs to.

Quick Access Toolbar

The Quick Access toolbar provides one-click access to your most frequently-used saved searches and Favorite Lists. The Quick Access toolbar allows you to add shortcuts to your saved searches and Favorite Lists from any Maximizer CRM module, and you can access the Quick Access toolbar from any page in Maximizer CRM.

When you select a Quick Access toolbar shortctut, Maximizer CRM automatically switches to the appropriate page and retrieves the associated saved search or Favorite List. For example, if you are viewing the Calendar page and you select a Quick Access toolbar shortcut for a saved search from the Address Book search catalog, the Address Book page opens automatically and all Address Book entries matching the search are displayed.

You can also customize the way that shortcuts to your Favorite Lists and saved searches appear in the Quick Access toolbar by associating an icon with the shortcut, specifying a custom label, and choosing the order in which the shortcuts appear.



Add a Saved Search to the Quick Access Toolbar

You can add a saved search to your quick access toolbar from the Search Catalog dialog. When adding a saved search to the Quick Access toolbar you can choose how you want the saved search to appear in the toolbar by specifying a name and icon for the shortcut.

You can add saved searches from the Search Catalog dialog in the Address Book, Campaigns, Customer Service, and Opportunities pages.

1. Select ***Search > Search Catalog***.
2. Select the saved search that you want to create a shortcut for and click ***Add to Icon Bar for Quick Access***.

If necessary, from the ***Show*** drop-down list, select ***My Search Catalogs*** or ***All Search Catalogs*** to change the list of saved searches displayed.

3. Enter a ***Name*** and select an ***Icon*** for the new Quick Access toolbar shortcut, and click ***Save***.

   The shortcut is added to the Quick Access toolbar.

Add a Favorite List to the Quick Access Toolbar

You can add a Favorite List to your quick access toolbar from the Favorite Lists dialog. When adding a Favorite List to the Quick Access toolbar you can choose how you want the Favorite List to appear in the toolbar by specifying a name and icon for the shortcut.

You can add Favorite Lists from the Favorite Lists dialog in the Address Book, Customer Service, and Opportunities pages.

1. Select ***View > Favorite Lists***.
2. Select the Favorite List that you want to create a shortcut for and click ***Add to Icon Bar for Quick Access***.

   If necessary, from the ***Show*** drop-down list, select ***My Favorite Lists*** or ***All Favorite Lists*** to change the list of Favorite Lists displayed.
3. Enter a ***Name*** and select an ***Icon*** for the new Quick Access toolbar shortcut, and click ***Save***.

   The shortcut is added to the Quick Access toolbar.

Retrieve a Favorite List or Saved Search with the Quick Access Toolbar

Using the Quick Access toolbar, you can retrieve a saved search or Favorite List with a single click. When you select a Quick Access toolbar shortctut, Maximizer CRM automatically switches to the corresponding page and retrieves the saved search or Favorite List.

1. Click the icon in the Quick Access toolbar that is associated with the saved search or Favorite List that you want to retrieve.

   -or-

   Hover your mouse over the Quick Access toolbar and select one of the shortcuts in the window that appears.

   The appropriate page opens and the list of entries is displayed.

Customize the Quick Access Toolbar

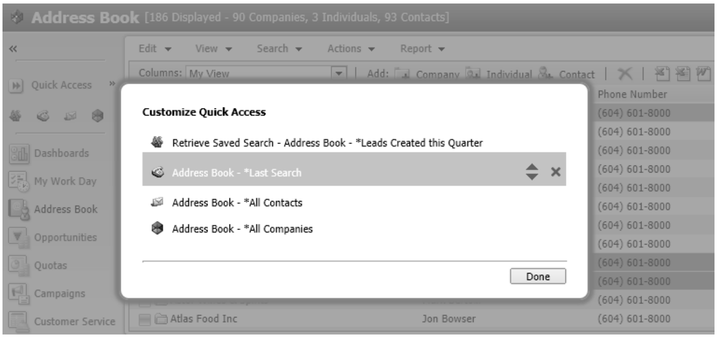
You can customize the way that shortcuts to your Favorite Lists and saved searches appear in the Quick Access toolbar by changing the order in which the shortcuts appear and removing shortcuts that you no longer need.

1. Click or hover your mouse over the arrow icon next the Quick Access toolbar.

   A window appears displaying a list of your Quick Access shortcuts.

2. Click the ***Customize*** link in the bottom-right corner of the window.

   The Customize Quick Access window appears.



3. Hover your mouse over a shortcut in the list to reveal the up/down and delete controls.

4. Click the up or down arrows to move the shortcut to a new location in the list.

   -or-

   Click the ***X*** icon to remove the shortcut from the list.

5. Click ***Done***.

   Your changes to the Quick Access toolbar are saved.

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.

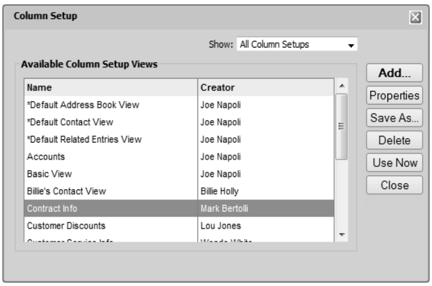
After creating a column setup, you can associate it with a saved search in the search catalog or with a Favorite List. The column setup is automatically displayed whenever the saved search or Favorite List is retrieved.

Create a Column Setup

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.

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.

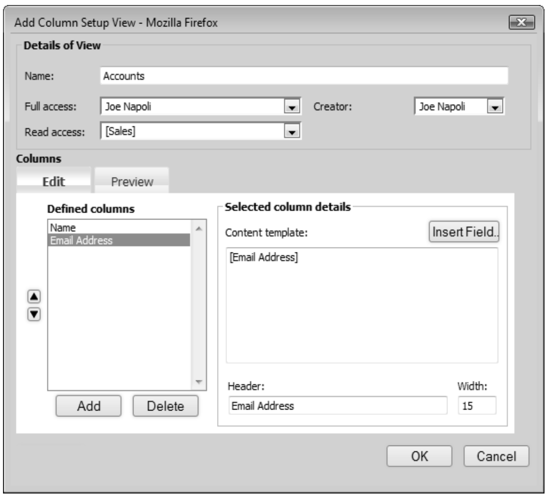
You can repeat this step to add multiple fields to the selected column.

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.

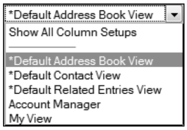


Retrieve a Column Setup

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

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

  To select a column setup created by another user, you may first need to select ***Show All Column Setups*** at the top of the drop-down list.



- Select ***View > Column Setups***. Then, select the column setup, and click ***Use Now***.

  To select a column setup created by another user, you may first need to select ***Show All Column Setups*** at the top of the drop-down list.

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.

The colors of current and selected entries override the colors in coloring rules.

Create a Coloring Rule

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

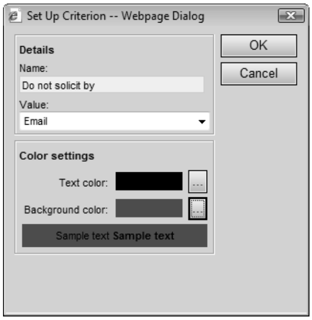
1. Select ***View > Coloring Rules***.
2. Click ***Add***.

   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***.

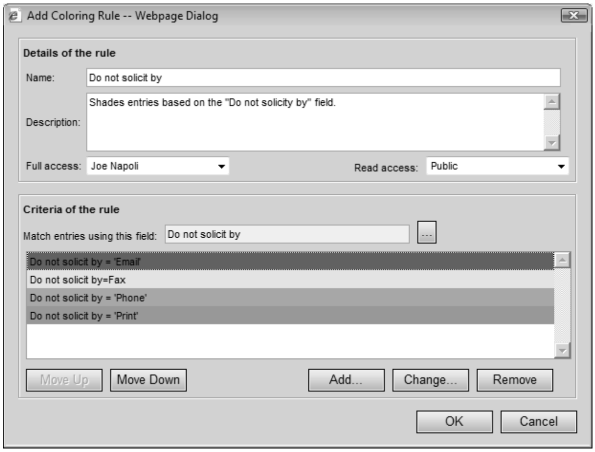
   The Set Up Criterion dialog box opens.
7. Select a ***value*** for the field, choose ***text*** and ***background*** colors, and click ***OK***.

   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.



Apply a Coloring Rule

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.

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

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.

Hotlist Page

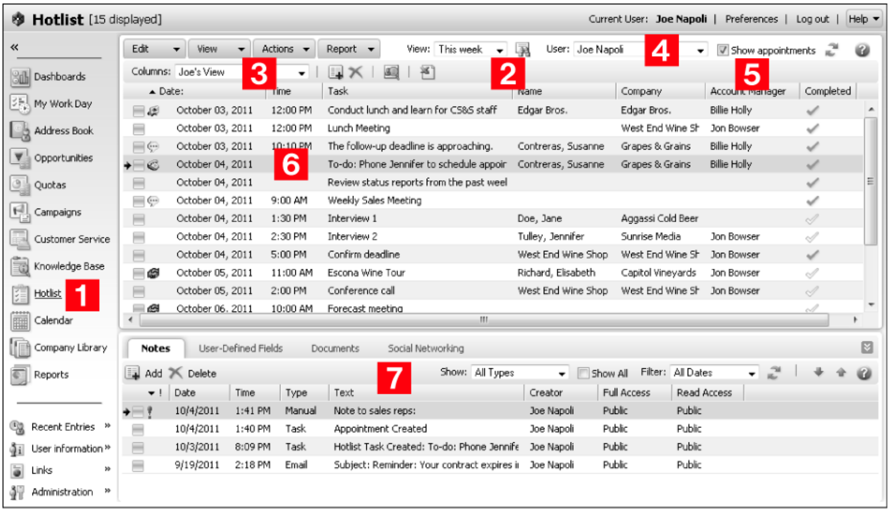
You can view all of your Hotlist tasks in the Hotlist page. Keep the following points in mind when working in the Hotlist page.

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.
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.

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

7 View information on the Address Book entry associated with the current task in the following panes.



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.

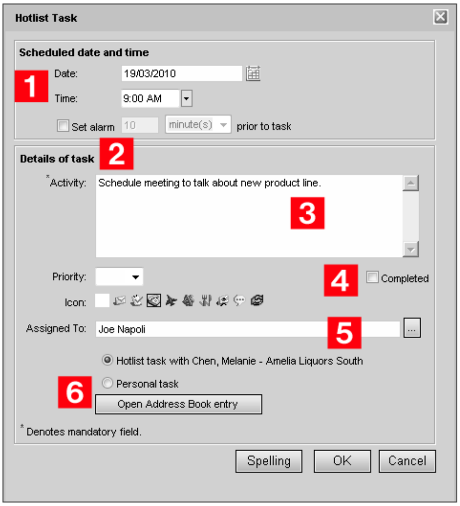
2 Select ***Set alarm*** to remind yourself of the task before the scheduled time.

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.



Add a Hotlist Task

You can create Hotlist tasks for Address Book entries, campaigns, customer service cases, and opportunities. You can also create personal Hotlist tasks. Personal Hotlist tasks are not associated with other entries.

When creating Hotlist tasks, you can set a due date and time for the task and an alarm in advance of the due date, and you can set a description and priority for the task.

You can also create tasks for other Maximizer users to complete. When you create a task for another user, the task will appear in that user's Hotlist, and they will be reminded by the alarm if one is set. You can also choose to send an email reminder to the assigned user when you create the task.

1 Click on the entry to make it the current entry.

– or –

Open the entry.

– 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***.

   – or –

   Right-click and select ***Schedule > To-do***.

   This option is available only in the Address Book page.

   The Add Hotlist Task dialog box opens.

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

   If the task is assigned to another user you may be prompted to send a notification email to the user, depending on your Calendar/Hotlist preferences.

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

Reassign Hotlist Tasks

You can reassign Hotlist tasks to different Maximizer users directly in the Hotlist page. You can reassign one Hotlist task, or you can select multiple tasks to assign all of them to the same user. When you reassign a task from one user to another, you can send an email notification to both users to let them know that the task has been reassigned.

1. Click on the Hotlist task to make it the current entry.

   – or –

   Select multiple Hotlist tasks.

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

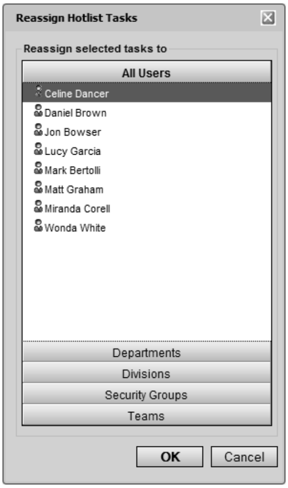
2. Select ***Edit > Reassign***.

   The Reassign Hotlist Tasks dialog box opens. Users are displayed by group.

3. Select a user.

   Type the first letter in the item’s name to jump to that item in the list.

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



4 Click ***OK***.

Depending on your Calendar/Hotlist preferences, you may be prompted to send an email message to the selected users.

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

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, campaigns, customer service cases, and opportunities, or they can be personal.

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.

In the View bar at the top of the page, you can view the dates for which appointments are currently displayed in the page. By default, appointments are displayed for the current day, week, or month. You can select any other day/week/month to view appointments in the Calendar for that time period. 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 page, 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.

   Color bars and icons indicate the users and booked resources and locations for appointments.

   - Monthly view – To view details of a day’s appointments in a pop-up window, hold your mouse pointer over the day. To display appointment details, hold your mouse over the appointment. To open an appointment from the pop-up window, click on the appointment.
   - Weekly, weekly list, and daily views – To display appointment details, hold your mouse over the appointment. To open an appointment, double-click on the appointment.
5. Select the ***Open Address Book entry*** icon to view the Address Book entry associated with the selected appointment. You can also right-click and choose this command from the context menu.

6 From the ***User*** drop-down list, select a user to display another user's appointments, or select a location or resource to view the booked time for meeting locations and resources.

If a user has set their response for an appointment to ***Declined*** their color bar is not shown for that appointment in the Calendar, and their name appears crossed-out with a red line through it in the appointment details.

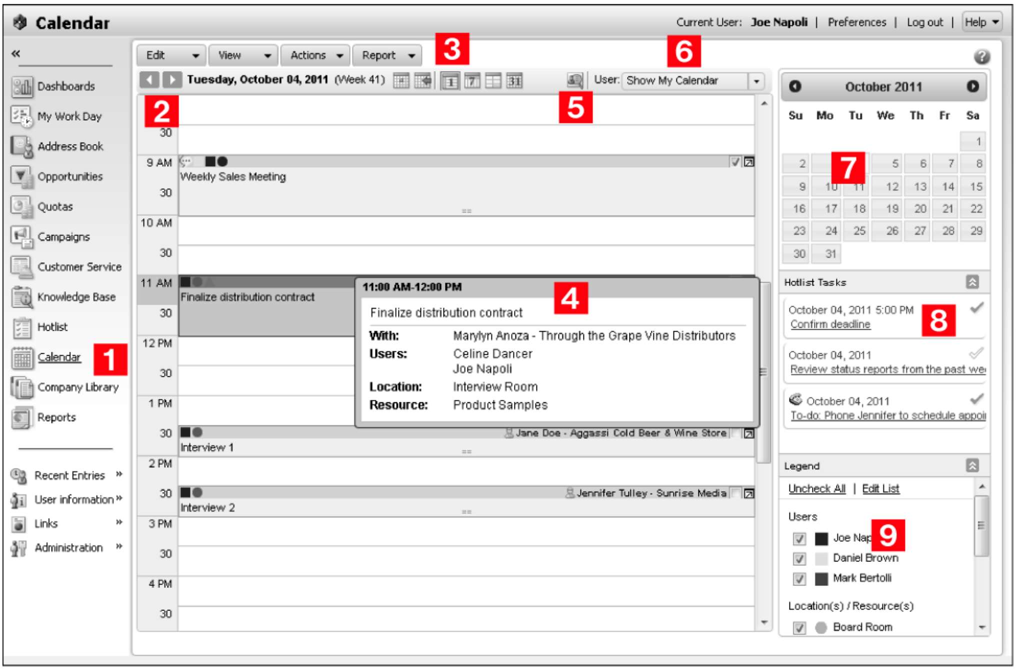
7 Select a date in the miniature calendar view to navigate to a different day, or month in the calendar. Use the arrow buttons to move between months or years.

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.

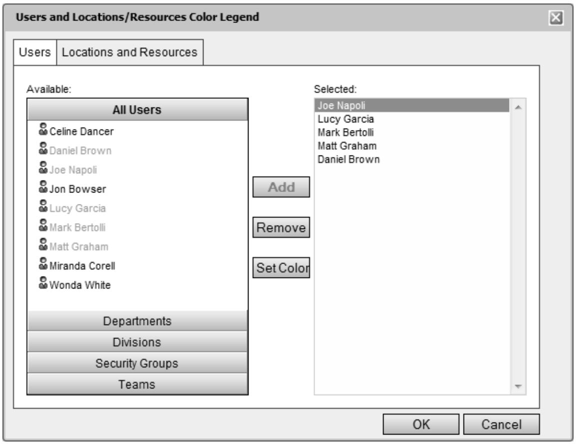


Add Items to the Calendar Legend

You can add other Maximizer users and locations and resources to the legend in the Calendar page. While adding the items to the legend, you can assign colors to the items to identify which items are assigned to specific appointments directly in the Calendar page.

1. If necessary, in the bottom-right corner of the Calendar page, expand the ***Legend*** section.
2. In the ***Legend*** section, click ***Edit List***.

   The Users and Locations/Resources Color Legend dialog box opens to the Users tab.



3. To add locations and resources to the legend, select the ***Locations and Resources*** tab.
4. Select an item in the ***Available*** list, and click ***Add***.
   - To select multiple items, press ***Control*** while selecting the items.
   - To select a series of items, select the first item in the series, then press ***Shift*** and select the last item in the series.
   - Type the first letter in the item's name to jump to that item in the list.
   - Select a security group, department, division, or team to add all members of the group to the list.

   Users are grouped by the departments, divisions, security groups, and teams to which they belong if you have the "Display users by groups" option enabled in your preferences.
5. Select the color to assign to the item, and click ***OK***.

6. Click ***OK*** to save the changes to the legend.

   The Legend updates to show the new items with the selected colors.

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.

   The email reminder message lists the basic appointment details. You cannot edit this message. When adding a new appointment, Maximizer retains the email reminder settings from the last appointment you created.

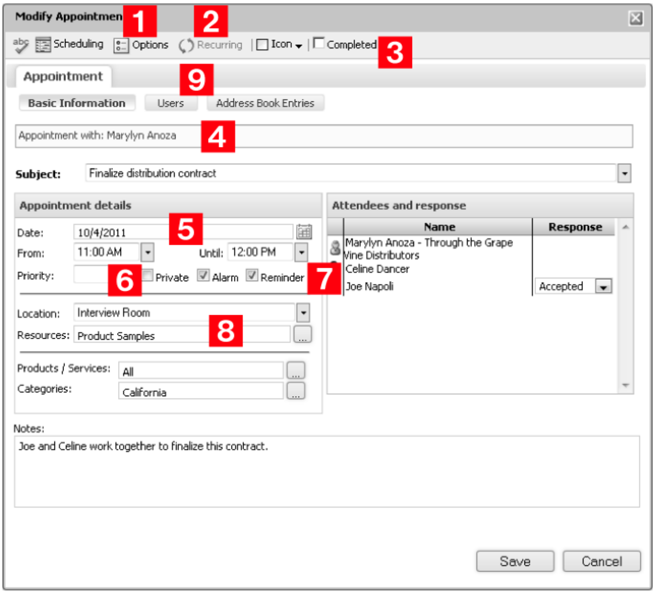
You can click Options to specify that email reminders are also sent to Address Book entries.

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. Click the name of an Address Book entry to view the entry's contact information.



Add an Appointment

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. When you choose to send notifications to other users in the appointment they are prompted to accept or decline your appointment request the next time they log in to Maximizer.

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.

When you schedule an appointment for an opportunity or customer service case, the Contact associated with the opportunity or case is automatically added to the 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.***

   – or –

   In the Calendar page, right-click, and select ***Add Appointment.***

   – or –

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

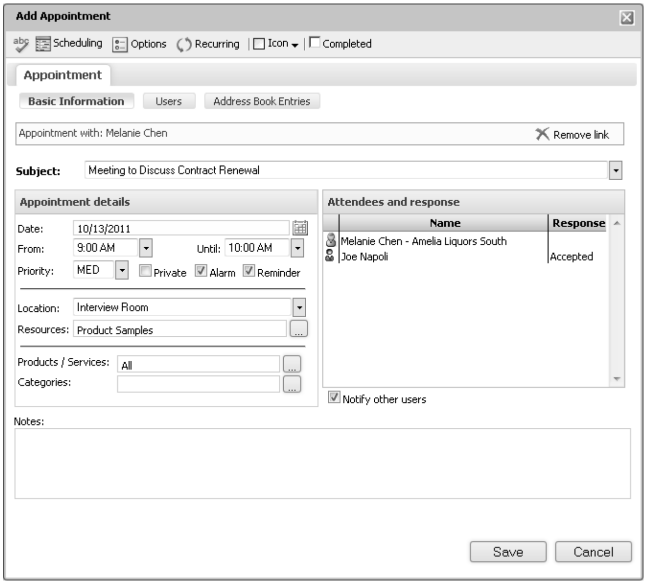
   The Add Appointment dialog box opens.

2. Click the ***Scheduling*** icon to view the free time of users, locations, and resources and to select a time for the appointment.

   Selected users, locations, and resources are automatically added to the appointment.

You can also select a time directly in the Appointment dialog box.

3. Specify the details of the appointment.



4 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.

5 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.

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

Add Users to an Appointment

You can add other Maximizer users to existing and new appointments.

1 Open the appointment.

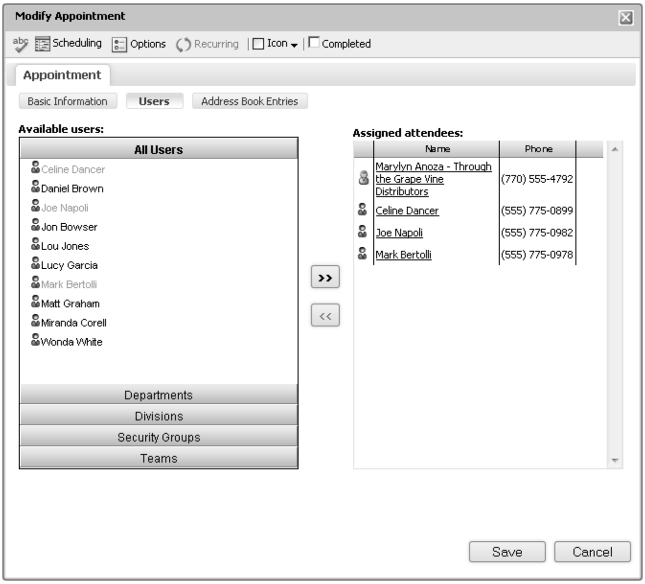
2 Select the ***Users*** tab.

3 In the ***Available users*** list, select the users to add to the appointment, and click the right arrow button to add the users to the ***Assigned attendees*** list.

- To select multiple users, press ***Control*** while selecting the users.
- To select a series of users, select the first user in the series, then press ***Shift*** and select the last user in the series.
- Type the first letter in the item's name to jump to that item in the list.
- Select a security group, department, division, or team to add all members of the group to the list.

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

4 Click ***Save*** to save the changes to the appointment.



View the Availability of Users, Locations, and Resources

You can quickly view the availability of users, locations, and resources. You can access the Free Time dialog box from the Calendar page, or you can access the dialog box while creating or viewing an appointment. In an open appointment, you can select a new date and time for the appointment and add users, locations, and resources to the appointment directly from the Free Time dialog box.

1. In the Calendar page, select ***View > Free Time***.

   – or –

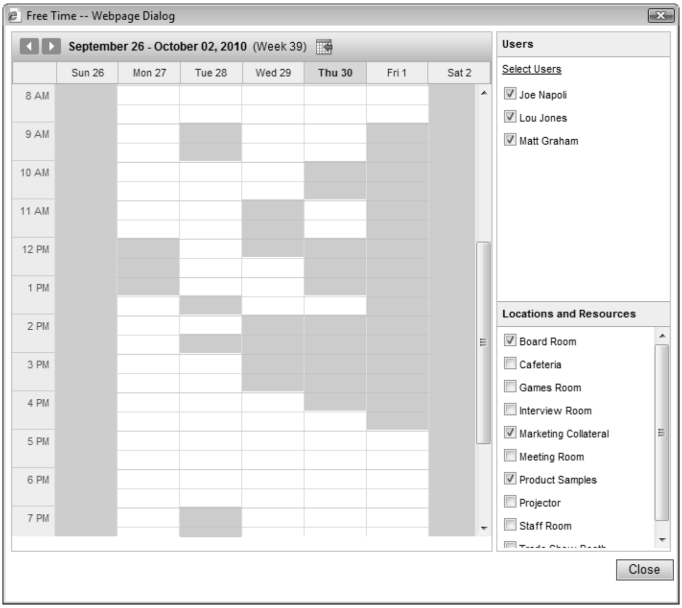
   In an open appointment, select the ***Availability*** icon.

   The Free Time dialog box opens showing the availability for the users in the appointment.

2. To view the availability of other Maximizer users, click ***Select Users*** or ***Invite Other Users***, move users to the ***Assigned attendees*** list, and click ***OK***.

3. On the right side of the dialog box, select and clear items to view or hide the availability of different users, locations, and resources. When a user has set their response for an appointment to ***Declined*** they appear as available in the Free Time dialog box during that appointment.

If you are viewing the Free Time dialog box from an open appointment, the selected users, locations, and resources are automatically added to the appointment when you click OK.



Send Email Notification as iCalendar Files

In your Calendar/Hotlist preferences, you can specify that iCalendar (.ICS) files are attached to appointment email notification sent to Address Book entries. Appointments are automatically added to the calendar of Address Book entries receiving the notification if they use calendar applications that support the iCalendar file format. Maximizer users do not receive iCalendar file attachments.

If an attendee responds to an iCalendar notification, the response is sent to the Maximizer user who created the appointment. When you receive a response to an iCalendar notification, you are alerted that the original appointment does not exist. This message refers to the status of the appointment in your email application, not the status of the appointment in Maximizer. The iCalendar response does not modify the appointment in Maximizer.

1. In the top-right corner of the page, click ***Preferences***.

   The Personal Preferences dialog box opens.

2. Click ***Other Preferences***.

   The Preferences dialog box opens to the Calendar/Hotlist tab.

3. From the ***Email appointment notification*** drop-down list, select ***Ask*** or ***Always***.
4. Select ***Include the iCalendar (.ics) attachment***.
5. Click ***OK*** to save the changes to the Preferences dialog box.

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 following pane for Address Book entries, and in the Activities tab for opportunities, campaigns, and customer service cases. If activities are scheduled for opportunities and customer service cases, the activities are listed with the associated Address Book entries as well as with the opportunities and customer service cases.You can also add and modify activities directly in entries.

View Appointments and Tasks Scheduled for an Address Book Entry

1. Click the entry in the Address Book page to make it the current entry.
2. Select the ***Activities*** following pane.
3. Select a date range to show activities for from the ***View*** drop-down list.
4. Click the ***filter icon*** to adjust which activities are displayed.

   The filter options dialog box opens.
5. Select the filter options for the activities you would like to view.
   - Select the user whose activities you want to view from the ***User*** drop-down list.
   - Select ***Show appointments, Show carried forward unfinished activities,*** or ***Show completed activities*** to include these activities in the list.
   - In the ***Options*** section, select whether you want to see all activities or only those associated with an action plan.
6. Click OK to apply the filter options.

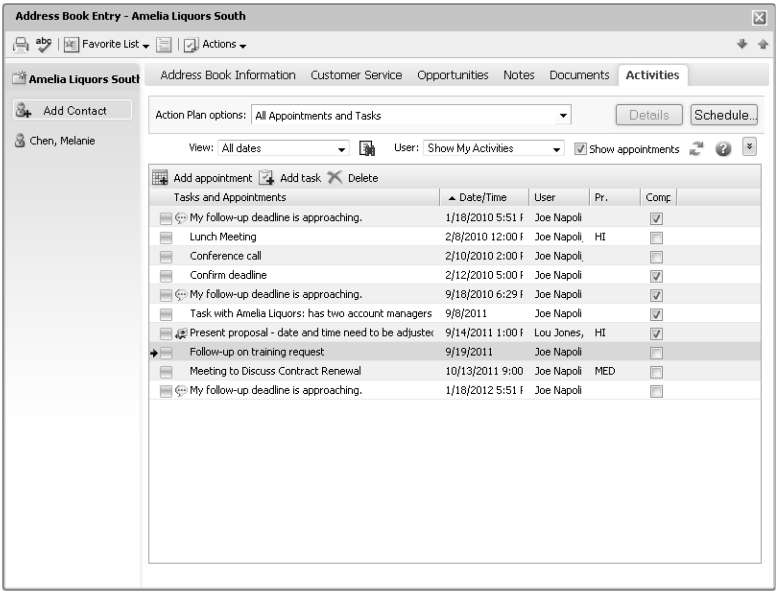
   All appointments for the selected entry that match the filter and date range criteria are displayed in the list.

View Appointments and Tasks Scheduled for an Entry

1. Open the entry.
2. Select the ***Activities*** tab.
3. If necessary, select ***Show activities***.

4 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.



Activities Tab

The Activities tab in the following panes for an Address Book entry, or in an open opportunity, customer service, or campaign entry displays Calendar appointments and Hotlist tasks associated with the entry. If activities are scheduled for opportunities and customer service cases, the activities are listed with the associated Address Book entries as well as with the opportunities and customer service cases.

Activities are displayed in the list based on criteria specified in the various filters including Action Plan activities, date, and user. By default, activities are sorted by date. You can select and sort entries like in other lists in Maximizer.

- To open an appointment or task, click on the activity.
- To complete an appointment or task, click the checkbox in the Complete column.
- To add or delete appointments or tasks, use the icons in the view bar at the top of the list.

Action Plan Options

The Action Plan options lets you filter the list of activities by Action Plan. The activities displayed follow the other filter elements as well as the option selected in the Action Plan filter.

- When viewing the activities for an Address Book entry, click the filter icon to access the Action Plan options in the Details following pane.
- When viewing the activities for an opportunity, customer service case, or campaign entry, the Action Plan options are displayed in a drop-down list in the Activities tab.

The following options are available to customize the way Action Plan activities are displayed:

- ***All Appointments and Tasks –*** Displays appointments and tasks regardless of Action Plans.
- ***Action Plan Activities –*** Displays only appointments and tasks that are scheduled as part of Action Plans.
- ***Action Plan –*** Select the name of an Action Plan to display only appointments and tasks scheduled as part of the Action Plan.

  Once an Action Plan is selected, click ***Details*** to view information on the Action Plan and the Action Plan template.

When viewing the Action Plan options in the Activities tab of an opportunity, customer service case, or campaign, the following options are also available:

- ***Display all Plans –*** Updates the list of Action Plans at the bottom of the drop-down list so it displays all Action Plans currently scheduled for the entry.

  This option is not available in the Activities tab for Address Book entries.
- ***Clear list –*** Removes all Action Plans from the current list.

  This option is not available in the Activities tab for Address Book entries.
- ***Filter Plan list –*** Opens a dialog box where you can specify criteria to apply to the list of Action Plans. You can specify the dates Action Plans were scheduled and the users who scheduled the Action Plans.

  This option is not available in the Activities tab for Address Book entries.

Filter

Use the filter options to change the list of activities currently displayed.

- When viewing the activities for an Address Book entry, click the filter icon in the Details following pane.
- When viewing the activities for an opportunity, customer service case, or campaign entry, click the arrow button to the right of the primary filter options to expand and hide the filter details.

The following filter options are available to customize the way activities are displayed:

- ***View –*** Select a date range for the activities.

  Select ***All dates*** to ignore the date of activities.

  Select the ***Custom Filter*** icon to specify any dates for the filter.
- ***User –*** Select a specific user to view only activities scheduled by that user.

  Select ***All Users*** to ignore the user.
- ***Show appointments –*** Displays appointments in the list of activities. If this option is cleared, only Hotlist tasks are displayed.
- ***Show carried forward unfinished activities –*** Displays Hotlist tasks that are not marked as complete but scheduled for dates prior to the date range selected in the filter.

  This option is unavailable when “Show completed activities” is selected.
- ***Show completed activities –*** Displays appointments and tasks that are marked as complete.

Alarms

You can schedule alarms to remind you of upcoming appointments and Hotlist tasks. You can also schedule email reminders for appointments.

At the scheduled time, the alarm pops up in Maximizer reminding you of the activity. In the Alarm dialog, you can view a summary of pending activities, open and modify activities, complete activities, view details for Address Book entries linked to activities, and reschedule the alarm to appear later in the day.

Set an Alarm for a Hotlist Task

You can set alarms for Hotlist tasks while adding the tasks, and you can set alarms for existing tasks. If you set an alarm for a timeless task, it will go off as soon as you log in to the Address Book the day of the task.

1. Open the Hotlist task.
2. Select the ***Set alarm*** checkbox.
3. To the right of the checkbox, specify the amount of time before the task to set the alarm.

   From the drop-down list, you can select a different unit for the time.
4. Click ***OK*** to save the changes to the Hotlist task.

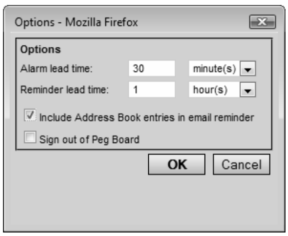
Set an Alarm and Email Reminder for an Appointment

You can set alarms and email reminders for appointments while adding the appointments, and you can set alarms and reminders for existing appointments.

If you have declined an appointment, the Alarm and Reminder checkboxes are disabled.

1. Open the appointment.
2. To set an alarm, select the ***Alarm*** checkbox, and to set an email reminder, select the ***Reminder*** checkbox.
3. Click ***Options***.
4. Specify the lead times for the alarm and reminder.
   - In the ***Alarm lead time*** field, specify the amount of time before the appointment to set the alarm.
   - In the ***Reminder lead time*** field, specify the amount of time before the appointment to send the email reminder.

   From the drop-down list, you can select a different unit for the time.



5. To send the email reminder to the Address Book entry associated with the appointment, select the ***Include Address Book entries in email reminder*** checkbox.
6. Click ***OK*** to save the changes in the Options dialog box, and click ***OK*** again to save the changes to the appointment.

Set Default Values for Alarms and Reminders

In the Calendar/Hotlist preferences, you can set default options for alarms and email reminders in appointments and tasks. The default values specified in the preferences are automatically set in new appointments and tasks. You can change these values in specific appointments and tasks while adding or modifying the activities.

1. In the top-right corner of the page, click ***Preferences***.
2. Click ***Other Preferences***.

   The Preferences dialog box opens to the Calendar/Hotlist tab.
3. Specify default values for the alarm and reminder preferences.
   - In the ***Alarm lead time*** field, specify the amount of time before the activity to set the alarm.

     This setting affects appointments and Hotlist tasks.
   - To turn alarms on by default in new appointments, select the ***Set the alarm on when adding an appointment*** checkbox.
   - To send email reminders to Address Book entries by default, select the ***Include Address Book entries in appointment email reminders*** checkbox.
4. Click ***OK*** to save the changes to the Preferences dialog box.

Reschedule Alarms from the Alarm Dialog Box

While viewing alarms in the Alarm dialog box, you can reschedule the alarms to reappear later. You can delay the alarm by a set number of minutes, hours, days, or weeks. For upcoming activities, you can also reschedule the alarm to go off a period of time before the activity is scheduled to start.

1. Select the checkbox next to the activities for which you want to reschedule the alarm.

   – or –

   In the ***Options*** area, select ***Apply to all*** to reschedule the alarm for all activities.
2. From the ***Snooze time*** drop-down list, select an amount of time by which to delay the alarm.

   If an activity is scheduled in the future, you can also specify an amount of time before the start of the activity.
3. Click ***Snooze***.

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, opportunities, campaigns, and customer service cases.

Action Plan Library

The Action Plan Library stores Action Plan templates. Action Plan templates store the details of your Action Plans. When you schedule an Action Plan, you can choose an existing Action Plan template.

Each Action Plan template includes the details of the appointments and tasks in the Action Plan, as well as the time of the activities relative to a start date.

While creating an Action Plan template, you can assign the activities in the Action Plan to specific Maximizer users. Then, when you schedule the Action Plan, the appointments and tasks are automatically assigned to the users.

You can also assign Action Plan activities to a generic user called the “current user”. When scheduling the Action Plan, you can substitute the current user with another Maximizer user to assign the activities in the Action Plan to the selected user.

Users must have adequate Action Plan Library permissions to apply, create, modify, or delete Action Plan templates.

Create an Action Plan Template

To complete this procedure, you must have Insert permission for the Action Plan Library.

You can create Action Plan templates, which can later be scheduled to create appointments and Hotlist tasks for Maximizer users and for specific entries.

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.

Dependent Activities

When you schedule an Action Plan, you can specify that the activities in the Action Plan are dependent of each other. Dependent activities should be completed in their scheduled order. The order of the activities is determined by the date and time of the activities within the Action Plan. This order is taken into account when you complete Action Plan activities.

When you complete a dependent activity, Maximizer checks the order and date of the activity.

- If an earlier activity in the Action Plan is incomplete, you are prompted with a message. The message does not prevent you from completing the activity.
- If you complete an activity earlier or later than its scheduled date, you have the option of rescheduling the remaining activities in the Action Plan based on the date the activity is completed. You can reschedule only activities to which you have full access.

If the “Skip non-work days” option was selected when the Action Plan was scheduled, the activities are rescheduled only on work days.

For example, if you complete an activity one day late, all proceeding activities in the Action Plan are moved forward by one day. If any of the activities is scheduled to occur on a non-work day, it’s moved to the next work day. If any of the activities is assigned to a user who has not granted you full access to the Calendar (for appointments) or Hotlist (for tasks), the activity remains unchanged.

You must complete dependent activities individually. If you attempt to complete multiple activities at once, any dependent activities will not be completed.

Schedule an Action Plan

To complete this procedure, you must have Read permission for the Action Plan Library.

You can schedule Action Plans from the Address Book, Opportunities, Campaigns, Customer Service, or Hotlist page. When you schedule an Action Plan from the Hotlist page, the Action Plan is scheduled with the Address Book entry associated with the selected task or appointment.

You cannot schedule an Action Plan from the Hotlist page when a personal task or appointment is selected.

You can schedule the Action Plan with a single entry, or you can select multiple entries to schedule the Action Plan with all of the entries at the same time. You can choose any existing Action Plan template for the Action Plan.

1. Click on the entry to make it the current entry.

   – or –

   Open the entry.

   – or –

   Select the entries.

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

2 Select ***Actions > Schedule an Action Plan***.

– or –

On the ***Home*** tab, select ***Action Plan*** from the ***Schedule*** group.

– or –

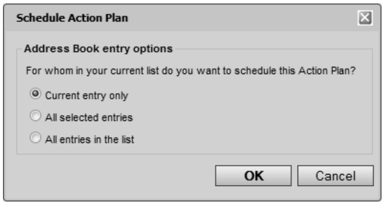
Right-click and select ***Schedule > Action Plan***.

This option is available only in the Address Book page.

3 If necessary, select how you want to use the current list.

You can schedule the Action Plan with only the current entry, with all selected entries, or with all entries in the current list.

If no entries are selected, the Action Plan is automatically scheduled with the current entry.



4 From the ***Plan template*** drop-down list, select an existing Action Plan template.

Details of the selected template are displayed. Optionally, you can modify the plan name and description.

5 In the ***Start plan on*** field, specify the start date of the Action Plan.

You can click the Calendar icon to choose a date from a pop-up calendar.

6 To take the order of activities into account when activities are completed, select ***Set activities as dependent***.

If this option is selected, users are prompted when they complete activities in the incorrect order.

7 If necessary, click ***Advanced*** to toggle between the advanced and simplified view of the dialog box.

8 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.

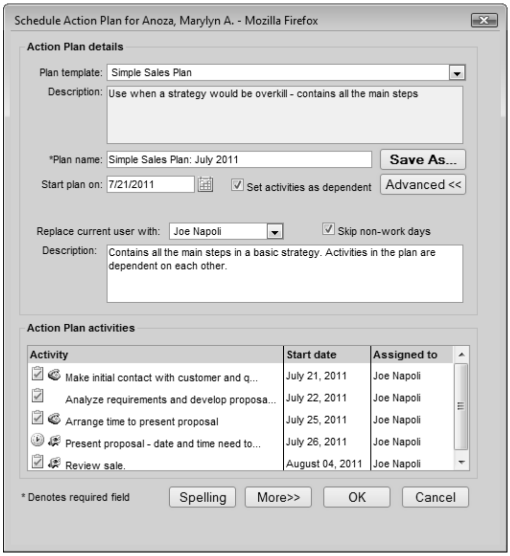
9 Select ***Skip non-work days*** to schedule activities only on work days.

Any activities scheduled on a non-work day are moved to the next work day.

10 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.

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



View Activities Scheduled from an Action Plan

You can view a list of activities scheduled from a specific Action Plan in the Activities tab of an entry.

1 Open the entry that the Action Plan is scheduled for.

2 Select the ***Activities*** tab.

3 From the ***Action Plan options*** drop-down list, select ***Display all plans***.

A list of all Action Plans scheduled with the entry is displayed in the drop-down list.

4 Select the name of the Action Plan.

5 To display all activities in the Action Plan, set the following filter options:

- From the ***View*** drop-down list, select ***All dates***.
- From the ***User*** drop-down list, select ***All Users***.
- Select ***Show appointments***.
- On the right, click the arrow to expand the view options, and select ***Show completed activities***.

CHAPTER 5

Notes, Documents, and Email

Store Notes and Documents in your Address Book

In this chapter...

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.

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 in previous versions of Maximizer when you create or modify accounting transactions using external accounting applications.
- ***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 remote 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 Pane

The Notes pane displays notes for the current entry in the Address Book, Opportunities, Customer Service, Campaigns, or Hotlist page.

In the Hotlist page, the Notes pane displays the notes for the Address Book entry associated with the selected task or appointment. Notes are displayed for an appointment only if a single Address Book entry is associated with the appointment.

In an open entry, the Notes tab has most of the same functionality as the Notes pane.

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

1 Identify notes marked as important with the ***Important*** icon.

By default, notes are sorted by the Important column, but you can click any column heading to sort by another column.

2 Use the ***Show*** drop-down list to narrow the entries to a specific note type (for example, “Manual” or “Email”).

3 Select ***Show All*** to display all notes for the current Address Book entry, including notes belonging to the Company/Individual and all associated Contacts. If this checkbox is not enabled, only notes belonging to the selected entry are displayed.

This option is available only in the Address Book and Hotlist pages.

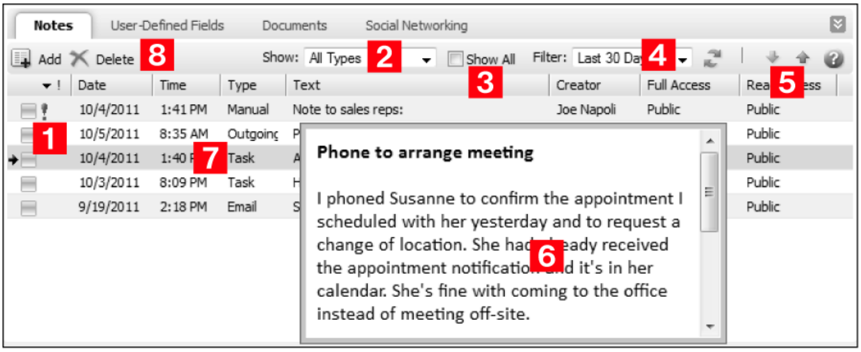
4 Use the ***Filter*** drop-down list to filter notes by date. Choose ***<Custom...>*** to specify a custom date range.

5 Use the up and down arrows to view the notes for the previous or next entry in the main list.

6 Hover your mouse over an entry to view a preview of the note in a pop-up window.

7 Click on an entry to open and modify a note.

8 Use the buttons at the top of the list to add and delete notes.



Add a Note to an Entry

You can add notes to Address Book entries, customer service cases, campaigns, and opportunities. 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.

1 Click on the entry to make it the current entry.

Notes for the entry are displayed in the Notes tabbed pane.

2 In the ***Notes*** pane, click ***Add***.

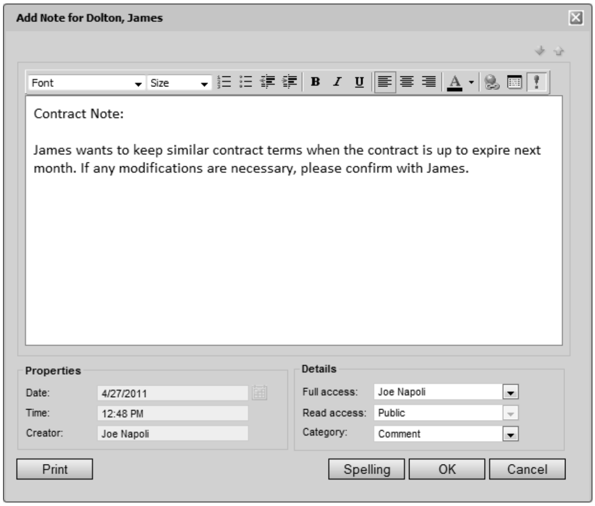
3 Enter the content of the note.

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.

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.

6 Click ***OK***.



Set Up a Default Note

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.

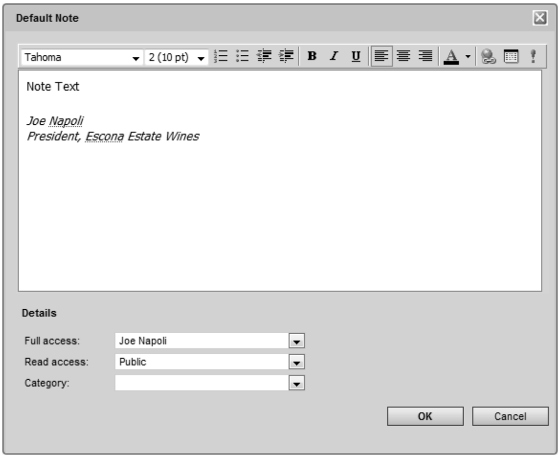
1 Select ***Edit > Default Note***.

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

In Maximizer, documents are files that are created in other applications. You can attach documents to Address Book entries, customer service cases, campaigns, and opportunities. When you send an email message from Maximizer, you can save a copy of the message as a document with the entry. You can also add hyperlinks to documents stored outside of the Address Book. Documents are stored with the entries to be accessed at any time.

Documents Pane

The Documents pane displays documents attached to the current entry in the Address Book, Opportunities, Customer Service, Campaigns, or Hotlist page.

In the Hotlist page, the Documents pane displays the documents for the Address Book entry associated with the selected task or appointment. Documents are displayed for an appointment only if a single Address Book entry is associated with the appointment.

In an open entry, the Documents tab has most of the same functionality as the Documents pane.

Keep the following tips in mind when working in the Documents pane:

1. Use the buttons at the top of the list to add and delete documents and hyperlinks and to view the properties of the current entry.

2. Use the ***Show*** drop-down list to narrow the entries to a specific type of document.

   - ***Maximizer Documents –*** Displays documents created in Maximizer.
   - ***Emails –*** Displays email messages sent from Maximizer.
   - ***Other –*** Displays any other type of file attached to the entry.

3. Use the ***Show All*** option to display all documents for the current Address Book entry, including documents belonging to the Company/Individual and all associated Contacts. If this checkbox is not enabled, only documents belonging to the selected entry are displayed.

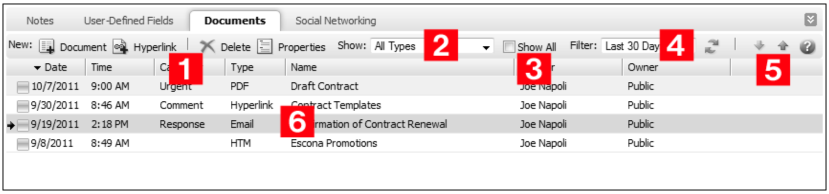
   This option is available only in the Address Book and Hotlist pages.

4. Use the ***Filter*** drop-down list, to specify the date range for documents displayed in the list.

   You can select a number of date ranges, including ***Last 30 Days*** and ***Last 12 Months***. Or choose ***Custom*** to select specific dates for the date range.

5 Use the up and down arrows to view the documents for the previous or next entry in the main list.

6 Click on an entry to open the document in its native application.



View a Document Attached to an Entry

You can view documents attached to entries from Maximizer. The file opens in the default application for the file extension of the document. If the document is a hyperlink, a new browser window opens displaying the source document.

From Maximizer, you can open only embedded documents. Linked documents are not supported in Maximizer.

1 Click on the entry to make it the current entry.

2 Select the ***Documents*** pane.

Documents attached to the entry are displayed.

3 If necessary, select an option from the ***Show*** drop-down list to change the types of documents displayed.

4 Click the document that you want to open.

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.

Add a Document to an Entry

You can attach any type of files as documents to Address Book entries, customer service cases, campaigns, and opportunities.

1 Click on the entry to make it the current entry.

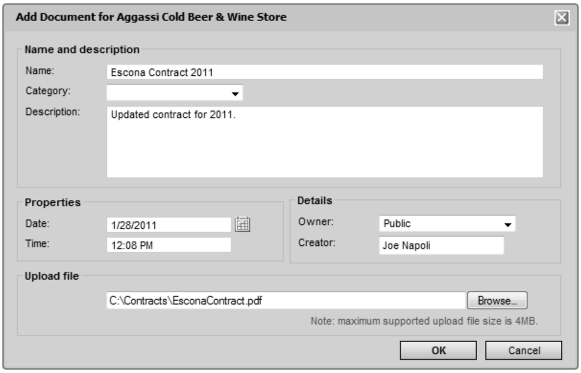
2 Select the ***Documents*** pane.

3 Next to ***New*** in the view bar, click ***Document***.

4 Specify properties for the document, such as ***Name***, ***Category***, ***Description***, and ***Owner***.

5 Click ***Browse*** and browse to the location of the file, and click ***Open***.

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



Add a Hyperlink to an Entry

You can add hyperlinks as documents to Address Book entries, customer service cases, campaigns, and opportunities. Hyperlinks record links to documents stored outside of the Address Book, for example on local and network drives, on external websites, in Microsoft SharePoint folders, and in any other locations that can be expressed as URLs. When you open a hyperlink, the source document of the hyperlink is displayed in a new browser window.

1 Click on the entry to make it the current entry.

2 Select the ***Documents*** pane.

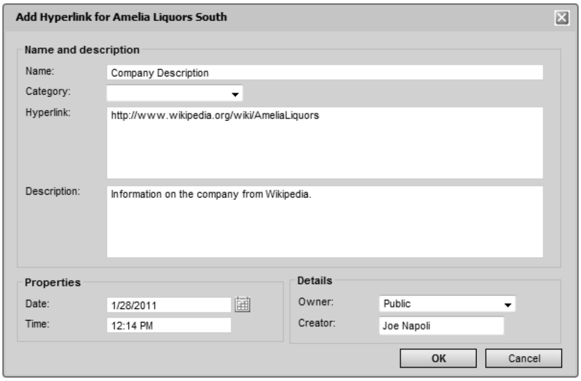
3 Next to ***New*** in the view bar, click ***Hyperlink***.

4 In the ***Name*** field, enter the name of the document.

5 In the ***Hyperlink*** field, enter the URL of the document.

6 Specify other properties of the document, such as ***Category***, ***Description***, and ***Owner***.

7 Click ***OK*** to save the hyperlink as a document with the entry.



Change the Properties of a Document

After adding documents, you can access the properties of the documents at any time to change any of the properties.

1 Click on the entry to make it the current entry.

2 Select the ***Documents*** pane.

3 Click on the document to make it the current entry.

4 In the ***View*** bar, click ***Properties***.

5 Edit any of the properties of the document.

6 To replace the content of the document, click ***Browse*** and browse to a new file.

7 Click ***OK*** to save the changes to the document.

If you click in the text of the entry, the document opens. Instead, click to the left of the entry to select it, or click in an empty area of the row to make it the current entry.

History

See "Types of Notes" on page 146 about the types of notes that are automatically logged by Maximizer to provide a history of your activities with an entry.

In Maximizer, you can quickly access the entire history for an entry in the History pane. The History pane displays all of the notes and documents associated with the current entry in the main window so that you can see all of the recent activity with the entry at a glance.

History Pane

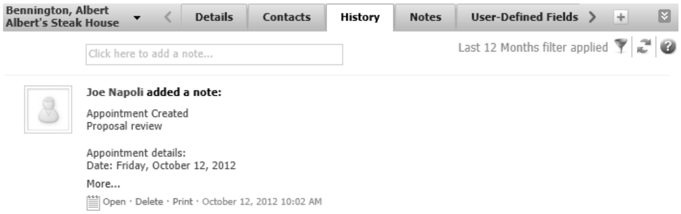
The History pane is available for entries in the Address Book, Opportunities, Campaigns, Customer Service, and Hotlist pages. All of the notes, documents, and emails associated with the current entry are displayed in the History pane. Each note, document, and email is displayed along with the name of the user who created it, the user's profile picture, and the date and time it was created. Notes and emails are displayed along with a preview of their content. The history is displayed in reverse-chronological order with the most recent notes and documents displayed first. Notes marked as important are displayed first.

Keep the following tips in mind when working with the History pane:

Click the Filter button to filter notes and documents in the History pane by date range and/or type.

1. You can easily add notes to an entry in the History pane by typing directly in the field labeled ***Click here to add a note***.
2. Identify whether a history entry is a note, an email, a Maximizer document, or a different document type by viewing the icon displayed next to the entry.
3. For emails with attachments, a paperclip is shown in the Subject line. Click the ***More*** link to open the attachment without opening the email.
4. ***Open*** or ***Delete*** a note, document, or email by clicking the link below it.
5. Click the ***Properties*** link below a document or email to view its properties.
6. Click the ***Print*** link to print it.
7. Reply to and forward an email by clicking the ***Reply***, ***Reply All***, and ***Forward*** links.

8 Click the ***More*** link below a note or email preview to display its entire content.



Add a Note to an Address Book Entry

You can add notes to Address Book entries, customer service cases, campaigns, and opportunities in the History pane. Notes added through the History pane are added as manual notes.

1 Click on the entry in the main window to make it current.

2 Click in the Click here to add a note field.

The field expands and a Submit button appears.

3 Enter the content of the note and click Submit to save it.

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.

You can add documents, notes and hyperlinks to the Company Library. Documents are created with external applications. Notes contain plain text. Hyperlinks point to documents stored externally and are expressed as URLs. These items are arranged in the Company Library in a folder structure.

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 and hyperlinks in the right part of the page.

5 Click on a document, hyperlink, or note to open it.

Organizing the Company Library

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

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.

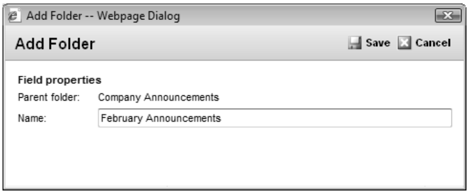
– or –

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

2 Next to ***New*** in the toolbar, click ***Folder***.

The Add Folder dialog box opens.

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



Move an Item in the Company Library

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

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

If you select a folder, all items in the folder are moved with it.

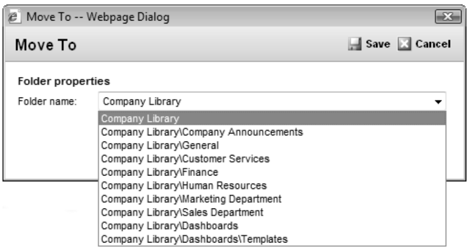
2 In the toolbar, click the ***Move To*** icon.

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.

Add a Document 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 as either private or public entries. While adding the document, you browse to an existing file on your hard drive or network.

1. In the Company Library page, click on the folder to which you want to add the document.
2. Next to ***New*** in the toolbar, click ***Document***.

   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***.

If a document with the specified name already exists in the selected folder, you are prompted with a message asking if you want to replace the existing document. Click ***Yes*** to replace the existing document, or click ***No*** to keep the existing document.

Add a Note to the Company Library

You can add plain text notes to the Company Library. Write the content of the note directly in the Company Library page while adding the note.

1. In the Company Library page, click on the folder to which you want to add the note.
2. Next to ***New*** in the toolbar, click ***Note***.

   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***.

Add a Hyperlink to the Company Library

You can add hyperlinks to the Company Library. Hyperlinks point to documents stored outside of the Address Book. Hyperlinks record links to any locations that can be expressed as URLs.

1. In the Company Library page, click on the folder to which you want to add the hyperlink.
2. Next to ***New*** in the toolbar, click ***Hyperlink***.
   The Add Hyperlink dialog box opens.
3. In the ***Name*** field, enter a name to refer to the document.
4. In the ***Hyperlink*** field, enter the URL of the document.
5. Specify the category and owner for the hyperlink, as desired.
6. Click ***Save***.

Send Items by Email from the Company Library

You can send items by email directly from the Company Library page. You can select one or multiple documents, hyperlinks, and notes or a folder to send all items in the folder. Documents are attached to the email message, while hyperlinks are inserted directly into the content of the email message. Notes are either inserted into the message or attached to the message depending on the number of items selected.

1. If you want to send the items to an Address Book entry, in the Address Book page, select the Address Book entry to send the documents to.
2. In the Company Library page, select the checkbox beside any documents, hyperlinks, and notes you want to send.

You can also select a folder to send all documents, notes, and hyperlinks in the folder.

3. In the toolbar, click ***Email Document***.

   The Send Email dialog box opens with the selected items attached to or inserted into the email message.

4. Enter the details of your email message.

5. Click ***Send***.

Email

You can send email messages to Address Book entries directly from the main Maximizer pages. When you create email messages, you can insert merge fields into the message text. And you can save the email messages as templates to reuse later.

Email preferences are set in Maximizer 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.

View an Email Message from an Entry

When you use Maximizer to send email messages to Address Book entries, you can save copies of the messages as documents with the associated Address Book entries, opportunities, and customer service cases. You can open and view these email messages from Maximizer. You can also reply to, forward, and print the email messages.

1. In the Address Book, Opportunities, or Customer Service page, select the entry the email message is saved to.
2. Select the ***Documents*** following pane.
3. Click the email message you want to view.

   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.

Send an Email Message 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.

You can send an email message to the current entry, to all selected entries, or to the entire list of entries.

When sending an email in Maximizer you can ensure that a copy of the email appears in your email application by choosing to automatically send a carbon copy (CC) of the email to yourself.

1. Click on the entry to make it the current entry.

   – or –

   Open the entry.

   – or –

   Make a list of entries.

   – or –

   Select multiple entries.

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

2. Select ***Actions > Write an Email***.

   – or –

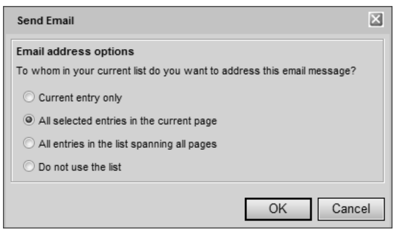
   Right-click and select ***Write an Email***.

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

This option is available only in the Address Book page.

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. 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.

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.

   Use the toolbar icons and font drop-down lists to format your message.

   If you are sending email to a single Address Book entry or to multiple Address Book entries using the Separately option, you can insert 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.

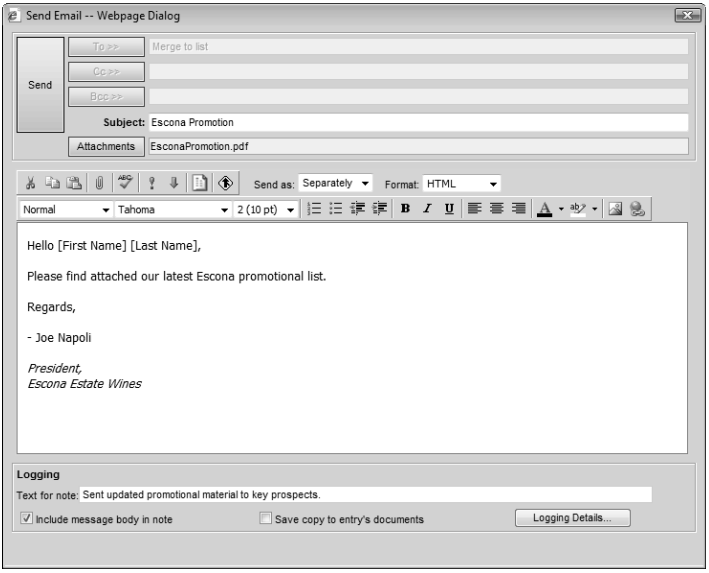
Do not use angle brackets, < or >, in the email editor. Any text between the brackets will be removed from the email message.

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.
   - Select ***Send a copy of this message to myself*** to automatically send a carbon copy of the email message to your email address.

9 Click ***Send***.


Send Email -- Webpage Dialog
Send
To >>
Merge to list
Cc >>
Bcc >>
Subject: Escona Promotion
Attachments
EsconaPromotion.pdf
Send as: Separately
Format: HTML
Normal
Tahoma
2 (10 pt)
Hello [First Name] [Last Name],
Please find attached our latest Escona promotional list.
Regards,
- Joe Napoli
President,
Escona Estate Wines
Logging
Text for note: Sent updated promotional material to key prospects.
Include message body in note
Save copy to entry's documents
Logging Details...

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.

Create an Email Template

You can create email templates from the Compose Email Message dialog box whenever you compose a new email message.

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

   The HTML Email Templates or Text Email Templates dialog box opens.
5. Click ***Add*** to add a new email template.
6. 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***.
7. Click ***Close*** to return to the email message.

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]

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.

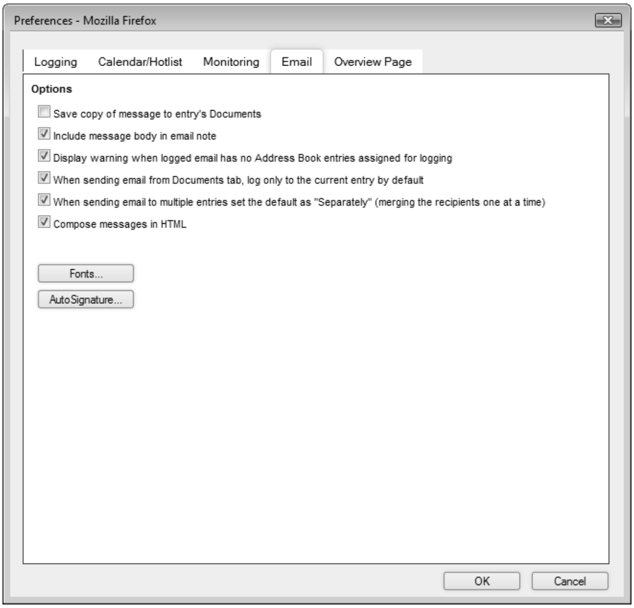
Merge fields are not restricted to Address Book entry information—you can insert merge fields for your own user information, customer service cases, and opportunities as well.

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

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

Setting Email Preferences

Maximizer contains a number of email preferences that let you set default options for outgoing email. You can access these settings in the Email tab of the Preferences dialog box.



Set Up an Email AutoSignature

You can set up an email AutoSignature in the email preferences. The AutoSignature is added to the end of outgoing email messages sent from Maximizer. You can choose whether or not to include the AutoSignature when you reply to and forward email messages.

1. In the top-right corner of the page, click ***Preferences***.

   The Personal Preferences dialog box opens.

2. Click ***Other Preferences***.

3. Select the ***Email*** tab.

4. Click ***AutoSignature***.

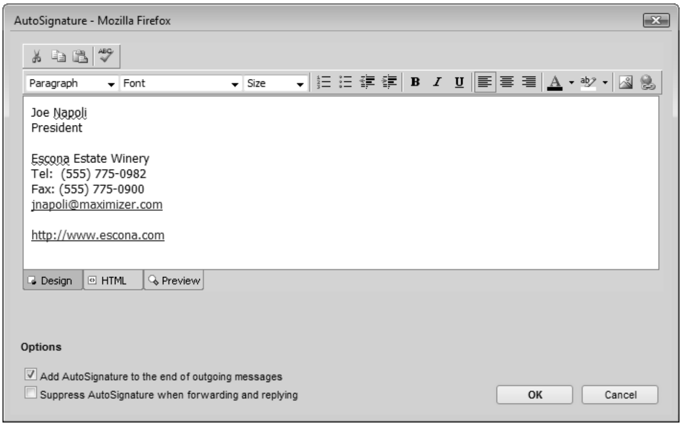
5. Enter the content of the email signature.

   Use the options in the toolbar to add formatting, images, and hyperlinks to the signature.

6 Under ***Options***, select ***Add AutoSignature to the end of outgoing messages***.

7 To exclude the signature when you forward or reply to email messages, select ***Suppress AutoSignature when forwarding and replying***.

8 Click ***OK*** to save the AutoSignature, and click ***OK*** again to save the changes to the preferences.



Set Default Fonts for Email Messages

In the email preferences you can set default fonts for email messages in Maximizer. You can set up different fonts for new messages and for messages that you are forwarding or replying to.

1 In the top-right corner of the page, click ***Preferences***.

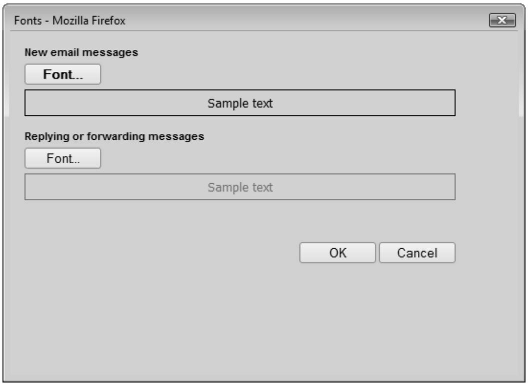
The Personal Preferences dialog box opens.

2 Click ***Other Preferences***.

3 Select the ***Email*** tab.

4 Click ***Fonts***.

The Fonts dialog box opens displaying the current default fonts.



5 Under ***New email messages*** or ***Replying or forwarding email messages***, click ***Font***.

6 Select the default font, font style, size, and color, and click ***OK***.

7 Click ***OK*** to save the default fonts, and click ***OK*** again to save the changes to the preferences.

Microsoft Word Integration

You can use Microsoft Word as your word processor while working with Maximizer. With Word integration, you can launch Word directly from Maximizer and work with Maximizer entries from Word.

Word integration is available only in Microsoft Internet Explorer.

Word integration installs the Maximizer tab in the ribbon in versions of Word that use a ribbon interface and the Maximizer toolbar in earlier versions of Word. The options in the Maximizer toolbar menu integrate information from Maximizer Address Book entries, opportunities, customer service cases, and users with Word documents.

Install Microsoft Word Integration

Word integration is available only in Microsoft Internet Explorer.

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

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

1. In the left navigation pane, hover your mouse over ***Administration***, and select ***Desktop and Mobile Setup*** from the pop-up window.

   The Desktop and Mobile Setup page opens.

2. Select the ***View more information link*** in the ***Microsoft Word Integration*** section.

   The system requirements and a description of the basic steps required to install the Microsoft Word Integration appear below the link.

3. Click ***Download Word Integration***.

   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.

Open Microsoft Word from Maximizer

To complete this procedure, Microsoft Word Integration must be installed.

Word integration is available only in Microsoft Internet Explorer.

- In the View bar, select the ***Open Microsoft Word*** icon.

Insert a Merge Field in a Microsoft Word Document

To complete this procedure, Microsoft Word Integration must be installed.

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

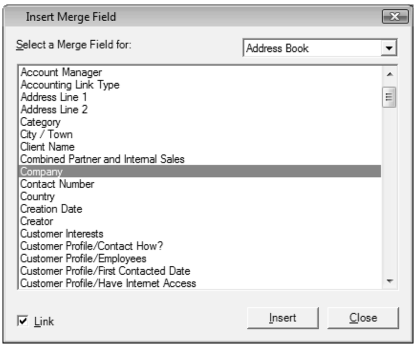
Word integration is available only in Microsoft Internet Explorer.

When you add a merge field to a Word document, you have the option of adding the merge field as a link. When the merge field is added as a link, a field is added to the document. When you merge the document, the field is replaced with the value from the current entry. If you add a merge field without linking it, the value of the field in the current entry is added to the document as text.

This procedure is written for Microsoft Word 2007 or later. The steps are slightly different in earlier versions of Word.

1. With a document open in Word, place your cursor where you want to insert the merge field.
2. In the ***Maximizer*** tab, click the top of the ***Insert Merge Field*** icon in the ***Insert and Preview*** group.

   The Insert Merge Field dialog box opens.



3. From 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 ***Insert*** to add the merge field to the document.

   The merge field is inserted into the document at the current cursor position.

   Continue inserting merge fields until your document is complete. You may edit the document and reposition the cursor while the Insert Merge Field dialog box remains open.
7. When you are finished inserting merge fields, click ***Close***.

Insert a Basic Merge Field in a Microsoft Word Document

To complete this procedure, Microsoft Word Integration must be installed.

You can add a merge field for some basic fields directly from the Maximizer CRM group in the Add-Ins tab. The current state of the Link checkbox in the Insert Merge Field dialog box determines if the merge field is added as a link or not. By default, the merge field is added as a link.

Word integration is available only in Microsoft Internet Explorer.

1. With a document open in Word, place your cursor where you want to insert the merge field.
2. In the ***Maximizer*** tab, click the bottom of the ***Insert Merge Field*** icon in the ***Insert and Preview*** group, and select the merge field.

   The merge field is inserted into the document at the cursor position.

Preview a Microsoft Word Document

To complete this procedure, Microsoft Word Integration must be installed.

Word integration is available only in Microsoft Internet Explorer.

You can view previews of Word documents showing information from entries in your Maximizer Address Book. When you preview the document, the linked merge fields in the document are replaced with values for the current Maximizer user, Address Book entry, opportunity, or customer service case.

This procedure is written for Microsoft Word 2007 or later. The steps are slightly different in earlier versions of Word.

1. Open the document in Word.
2. In Maximizer, click on the entry to make it the current entry.

3 In the ***Maximizer*** tab in Word, select ***Preview*** from the ***Insert and Preview*** group.

The merge fields in the document are replaced with values from the current entry.

Select Preview a second time to return to the default view showing the merge fields.

4 To view values for the next or previous entry in the list: in the ***Maximizer*** tab, select ***Previous Entry*** or ***Next Entry*** from the ***Navigate*** group.

Send a Microsoft Word Document to the Printer

To complete this procedure, Microsoft Word Integration must be installed.

Word integration is available only in Microsoft Internet Explorer.

When you use Microsoft Word with Maximizer, you can send a Word document to the printer, automatically merging the document with 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 save the document to all entries included in the merge.

You can merge the document for a single Maximizer entry, or you can select multiple entries to print the document for all entries at the same time.

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

This procedure is written for Microsoft Word 2007 or later. The steps are slightly different in earlier versions of Word.

1 Open the document in Word.

2 In Maximizer, click on the entry to make it the current entry.

– or –

In Maximizer, select multiple entries.

- Click the checkbox to the left of entries.
- Click on the entries one at a time while holding down the ***Control*** key.
- To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

3 To save the merged document to the current or selected Address Book entries when it is printed, in the ***Maximizer*** tab in Word, check the ***Save Merged Document(s)*** option in the ***Merge*** group.

4 To print the document for the current entry only, in the ***Maximizer*** tab in Word, select the top of the ***Send to Printer*** icon in the ***Merge*** group.

– or –

To print the document for multiple selected entries, in the ***Maximizer*** tab in Word, select the bottom of the ***Send to Printer*** icon in the ***Merge*** group, and select the ***Print Selected Entries*** option.

A dialog appears confirming that the document will be printed for the selected entries. Click ***Yes*** to continue.

If the ***Save Merged Document(s)*** option is checked, the Save Document to Maximizer Entry dialog appears.

5. Enter the ***Name***, ***Owner***, ***Category***, and ***Description*** for the saved document, then click ***OK***.

   The merged document is sent to the default printer currently set up in Word.

Save a Microsoft Word Document to a Maximizer Entry

To complete this procedure, Microsoft Word Integration must be installed.

Word integration is available only in Microsoft Internet Explorer.

When you use Microsoft Word with Maximizer, you can save a Microsoft Word document to the current entry in Maximizer or to multiple selected entries. The document is saved to the Documents tab of the entries.

You can save Microsoft Word documents to Address Book entries, customer service cases, and opportunity entries. If the document contains any linked merge fields, the merge fields are replaced with values for the current Maximizer user, Address Book entry, opportunity, or customer service case when the document is saved.

This procedure is written for Microsoft Word 2007 or later. The steps are slightly different in earlier versions of Word.

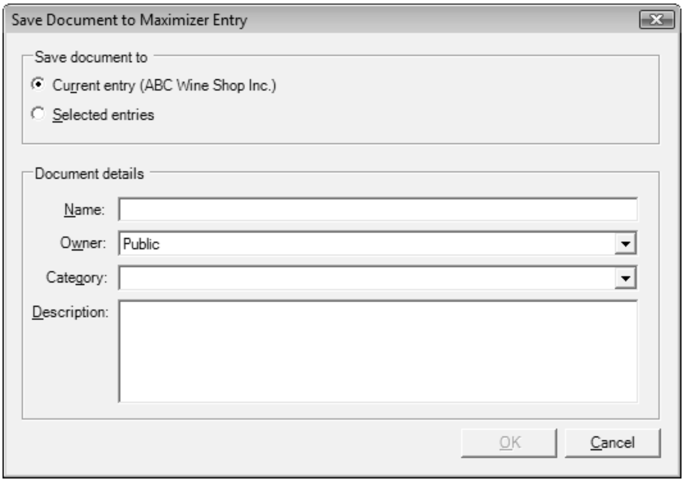
1. Open the document in Word.
2. In Maximizer, click on the entry to make it the current entry.

   – or –

   In Maximizer, select multiple entries.

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.
3. In the ***Maximizer*** tab in Word, select ***Save to Maximizer Entry***.

   The Save Document to Maximizer Entry dialog appears.



4 In the ***Save document to*** group, select whether you want to save the document to the ***Current entry*** only or to all ***Selected entries***.

5 Enter the ***Name***, ***Owner***, ***Category***, and ***Description*** for the saved document, then click ***OK***.

The merged document is saved to the current or selected Maximizer entries.

Create Envelopes and Mailing Labels for Maximizer Entries

To complete this procedure, Microsoft Word Integration must be installed.

Word integration is available only in Microsoft Internet Explorer.

When you use Microsoft Word with Maximizer, you can create envelopes and mailing labels for the current entry in Maximizer or for multiple selected entries. The envelopes and labels are automatically formatted with the name and address of the Maximizer contact.

This procedure is written for Microsoft Word 2007 or later. The steps are slightly different in earlier versions of Word.

1 Open Microsoft Word.

2 In Maximizer, click on the entry to make it the current entry.

– or –

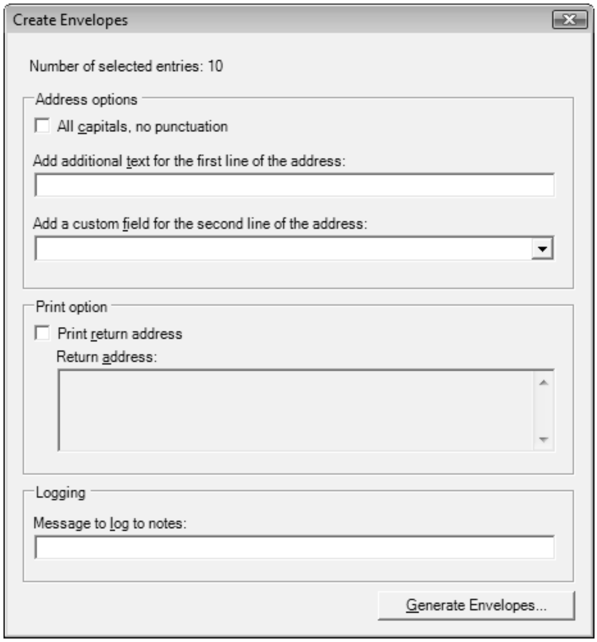
In Maximizer, select multiple entries.

- Click the checkbox to the left of entries.
- Click on the entries one at a time while holding down the ***Control*** key.

- To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

3 To create envelopes, in the ***Maximizer*** tab in Word, select ***Envelopes*** in the ***Print*** group.

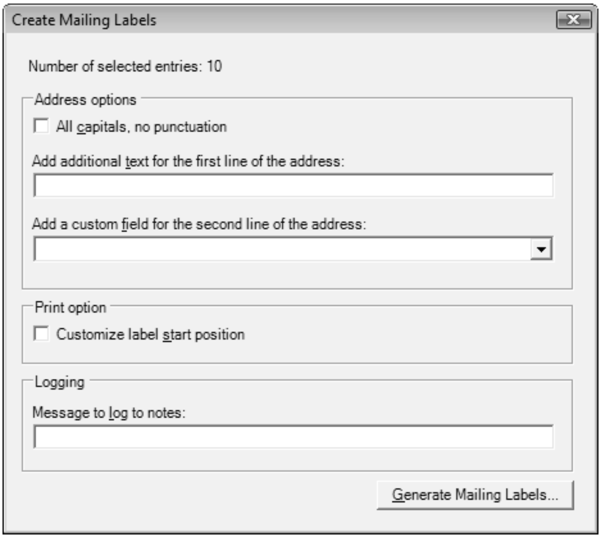
The Create Envelopes dialog box opens.



– or –

To create mailing labels, in the ***Maximizer*** tab in Word, select ***Labels*** in the ***Print*** group.

The Create Mailing Labels dialog box opens.



4 Set the ***Address options*** to customize the way the address appears on the envelopes or labels.

Select the ***All capitals, no punctuation*** option to display the address in ALL CAPS with any punctuation removed.

To display a line of custom text above the address, enter it in the ***Add additional text for the first line of the address*** field. If you do not want to display additional text above the address, leave this field blank.

To display a merge field above the address, select it in the ***Add a custom field for the second line of the address*** drop-down list. If you do not want to display a custom merge field above the address, leave this field blank.

5 Set the ***Print option*** to customize the way the envelopes or labels are printed.

The Return address field is automatically populated with the return address that is saved in Microsoft Word. Refer to your Microsoft Word documentation for information on how to update this address.

When creating envelopes, if you want to include a return address, select the ***Print return address*** option and enter the return address in the ***Return address*** field.

When creating labels, if you will be printing the labels on a partially-used label sheet and would like to set a custom starting position for printing the labels, select the ***Customize label start position*** option.

6 To log a note to the Maximizer entries for which the envelopes or labels are created, enter the text of the note in the ***Message to log to notes*** field. If you do not wish to log a note to the Maximizer entries, leave this field blank.

7. Click ***Generate Envelopes*** or ***Generate Mailing Labels***.

   The Microsoft Word Envelope Options or Label Options dialog box opens.

Refer to your Microsoft Word documentation for more information on how to use the settings in the Envelope Options and Label Options dialog boxes.

8. Select the envelope size or label type and other printing options, then click ***OK***.

   A new document opens containing the envelopes or labels.

Microsoft Outlook Integration

Microsoft Outlook integration for Maximizer adds a toolbar or a ribbon bar (Office 2010) in the Mail, Contacts, and Contact information windows in Outlook.

Outlook integration works with Outlook 2003 or higher.

To access Maximizer commands, the Maximizer 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.
- Create Address Book entries.
- Create customer service cases.
- Save email messages to Address Book entries, opportunities, and customer service cases.
- View Address Book entries.
- Synchronize appointments and contacts between Outlook and Maximizer.
- Track email threads in a Maximizer Address Book entry's documents.

The following sections contain additional information on using Outlook integration:

- "Install Microsoft Outlook Integration" on page 182
- "Set Up Microsoft Outlook Integration" on page 182
- "Select a Microsoft Outlook Address List for Integration" on page 185
- "Add an Address Book Entry from Microsoft Outlook" on page 186
- "Add a Customer Service Case from Microsoft Outlook" on page 187
- "Save an Email Message to an Entry from Microsoft Outlook" on page 188
- "View an Address Book Entry from Microsoft Outlook" on page 189
- "Track an Outlook Email Thread in Maximizer" on page 190

Install Microsoft Outlook Integration

To complete this procedure, Microsoft Outlook integration must be enabled. For more information, see the Maximizer CRM Administrator’s Guide or your system administrator.

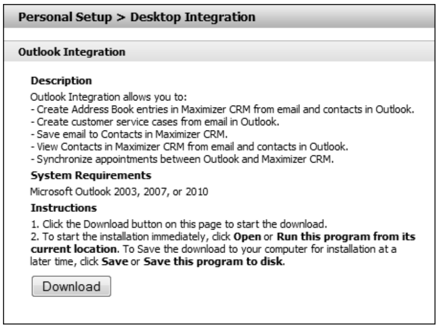
This setup involves downloading Active X controls, which may be disallowed on some networks. Outlook integration can also be installed from the Maximizer CRM CD. For more information, see the *Maximizer CRM Administrator’s Guide*.

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 ***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.

Set Up Microsoft Outlook Integration

To complete this procedure, Outlook Integration for Maximizer must be installed.

Before using Microsoft Outlook Integration, you must configure Outlook to communicate with Maximizer. You must specify the Maximizer URL, the Address Book, and the Maximizer user ID and password. You can also set default preferences for creating new Address Book entries, and configure Outlook Synchronization.

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

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

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

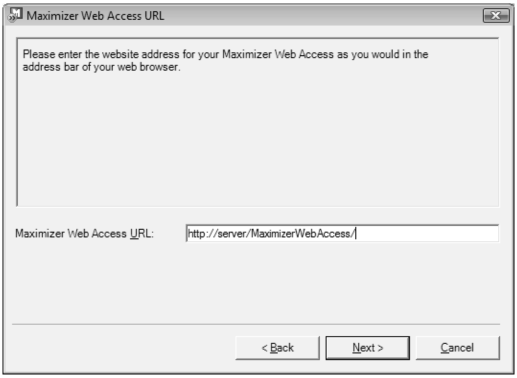
   The Outlook Integration for Maximizer wizard opens.

2. Click ***Next***.

3. Enter the Maximizer URL.

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

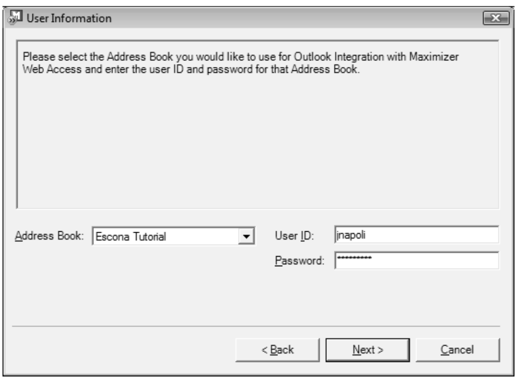
   http://<servername>/MaximizerWebAccess/



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***.

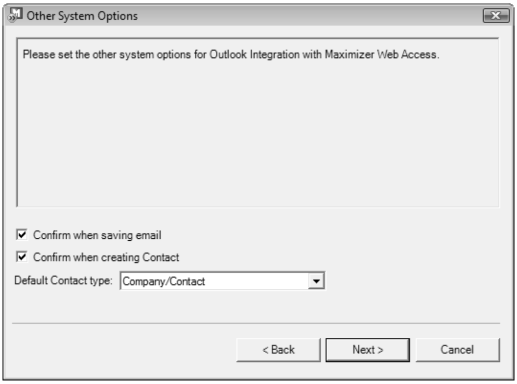


7 Select the options for creating Address Book entries and saving email messages:

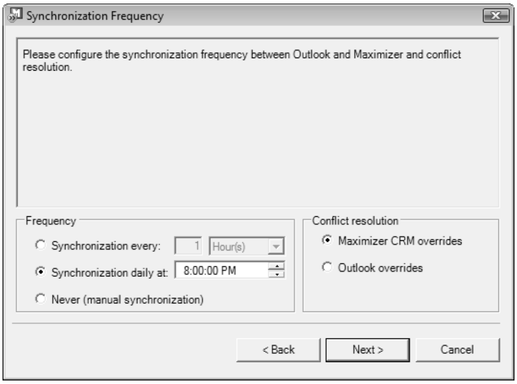
- Select the ***Confirm when saving email*** and the ***Confirm when creating Contact*** options to specify details before saving email or contact information to Maximizer.
- In the ***Default Contact type*** drop-down list, select the type of Address Book entry that is created when you add contacts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

Click ***Next***.

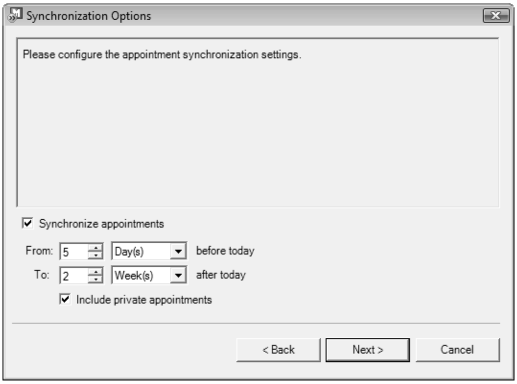


8 Specify the frequency for synchronization between Maximizer and Outlook, and click ***Next***.



9 Specify the options for synchronizing contacts between Maximizer and Outlook, and click ***Next***.

- Select the ***Synchronize Address Book entries*** option if you want to synchronize contacts between Maximizer and Outlook.
- In the ***Synchronize Address Book entries from Favorite List*** drop-down, select the Maximizer favorite list that you want to synchronize entries from.
- In the ***Synchronize Contacts from Outlook Category*** field, enter the Outlook contact category that you want to synchronize entries from.
- Click ***Phone Mapping*** to set up a mapping between Outlook contact phone number fields and the corresponding phone number fields in Maximizer Address Book entries.



10 Click ***Finish***.

Select a Microsoft Outlook Address List for Integration

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

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

This procedure is written for Microsoft Outlook 2010. The steps may differ slightly in earlier versions of Outlook.

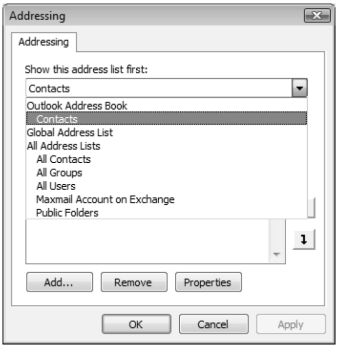
1 In Outlook, on the ***Home*** tab, select ***Address Book*** from the ***Find*** group.

The Address Book dialog box opens.

2 Select ***Tools > Options***.

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

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



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

Add an Address Book Entry from Microsoft Outlook

To complete this procedure, Outlook Integration for Maximizer must be installed.

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

The Create Contact command is available in the Maximizer Outlook Integration tab or toolbar in the Mail and Contact windows, and the Message and Contact dialogs 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.

1. In Outlook, select the contact or the email message.
2. Select ***Create Contact***.

   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.
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.

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

Add a Customer Service Case 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 Maximizer is open in Microsoft Internet explorer and an Address Book entry is currently selected.
- Save the email message to an existing customer service case. This option is available only if Maximizer is open in Microsoft Internet explorer and a customer service case is currently selected.

1. Select an email message in Outlook, and select ***Create Case***.

   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.

Save an Email Message to an Entry from Microsoft Outlook

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

If you or another user has already saved the email message to the entry, Maximizer will avoid creating a duplicate entry by not saving the email again.

This procedure is written for Microsoft Outlook 2010. The steps may differ slightly in earlier versions of Outlook.

If there are no Address Book entries, opportunities, or customer service cases associated with the email message, you can search for entries in your Maximizer Address Book to save the email message to. The email message is then saved to the selected entries as a document.

1 Select or open the email message in Outlook, on the ***Maximizer*** tab, expand the ***Save to Maximizer*** menu and select the ***Save to Address Book Entry***, ***Save to Opportunity***, or ***Save to Case*** option.

– or –

In Outlook, compose a new email message, and on the ***Maximizer*** tab, select ***Send Email and Save to Contact*** , ***Send Email and Save to Opportunity***, or ***Send Email and Save to Case***.

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, or the opportunity or case whose contact 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, Save Email to Opportunity, or Save Email to Case dialog box opens. The list displays all of the entries that contain the email address of the sender or recipient. If no such entries exist, the list is empty.

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

2. If the entries that you want to save the email to do not appear in the list, click the ***Search Address Book entries***, ***Search opportunities***, or ***Search cases*** link.

   The Search Maximizer Address Book entries, Search Maximizer opportunities, or Search Maximizer cases dialog opens.

3. Enter the ***Last Name*** or ***Company*** of the Address Book entry, opportunity contact, or case contact that you want to search for and click ***Search***.

   The search results are displayed in the list.

4. Select the entries that you want to save the email to and click ***OK***.

   The selected entries are added to the list.

   - If you want to select multiple entries, hold down the ***Ctrl*** key as you click each entry.
   - Click the ***View selected entry in Maximizer*** to open your Maximizer Address Book and view the selected entry.

5. Check the box next to each of the entries that you want to save the email to and click ***OK***.

6. The email is sent and is saved to the documents of all selected entries.

View an Address Book Entry from Microsoft Outlook

You can automatically open Maximizer to view Address Book entries from Microsoft Outlook. You can view Address Book entries associated with Outlook contacts or with email messages. 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 your web browser opens displaying the Address Book page in Maximizer. The page lists all matching entries.

1. In a mail or contacts window in Outlook, select an email message or contact.

2. Select ***View Contact in Maximizer***.

Track an Outlook Email Thread in Maximizer

You can track an Outlook email thread in your Maximizer Address Book using the Maximizer Outlook Integration add-in. When you choose to track an Outlook email thread you select a Maximizer Address Book entry and any email responses in the same thread in Outlook are automatically saved to the entry's documents in Maximizer. By tracking email threads in Outlook you can ensure that important email messages are always saved with the related entries in your Maximizer Address Book and are available when you need them.

Keep the following points in mind when tracking email threads with Maximizer Outlook Integration:

- When you start tracking an email thread, only the current and future emails are saved to the selected Address Book entry in Maximizer. Any existing emails in Outlook that are part of the same thread are not saved to the Address Book entry.
- If another Maximizer Address Book entry is added to an email thread in Outlook that is already being tracked in Maximizer, email messages in the thread are not automatically added to the new Address Book entry's documents. If you want to track the email thread with the new Address Book entry as well, you should stop tracking the email thread and start tracking it again to select the new entry.
- Once you start tracking an email thread, all messages in the thread are saved to the documents of the selected entries. If you no longer need to track an email thread make sure that you stop tracking it to avoid filling up the documents of your Address Book entries with unnecessary email messages.

1. In Outlook, select or open the email message you want to track and select ***Save and Track***.

- 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 and all future email responses to this message are automatically saved to the matching entry's documents.
- 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 Outlook Integration Options icon.

2. If the entries that you want to track the email thread with do not appear in the list, click the ***Search Maximizer Address Book entries*** link.

   The Search Maximizer Address Book entries dialog opens.

3. Enter the ***Last Name*** or ***Company*** of the Address Book entry that you want to search for and click Search.

   The search results are displayed in the list.

4. Select the entries that you want to track the email thread with and click ***OK***.

   The selected entries are added to the list.

- If you want to select multiple entries, hold down the ***Ctrl*** key as you click each entry.
- Click the ***View selected entry in Maximizer*** to open your Maximizer Address Book and view the selected entry.

5. Check the box next to each of the entries that you want to track the email thread with and click ***OK***.

   This email message and all future email responses to this message are automatically saved to the documents of the selected entries.

   If you no longer need to track this email thread, select any message in the thread and, in the Maximizer tab, select ***Stop Tracking***.

Microsoft Outlook Synchronization

Microsoft Outlook Synchronization mirrors select appointments and contacts between Maximizer and Microsoft Outlook to ensure the entries exist in both programs and that they both contain the same information. Outlook Synchronization is included in Outlook Integration for Maximizer.

Outlook Synchronization settings are configured on a per-user basis, and each Maximizer user has one set of configuration settings. Outlook Synchronization preferences enable you to specify the following settings:

- The frequency of synchronization. This setting determines how often entries are synchronized including the option only to synchronize manually.
- Conflict resolution options. When an entry has changed in both Maximizer and Outlook since the last synchronization, you can choose to have the Maximizer entry override the Outlook entry, or vice-versa.
- The type of entries to synchronize. You can choose to synchronize appointments, or Address Book entries, or both.
- The date range within which appointments are synchronized. All appointments scheduled within the specified date range are synchronized. These settings apply to appointments in both Maximizer and Outlook.
- The Address Book entries to synchronize. All contacts from the specified Outlook category and all Maximizer Address Book entries from the specified favorite list are synchronized.
- Phone number mapping options. You can specify a mapping between each phone number field in your Outlook contacts and a corresponding field in your Maximizer Address Book entries.

The "Sync Issues" folder in Outlook contains log files and items that Outlook has been unable to synchronize with Microsoft Exchange. This folder does not apply to Outlook Synchronization with Maximizer.

You cannot use Outlook Synchronization if MaxSync for Microsoft Exchange is installed and configured for the current Address Bookf

Synchronizing Appointments with Microsoft Outlook

When Outlook Synchronization is configured, it can synchronize select appointments between the Maximizer Address Book and Microsoft Outlook. Appointments scheduled within the specified date range are synchronized.

If an instance of a recurring appointment occurs within the specified date range, all instances of the recurring appointment are synchronized as well. You can also specify whether to include private appointments in the synchronization.

The Products/Services, Categories attendees, resources, and any notes you add to appointments in Maximizer are synchronized to Outlook. These items appear as part of the appointment dialog box in Outlook.

Recurring Appointments

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

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

Group Appointments

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

Synchronizing Contacts with Microsoft Outlook

When Outlook Synchronization is configured, it can synchronize select contacts between the Maximizer Address Book and Microsoft Outlook. Contacts in the specified category in Outlook are synchronized with the Address Book entries in the specified favorite list in Maximizer.

Phone numbers in your Outlook contacts are synchronized with the corresponding fields in your Maximizer Address Book entries according to the Phone Mapping settings specified in your Microsoft Outlook Synchronization Options.

Configure Microsoft Outlook Synchronization

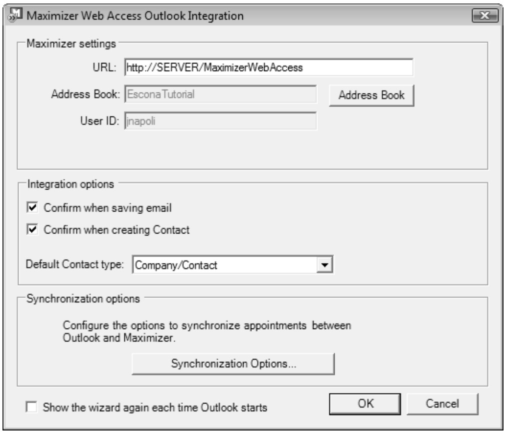
To complete this procedure, Outlook Integration for Maximizer must be installed.

You can set up Outlook Synchronization in the Outlook Integration for Maximizer Wizard that runs when you first open Outlook after installing Outlook Integration. After setting up Outlook Integration, you can change the settings at any time.

This procedure is written for Microsoft Outlook 2010. The steps may differ slightly in earlier versions of Outlook.

1. In Outlook, on the ***Maximizer*** tab, select ***Preferences***.

   The Maximizer Outlook Integration dialog box opens.



2. Click ***Synchronization Options***.
3. Under ***Frequency***, specify how often Maximizer should synchronize with Outlook.

   If you select Never (manual synchronization), you must initiate synchronization manually.
4. Under ***Conflict resolution***, specify how to handle entries that have changed in both Maximizer and Outlook since the last synchronization.
5. Select ***Synchronize appointments***.

   In the ***From*** and ***To*** fields, specify the date range of the appointments included in synchronization.

Select or clear ***Include private appointments*** to include or exclude appointments marked as private in the synchronization.

6 Select ***Synchronize Address Book entries***.

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

In the ***Synchronize Contacts from Outlook Category*** field, enter the Outlook contact category that you want to synchronize entries from.

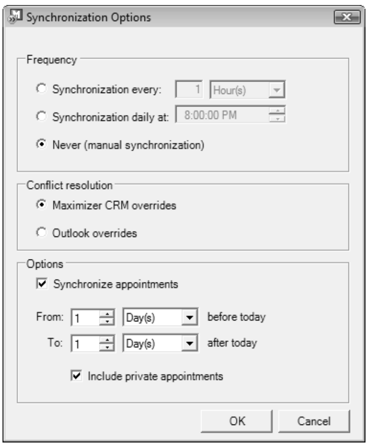
7 Click ***Phone Mapping***.

The ***Phone Mapping*** dialog opens.

8 For each phone number field in the ***Outlook*** column that you want to synchronize, select a corresponding field in the ***Maximizer*** column, and click ***OK***.

Each Maximizer phone number field can only be mapped to one Outlook phone number field.

9 Click ***OK***.



10 Click ***OK*** to save all changes in the Outlook Integration settings.

Manually Synchronize with Microsoft Outlook

To complete this procedure, Outlook Integration for Maximizer must be installed.

You can manually synchronize entries between your Maximizer Address Book and Microsoft Outlook at any time.

This procedure is written for Microsoft Outlook 2010. The steps may differ slightly in earlier versions of Outlook.

- In Outlook, on the ***Maximizer*** tab, select ***Sync with Maximizer***.

CHAPTER 6

Opportunities

Organize Your Sales with Opportunity Management

In this chapter...

About Opportunities

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

You can use opportunities to formalize your sales processes.

- 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, 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:

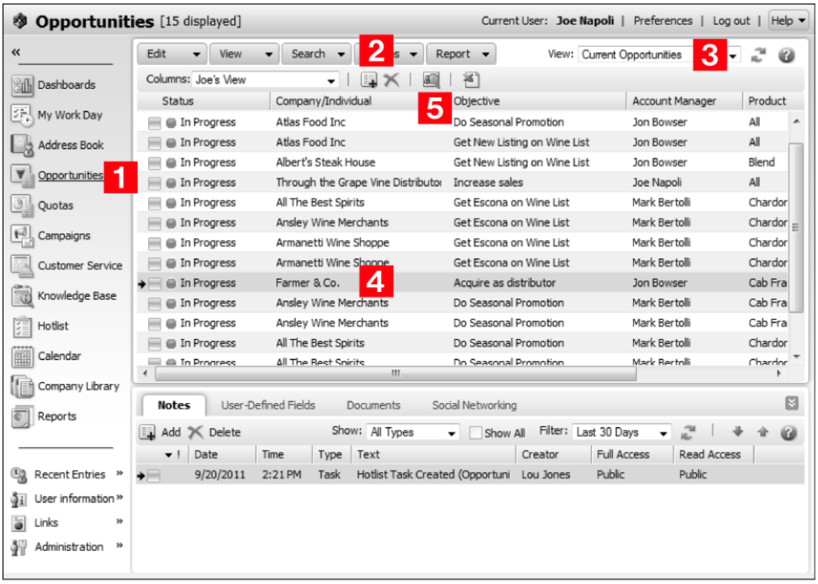
1 Select the ***Opportunities*** icon to open the Opportunities page.

2 Use the ***view bar*** buttons for common opportunity tasks.

3 Use the ***View*** drop-down list to show all opportunities, team-updated opportunities, or current opportunities.

4 Click an ***opportunity*** to view or modify it.

5 Click the ***Open Address Book entry*** button in the View bar to view the Address Book entry associated with the current opportunity.



View an Opportunity from the Opportunities Page

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

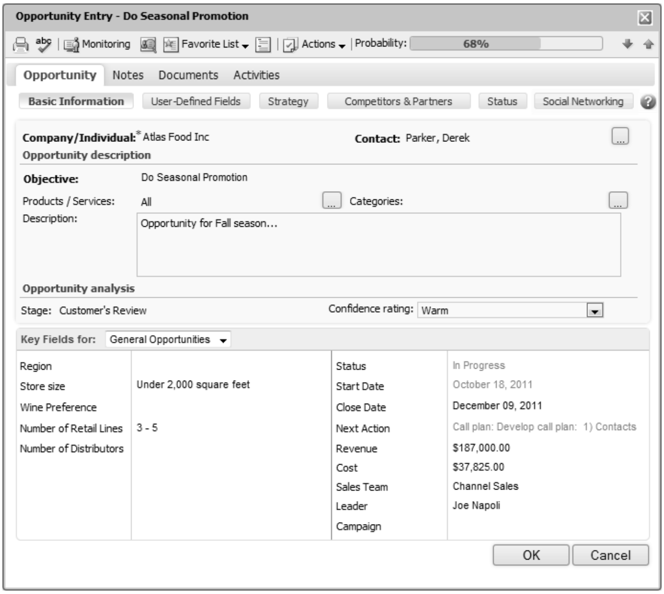
The Opportunities page opens.

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.



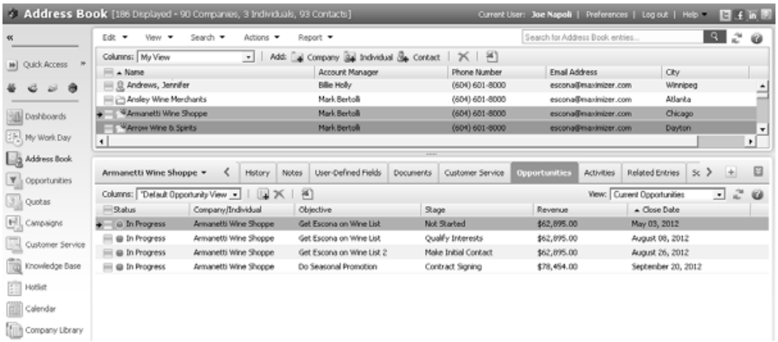
4 Select the other tabs to view more information on the opportunity.

View an Opportunity from an Address Book Entry or Hotlist Task

1 Select the Address Book entry or Hotlist task.

2 Select the ***Opportunities*** following pane.

All opportunities for the current Address Book entry, or for the Address Book entry linked to the current Hotlist task are displayed in the list.



3 Click on an opportunity to open it.

Retrieve Address Book Entries Associated with Opportunities

You can retrieve the Address Book entries associated with opportunities and add them to the current list in the Address Book page. If a contact is associated with the opportunity as well as a company or individual, both the contact and the company or individual are retrieved and added to the list.

You can retrieve the Address Book entries associated with a single opportunity, or you can select multiple opportunities to retrieve the Address Book entries associated with all of the selected entries at once.

1 Click on the opportunity to make it the current entry

-or-

Select multiple opportunities.

- Click the checkbox to the left of entries.
- Click on the entries one at a time while holding down the Control key.
- To select all entries between two entries, select an entry and, while holding down the Shift key, select another entry.

2 Select View > View in Address Book.

Opportunities Tab

The Opportunities tab or following pane displays the opportunities associated with the current entry. In the Opportunities following pane for an Address Book entry, all opportunities associated with the entry are displayed. In a campaign, all opportunities to which the campaign is assigned are displayed. Generally, the opportunities are for Address Book entries subscribed to the campaign.

Opportunities are displayed in a list based on criteria specified in the status and close date filters. You can select and sort entries like in other lists in Maximizer.

- To open an opportunity, click on the entry.
- From the ***Columns*** drop-down list, select an existing opportunity column setup to change the fields displayed in the list.
- To add or delete opportunities, use the icons in the view bar at the top of the list.

  You can add opportunities only from an Address Book entry, not from a campaign.

Add an Opportunity

All opportunities are associated with Address Book entries. To create an opportunity, you must select an Address Book entry or an existing opportunity, customer service case, or activity associated with the Address Book entry.

1. Click on the Address Book entry or on an opportunity associated with the Address Book entry to make it the current entry.

   – or –

   In the Hotlist page, click on an activity associated with the Address Book entry to make it the current entry.

   – or –

   Open a customer service case associated with the Address Book entry.

You can select a different Address Book entry in the Opportunity Entry dialog box by clicking the ellipsis button beside the Company/Individual field.

2. In the Address Book page or in an open customer service case, select ***Actions > Create an Opportunity***.

   – or –

   In the Opportunities following pane of the Address Book or Hotlist page, click ***Add***.

   – or –

   In the Opportunities page, select ***Edit > Add Opportunity***.

   – or –

   In the Address Book page, right-click an entry and select ***Create an Opportunity***.

   The Oppportunity Entry dialog box opens.

3. Specify the basic fields for the opportunity.
   - Enter the opportunity ***Objective***. The objective should describe the goal of this opportunity.
   - Select the applicable ***Products/Services*** and ***Categories***.
   - Enter the ***Description*** of the opportunity.
   - Select a ***Stage*** and ***Confidence Rating*** for the opportunity.

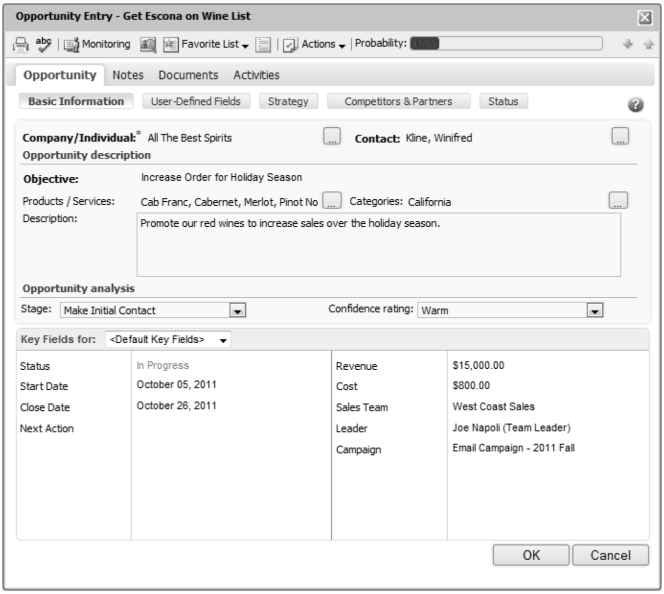
Mandatory opportunity fields are denoted by an asterisk.

4. From the ***Key Fields for*** drop-down list, select a Key Fields list, and enter values for the fields in the list.

   Key Fields lists contain system fields and user-defined fields. They are defined by your system administrator in the Key Fields preferences in Administrator.

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

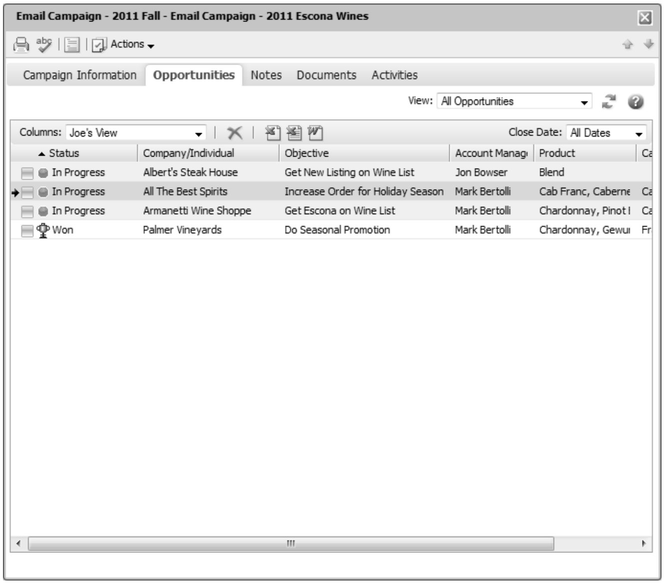
6 Click ***OK*** to save the opportunity.



Assigning Campaigns to Opportunities

You can associate automated campaigns with opportunities to identify which campaigns are the sources of your opportunities. In the campaigns, you can calculate the revenue generated by all of the opportunities associated with the campaigns.

From an open campaign, you can view the opportunities associated with the current campaign in the Opportunities tab.



You can assign campaigns to opportunities manually at any time after creating an opportunity. You can also assign campaigns automatically to new opportunities by specifying settings in your user preferences.

The system administrator can set the campaign field as a mandatory field to ensure all opportunities are associated with campaigns. You may want to have a generic campaign to associate with opportunities that do not correspond with existing automated campaigns. For example, someone can create a campaign named "None", which doesn't contain any campaign activities for this purpose.

You must have Read permission for campaigns to assign a campaign to an opportunity. If the Campaign field is set as a mandatory field, you cannot create or modify new opportunities without this permission.

Assign a Campaign to an Opportunity

To complete this procedure, you must have Read permission for campaigns and Modify permission for opportunities.

You can associate existing automated campaigns with opportunities.

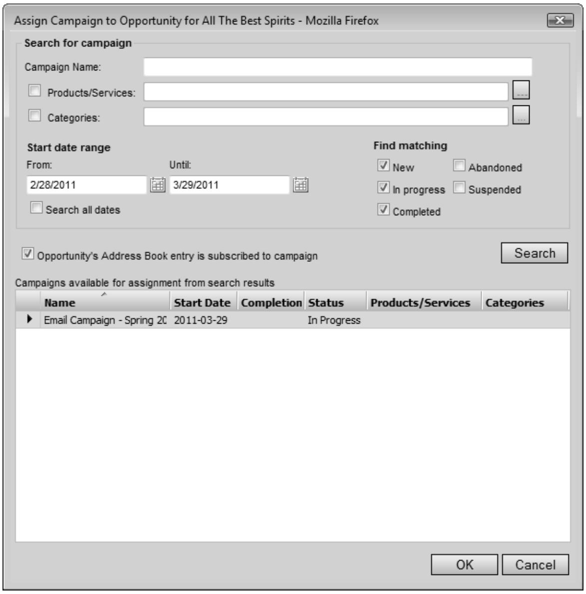
1. Open the opportunity.
2. If necessary, from the ***Key Fields for*** drop-down list, select a Key Fields list that contains the Campaign field.

   By default, the Campaign field is included in the <Default Key Fields> list.
3. Select the ***Campaign*** field, and click the ellipsis button to the right of the field.

   The Assign Campaign to Opportunity dialog box opens.
4. Enter the search criteria for the campaign.
   - In the ***Campaign Name*** field, specify the name of the campaign.
   - In the ***Products/Services*** and ***Categories*** fields, specify the products, services and categories associated with the campaign.

     By default, the Products/Services and Categories values from the opportunity are selected.
   - Under ***Start date range***, specify the date range for the campaign start date, or select ***Search all dates***.
   - Under ***Find matching,*** select the status values of the campaigns.
   - Select ***Opportunity's Address Book entry is subscribed to campaign*** to return only the campaigns to which the Address Book entry associated with the opportunity is subscribed.
5. Click ***Search***.

   The automated campaigns matching the search criteria are displayed.
6. Select the campaign and click ***OK***.



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

Automatically Assign Campaigns to Opportunities

To complete this procedure, you must have Read permission for campaigns.

You can set your preferences to assign existing campaigns automatically to new opportunities. If an Address Book entry is subscribed to a campaign, the campaign is assigned to any new opportunities for the Address Book entry within a specified time period. If the Address Book entry is subscribed to multiple campaigns in the time period, you are prompted to select a campaign when you first create the opportunity.

1 In the top-right corner of the page, click ***Preferences***.

The Personal Preferences dialog box opens.

2 Select ***Automatically assign campaign when creating a new opportunity***.

3 From the ***Limit the search to campaigns created*** drop-down list, select the time period in which campaigns must be created.

You can limit the search to campaigns created in the current year, quarter, or month.

To ignore the creation date of campaigns, select ***All Dates***.

4. Click ***Save*** to save the changes to your preferences.

Opportunity Status

When you add a new opportunity, its status is set to “In progress”. By default, when you open the Opportunities page, your current, or “In progress”, opportunities are displayed. You can change the status of an opportunity to indicate that the opportunity is won, lost, abandoned, or suspended.

Complete an Opportunity

To complete this procedure, you must have Modify rights for opportunities, and you must either be assigned as the leader or be a team member with edit rights in the opportunity.

You can complete an opportunity to indicate that the opportunity is won, lost, or abandoned. While completing the opportunity, you can select a reason and enter comments on the opportunity. The completion reasons are set in Administrator. The list differs depending on the status of the opportunity.

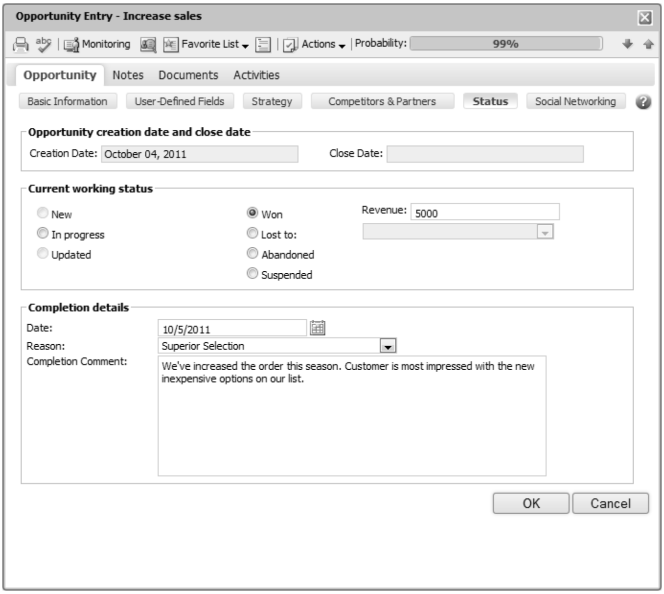
If the opportunity is won, the revenue for the opportunity is recognized against any quotas assigned to the leader or sales team. If the Address Book entries associated with the opportunity are sales leads, the entries are automatically converted to regular entries (not sales leads).

1. Open the opportunity.
2. Select the ***Status*** tab.
3. Under ***Current working status***, select the status of the opportunity: ***Won***, ***Lost to***, or ***Abandoned***.
4. If the opportunity is won, enter the revenue for the opportunity.

   By default, the projected revenue is displayed.
5. If the opportunity is lost, select the competitor who won the opportunity.

   You can select any competitors assigned to the opportunity.
6. Under ***Completion details***, select a reason for completing the opportunity and enter a comment, as desired.

7 Click ***OK***.



Suspend an Opportunity

To complete this procedure, you must have Modify rights for opportunities, and you must either be assigned as the leader or be a team member with edit rights in the opportunity.

When you suspend an opportunity, it is no longer displayed in the list of current opportunities. When the opportunity is suspended, you can continue to modify the opportunity. If a strategy is scheduled for the opportunity, you cannot modify the success factors, roles, and steps in the opportunity. Any unfinished activities are removed from the Hotlist. If you later reopen the opportunity, the activities are returned to the Hotlist.

1 Open the opportunity.

2 Select the ***Status*** tab.

3 Under ***Current working status***, select ***Suspended***.

4 Under ***Completion details***, select a reason for suspending the opportunity and enter a comment, as desired.

5 Click ***OK***.

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. These teams are created and managed in Administrator.

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 any changes to the opportunity. The team leader can schedule strategies for opportunities, assign the activities in the strategies to other team members, and change the status of opportunities.
- ***Team member –*** Regular team members can update the basic and user-defined fields in an opportunity, but they do not have the right to change the strategy or the status of the opportunity. The member's role is to perform the tasks the team leader assigns. Team members can modify the tasks from the Calendar and Hotlist pages.
- ***Team member with edit rights –*** Team members can be granted edit rights for opportunities, giving the team member the same abilities as the team leader.

Assign a Sales Team to an Opportunity

You can assign sales team to opportunities while adding or modifying the opportunities. Members of the selected sales teams can be specified as leaders of opportunities.

1. Open the opportunity.
2. If necessary, from the ***Key Fields for*** drop-down list, select a Key Fields list that contains the Sales Team and Leader fields.

   By default, the Sales Team and Leader fields are included in the <Default Key Fields> list.
3. From the ***Sales Team*** drop-down list, select the sales team to assign the opportunity to.

4. From the ***Leader*** drop-down list, select a member of the selected sales team as the leader of the opportunity.
5. Click ***OK*** to save the changes to the opportunity.

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, you can schedule strategies for your opportunities and add and modify strategy components in opportunities.

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 role represents a person who directly affects the outcome of an opportunity. You assign each role a weight based on how much you think that person affects the probability of closing the opportunity. In each opportunity, you can assign roles to specific Contacts in your Address Book.
- ***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.

Schedule a Strategy for an Opportunity

Schedule a strategy from the Strategy Library 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.

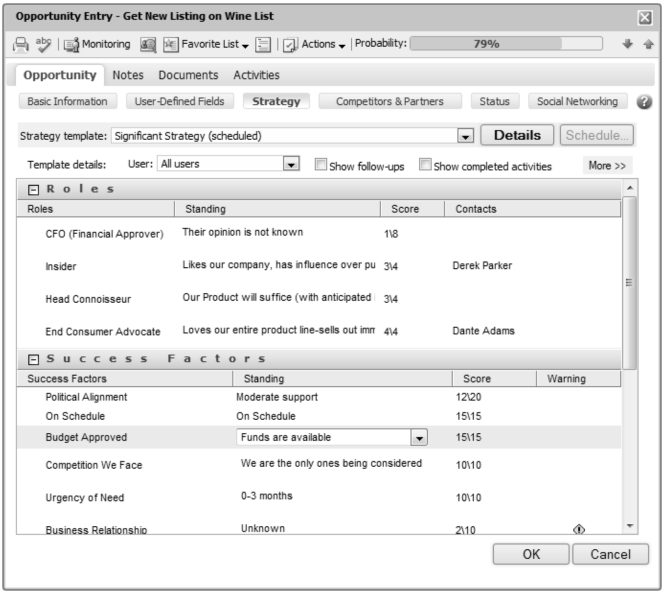
1. Open the opportunity, and select the ***Strategy*** tab.
2. From the ***Strategy template*** drop-down list, select a strategy.

   You can click ***Details*** to view specific properties of the strategy such as the description and cost.
3. Click ***Schedule***, select the ***Start date*** for applying the strategy, and click ***OK***.

4. 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.
5. For each success factor in the strategy, click in the ***Standing*** column and select a standing for the success factor.

You cannot apply standings to the “On Schedule” and “Political Alignment” success factors. They are calculated automatically.



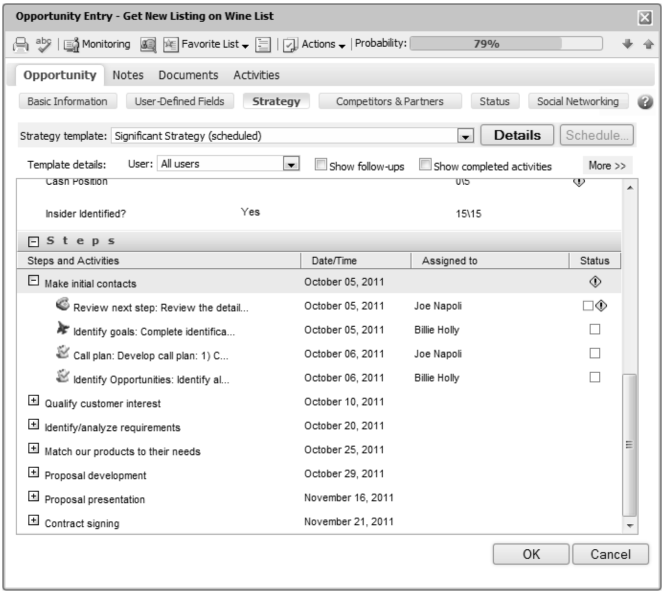
6 Select a step and click the ***plus sign*** to view all activities for this step.

7 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.)

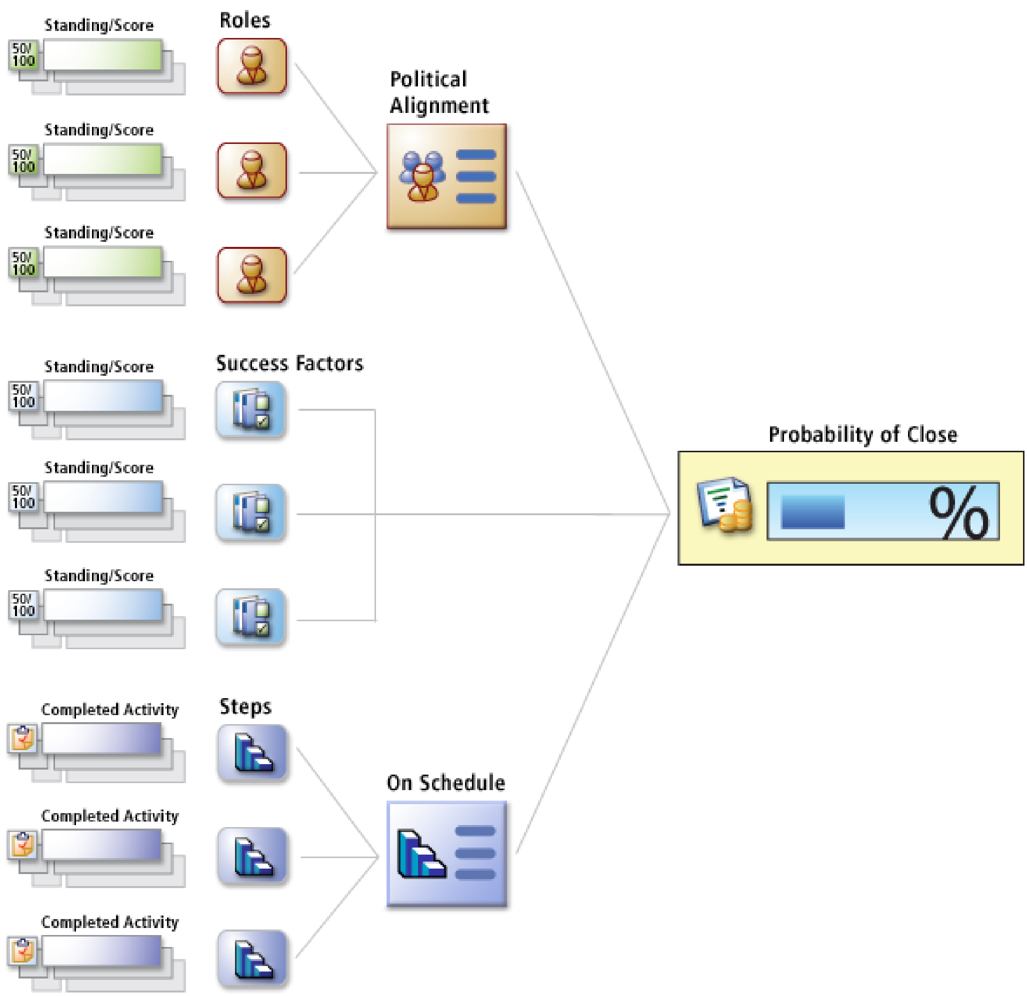
- Use the ***More*** button to add, modify, or delete roles, success factors, steps, and activities.



8 Click ***OK*** 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.



Multi-Currency

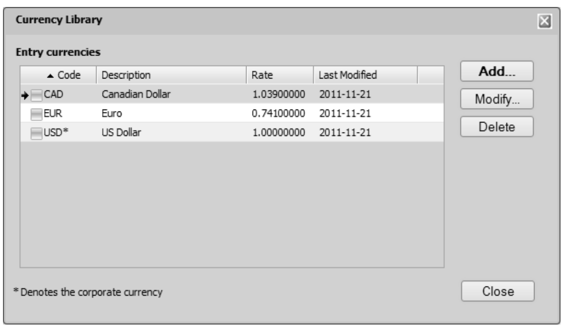
Enabling multi-currency in an Address Book enables users to enter opportunity revenue in other currencies. All other currency fields are displayed in the default currency for the Address Book, otherwise known as the corporate currency. Additional currencies added to the Address Book can be applied to opportunity revenue on a per-entry basis.

Multi-currency is enabled in Administrator. If this functionality is not enabled, all related fields, menu items, and dialog boxes are not visible in Maximizer. Once multi-currency is enabled for an Address Book, it cannot be disabled. The corporate, or default, currency for the Address Book is also set in Administrator. For more information on enabling multi-currency, granting users rights to manage multi-currency, and setting the corporate currency, see the *Maximizer CRM Administrator's Guide*.

The corporate currency acts as the exchange rate baseline for other currencies. The corporate currency always has an exchange rate of 1.0, and other currencies have their own exchange rates. The exchange rates determine the revenue conversion from one currency to another. By default, the corporate currency is US, but this can be changed in Administrator.

Currency Library

Currencies are managed in the Currency Library in Maximizer. When designated users are given the "Allow manage currencies" security right in their user access rights, they can add, modify, and delete currencies in the Address Book.



Once you add a currency, you can use it as the revenue currency for any opportunity entry. The cost fields in the opportunity are always displayed in the corporate currency.

In addition to adding currencies, you can also modify and delete currencies from the currency library using the buttons in the Currency Library dialog box. When you modify an exchange rate for a currency, the new rate is applied to existing opportunities that are in progress and to new opportunities.

Add a Currency to the Currency Library

To complete this procedure, you must have the "Allow manage currencies" privilege.

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

   The Currency Library dialog box opens.

2. Click ***Add***.

   The Add Currency dialog box opens.

3. From the ***Currency*** drop-down list, select a currency.

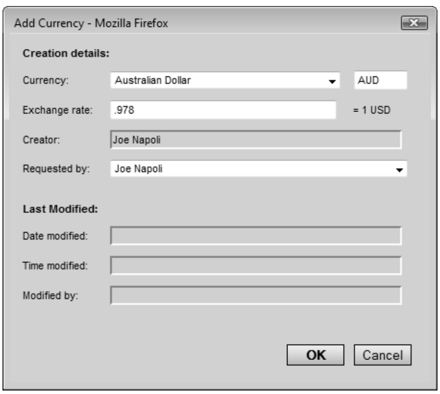
   The ISO code is entered automatically, but you can change this field or leave it blank if necessary. For example, you may want to use US, rather than USD, for the US Dollar.

4. In the ***Exchange rate*** field, enter the value of the currency in comparison with the corporate currency.

   By default, this value is set to 1.

If you change your corporate currency, all currency rates are set to 1.

5. If necessary, from the ***Requested by*** field, select a user.
6. Click ***OK.***



Modify a Currency in the Currency Library

To complete this procedure, you must have the "Allow manage currencies" privilege.

You can modify some properties of existing currencies in the currency library. If you select the corporate currency, you can modify only the currency code and the user selected in the Requested by field. The exchange rate of the corporate currency is always 1. If you select another currency, you can also modify the exchange rate.

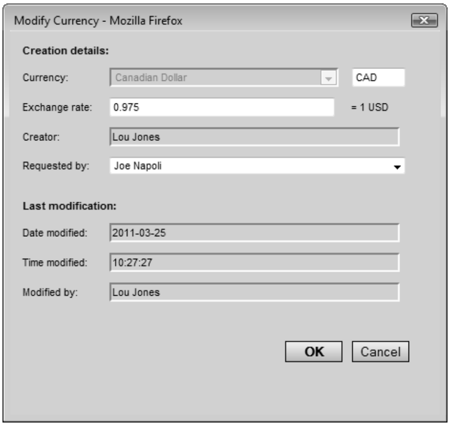
1 In the left navigation pane, hover your mouse over ***Administration***, and select ***Currency Library*** from the pop-up.

The Currency Library dialog box opens.

2 Select the currency you want to modify, and click ***Modify***.

The Modify Currency dialog box opens.

Information on when the currency was last modified is displayed at the bottom of the dialog box.



3 Update the details of the currency, and click ***OK***.

Change the Currency in an Opportunity

By default, opportunity revenue is calculated using the corporate currency. But you can change the currency for the revenue while adding or modifying an opportunity. Multi-currency must be enabled in the current Address Book, and there must be more than one currency set up in the Currency Library in order to specify the currency in an opportunity.

1. Open the opportunity.
2. If necessary, from the ***Key Fields for*** drop-down list, select a Key Fields list that contains the Currency field.

   By default, the Currency field is included in the <Default Key Fields> list.
3. From the ***Currency*** drop-down list, select the currency.

   The currency in the Revenue updates to show the selected currency value.
4. Click ***OK*** to save the change to the opportunity.

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*.

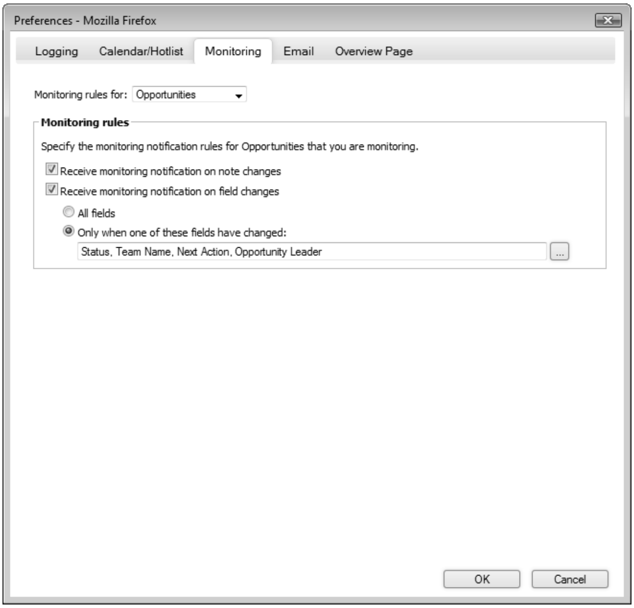
Configure Opportunity Monitoring

You can configure email notification for opportunities in the monitoring preferences. You can specify to receive email notification when notes are added or modified and when fields are changed. You can also select specific fields to receive notification only when one of the specified fields changes.You receive notification only for the opportunities you are selected to monitor.

Monitoring preferences are available only in Maximizer CRM Enterprise Edition.

1. Click ***Other Preferences***.
2. Select the ***Monitoring*** tab.
3. In the ***Monitoring rules for*** drop-down list, ensure ***Opportunities*** is selected.
4. To receive notification when notes are added or modified, select ***Receive monitoring notification on note changes***.
5. To receive notification when fields are changed, select ***Receive monitoring notification on field changes***, and select the fields for which to receive notification.
   - To receive notification when any field is modified, select ***All fields***.
   - To receive notification when specific fields are modified, select ***Only when one of these fields is changed***, click the ellipsis, and select the fields.

6 Click ***OK*** to save the changes to the Preferences dialog box.



Select Users for Opportunity Monitoring

To complete this procedure, you must have modify permission for opportunities.

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.

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.

1 Click on the opportunity to make it the current entry.

– 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.

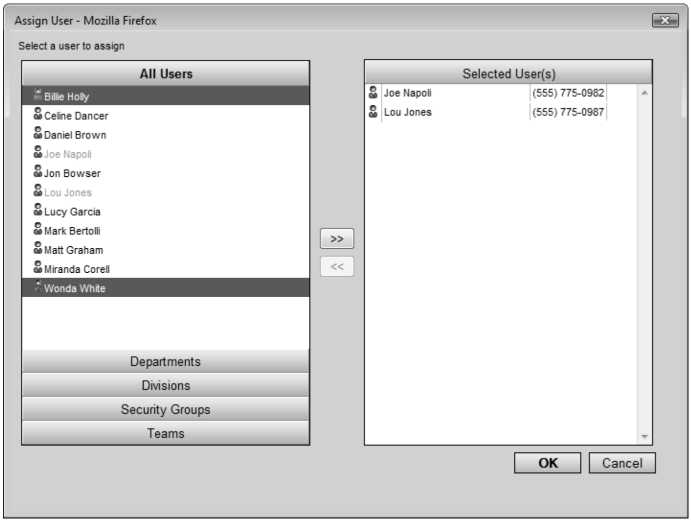
The Assign User dialog box opens. A list of available users is displayed on the left and the current list of opportunity monitors is displayed on the right.

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

- To select multiple users, press ***Control*** while selecting the users.
- To select a series of users, select the first user in the series, then press ***Shift*** and select the last user in the series.
- Type the first letter in the item's name to jump to that item in the list.
- Select a security group, department, division, or team to add all members of the group to the list.

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

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.

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. The following columns are displayed:
   - ***Name –*** The name of the opportunity leader, team, or territory that the quota is assigned to.
   - ***Fiscal Period –*** The milestone that the quota applies to.
   - ***Quota –*** The amount of the quota in the milestone.
   - ***Weighted Forecast –*** The weighted revenue of all opportunities that are in progress and are scheduled to close during the milestone.
   - ***Unweighted Forecast –*** The total revenue of all opportunities that are in progress and are scheduled to close during the milestone.
   - ***Closed Sales –*** The total revenue of all opportunities that are won during the milestone.
   - ***Lost Sales –*** The total revenue of all opportunities that are lost during the milestone.
   - ***% of Quota –*** The percentage of the quota that is achieved during the milestone.

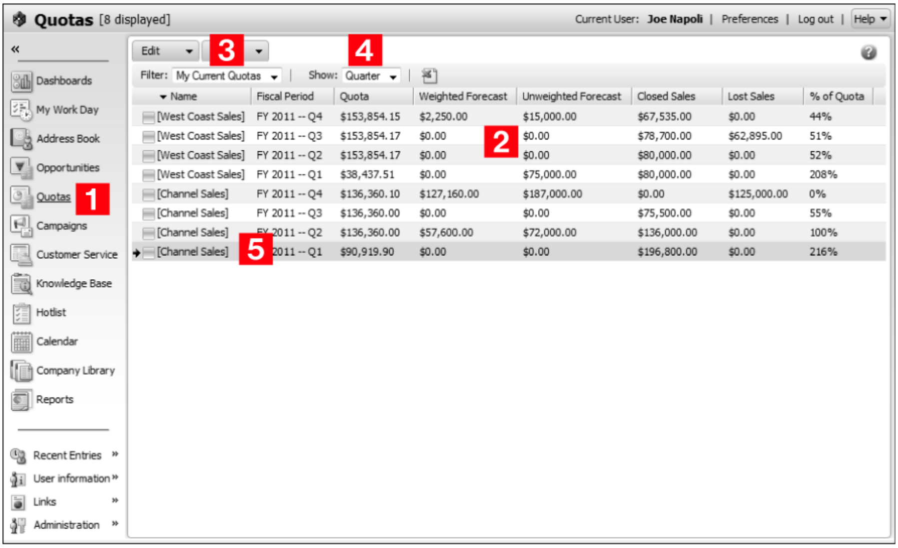
The year shown in the Fiscal Period column refers to the year that the fiscal year ends. This value may differ from the calendar year for some months and quarters.

3. Use the ***Filter*** drop-down list to change the list of quotas displayed.display all of your quotas, all of your quotas for the current fiscal year, or all quotas that you have the right to view.
   - ***My Quotas –*** Displays all of your quotas and all of the quotas for your teams and territories.

- ***My Current Quotas –*** Displays all of your quotas and all of the quotas for your teams and territories in the current year.
- ***All Quotas –*** Displays all quotas in the Address Book that you have the rights to view.

4 Use the ***Show*** drop-down list to display quotas by month, quarter, or year.

5 Click on an entry to modify the quota for the entire year.



Quota Templates

Quota templates store the details of quotas so they can be reused and applied to different teams, territories, and leaders. All of the details specified in the quota template can be modified when it's applied.

Only users with the sales manager role can access quota templates.

Create or Modify a Quota Template

To complete this procedure, you must have the Sales Manager user role.

1 In the ***Quotas*** page, select ***Edit > Quota Templates***.

2 Click ***Add.***

-or-

Select the quota template that you want to modify and click ***Modify***.

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 amount applied to a milestone, select the milestone, click ***Modify***, and enter the new amount or percentage.

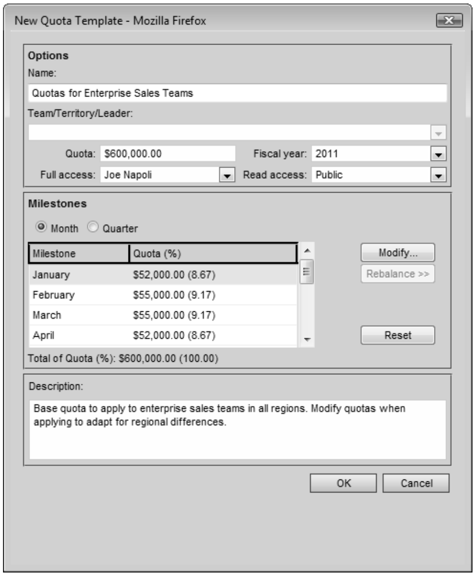
After making any changes, you can click ***Reset*** to return to the default milestones.

8 If necessary, redistribute the quota amounts applied to the milestones to match the quota value.

The Total of Quota (%) value displays the total amount of all milestones and their percentage of the quota value.

- To add or subtract the difference to or from a single milestone, select the milestone, click ***Rebalance***, and click ***Selected***.
- To add or subtract the difference to or from all milestones, click ***Rebalance***, and click ***All***.

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



Apply a Sales Quota

To complete this procedure, you must have the Insert permission for Quotas,

You can apply sales quotas to teams, territories, and leaders. You can apply existing quota templates or create new quotas.

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

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

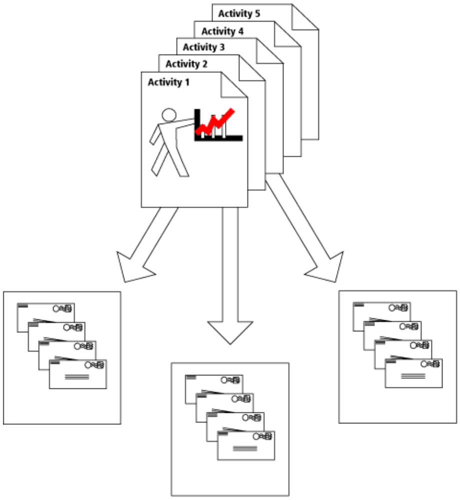
Market Your Products and Services

In this chapter...

About Campaigns

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.

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.

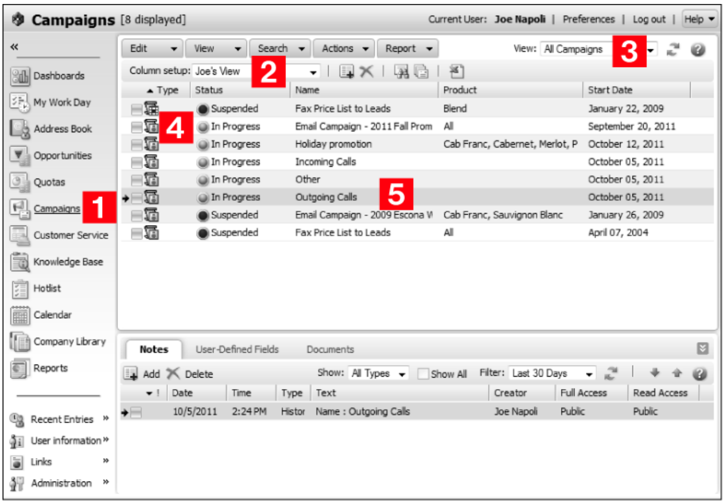
You can "broadcast" email to any number of Address Book entries to support your marketing campaign. Ask your Internet Service Provider if there is a limit on how many email messages that can be sent concurrently. You can control the cycle time check in the automated services preferences in Administrator.

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:

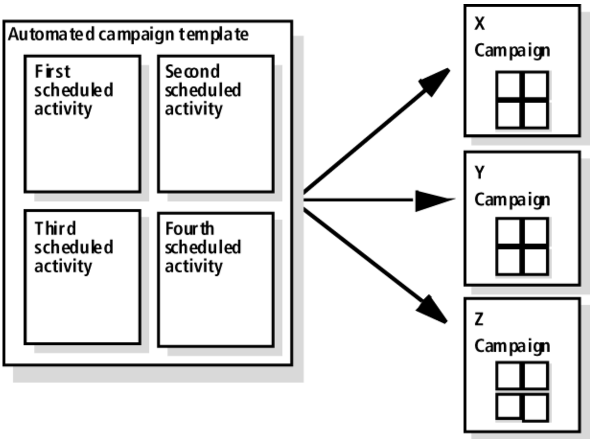
1. Select the ***Campaigns*** icon to open the Campaigns page.
2. From the ***Column setup*** drop-down list, select a column setup and change the information displayed about each campaign.
3. Use the ***View*** drop-down list to filter the list of campaigns.
4. Use the icons in the ***Type*** column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



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.

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.



Activities in Automated Campaign Templates

An automated campaign template determines the actions that occur during a campaign. The campaign template sets out in precise terms which activities to use and when to send the campaign media (email messages, faxes, or printed documents). You can schedule as many activities in a campaign template as you need.

When adding activities to a campaign template, you will need to plan some details ahead of time, including the following:

- How many email messages, faxes, or printed documents you want to send.
- Which file types to use for the campaign activity.
- How many days after the campaign is launched that the campaign message is sent.

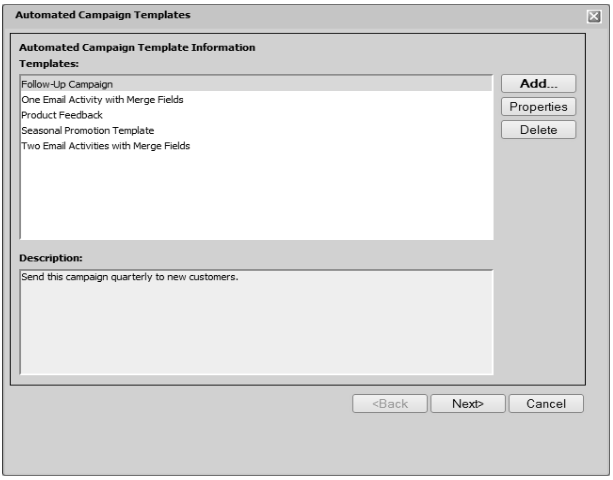
Create an Automated Campaign Template

Once you have a plan worked out, you can create an automated campaign template.

1. Select ***Edit > Automated Campaign Templates***.

   The Automated Campaign Templates dialog box opens.

2. Click ***Add*** to add a new template.



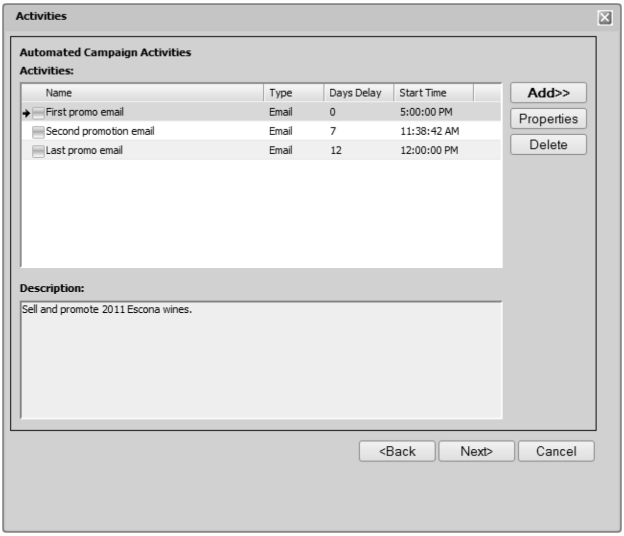
3. Choose whether you are creating an entirely new campaign template or one that is based on an existing campaign template.

   If you choose to base the new campaign template on an existing campaign template, Maximizer copies the content of the existing campaign template into your new campaign template.

4. Type a name and description for the new campaign template and click ***OK***. Then, click ***Next***.

5. In the Activities wizard page, use the ***Add***, ***Properties***, and ***Delete*** buttons to define the series of activities that comprise this template.

When adding activities, you are prompted to specify the type of activity—email, fax, or print.



6. When you are finished defining activities, click ***Next***.
7. To create an automated campaign immediately using the template, select ***Launch a new campaign based on this template***.
8. Click ***Finish*** to save the template.

Add an Activity to an Automated Campaign Template

An activity is an email message, a fax, or a printed document that is sent out a certain number of days after an automated campaign is launched using a campaign template. You can add as many activities as you want.

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

1. Select ***Edit > Automated Campaign Templates***.

   The Automated Campaign Templates dialog box opens.
2. Select the automated campaign template to which you want add the activity, and click ***Next***.

   The Activities wizard page opens.
3. Click ***Add***, and select ***Email***, ***Fax***, or ***Print***.

   The Add Email/Fax/Print Activity dialog box opens.
4. Enter the details of the activity.

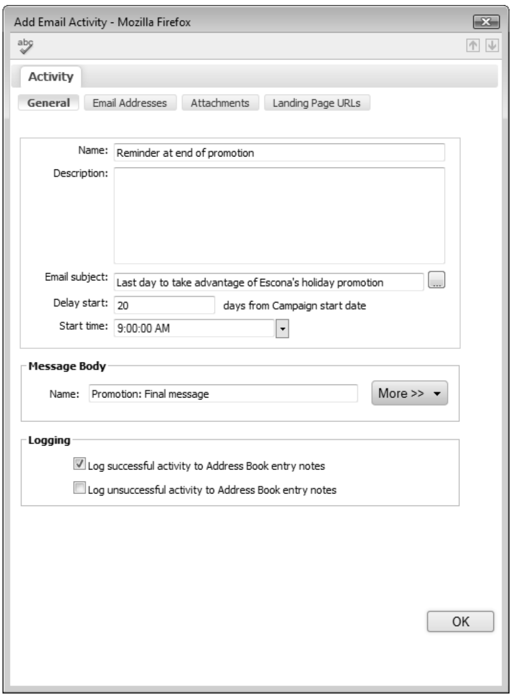
- Enter the ***Name*** and ***Description***.
- For fax and print campaigns, select a ***printer***.

  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 the ***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 is launched that the activity occurs.
- Specify the ***start time***, which defines the time of day the activity occurs.
- Under ***Message Body***, click ***More > Select Existing Message*** to access the list of saved messages.

  Select an existing message, and click ***OK*** to attach the message to the activity.
- 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.



5 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.

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

- The name and email address of the ***From*** account are visible in the email message.

  If you leave this field empty, the email message is sent from the current user.

- The name and email address of the ***ReplyTo*** account are used when email recipients reply to the email message.

  If you leave this field empty, replies are sent to the From address.

  In order to monitor email bounces and replies for campaigns, you must enter From and Reply To email addresses for the same accounts specified in the campaign monitoring settings in Administrator.

- 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.

7 Select the ***Attachments*** tab and click ***Add*** to add any attachments to the email message.

8 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 merge field.

9 Click ***OK*** and continue through the campaign template wizard.

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 add activities to automated campaigns and automated campaign templates, you choose a message for each activity.

For email activities, Maximizer can send text and HTML email messages, in addition to the email template file (.ETF) format created by the Maximizer Word Processor. Create HTML and text files directly in Maximizer using the Campaign Message Editor. Or use an editor of your choice to create the files, and import the files into Maximizer.

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. Anoza" or "Dear Marylyn".

Campaign Message Library

Automated campaign messages are stored in the Message Library, accessible from the Campaigns page, from automated campaign templates, from the Campaign Message Editor, and from activities in existing automated campaigns.

You can use the Message Library to retrieve, modify, and export existing automated campaign messages. You can also import campaign messages created in external applications into the Message Library to attach to activities in automated campaigns and automated campaign templates.

Create an Automated Campaign Email Message

You can create email messages for your automated campaigns using the Campaign Message Editor or using an external HTML editor. You can create a new message while adding or modifying campaign activities in existing campaigns or in campaign templates.

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

   The Message Library dialog box opens.

2. Click ***New***.

   The Campaign Message Editor dialog box opens.

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

4. 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.

5. Click ***Save***.

   The Add Campaign Message dialog box opens.

6. 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.

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 format, 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:

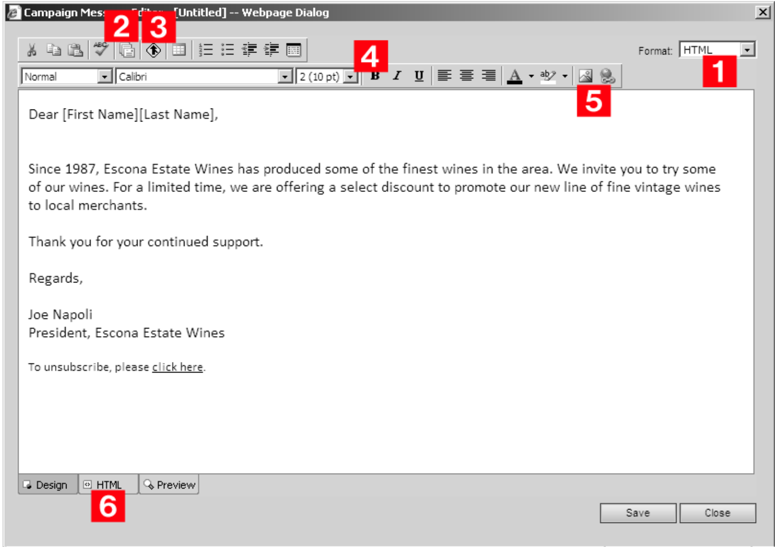
1. From the ***Format*** drop-down list, select the format of the email message: ***Plain Text*** or ***HTML***.
2. Select the ***Message Library*** icon to retrieve an existing email message from the Message Library.
3. Select the ***Insert Fields*** icon to add merge fields to the message.
4. Use the 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 help you track information on your campaign subscribers, like who has opened a campaign email message and who has visited your web site from a campaign email message.

The easiest way to use merge fields in HTML is to create an email template using the Campaign Message Editor and to insert the merge fields into the content of the HTML file using the Insert Fields toolbar icon.

- ***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. The merge field syntax replaces the value of the SRC attribute in the <img> element (image element), for example, <img src="[Campaign Opened Email Tracking URL]">.

- ***Campaign Redirect URL*** **–** This merge field tracks how many customers visit 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 a link, the URL visited count is updated.

You can add up to five redirect URL merge fields to your campaign messages. The syntax of each merge field is [Campaign Redirect URL], [Campaign Redirect URL1], [Campaign Redirect URL2], Campaign Redirect URL3], and [Campaign Redirect URL4].

Add the syntax of these merge fields to hyperlinks in your HTML message. The merge field syntax replaces the value of the HREF attribute in the <a> element (hyperlink element), for example <a href="[Campaign Redirect URL">.

You specify the actual URL of the web page in the Landing Page URLs tab of the Email Activity dialog box.

- ***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 the syntax of this merge field to a hyperlink in your HTML message. The merge field syntax replaces the value of the HREF attribute in the <a> element (hyperlink element), for example <a href = "[Campaign Remove Subscriber URL]">.

- ***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. You must add this merge field manually to a campaign message. It isn't included in the list of merge fields in the Insert Merge Field dialog box.

Example of a Campaign Email Message

In this example, an email message will be sent to notify the recipients of a product discount. The message contains merge fields for tracking who has opened the email and who has visited landing pages. It also contains a link to let users unsubscribe from the campaign.

```
<HTML>
<body>
<img src=”{Campaign_Opened_Email_Tracking_URL?}”>
<p>Since 1995, this company has produced some of the finest products in the
state. We invite you to try our new selection. For a limited time, we are offering
a select discount to promote our new line for 2011.</p>
<p>For more information, please visit the following pages: </p>
<p><a href=”{Campaign_Redirect_URL?}”>Landing Page</a>.</p>
<p><a href=”{Campaign_Redirect_URL1?}”>Landing Page 1</a></p>
<p><a href=”{Campaign_Redirect_URL2?}”>Landing Page 2</a></p>
<p>To unsubscribe from this campaign, please <a
href="{Campaign_Remove_Subscriber_URL?}">click here</a></p>
<p>You are receiving email from this Service Computer,
{Service_Computer_Name?}.</p>
</body>
</HTML>
```

Creating Automated Campaigns

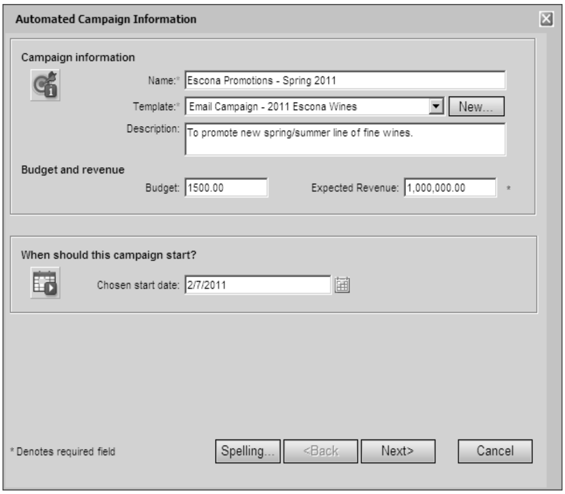
Automated campaigns are implementations of automated campaign templates. You can add as many campaigns as you like using the same campaign template and manage them in the Campaigns page.

An automated campaign is always associated with one or more Address Book entries. The Address Book entries are the recipients of the messages sent in the campaign. When you create a 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.

Add an Automated Campaign

1. In the Campaigns page, select ***Edit > Add Automated Campaign***.
2. Choose a template and enter the basic information for the campaign, and click ***Next***.
   - From the ***Template*** drop-down list, select an existing campaign template.

     To create a new template, click ***New***.
   - Enter the ***name***, ***description***, ***budget***, and ***expected revenue*** of the campaign.
   - Specify the ***start date*** for the campaign.

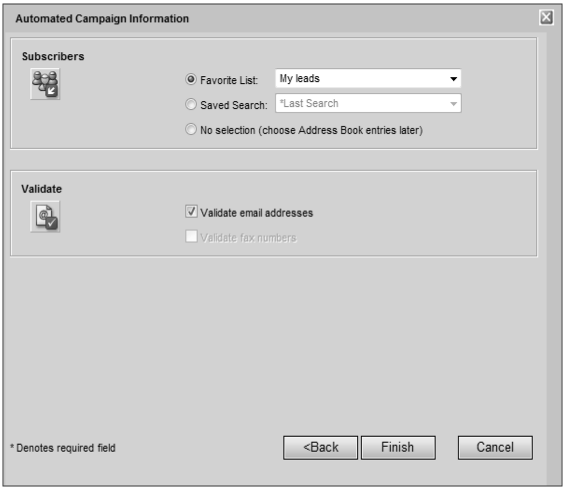


3 Select the ***subscribers*** to add to the campaign.

- Select an existing Favorite List of Address Book entries.
- Select a saved search of Address Book entries from the search catalog.
- Do not select any Address Book entries.

  You can add subscribers to the campaign after it is launched.

4 Select ***Validate email addresses*** to be notified of any blank email addresses or those missing the @ symbol, or select ***Validate fax numbers*** to be notified of invalid fax numbers.



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

View an Automated Campaign

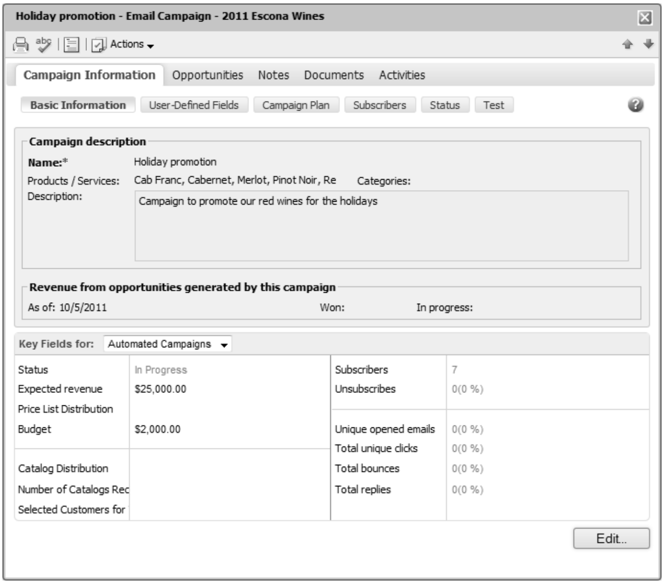
After creating an automated campaign, you can view and modify details that are not available while adding the campaign.

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

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

2 In the ***Basic Information*** tab, view the campaign's basic information.

3 From the ***Key Fields for*** drop-down list, select a Key Fields list to view a different set of Key Fields.



4 Select the remaining tabs to view more details on the campaign.

Activities in Automated Campaigns

All automated campaigns contain activities that are scheduled to occur during the campaign. Each activity contains an email message, a fax, or a printed document that is sent as part of an automated campaign. 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.

Add an Activity to an Automated Campaign

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.

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

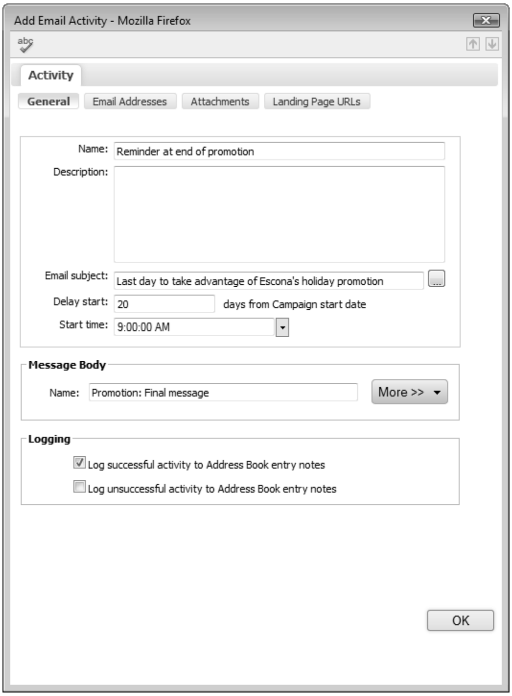
   The Add Print/Fax/Email Activity dialog box opens.
3. Enter the details of the activity.
   - Enter the ***Name*** and ***Description***.
   - For fax and print campaigns, select a ***printer***.

     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 the ***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 is launched that the activity occurs.
   - Specify the ***start time***, which defines the time of day the activity occurs.
   - Under ***Message Body***, click ***More > Select Existing Message*** to access the list of saved messages.

     Select an existing message, and click ***OK*** to attach the message to the activity.
   - 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 name and email address of the ***From*** account are visible in the email message.

  If you leave this field empty, the email message is sent from the current user.

- The name and email address of the ***ReplyTo*** account are used when email recipients reply to the email message.

  If you leave this field empty, replies are sent to the From address.

  In order to monitor email bounces and replies for campaigns, you must enter From and Reply To email addresses for the same accounts specified in the campaign monitoring settings in Administrator.

- 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 merge field.

8 Click ***OK*** to finish adding the activity to the automated campaign.

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.

Add Subscribers to an Automated Campaign

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.

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***.

Remove Subscribers from a Campaign

You can remove Address Book entries that are already subscribed to a campaign.

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.

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***.

Remove Subscribers in a Favorite List from a Campaign

You can remove all Address Book entries 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***.

Retrieve a List of Subscribers for a Campaign

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.

- 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***.

Automated Campaign Statistics

Maximizer keeps tracks of statistics on automated campaigns with email activities. You can view statistics for the entire campaign, or you can view statistics for specific email activities in the campaign. The following information is tracked:

- The number of email messages opened by campaign recipients. The following statistics are included:
  - ***Unique opened emails (campaign) –*** The number of campaign subscribers that have opened any message included in a campaign.
  - ***Emails opened –*** The total number of times a specific message has been opened in a campaign activity.
  - ***Emails opened unique (activity) –*** The number of subscribers that have opened a specific message in a campaign activity.

  These statistic are tracked only if you include the Campaign_Opened_Email_Tracking_URL merge field in your campaign messages.
- The number of campaign subscribers that have unsubscribed from a campaign. The following statistics are tracked:
  - ***Unsubscribes (campaign) –*** The total number of campaign subscribers who have unsubscribed from a campaign.
  - ***Unsubscribed (activity) –*** The number of campaign subscribers who have unsubscribed from a specific activity in a campaign.

  This statistic is tracked only if you include the Campaign_Remove_Subscriber_URL merge field in your campaign messages.
- The number of times landing page URLs are accessed from a campaign. The following statistics are included:
  - ***Total unique clicks (campaign) –*** The number of unique visits to all landing page URLs in a campaign. 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.
  - ***Total URL visited (activity) –*** The total number of visits to any landing page URL in an activity.
  - ***Total URL visited unique (activity) –*** The number of unique visits to any landing page URL in a specific activity. A subscriber in a campaign can increment this count only once per landing page URL in an activity.

- ***URL visited x –*** The total number of visits to a specific landing page URL (x) in an activity.
- ***URL visited unique x –*** The number of unique visits to a specific landing page URL (x) in an activity.

These statistic are tracked only if you include the Campaign_Redirect_URL merge fields in your campaign messages and you specify the landing page URLs in the email activity. You can add up to five landing page URLs to each activity.

- The number of messages that have bounced or been replied to. The following statistics are included:
  - ***Total bounces –*** The number of email messages that have been returned to the campaign sender.
  - ***Total replies –*** The number of campaign subscribers that have replied to a campaign message.

  These statistics are tracked only if email accounts are specified in the campaign monitoring settings in Administrator. These email accounts must match the From and Reply To email addresses specified in campaign activities.

View Campaign Statistics

To complete this procedure, you must have Read permission for Campaigns.

You can view overall campaign statistics in the Basic Information tab of an open campaign. You can also add the Total bounces, Total unique clicks, Total opened emails, Total replies, and Unsubscribes fields to the column setup in the Campaigns page.

1. Open the campaign.
2. If necessary, select a Key Fields list containing the campaign statistics you want to view.

   By default, the campaign statistics fields are included in the Default Key Fields list, including the following fields:

   - ***Unique opened emails –*** The number of subscribers that open one of the email messages in a campaign.
   - ***Unsubscribes –*** The total number of subscribers who have unsubscribed from the campaign.
   - ***Total unique clicks –*** The number of unique visits to landing page URLs in the campaign by subscribers.

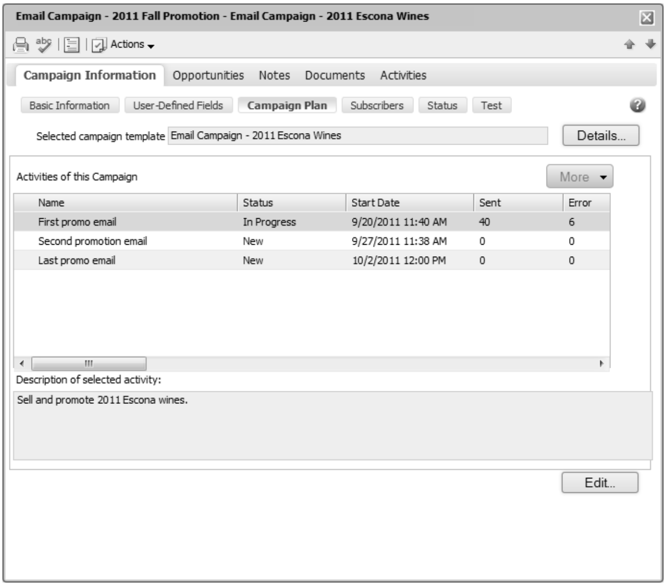
- ***Total replies –*** The number of campaign subscribers that have replied to a campaign message.
- ***Total bounces –*** The number of email messages that have been returned to the campaign sender.

View Statistics on Campaign Activities

To complete this procedure, you must have Read permission for Campaigns.

You can view statistics on each activity 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.

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



Retrieve a List of Entries who Have Opened Email

To complete this procedure, you must have Read permission for Campaigns and Read Access to the campaign subscribers. As well, the Campaign_Opened_Email_Tracking_URL merge field must be included in campaign email messages.

You can retrieve a list of Address Book entries who have opened campaign email messages.

1. Select the automated campaign.
2. Select ***Actions > Retrieve Opened Emails Address Book Entries***.

   The Address Book page opens and displays a list of entries who have opened a campaign email message.

Retrieve a List of Entries who Have Visited Landing Page URLs

To complete this procedure, you must have Read permission for Campaigns and Read Access to the campaign subscribers. As well, the Campaign_Redirect_UR merge fields must be included in campaign email messages, and landing page URLs must be specified in the email activity.

You can retrieve a list of Address Book entries who have visited the landing page URLs specified in email activities for automated campaigns.

1. Select the automated campaign.
2. Select ***Actions > Retrieve Click-Through Address Book Entries***.

   The Address Book page opens and displays a list of entries who have visited one of the landing page URLs included in campaign email messages.

Retrieve a List of Entries who Have Unsubscribed from a Campaign

To complete this procedure, you must have Read permission for Campaigns and Read Access to the campaign subscribers. As well, the Campaign_Remove_Subscriber_URL merge field must be included in campaign email messages.

You can retrieve a list of Address Book entries who have unsubscribed from an email campaign by visiting the link in the

Campaign_Remove_Subscriber_URL merge field. When an entry unsubscribes from a campaign, the "Do not solicit" field is set to "Email" for the entry.

1. Select the automated campaign.
2. Select ***Actions > Retrieve Unsubscribed Address Book Entries***.

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

Retrieve a List of Entries for a Campaign Activity

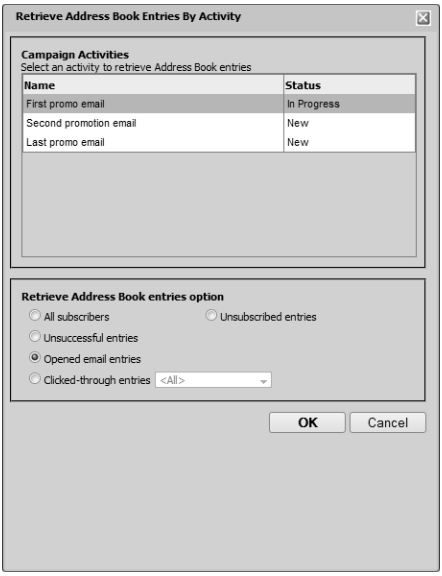
To complete this procedure, you must have Read permission for Campaigns and Read Access to the campaign subscribers. As well, the appropriate merge fields must be included in the campaign email messages.

You can retrieve a list of Address Book entries that have performed actions in specific activities in automated campaigns. You can retrieve the entire list of Address Book entries for an activity, the list of unsuccessful entries for an activity, the list of Address Book entries that have opened the email message included in a specific activity, the list of entries that have unsubscribed from a specific activity, and the list of entries that have visited landing page URLs in an activity.

1. Select the automated campaign.
2. Select ***Actions > Retrieve Address Book Entries by Activity***.
3. Under ***Campaign Activities***, select the activity.
4. Under ***Retrieve Address Book entries option***, select the list of 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***.
5. If you selected ***Clicked-through entries***, from the drop-down list, specify which landing page URLs to view entries for.

6 Click ***OK***.


Retrieve Address Book Entries By Activity
Campaign Activities
Select an activity to retrieve Address Book entries
Name
Status
First promo email
In Progress
Second promotion email
New
Last promo email
New
Retrieve Address Book entries option
All subscribers
Unsubscribed entries
Unsuccessful entries
Opened email entries
Clicked-through entries
<All>
OK
Cancel

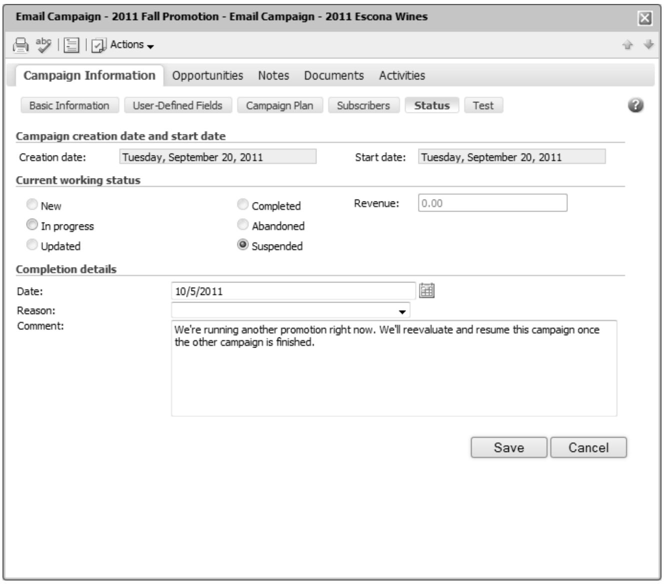
Status of Automated Campaigns

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.

Suspend an Automated Campaign

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.

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***.

Resume an Automated Campaign

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

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.

Run a Test 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***.

Calculating the Return on Investment for Campaigns

You can calculate the return on investment for an automated campaign in the Basic Information tab of an open campaign. The calculation is based on the revenue generated by opportunities associated with the campaign.

In order to be counted in the calculation, opportunities must have values specified in the Revenue field. The return on investment adds up the revenue from all won and in-progress opportunities associated with the campaign.

You can add the “Revenue Won” and “In Progress Revenue” fields to your column setup to view this calculation directly in the Campaigns page. You must update the calculation directly in the campaign entry to update the values shown in the column setup.

Calculate the Return on Investment for a Campaign

1. Open the campaign.
2. Click ***Edit***.
3. Under ***Revenue from opportunities generated by this campaign***, next to ***As of,*** select the date from which you want to calculate the revenue.

   By default, the creation date of the campaign is selected, but you can select another date to narrow the date range.
4. Click ***Calculate***.

   The ***Won*** field displays the total revenue of the opportunities that are won.

   The ***In Progress*** field displays the total revenue of the opportunities that are still in progress.

Retrieve a List of Opportunities for a Campaign

You can quickly retrieve a list of the opportunities associated with a campaign and display them in the Opportunities page.

- Select the automated campaign and select ***Actions > Retrieve Opportunities***.

  The Opportunities page opens and displays the list of the opportunities associated with the campaign.

CHAPTER 8

Customer Service

Provide the Key to Success with Customer Service

In this chapter...

Customer Service Cases

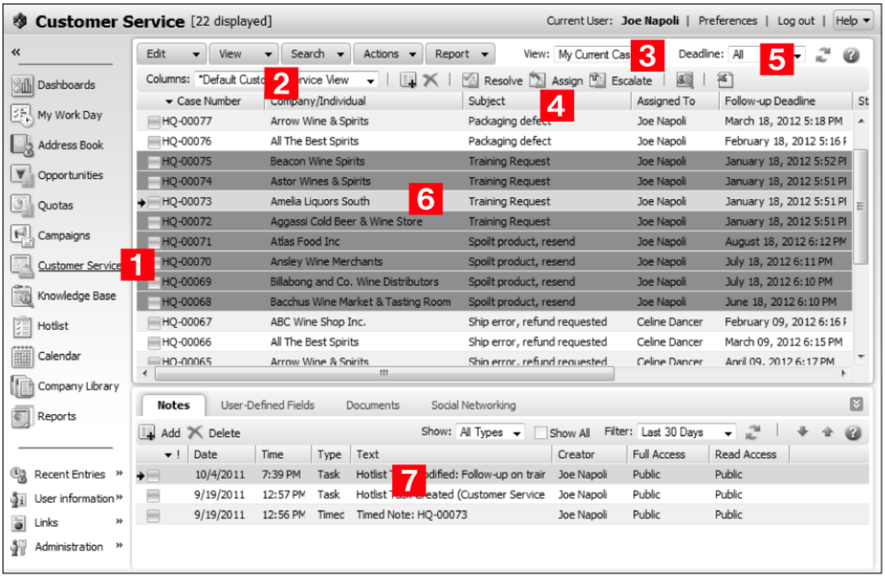
The customer service features in Maximizer help support and enhance your existing customer service business processes. All Address Book entry customer service communication can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner.

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. From the ***Columns*** drop-down list, select an existing customer service column setup to change the fields displayed in the list.
3. Use the ***View*** drop-down list to display cases assigned to you or show other queues.
4. Use the icons in the ***View bar*** to add, delete, 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.

7 Use the following panes to view additional information for the selected customer service case.



View a Case from the Customer Service Page

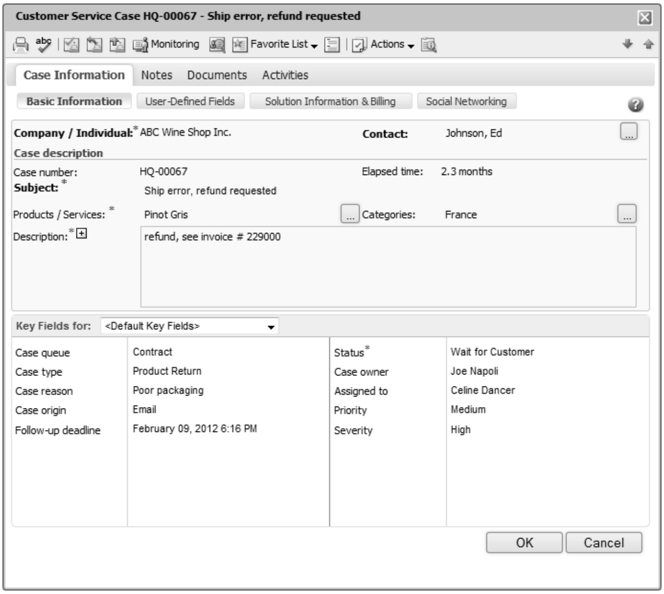
1 Select the ***Customer Service*** icon to open the Customer Service page.

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.



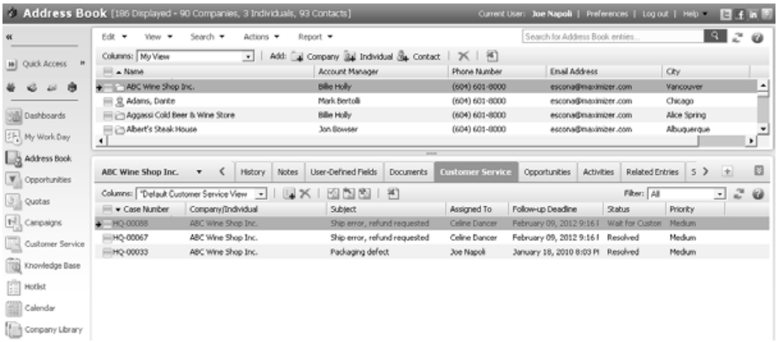
4 Select the other tabs to view more information on the case.

View a Case from an Address Book Entry or Hotlist Task

1 Select the Address Book entry or Hotlist task.

2 Select the ***Customer Service*** following pane.

All customer service cases for the current Address Book entry, or for the Address Book entry linked to the current Hotlist task are displayed in the list.



3 Click on a customer service case to open it.

Retrieve Address Book Entries Associated with Cases

You can retrieve the Address Book entries associated with cases and add them to the current list in the Address Book page. If a contact is associated with the case as well as a company or individual, both the contact and the company or individual are retrieved and added to the list.

You can retrieve the Address Book entries associated with a single case, or you can select multiple cases to retrieve the Address Book entries associated with all of the selected entries at once.

1 Click on the case to make it the current entry

-or-

Select multiple cases.

- Click the checkbox to the left of entries.
- Click on the entries one at a time while holding down the ***Control*** key.
- To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

2 Select ***View > View in Address Book***.

Creating 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.

Add a Customer Service Case

When creating a new case, you can select an Address Book entry or select an existing customer service case or activity associated with the Address Book entry.

1. Click on the Address Book entry or an existing customer service case associated with the Address Book entry to make it the current entry.

   – or –

   In the Hotlist page, click on an activity associated with the Address Book entry to make it the current entry.

2. In the Address Book page, select ***Actions > Create a Customer Service Case***.

   – or –

   In the Address Book page, right-click and select ***Create a Customer Service Case***.

   – or –

   In the Customer Service page, select ***Edit > Create a Customer Service Case***.

   – or –

   In the Customer Service following pane of the Address Book or Hotlist page, select the ***Add*** icon.

   The Customer Service Case dialog box opens.

You can select a different Address Book entry in the Customer Service Case dialog box by clicking the ellipsis button beside the Company/Individual field.

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.

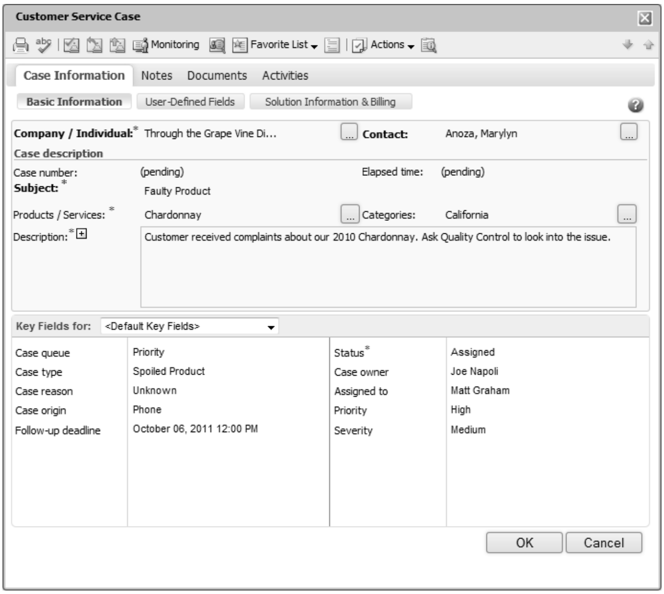
   - Select the applicable ***Products/Services*** and ***Categories*** for the case.
   - Enter a ***Subject*** and a ***Description*** of the case.

5 From the ***Key Fields for*** drop-down list, select a Key Fields list, and enter values for the fields in the list.

Key Fields lists contain system fields and user-defined fields. They are defined by your system administrator in the Key Fields preferences in Administrator. They may include the following fields:

- ***Follow-up deadline –*** Select the follow-up deadline for the case.
- ***Case Owner –*** Select the Maximizer user who is ultimately responsible for the closure of the case.
- ***Assigned to –*** 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.



6 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.

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

Assign a Customer Service Case

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 and to the case owner when you assign or escalate a case.

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.

1. Click on the customer service case to make it the current entry.

   – 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, 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, case owner, or Address Book entry.

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

Resolve a Customer Service Case

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 directly in the Resolve Case dialog box.

1 Click on the customer service case to make it the current entry.

– 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.

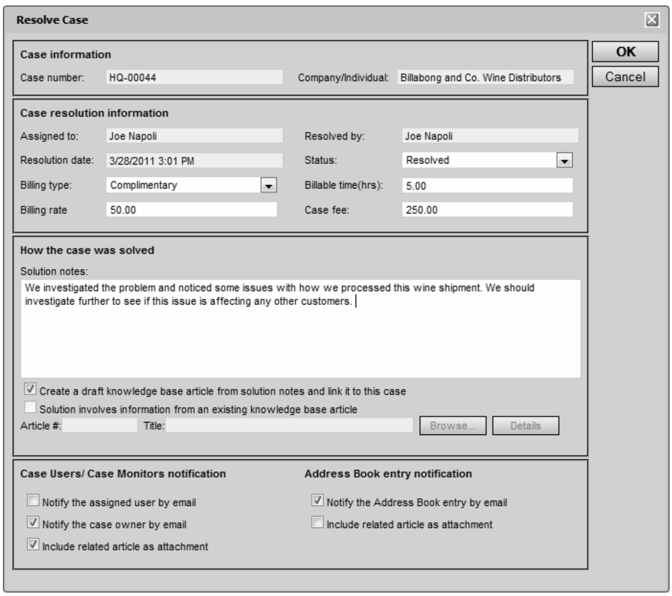
You can also select a knowledge base article to link to the case, or create a draft knowledge base article from the solution note.

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

5 Under ***Case Users/Case Monitors Notification*** and ***Address Book Entry Notification***, specify how you want to notify other Maximizer users and the Address Book entry associated with the case.

In either section, select ***Include related article as attachment*** to attach the knowledge base article associated with the case to the email message.

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 case 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*.

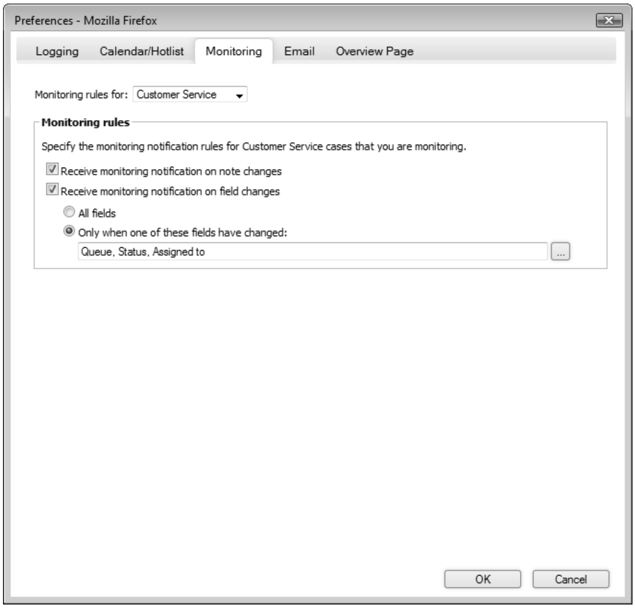
Configure Customer Service Case Monitoring

You can configure email notification for customer service cases in the monitoring preferences. You can specify to receive email notification when notes are added or modified and when fields are changed. You can also select specific fields to receive notification only when one of the specified fields changes. You receive notification only for the customer service cases you are selected to monitor.

Monitoring preferences are available only in Maximizer CRM Enterprise Edition.

1. Click ***Other Preferences***.
2. Select the ***Monitoring*** tab.
3. From the ***Monitoring rules for*** drop-down list, select ***Customer Service***.
4. To receive notification when notes are added or modified, select ***Receive monitoring notification on note changes***.
5. To receive notification when fields are changed, select ***Receive monitoring notification on field changes***, and select the fields for which to receive notification.
   - To receive notification when any field is modified, select ***All fields***.
   - To receive notification when specific fields are modified, select ***Only when one of these fields is changed***, click the ellipsis, and select the fields.

6 Click ***OK*** to save the changes to the Preferences dialog box.



Select Users for Case Monitoring

To complete this procedure, you must have Modify permission for customer service cases.

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.

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.

1 Click on the customer service case to make it the current entry.

– or –

Open the customer service case.

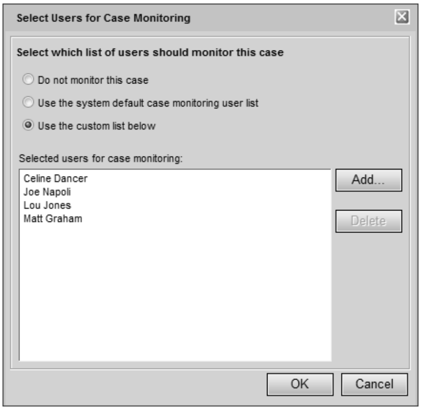
2 Select ***Edit > Case Monitoring***.

– 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.

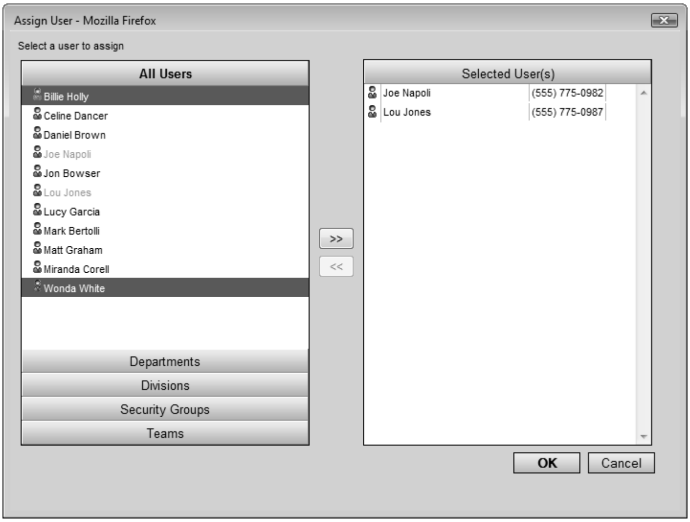
The Assign User dialog box opens. A list of available users is displayed on the left and the current list of case monitors is displayed on the right.

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

- To select multiple users, press ***Control*** while selecting the users.
- To select a series of users, select the first user in the series, then press ***Shift*** and select the last user in the series.
- Type the first letter in the item’s name to jump to that item in the list.
- Select a security group, department, division, or team to add all members of the group to the list.

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

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 cannot access the Maximizer Word Processor from Maximizer, as it is available only in Maximizer.

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.

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

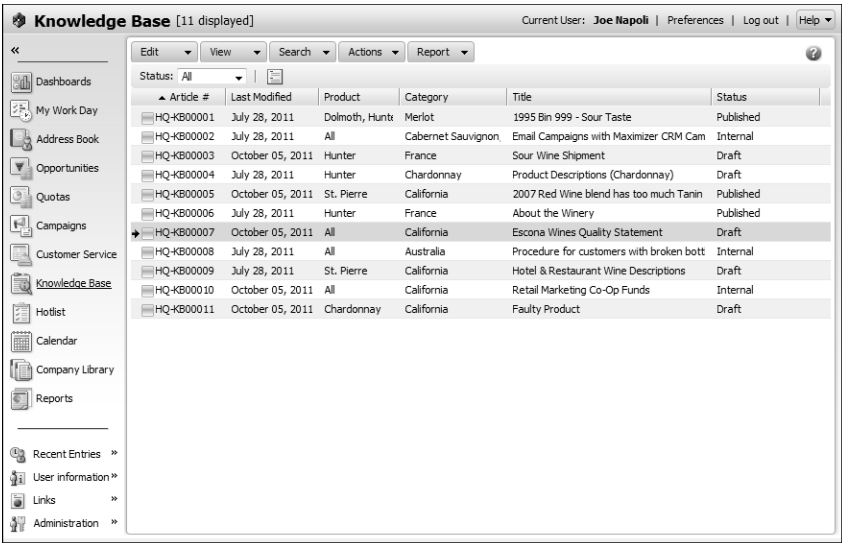
The knowledge base keeps track of the solutions to your customer service cases. Each separate case solution is stored in a knowledge base article. An article is typically created for each case solution, answered question, or guideline relating to your products or services.

Articles in the knowledge base are stored in standard format (text), in a document format (file attachment), or hyperlink format (URL to external file).

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.



View a Knowledge Base Article

The knowledge base ensures that valuable case solutions are recorded, reviewed for quality assurance, and made available to the appropriate users. You can view existing knowledge base articles as long as you have the required permissions.

1. Select the ***Knowledge Base*** icon.

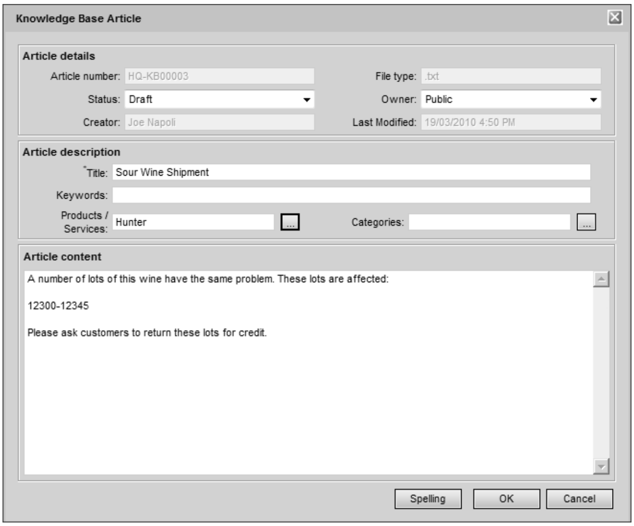
   The Knowledge Base page opens.

2. If necessary, select an option from the ***Status*** drop-down list to filter the list of articles.

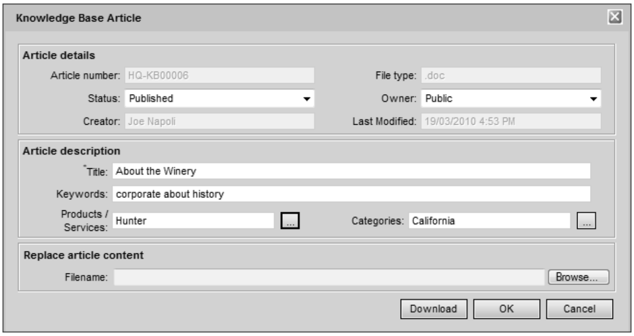
3. Click on an article to open it.

   The Knowledge Base Article dialog box opens displaying details on the article.

   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.



If the article is a hyperlink, the source of the hyperlink opens in a new browser window.

4 To view the content of a document article, click ***Download***.

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 modified 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.

The search returns only entries containing full words specified in the search text. If you search for text that is included in part of a word, the search does not return entries that contain that word. For example, if you search for "hedge", only entries containing the word "hedge" are returned. Entries containing the word "hedgehog" are not returned.

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 users with the Knowledge Base Approver role.
- ***Internal –*** Articles can be viewed by all users who have knowledge base read rights, excluding Customer Access and Partner Access users, and modified by users with the Knowledge Base Approver role.
- ***Published –*** Articles can be viewed by all users who have knowledge base read rights, including Customer Access and Partner Access users, and modified by users with the Knowledge Base Approver role.
- ***Expired –*** Articles can be viewed and modified by creators, owners (users or security groups), and users with the Knowledge Base Approver role.

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. You can also add an article as a hyperlink pointing to a document stored outside of the Maximizer Address Book.

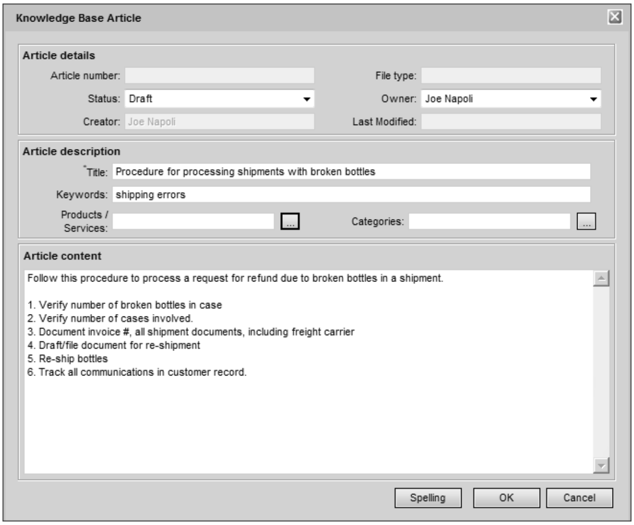
A newly created article is assigned a draft status until it is opened and assigned a different status by the appropriate users.

Add a Standard Knowledge Base Article

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.

1. In the Knowledge Base page, select ***Edit > Add Standard Article***.
2. Specify details of 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.



Add a Document Knowledge Base Article

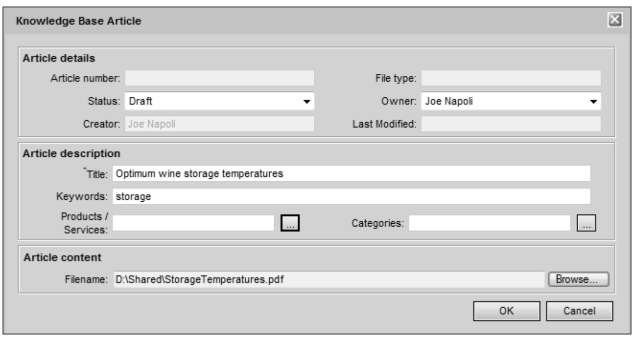
You can add any type of file to the knowledge base as a document article. When attaching the file, you can browse to folders on your computer or network.

1 In the Knowledge Base page, select ***Edit > Add Document Article***.

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:

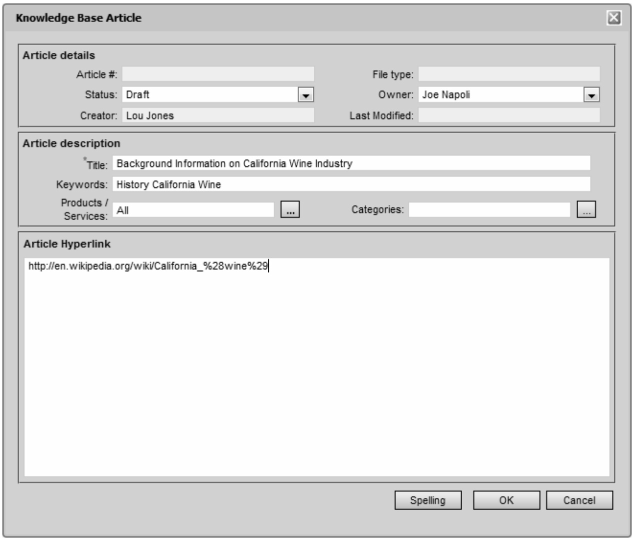
- Microsoft Word (*.DOC)
- Microsoft Excel (*.XLS)
- Microsoft PowerPoint (*.PPT)
- Text (*.TXT)
- HTML (*.HTM or *.HTML)

Add a Hyperlink Knowledge Base Article

You can add articles to the knowledge base as hyperlinks. Hyperlinks record links to documents stored outside of the Address Book, for example on local and network drives, on external websites, in Microsoft SharePoint folders, and in any other locations that can be expressed as URLs. When you open a hyperlink, the source document of the hyperlink is displayed in a new browser window.

1. In the Knowledge Base page, select ***Edit > Add Hyperlink Article***.
2. Specify details of the article, including the ***Title***, ***Keywords***, ***Products/Services***, and ***Categories***.
3. In the ***Article Hyperlink*** area, enter the URL of the article.

4 Click ***OK*** to save the article to the knowledge base.



Modify a Knowledge Base Article

Users can modify existing articles depending on their user roles and the status of the knowledge base articles.

1 In the Knowledge Base page, click on the article to make it the current entry.

2 In the ***View*** bar, select the ***Properties*** icon.

The Knowledge Base Article dialog box opens displaying details on the article.

3 Edit the article details.

4 To replace the content of a document article, click ***Browse*** and select the new article.

5 Click ***OK*** to save the changes to the article.

CHAPTER 9

Reporting

Report on the Progress of Your Business

In this chapter...

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.

View a Dashboard

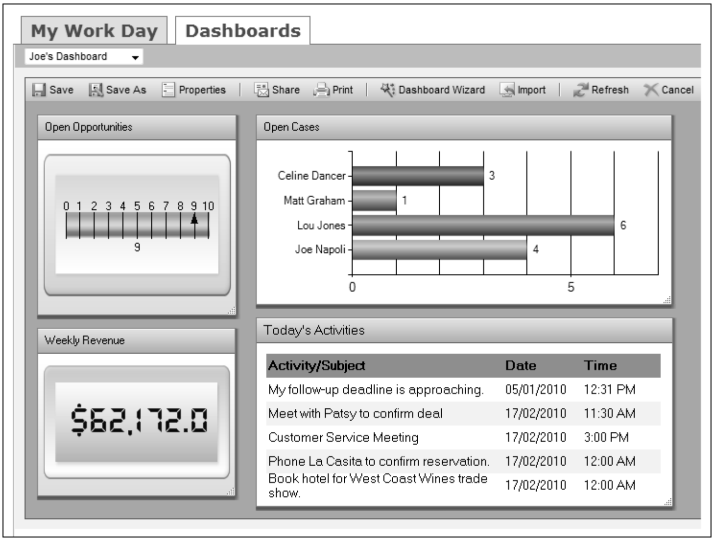
To complete this procedure, you must have read permission for Dashboards.

You can access your dashboards from the Dashboards icon in the icon bar. If the dashboard you want to view is not displayed, select it from the drop-down list.

If the Dashboards tab is not displayed, click Preferences > Other Preferences > Overview Page and ensure the Show Dashboards checkbox is selected.

1. Select the ***Dashboards*** icon.
2. From the drop-down list, select the dashboard you want to view.

The selected dashboard is displayed.



Setting Up Dashboards

Setting up a new dashboard involves the following tasks:

1. Set up searches or SQL metrics for your dashboard indicators.
2. Create the dashboard using the Dashboard Wizard.
3. Add indicators to the dashboard.
4. Customize the appearance of the dashboard indicators.
5. Resize and move the dashboard indicators.

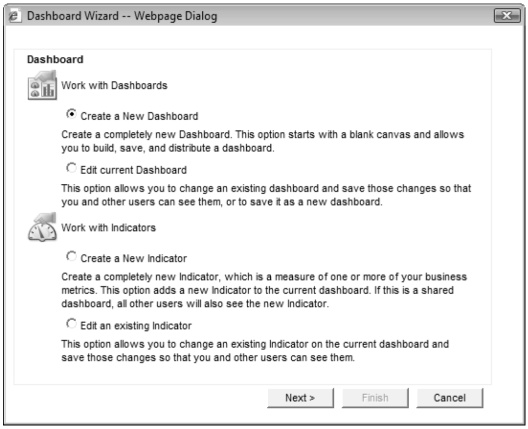
Create a Dashboard

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 Mobile Access.

1. In the Dashboards tab of the My Work Day page, select the ***Dashboard Wizard*** icon.

   The Dashboard Wizard opens.

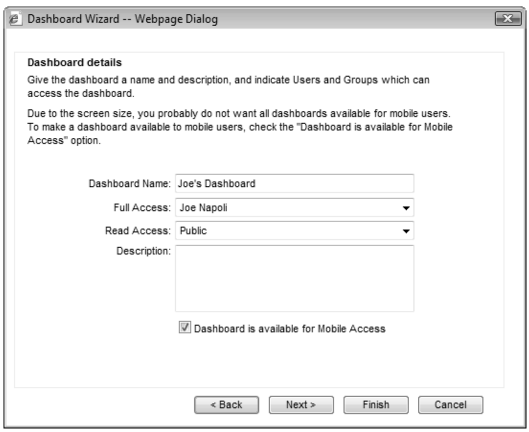
2 Select ***Create a New Dashboard***, and click ***Next***.



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 Mobile Access*** to make the dashboard available to Mobile Access users.

  If you don’t select this option, the dashboard is available only in Maximizer and in Maximizer. 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.
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 Address Book information in the following ways:

- ***Saved 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.
- ***Filters –*** You can specify filters for activities and quotas and return information on the entries that match the filters. You can filter information by date, assigned users or teams, and values of specific fields in appointments and tasks.

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. You can set up the Click Throughs for an indicator to open another Dashboard, to retrieve a list in Maximizer containing the results of the search associated with the indicator, or to retrieve a list of the entries included in the total for an individual group within the indicator.

Searches for Indicators

You can use the Advanced Search command to set up searches in the Address Book, Opportunities, Customer Service, and Campaigns pages 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:

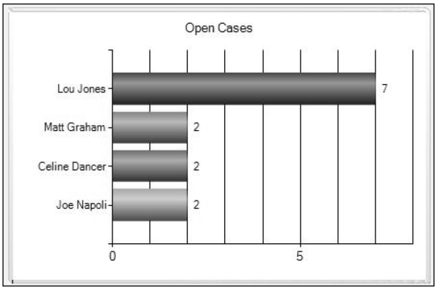
- ***Average –*** The indicator displays the average value of a selected numeric field for all entries returned in the search.
- ***Minimum –*** The indicator displays the minimum value of a selected numeric field for all entries returned in the search.
- ***Maximum –*** The indicator displays the maximum 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. When a Click Through to produce a list in Maximizer is specified for a group indicator, clicking on an individual group within the indicator retrieves only the entries included in that group.

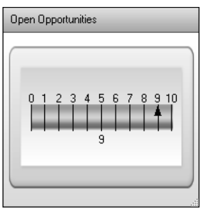


- ***List Control –*** These controls format information in lists. They can report information directly from Maximizer records, or they can summarize information based on values from multiple entries.


Today's Activities

Activity/Subject	Date	Time
Meeting	24/11/2009	3:30 PM
Customer Service Meeting	24/11/2009	2:00 PM
Phone representative about new deal.	24/11/2009	11:00 AM
Book hotel for Santa Rosa trade show.	24/11/2009	
Phone to confirm reservation.	24/11/2009	11:00 AM

- ***Gauges –*** These controls display a single numeric value for an indicator.



Grouping for Indicators

When you set up a bar chart or pie chart Group Indicator, you can choose how you wish to group the information displayed in the indicator. For example, you may want an indicator to display the sum of the revenue for all of the current opportunities in the pipeline. You could choose to group the opportunities by sales team to see at-a-glance how each team is performing, or you could choose to group the opportunities by product or service to show what your biggest revenue generators are. Maximizer allows you to group an indicator on any field you want within the Address Book entries, opportunities, customer service cases, Hotlist tasks, or Quotas returned by the search set up for the indicator.

If the field you wish to group on allows multiple selection, for example a multi-value basic field or multi-value table user-defined field, you can choose to group the information by unique values or combined values. If you select to group by unique values, every unique value that is selected in the field will be included in the grouping, including multiple values for individual entries returned by the search associated with the indicator. On the other hand, if you select to group by combined values, the grouping will only include the combined values for each entry returned by the search. For example, in a bar chart that displays the number of current opportunities grouped by Products/Services, if the indicator is selected to group by unique values, an individual opportunity associated with two Products/Services would be included in the count for each of the two unique Products/Services groups. However, if the indicator is selected to group by combined values, the opportunity would only be counted in the group of opportunities associated with both Products/Services, and would not be counted in the groups for each separate Products/Services.

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 to work with –*** The Address Book, Opportunities, Campaigns, Customer Service, Quotas, or Hotlist page opens displaying entries retrieved from the search associated with the indicator. If the indicator is a bar chart, you can click on an individual bar to retrieve only the entries that are included in the total for that bar. If the indicator is a pie chart, you can click on an individual slice of the pie to retrieve only those entries that are included in the total for that slice.
- ***Run a report –*** A report opens in the Reports module. You must enter the URL of the report while setting up the indicator. You can get the URL by opening the report from the Reports page.
- ***Open another dashboard –*** A dashboard is displayed. You must specify the dashboard while setting up the indicator.

Add an Indicator to a Dashboard

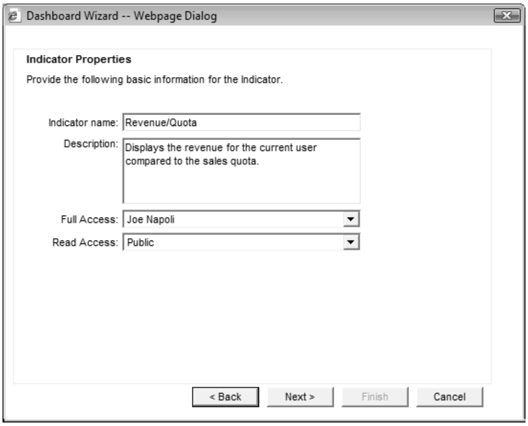
You can add indicators while creating dashboards, or you can add them to existing dashboards.

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.

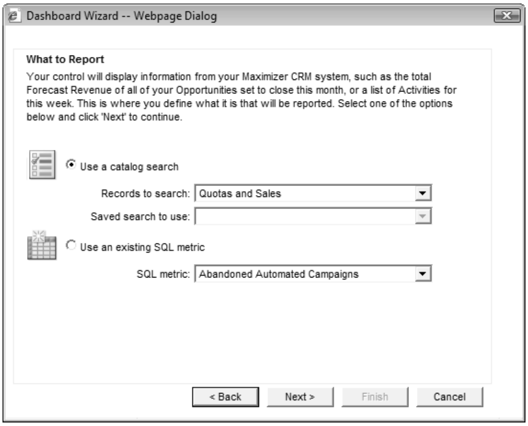


3 Select a control for the indicator, and click ***Next***.

The What to Report screen opens.

4 Select the catalog search or SQL metric to associate with the indicator, and click ***Next***.

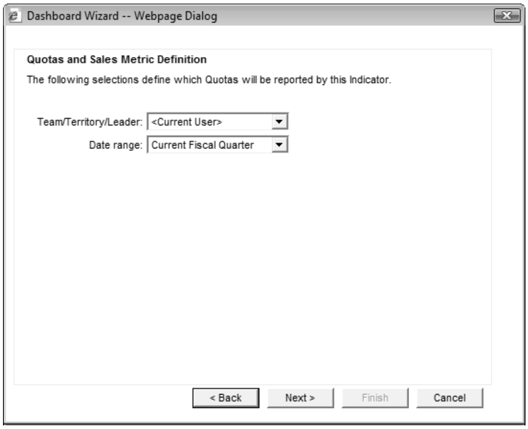
- To associate the indicator with a catalog search: Select ***Use a catalog search***. In the ***Records to search*** drop-down list, select the type of entry associated with the search. In the ***Saved search to use*** drop-down list, select the search from the search catalog.
- To associate the indicator 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.



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.



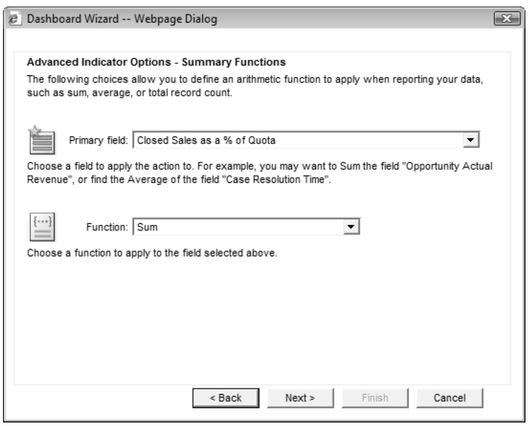
6. If you are creating a list control, specify the type of information to return.

   - 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.



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***.

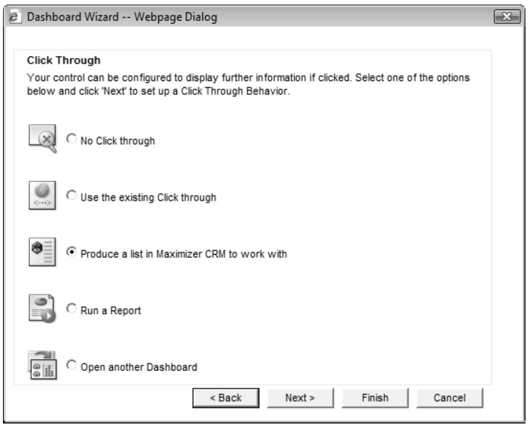
For example, to display data for each Maximizer user, you can select a field that displays a user name.

If the field you select is a multi-value field, options appear to allow you to ***Group by unique values*** or to ***Group by combined values***.

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***.



If the Click Through runs a report or launches another dashboard, specify the URL of the report or select the dashboard, 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.

Customize a Dashboard Indicator

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.

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.

Modify 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.

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***.

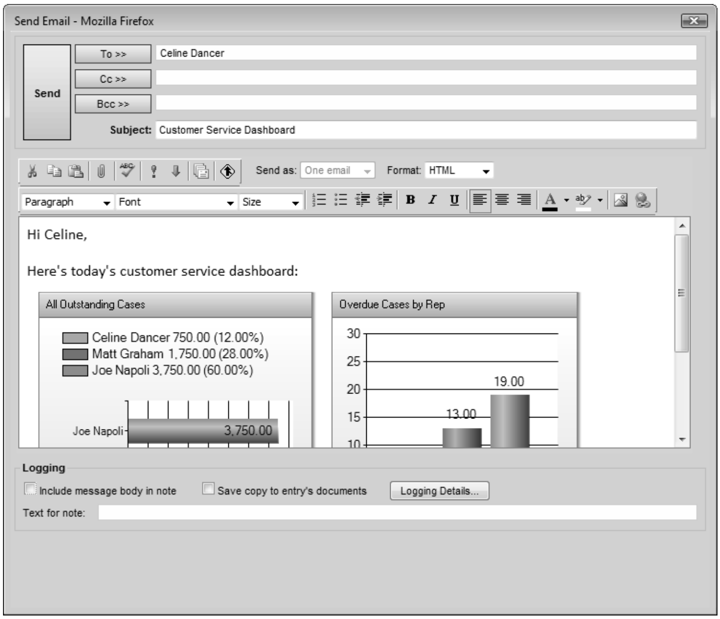
6 Click the ***Save*** icon to save the changes to the dashboard.

Send a Dashboard

You can send an image of the current dashboard by email. If you send an HTML-format email message, the image is inserted in the content of the message. If you send a plain text email message, a .PNG file is attached to the email message.

1. In the Dashboards tab of the My Work Day page, select the dashboard from the drop-down list.
2. Select the ***Share*** icon.

   The Send Email dialog box opens.
3. Specify the recipients and any additional content and properties for the email message.
4. Click ***Send.***



Import a Dashboard Created in a Previous Version of

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.

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***.

Reports Module

The Reports module lets you access reports from Microsoft SQL Server Reporting Services. You can also add new reports created in Microsoft SQL Server Report Builder

Default Reports

SQL Reporting Services Integration must be installed and enabled to access the Reports module. For more information, see the *Maximizer CRM Administrator's Guide*.

The following default reports are created when you first enable SQL Server Reporting Services integration:

- ***Login Statistics Report –*** Lists the date and time that each user logs in to the Address Book in a specified time period.
- ***Logins by User –*** Displays the logins to each module by users in the Address Book.
- ***Marketing Campaign ROI Report –*** Lists the opportunities generated by each campaign and the total expected revenue from the campaigns in a specified time period.
- ***Opportunity Pipeline Report –*** Lists the opportunities scheduled to close this quarter for the current user.
- ***Won Opportunities Report –*** Lists the opportunities won in the current quarter for the current user.
- ***Tasks and Appointments Report –*** Lists the tasks and appointments scheduled in a specified time period for the current user.
- ***Total Cases Reported Report –*** Lists the customer service cases created by each user in a specified time period.
- ***Unresolved Cases Report –*** Lists the customer service cases currently assigned to each user.

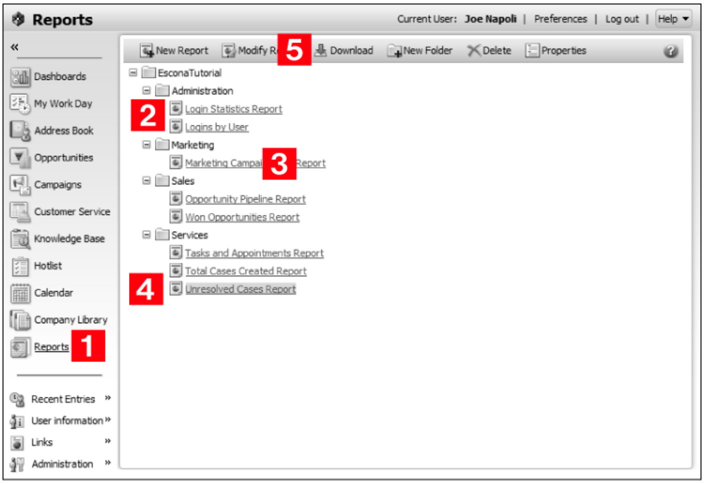
Reports Page

You can access your reports from the Reports page. Keep the following points in mind when working in the Reports page:

1. Select the Reports icon to open the Reports page.
2. Reports are organized in a folder structure.
3. Click on a report title to open the report in a separate instance of the browser.

   Once the report is opened, you can export the report to a different file format or send the report to the printer.
4. Click the report icon to select a report without opening it.

5 Use the toolbar icons to create a new report or folders, download a report file to your local computer, and perform other tasks on the selected report.



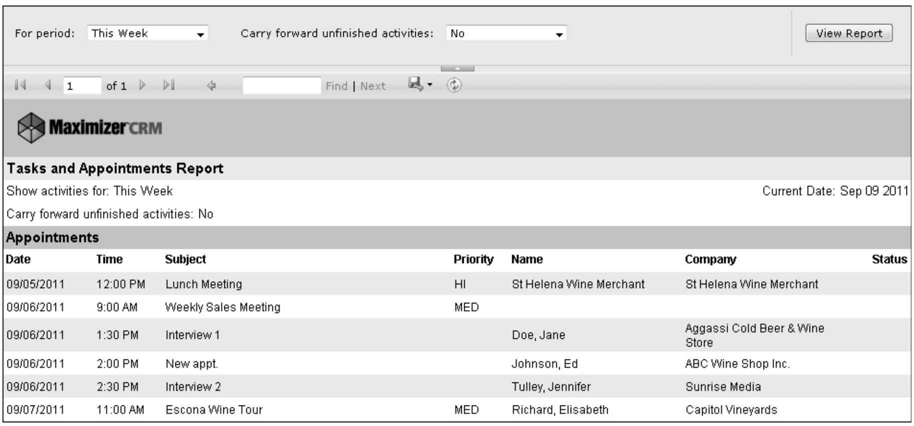
View a Report

1 In the Reports page, navigate to the folder containing the report.

2 Click the report title.

The report opens in a new instance of the browser.

3 If necessary, at the top of the report, adjust the options, and click ***View Report***.



Tasks and Appointments Report

Show activities for: This Week

Current Date: Sep 09 2011

Carry forward unfinished activities: No

Appointments

Date	Time	Subject	Priority	Name	Company	Status
09/05/2011	12:00 PM	Lunch Meeting	HI	St Helena Wine Merchant	St Helena Wine Merchant	
09/06/2011	9:00 AM	Weekly Sales Meeting	MED			
09/06/2011	1:30 PM	Interview 1		Doe, Jane	Aggassi Cold Beer & Wine Store	
09/06/2011	2:00 PM	New appt.		Johnson, Ed	ABC Wine Shop Inc.	
09/06/2011	2:30 PM	Interview 2		Tulley, Jennifer	Sunrise Media	
09/07/2011	11:00 AM	Escona Wine Tour	MED	Richard, Elisabeth	Capitol Vineyards	

Creating Reports for the Reports Module

You can create reports for the Reports module using Microsoft SQL Server Report Builder. You should create new reports from the existing reports that are installed when you first enable the SQL Server Reporting Services Integration. However, if you later want to modify the report, you can open the copy of the report stored locally on your computer. There's no need to download the report again from the Reports server.

Here's an overview of the steps required to create a new report:

1. If necessary, install Microsoft SQL Server Report Builder.

   You can download SQL Server Report Builder from the Microsoft Download Center.

2. Download an existing report from the Reports page.

   The data source for the report automatically points to the current Address Book.

3. Open the .RDL file in SQL Server Report Builder.

   When you open the file, you do not need to connect to the Report Server.

4. Use the tools in SQL Server Report builder to modify the report.

   If you want to work on an empty report, you can delete all existing elements in the report except for the data source.

5. If you use Windows Authentication, change the data source of the report so it uses Windows Authentication as well.

6. Save the report locally on your computer.

7. Add the report to the Reports page.

Install Microsoft SQL Server Report Builder

1. In a web browser, visit the following URL:

   http://www.maximizer.com/url/maxcrm/Max12reportbuilder.html

   The URL opens the Microsoft SQL Server 2008 R2 Report Builder 3.0 page in the Microsoft Download center.

2. Download the ***ReportBuilder3.msi*** file.

3. When the download is complete, run the ***ReportBuilder3.msi*** file.

4. Go through the Microsoft SQL Server Report Builder installation wizard to complete the installation.

   In the ***Default Target Server*** page, leave the ***Default target server URL*** field empty.

5. When the installation is finished, click ***Finish*** to close the installation wizard.

Download a Report from the Reports Page

You can download an existing report from the Reports page and open the report in Microsoft SQL Server Report Builder.

1. In the Reports page, select the report.
2. From the toolbar, click ***Download***.
3. Save the .RDL file locally to your computer.
4. Open the file in SQL Server Report Builder.

Using SQL Server Report Builder

You can use Microsoft SQL Server Report Builder to create new reports and modify existing reports in the Reports page. Reports created in SQL Server Report Builder are saved as .RDL files, which can be viewed in the Reports page. For detailed information on how to use SQL Server Report Builder, see the SQL Server Report Builder documentation.

Data Source for Reports

The data source for reports should point to a Maximizer Address Book. When you first create a report in SQL Server Report Builder, it's best to download an existing report from the Reports page and modify this report. The data source for the report automatically points to the current Address Book.

If you add a data source that points to a different database (either a Maximizer or a non-Maximzier database), the data source gets modified while uploading the report to the Reports page. You must modify the data source from Report Manager after uploading the report. You can also upload the report directly to Report Manager to keep the data source intact.

Running Reports

You can run a report in SQL Server Report Builder to view a preview of the report. When you run the report, you are prompted for a user name and password. You can use your Maximizer user credentials to view the report. You must enter the password in uppercase letters.

If you use Windows Authentication, you must also modify the data source of the report to run the report as the current Windows user:

1. In SQL Server Report Builder, in the left pane, under ***Data Sources***, double-click the data source of the report.

   The Data Sources Properties dialog box opens.
2. In the left pane, select ***Credentials***.
3. Select ***Use Current Windows User*** and click ***OK***.

Add a Report to the Reports Page

You can import existing reports saved as Report Definition Language (.RDL) files to the Reports page in Maximizer. Reports created in Microsoft SQL Server Report Builder are saved as .RDL files. When you first create a report in SQL Server Report Builder, it's best to download an existing report from the Reports page and modify this report. The data source for the report automatically points to the current Address Book.

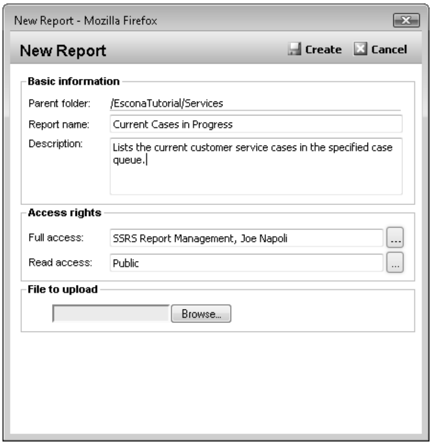
1. In the Reports page, select the folder to which you want to add the report.
2. From the toolbar, select ***New Report***.

   The New Report dialog box opens.
3. Specify access rights for the report.

   By default, the SSRS Report Management group and the current user are given full access to the report, but you can select any users and groups in the Full access and Read access fields.
4. Under ***File to upload***, click ***Browse***.
5. Navigate to the .RDL file, and click ***Open***.

   The name of the report is replaced by the file name.

6 Click ***Create***.



Modify an Existing Report

You can replace an existing report in the Reports page with another Report Definition Language (.RDL) file created in Microsoft SQL Server Report Builder.

If you are modifying one of the default reports, you should also rename the report. Otherwise, the report may be overwritten with the original report if the system administrator changes the SQL Server Reporting Services settings in Maximizer Administrator. You can specify a name for the report in the report properties.

1 In the Reports page, select the report.

2 From the toolbar, select ***Modify Report***.

The Modify Report dialog box opens.

3 Under ***File to upload***, click ***Browse***.

4 Navigate to the .RDL file, and click ***Open***.

5 Click ***OK***.

Export a Report

You can export a report in the Reports page as a file in one of the following formats:

- Portable Document Format (.PDF)
- Microsoft Word document (.DOC)
- Microsoft Excel document (.XLS)

After exporting the report, you can edit it using external applications.

1. From the Reports page, open the report
2. Select the ***Export*** icon, and select the type of file you want to export: ***PDF***, ***Excel***, or ***Word***.
3. Click ***OK*** to open the file in the external application.

Print a Report in the Reports Page

To complete this procedure, you must be using Microsoft Internet Explorer.

1. From the Reports page, open the report.
2. Select the ***Print*** icon.

   If it's your first time printing a report from the Reports page, you are prompted to install the SQL Server Reporting Services add-on.
3. If necessary, install the SQL Server Reporting Services add-on.

   The Print dialog box opens.
4. Select a printer and specify printing properties.
5. Click ***OK*** to send the report to the printer.

Printing Reports from Maximizer

Maximizer contains a number of reports that let you view and print detailed information on your entries and activity. For example, column reports display any information from Maximizer as it appears in the current list, while detailed reports let you print more detailed information on specific entries. Other reports, such as the notes, and user-defined fields reports, let you print specific information about your Address Book entries, opportunities, campaigns, and customer service cases.

Types of Reports

A number of reports are available from the Report menu in Maximizer:

- ***Calendar View –*** Displays the contents of the Calendar page in a printable report. This report is available only in the monthly view.
- ***Column Report –*** Displays the same information you see displayed in a controlling window, such as names and addresses or opportunity information.
- ***Detailed Report –*** Includes basic information for an Address Book entry, a customer service case, a campaign, or an opportunity.
- ***Notes Report –*** Prints notes attached to an Address Book entry, a campaign, a customer service case, or an opportunity.
- ***Phone Log –*** Lists phone calls recorded in Maximizer for the current user on a specific day.
- ***User-Defined Field Report –*** Lists the user-defined fields attached to an Address Book entry, a campaign, a customer service case, or an opportunity.
- ***Consolidated Activity Report*** - Displays the notes, Hotlist tasks, and appointments created by or assigned to Maximizer users in a specific date range.
- ***Customer Service Workload Report*** - Displays the number of customer service cases assigned to each representative, along with summary statistics showing the average age of cases for each representative, as well as details about each case. The Customer Service Workload Report is only available in the Customer Service module.
- ***Email Campaign Response Metrics Report*** - Displays information related to email campaigns, including the number of emails sent, the open rate for emails, and clickthrough

statistics. The Email Campaign Response Metrics Report is only available in the Campaigns module.

- ***Incoming vs. Outgoing Calls Report*** - Displays the phone calls made and received by users along with summary statistics about the duration of calls.
- ***Pipeline Report*** - Displays information about the current opportuntites throughout the various stages of the opportunity pipeline. The Pipeline Report is only available in the Opportunities module.

Print a Column Report

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.

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. Click on the single entry to include in the report to make it the current entry.

   – or –

   Make a list of entries to include in the report.

   – or –

   Select the entries to include in the report.

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.
   - To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

3. Select ***Report > Column Report***.

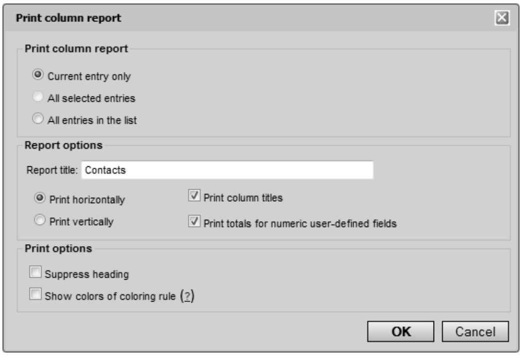
   – or –

   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***.

A new instance of the browser opens displaying the content of the report.

6 Click ***Print***.

7 Specify the printing properties and finish printing the report in your browser.

Print a Note Report

The note report displays the content and properties of notes attached to entries. It can include specific notes or all notes attached to an entry or multiple entries in a list. You can filter out notes to include only notes matching specific criteria in the report.

You can print a note report for a single entry, for multiple selected entries, or for all entries in a list in the Address Book, Opportunities, Campaigns, or Customer Service page. You can also open an entry and select specific notes to include in the report.

1. Create a list of entries.

   – or –

   In a main list, select the entries for which you want to print notes.

   – or –

   Click on the entry to make it the current entry.

   – or –

   Open the entry and select the ***Notes*** tab.

2. In an open entry, select any specific notes you want to include in the report.

3. Select ***Report > Notes Report***.

   – or –

   In the View bar of the Notes tab in an open entry, select the ***Note Report*** icon.

   The Print Note Report dialog box opens.

4. Under ***Print note report for***, select the entries to include in the report.

   If you are printing the report from a main page, the options refer to the entries in the main list.

   If you are printing the report from the Notes tab in an open entry, the options refer to the list of notes for the current entry.

5. Specify criteria for filtering out notes from the report.

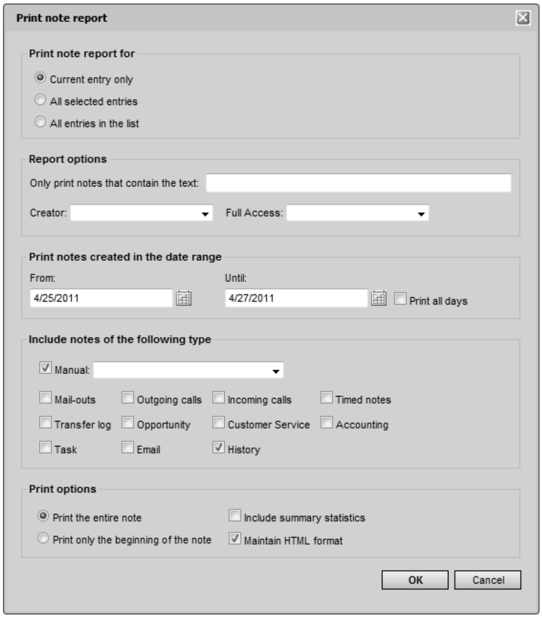
   - In the ***Only print notes that contain the text*** field, enter text to include only notes that contain the text in the report.
   - From the ***Creator*** and ***Full access*** drop-down lists, select values to include only notes matching the selected values.
   - Under ***Print notes in the date range***, select the date range for the notes to include in the report.
   - Under ***Include notes of the following type***, select the types of notes to include in the report.

6. Under ***Print options***, specify the content to include in the note report.

   - ***Print the entire note*** includes all of the note content and properties.
   - ***Print only the beginning of the note*** includes only the date, time, and a fragment of the note text.
   - ***Include summary statistics*** includes the total number of each type of note in the report.

- ***Maintain HTML format*** includes formatting in the report. This option is available only if you are printing the entire note content.

7 Click ***OK***



A new instance of the browser opens displaying the content of the report.

8 Click ***Print***.

9 Specify the printing properties and finish printing the report in your browser.

Print a Phone Log Report

You can print a Phone Log report to print the contents of the Phone Log from the Address Book, Opportunities, Campaigns, Customer Service, Knowledge Base, Hotlist, or Calendar page.

1 Select ***View > Phone Log***.

The Phone Log dialog box opens displaying the phone calls recorded in Maximizer for the current user on the current date.

2 To display phone calls for a different date, next to the ***Date*** field, select the Calendar icon and select a date.

3 If necessary, select specific phone calls in the list to include in the report.

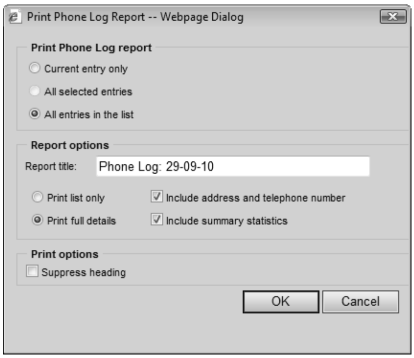
If you want to print all phone calls in the list, skip this step.

4 Click ***Print***.

The Print Phone Log Report dialog box opens.

5 Specify the report details.

- Under ***Print Phone Log report***, specify how you want to use the current list of entries.
- Under ***Report Options*** and ***Print Options***, specify the title and format of the report.



6 Click ***OK***.

A new instance of the browser opens displaying the content of the report.

7 Click ***Print***.

8 Specify the printing properties and finish printing the report in your browser.

Print the Calendar Monthly View

You can print a report showing the Calendar page in monthly view. You can choose to include the legend of users, locations, and resources in the report. To print the legend and color bars, the print background setting must be enabled in your web browser. This setting is typically found in the Page Setup options. If you do not want to include colors in the report, you can remove items from the Calendar legend before generating the report.

1. In the Calendar page, select the Monthly view.
2. If necessary, select a different month and select different users, locations, and resources to display in the report.
3. Select ***Report > Print Calendar***.

   A new instance of the browser opens displaying the content of the report.
4. To include the Calendar legend at the bottom of the report, select ***Include legend***.
5. In the text box at the top of the report, enter a title for the report.
6. Click ***Print***.
7. Specify the printing properties and finish printing the report in your browser.

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.

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.

The Advanced Export to Excel command is available only in Microsoft Internet Explorer.

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.

Export a List of Entries to Microsoft Excel

To complete this procedure, you must have the Allow export privilege.

1. Create a list of entries to export.

   – or –

   Select the specific entries to export.

   - Click the checkbox to the left of entries.
   - Click on the entries one at a time while holding down the ***Control*** key.

- To select all entries between two entries, select an entry and, while holding down the ***Shift*** key, select another entry.

2. Select a column setup and apply a coloring rule to use for the export.

3. In the View bar, click the ***Export to Excel*** icon or the ***Advanced Export to Excel*** icon.

   – or –

   Right-click and select ***Export to Excel*** or ***Advanced Export to Excel***.

This option is available only from the Address Book page.

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.

CHAPTER 10

Maintaining Your Address Book

Maintain Address Book Data

In this chapter...

User Properties

Your user properties are set up by your Maximizer administrator when your user account is created. You can view or change these properties in Maximizer when necessary.

Keep the following points in mind when viewing or modifying your user properties:

1. Your ***Display Name*** determines how your user is seen by other Maximizer users. For example, this is the name that users will see when they view the properties of entries that you have created, or when including your user in an appointment or Hotlist task, and is also the name that is displayed in history notes that are logged when you perform actions in Maximizer.
2. Your user photo is displayed in the History tab alongside notes and documents that you have created.
3. Your ***Phone numbers*** are displayed in the phone list when other users want to get in touch with you. Ensure that your phone numbers are up-to-date.
4. Your ***Email*** address is used by Maximizer to send system-generated emails, for example appointment reminders and customer service notifications. It is important that this email address be a valid email account that you check often.

Update your User Properties

You can update your user properties in Maximizer when the need arises, for example, if your phone number or email address changes.

1. In the top-right corner of the page, click on your display name next to Current User.

   The user Properties dialog box opens.
2. Update your personal information, such as your ***Name, Main address, Phone numbers***, and ***Email address/Website***.
3. Click ***OK*** to save the change to your user properties.

Add a User Photo

You can add a photo to your user profile. The photo is displayed in the History tab next to notes and documents you have created.

1. In the top-right corner of the page, click on your display name next to ***Current User***.

   The user Properties dialog box opens.

2. Under the image in the Name area, click ***Upload***.

   The Upload Photo dialog box opens.

3. Click ***Browse***.

4. Browse to and select the image file on your computer that you want to use as your profile photo, and click ***Open***.

   The image appears in the Upload Photo dialog box.

5. Click and drag around a portion of the image to select the part of the image to include.

   Any portion of the image that is outside of the selection area is removed from the image when it is saved.

   If necessary, you can adjust the sides of the selection area. To fit the image without distorting its proportions, the width of the selection area is kept equal to the height.

6. Click ***Save Photo*** to associate the image with your user profile.

7. Click ***OK*** to save the changes to your user properties.

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, you can set some of the Maximizer preferences. If you use the desktop application as well as Maximizer, these preferences are applied to the Address Book in both applications. You can also set personal preferences that affect only Maximizer.

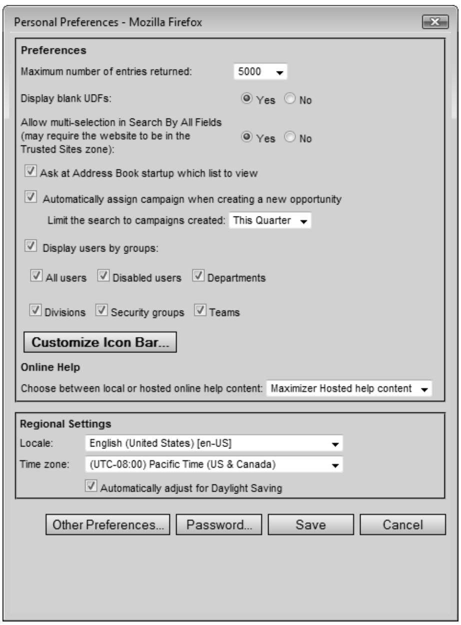
Set Personal Preferences

You can set personal preferences that affect the Maximizer interface. The preferences you set are applied only to the Address Book that is currently open.

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 your personal preferences in Maximizer.

Preferences

- ***Maximum number of entries returned –*** Select the maximum number of records to include in search results. If you increase this number, it may take longer to run some searches.
- ***Display blank UDFs –*** Determines if the "Show blank fields" option is turned on by default in the User-Defined Fields pane and the User-Defined Fields tab in open entries.
- ***Allow multi-selection in Advanced Search (may require the website to be in the Trusted Sites zone) –*** Controls the number of fields you can select when performing an advanced search. 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.
- ***Automatically assign campaign when creating a new opportunity –*** Assigns automated campaigns to new opportunities. When this options is selected, Maximizer searches existing campaigns when you add a new opportunity. If the Address Book entry is subscribed to a campaign in the specified time period, the campaign is automatically added to the opportunity.
- ***Limit the search to campaigns within –*** Sets the time period in which campaigns are searched when you automatically assign campaigns to new opportunities. Campaigns created outside of the time period can be assigned to opportunities manually.
- ***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.

Online Help

- ***Choose between local or hosted online help content –*** Determines the source for online help content.
  - ***Maximizer Hosted help content –*** Accesses the most up-to-date help content over the Internet.
  - ***Local help content –*** Accesses help content from your Maximizer server.

Regional Settings

- ***Locale –*** Sets the locale used to format date, time, numbers, and currencies.
- ***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 Address Book preferences.

Password

Enables you to change your password.

If your Maximizer 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.

Set your Time Zone

Your time zone is specified in your personal preferences. When you log in to Maximizer, 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.

- To change the time zone, click ***Yes***, select the time zone, and click ***Continue***.

  You may need to log out of Maximizer and log in again for the change to take affect.
- To close the message without adjusting the time zone, click ***No***.

Change the Date, Time, and Currency Format

In your personal preferences, the locale setting determines how date, time, number, and currency values are displayed in Maximizer.

1. In the top-right corner of the page, click ***Preferences***.

   The Personal Preferences dialog box opens.
2. From the ***Locale*** drop-down list, select the language and region value that corresponds to the display settings.
3. Click ***Save*** to save the changes to your preferences.

Working with Lists of Users

The “Display Users by Groups” setting in your personal preferences affects how users are listed in a number of dialog boxes in Maximizer, including the Appointment and Select Users for Full or Read Access dialog boxes. If you enable the setting, you can select which groupings to include in the user lists. The grouping are determined by various user properties.

- ***All Users –*** Lists all enabled users in a single list in alphabetical order, without any other groupings.
- ***Departments –*** Groups users by department. A user’s department is set in Administrator in the “Dept” field of the user’s properties. Users without values specified in this field are

not displayed in this list. In the user properties, security must be set to "Public" for users to display in this list.

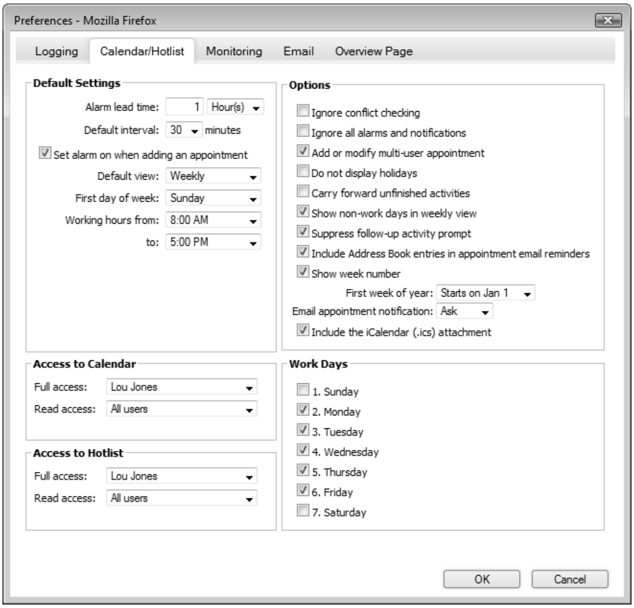
- ***Disabled Users –*** Lists all disabled users in alphabetical order. Disabled users cannot log in to Maximizer and are not displayed in any of the other lists. However, you can add disabled users to appointments and to opportunity and customer service case monitoring lists.
- ***Divisions –*** Groups users by division. A user's division is set in Administrator in the "Division" field of the user's properties. Users without values specified in this field are not displayed in this list. In the user properties, security must be set to "Public" for users to display in this list.
- ***Security Groups –*** Groups users by security group. If you are selecting values in the Full Access and Read Access fields, you can select a security group to add to the field. In other user-selection dialog boxes, you can select the users in the security groups.
- ***Teams –*** Groups users by sales and marketing teams.

Set your Maximizer Preferences

You can set your Address Book preferences directly in Maximizer. These settings are applied to both Maximizer and Maximizer. Your system administrator can also set these preferences in Administrator.

1. In the top-right corner of the page, click ***Preferences***.
2. Click ***Other Preferences***.

   The Preferences dialog box opens to the Calendar/Hotlist tab.
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 ***Monitoring*** to configure email notification for opportunity and customer service case monitors.
   - Select ***Email*** to specify the default settings for sending email.
   - Select ***Startup*** to specify startup options and 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. Select the Journal or Both option if you want to log notes to the Journal window in Maximizer.

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.

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. 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 page.
- ***First week of year –*** Determines when the first week of the year starts for the week numbering.
- ***Email appointment / task 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 or Hotlist task.

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 or task, Maximizer will ask you if you would like to send an email notification to the selected appointment attendees or the user assigned to the task. Upon confirmation, the Compose Email Message dialog box opens displaying the basic appointment or task 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 or task. 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, such as MaxAlarm and Maximizer Outlook Calendar Integration, to add, modify, or delete appointments.

- ***Include the iCalendar (.ics) Attachment –*** Attaches iCalendar files to email messages sent to Address Book entries using email appointment notification. Appointments are automatically added to the calendar of Address Book entries receiving the notification if they use calendar applications that support the iCalendar file format. This option is available only if email appointment notification is set to Ask or Always. Maximizer users do not receive iCalendar file attachments.

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 hidden from the weekly Calendar view if you clear the "Show non-work days in weekly view" option.

Monitoring Preferences

The Monitoring tab of the Preferences dialog box configures email notification for opportunities and customer service cases. Notification applies only to the opportunities and customer service cases you are selected to monitor.

- ***Monitoring rules for –*** Determines the type of entry for which you are configuring monitoring. Select Opportunities to view the settings for opportunities, and select Customer Service to view the settings for customer service cases.

Monitoring rules

- ***Receive monitoring notification on note changes –*** Sends an email message whenever a note is added or modified.
- ***Receive monitoring notification on field changes –*** Sends an email message when fields are modified. You can receive notification when any field is changed or when specific fields are changed.

  To receive notification when any field is modified, select ***All fields***.

  To receive notification when specific fields are modified, select ***Only when one of these fields have changed***, click the ellipsis, and select the fields.

Email Preferences

The Email tab of the Preferences dialog box determines settings for sending email messages to Address Book entries.

Options

- ***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.
- ***Compose messages in HTML –*** Sets HTML as the default format when composing mail messages.

Fonts

Sets the default fonts for email messages sent from Maximizer. You can specify different fonts for new messages and for message you reply to or forward.

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.

Startup Preferences

The Startup tab of the Preferences dialog box allows you to determine which page loads by default when you log in to

Maximizer, to select the list of entries that is displayed when you log in, and to select the information that is displayed in the My Work Day page.

Startup

- ***When starting, go directly to –*** Determines what page opens when you log in to Maximizer. Select the page that you want to open when you log in such as the My Work Day, Calendar, or Address Book. If you don't want to open a specific page but would rather log in to whichever page was open the last time you used Maximizer, select the *Last accessed module option.

Dashboards & My Work Day 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.

Address Book Options

This section allows you to choose the list of entries that is displayed when you first open the Address Book page.

- ***View empty list –*** Displays an empty list containing no Address Book entries.
- ***View list from last Maximizer session –*** Displays the list of Address Book entries that was open when you last used Maximizer.
- ***View Favorite List –*** Displays the Address Book entries from the selected Favorite List.
- ***View Saved Search –*** Displays the Address Book entries returned by the selected saved search from your Search Catalog.

If you want to be prompted for which Address Book list you would like to view each time you log in to Maximizer, select the ***Ask at Address Book startup which list to view*** option.

Importing Data

You can import data into Maximizer from comma-separated value (.CSV) files, tab-delimited text (.TXT) files, or Maximizer XML Interface (.MXI or .XML) files.

The following section contains additional information on importing data into Maximizer:

- "About Microsoft Outlook Contact Import" on page 337
- "Import Microsoft Outlook Contacts" on page 338
- "About Comma-Separated Value/Tab-Delimited Import" on page 339
- "Import Comma-Separated Value/Tab-Delimited Files" on page 340
- "Import Catalog" on page 341
- "Save Field Mappings to the Import Catalog" on page 342
- "Retrieving Field Mappings from the Import Catalog" on page 343
- "About Maximizer XML Interface Import" on page 343
- "Importing from MXI or XML Files" on page 343

About Microsoft Outlook Contact Import

The maximum supported file size that can be imported is 4MB. If your Microsoft Outlook contacts file is larger than 4MB you will need to import your contacts in smaller batches rather than all at once.

You can import Address Book entries into your Maximizer Address Book from your Microsoft Outlook Contacts. You can use this feature to quickly add your Microsoft Outlook Contacts to your Maximizer Address Book without having to enter them one-by-one.

Entries imported from Microsoft Outlook are created as Company and Contact entries in your Maximizer Address Book and are not created as sales leads. Name, address, and contact information fields from your Microsoft Outlook Contacts are automatically mapped to the corresponding fields in the imported Address Book entries. If an existing Company has a matching value in the Company Name or an existing Contact has matching values in the First Name, Last Name, and Email Address fields, the Company or Contact is updated. Otherwise a new Address Book entry is created.

Before importing your contacts from Microsoft Outlook you must first export them to a comma-separated values (.CSV) file. Please refer to your Microsoft Outlook documentation for instructions on how to export your contacts to a comma-separated values (.CSV) file.

Once the import is complete, results of the import are sent to an email address specified during the import. By default, the current user's email address is set, but you can specify any other email address during the import.

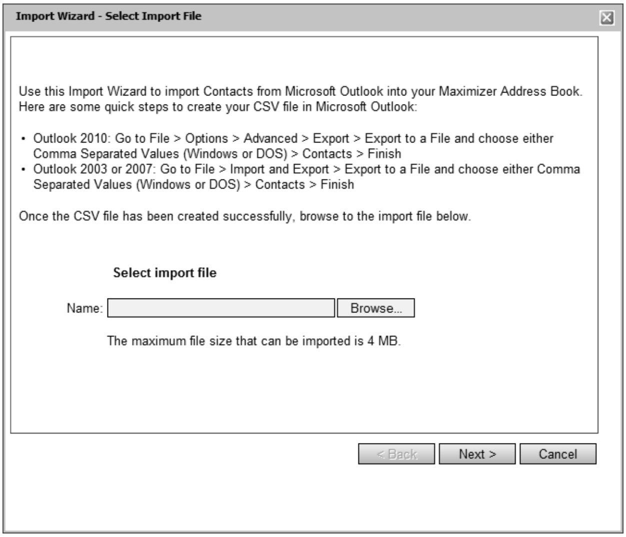
During the import, a Favorite List is created containing the Address Book entries created or updated by the import. The name of the Favorite List is "CSV imported [date] [time]". You can retrieve this Favorite List to review the results of the import.

Import Microsoft Outlook Contacts

To complete this procedure, you must have the Allow import privilege and Insert permissions for Address Book entries and user-defined fields.

1. In the left navigation pane, hover your mouse over ***Import*** and select ***Microsoft Outlook Contacts*** from the pop-up window.

   The Import Wizard - Select Import File dialog box opens.



2. Click ***Browse***, and choose the comma-separated values (.CSV) file that contains your exported contacts from Microsoft Outlook.
3. Click ***Next***.

   The Import Wizard - Finish dialog box opens.
4. In the ***Import results will be emailed to*** field, enter the email address that you want the results of the import emailed to. If you do not want to send an email with the results of the import, leave the field blank.
5. Click ***Import Now***.

The file is imported. If you entered a valid email address above, an email containing the results is sent once the import is complete.

About Comma-Separated Value/Tab-Delimited Import

You can import comma-separated value (.CSV) or tab-delimited text (.TXT) files into Maximizer. Files created in most spreadsheets can be saved as .CSV or tab-delimited text files. As well, most email applications have the option to export contacts to .CSV files.

When you import a file, you map each value in the first row of the .CSV or tab-delimited text file to a basic or user-defined field in Maximizer. To simplify the field mapping, it’s best if the first row is a header row containing the name of each field. You can choose to leave this row out of the import.

Each entry is imported as a Company, Contact, or Individual based on the values of the Company and Last name fields in the import file.

- If the entry has a value in the Company field but no value in the Last name field, the entry is imported as a Company.
- If the entry has a value in the Last name field but no value in the Company field, the entry is imported as an Individual.
- If the entry has values in both the Last name and Company fields, the entry is imported either as a Contact with a Company or as an Individual. You must specify how to import all entries of this type during the import.
- If the entry has no value in both the Company and Last name fields, the entry is not imported into Maximizer.

During the import, you can choose to import all entries as sales leads or as regular entries.

The import updates existing entries or creates new entries depending on values of fields in the import file. If an existing Company has a matching value in the Company Name field, the Company is updated. If an existing Contact or Individual has matching values in the First Name, Last Name, and Email Address fields, the Contact or Individual is updated. Otherwise, a new Address Book entry is created.

Once the import is complete, results of the import are sent to an email address specified during the import. By default, the current user’s email address is set, but you can specify any other email address during the import.

During the import, a Favorite List is created containing the Address Book entries created or updated by the import. The name of the Favorite List is “CSV imported [date] [time]”, for .CSV files, or “TXT imported [date] [time]”, for tab-delimited text files. You can retrieve this Favorite List to review the results of the import.

Import Comma-Separated Value/Tab-Delimited Files

Use this procedure to import Address Book entries into Maximizer from a comma-separated value (.CSV) or tab-delimited text (.TXT) file.

To complete this procedure, you must have the Allow import privilege and insert permission for Address Book entries.

The maximum supported file size that can be imported is 4MB. If the comma-separated values (.CSV) file or tab-delimited (.TXT) file that you want to import is larger than 4MB you will need to split the file into multiple files smaller than 4MB and import each one separately.

1. In the left navigation pane, click ***Import*** and select ***Comma-Separated Values (CSV)*** or ***Tab-delimited*** from the pop-up window depending on which type of file you want to import.

   The ***Import Wizard - Select Import File*** dialog box opens.

2. Click ***Browse***, choose the comma-separated values (.CSV) file or tab-delimited (.TXT) file that you want to import, and click ***Open***.

3. Select the ***File Encoding*** of the file you are importing, and click Next.

   If you are unsure which character encoding your file is saved in, please consult the documentation of the application you used to create the file.

4. Select how you want to import the entries, and click ***Next***.

   - Under ***Type of Import***, choose how to import entries that have values in both the Company and Last name fields.

     These entries are all imported either as Contacts for Companies or as Individuals.

   - Select ***Convert to name case*** to convert text that is in capital letters to mixed case.

   - Under ***Lead Handling***, choose to import all entries as sales leads or as regular entries.

   The Import Wizard - Field Mapping dialog box opens.

5. Map each field in the import file to a field in Maximizer, and click ***Next***.

   The value of each field in the first row of the import file is displayed on the left and any matching Maximizer fields are displayed on the right. If the import file contains a header row you can choose not to import it by selecting the ***Do not import first record; it is a header*** option.

   - Hover your mouse over a row, and click the arrow icon.

   - Select a basic or user-defined field from Maximizer to map to the field, and click ***OK***.

- To exclude a field from being imported, hover your mouse over the row, and click the ***X*** icon. Fields marked as ***Field not mapped*** are excluded from the import.

6 Map each of the fields in the ***Import File Fields*** column to a Maximizer Address Book entry field in the ***Map to Maximizer Fields***. Move the mouse over the field you want to map and click the arrow icon to pop up a list of Maximizer fields to choose from.

The Import Wizard - Finish dialog box opens.

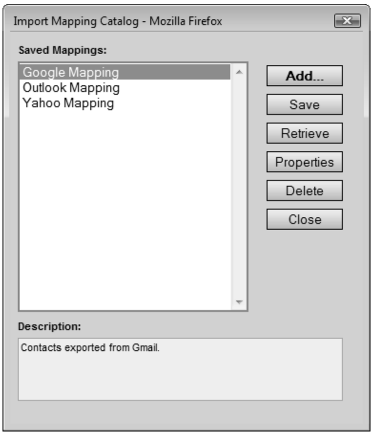
7 Enter your email address, and click ***Import Now***.

Results of the import are sent to the specified email address.

Import Catalog

When you import comma-separated values (.CSV) or tab-delimited text (.TXT) files into Maximizer, you must map every field in the import file to a field in Maximizer. You can save this field mapping to the Import Catalog. If you import a similar type of file in the future, you can retrieve the saved field mapping. The import catalog is especially useful if you regularly import entries from the same source (for example, Contacts exported from Microsoft Hotmail).

When you retrieve a field mapping from the Import Catalog, the list of Maximizer fields in the Import Wizard is replaced with the list saved in the Import Catalog. The field names in the import file do not need to match the names from the file when the field mapping was originally saved.



Save Field Mappings to the Import Catalog

Use this procedure to save field mappings in the Import Wizard to the Import Catalog. The Maximizer fields specified in the Field Mapping screen of the Import Wizard are saved so they can be retrieved later.

To complete this procedure, you must have the Allow import privilege and Insert permissions for Address Book entries and user-defined fields.

1. In the left navigation pane, hover your mouse over ***Import***, and select ***Comma-Separated Values (CSV)*** or ***Tab-delimited*** depending on which type of Import Catalog you want to create.

   The Import Wizard opens.

2. Proceed through the first two screens of the Import Wizard to select the import file and set options for the import.

3. In the Field Mapping screen, map each field from your import file to a field in Maximizer.

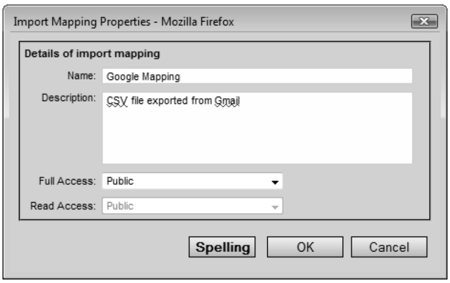
4. Click ***Catalog***.

   The ***Import Mapping Catalog*** dialog box opens.

5. Click ***Add***.

   The ***Import Mapping Properties*** dialog box opens.

6. Specify the name, description, and access rights for the field mapping, and click ***OK***.



Retrieving Field Mappings from the Import Catalog

Use this procedure to retrieve a saved field mapping from the Import Catalog into the Import Wizard. The Maximizer fields specified in the field mapping are retrieved to the Field Mapping screen of the Import Wizard.

To complete this procedure, you must have the Allow import privilege and Insert permissions for Address Book entries and user-defined fields.

1. In the left navigation pane, hover your mouse over ***Import***, and select ***Comma-Separated Values (CSV)*** or ***Tab-delimited*** depending on which type of Import Catalog you want to retrieve.

   The Import Wizard opens.
2. Proceed through the first two screens of the Import Wizard to select the import file and set options for the import.
3. In the Field Mapping screen, click ***Catalog***.
4. Select the saved field mapping, and click ***Retrieve***.
5. Follow the instructions in the Import Wizard to complete the import.

About Maximizer XML Interface Import

Address Book entries, customer service cases, knowledge base articles, and other data from Maximizer XML Interface (.MXI or .XML) files. These 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.

Imported Address Book entries are stored in a Favorite List. By default, the Favorite List is named according to the file format and import date and time, but you can specify any name for the Favorite List during the import.

Importing from MXI or XML Files

Use this procedure to import Address Book entries, customer service cases, or knowledge base articles into Maximizer from a Maximizer XML Interface (.MXI or .XML) file.

To complete this procedure, you must have the Allow import privilege and the required permissions for inserting and modifying entries included in the import..

➤ *To import data from a MXI or XML file*

1. In the left navigation pane, click Import and select XML and Maximizer MXI from the pop-up window.

   The Import dialog box opens.

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.

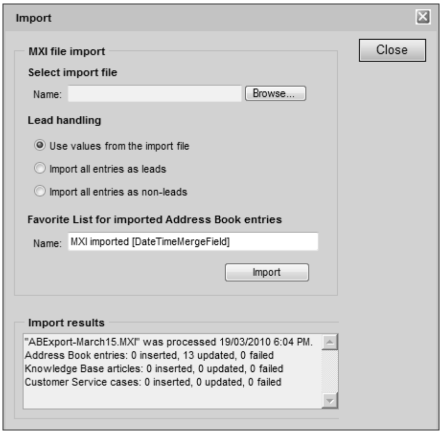
5. Click ***Import***.

   The file is imported.

   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.

The Import option is available only if you have the Allow import privilege.

If you do not have insert or modify permissions, the import results will list the entries as "Failed."



Web-To-Lead Forms

To use Web-to-Lead Forms your Maximizer SQL Server database must be set up to allow SQL Server Authentication. Web-to-Lead Forms do not work in a Windows Authentication only environment. For more information about SQL Server authentication methods refer to the Administrator's Guide. Note that this applies to Maximizer Web Access, not Maximizer CRM Live.

With Maximizer you can create a Web-to-Lead Form to collect information from customers and leads on your website. Information submitted through the Web-to-Lead Form is entered directly into your Maximizer Address Book. For example, you can use this feature to create a contact form to receive customer inquiries or a survey form to receive customer feedback.

Using the Web-to-Lead Form wizard in Maximizer you can perform the following tasks:

- Create a Web-to-Lead Form to collect information from customers and leads and create new Address Book entries based on the submitted information.
- Create a Web-to-Lead Form to collect information from existing Address Book entries and update the existing entries in your Address Book based on the submitted information.
- Select the Maximizer fields, including user-defined fields that you want to appear on the Web-to-Lead Form. For example, information entered in the Last Name field in a Web-to-Lead Form is inserted into the Last Name of the Address Book entry in Maximizer. If you have chosen a table or Yes/No user-defined field, a drop-down list is automatically created so customers can select available choices.
- Change how field names are displayed in Web-to-Lead Forms. For example, if you want to include the Maximizer Address Book entry field “Phone 1" in a Web-to-Lead Form, you can choose a helpful label such as “Home Phone” to display when customers view the form.
- Designate mandatory fields. If a customer fails to fill-in any fields in the form that are designated as mandatory, they are notified by an error message when they try to submit the form.
- Specify notification options for when a Web-to-Lead Form is submitted. You can choose to have a notification email sent each time the Web-to-Lead Form is submitted to one or more email addresses of your choice.
- Designate a favorite list to add the new or updated entries to when the Web-to-Lead Form is submitted. By adding the entries submitted through the Web-to-Lead Form to a favorite list they are easily accessible so that you can review the new entries, clean up any fields that were submitted incorrectly, remove any duplicate submissions, and follow-up on the submissions.
- Enter the address of a web page to redirect customers to after they submit the form. You can enter the URL of any web page, for example a thank you page or the home page of your website.

- View or modify existing Web-to-Lead Forms in the Web-to-Lead Form Catalog, so you can update existing forms as the need arises.
- Create new Web-to-Lead Forms based on existing ones in the Web-to-Lead Form Catalog, so you can quickly create similar Web-to-Lead Forms without having to re-enter all of the form options.
- Customize the generated HTML of the Web-to-Lead Form, so you can adapt the look and feel of the form to suit the theme of your website or incorporate the Web-to-Lead Form into an existing web page.

Create a Web-to-Lead Form

To complete this procedure, you must have the Allow import privilege and the required permissions for inserting and updating Address Book entries and User-Defined Fields.

1. In the left navigation pane, hover your mouse over ***Administration***, and select ***Web-to-Lead Forms*** from the pop-up window.

   The Web-to-Lead Forms dialog box opens.

2. Select the ***Create a new form*** option, and click ***Next***.

   The Web-to-Lead Forms Properties dialog box opens.

3. Enter a ***Name*** for the form. You can also enter a ***Description*** and adjust the ***Full Access*** and ***Read Access*** fields if necessary, and click ***Next***.

   By default, the Full Access and Read Access settings for new Web-to-Lead Forms are set to the current user. If you want other Maximizer CRM users to be able to view or edit the Web-to-Lead Form, you must select the appropriate users or security teams in the Full Access and Read Access fields. For example, if you are creating a Web-to-Lead Form that your manager will review or modify before it is uploaded, you should ensure the access settings allow your manager to access the Web-to-Lead Form.

   The Web-to-Lead Form Import Type dialog box opens.

4. Select the type of Web-to-Lead Form you want to create, and click ***Next***.

   If you want to create new Address Book entries when your Web-to-Lead Form is submitted, select the ***Create new Address Book entry*** option and choose how you want the new entries to be created in Maximizer CRM when the form is submitted.

   Select the ***Company and Contact*** option if you want new entries submitted through the form to be created as Company and Contact entries in Maximizer CRM. If you want new entries submitted through the form to be created as Individuals, select the ***Individual*** option.

If you want new entries submitted through the form to be created as sales leads, select the ***Create entries as leads*** option.

-or-

If you want to update existing Address Book entries when your Web-to-Lead Form is submitted, select the ***Update existing Address Book entry*** option.

The Web-to-Lead Form Fields dialog box opens.

5 Select the fields you want to include in the Web-to-Lead Form.

Add a field to the form by selecting the field in the ***Available Fields*** list and clicking the **>>** button to add it.

Remove a field from the form by selecting the field in the Fields in the Web-to-Lead Form list and clicking the **<<** button to remove it.

6 Modify the display names of the fields in the Web-to-Lead Form and the order in which they appear.

Modify the text in the ***Display Name on Form*** field in the ***Fields in the Web-to-Lead Form*** list to change the way the fields in the Web-to-Lead Form appear. For example, you could change the label of the “Phone 1” field to something more descriptive for your customers like “Home Phone”.

Select a field in the ***Fields in the Web-to-Lead Form*** and click the ***Move Up*** or ***Move Down*** button to change the order in which a field appears in the Web-to-Lead Form.

7 Select any fields in the Web-to-Lead Form that you want to be mandatory, and click ***Next***.

To make a field in the Web-to-Lead Form mandatory, check the ***Mandatory*** option next to the field in the ***Fields in the Web-to-Lead Form*** list. All of the fields in the Web-to-Lead Form that are marked as mandatory must be filled out by your customers before they can submit the form.

If you have selected to create new Company and Contact entries through your Web-to-Lead Form, you must include the ***Company*** and ***Last Name*** fields in the Web-to-Lead Form and you must make them mandatory.

If you have selected to create new Individual entries through your Web-to-Lead Form, you must include the ***Last Name*** field in the Web-to-Lead Form and you must make it mandatory.

The Web-to-Lead Notification and Submission dialog box appears.

Notification emails sent when the Web-to-Lead Form is submitted count towards your daily email limit if you are using Maximizer CRM Live. If you expect a large number of form submissions each day you should consider not sending notification emails and instead save submitted entries to a favorite list that you review regularly to avoid exceeding your email limit.

8 Choose how you want to be notified when the Web-to-Lead Form is submitted.

Select the ***Add to this favorite list*** option if you want entries submitted through the Web-to-Lead Form to be added to a favorite list. Click the ellipsis button to select the favorite list that you want the new or updated entries added to.

Select the ***Send email to*** option if you want a system-generated notification email sent each time the Web-to-Lead Form is submitted and enter the email address that you want the notification email sent to. If you want the notification emails sent to more than one person you can enter multiple email addresses separated by commas or semicolons.

9 Enter the address of the web page to show after the form is submitted, and click ***Finish***.

Enter the URL of the landing page you want to display after a customer submits the form in the ***URL to show after the form is submitted*** field. For example, you could display a thank you page, or you could display a page that allows the customer to download promotional materials or brochures, or you could simply redirect the customer back to your company's homepage. If you leave this field blank a generic thank you page is displayed after a customer submits the form.

The Web-to-Lead Form HTML dialog box appears.

If the password of the user who created the Web-to-Lead Form changes, or if the fields in the Web-to-Lead Form are changed, you must re-generate the HTML for the Web-to-Lead Form and update the page on your website with the new HTML source.

10 Save the HTML for the Web-to-Lead Form and upload it to your website.

The generated HTML source for the Web-to-Lead Form is displayed in the text field in the Web-to-Lead Form HTML dialog box. Copy-and-paste the HTML source into your preferred HTML editor and save it as an HTML file. Provide the HTML file to your webmaster to upload it to your website and create links to the form from other pages on your website so that your customers and leads can access it.

If you have created a Web-to-Lead Form to update existing Address Book entries, you must provide individual links to each Address Book entry that you want to use the form. The link must contain unique identification information that indicates which Address Book entry to update when the form is submitted. You can send links to your Address Book entries in Maximizer directly by email or with an email campaign. For more information on using Web-to-Lead forms with campaigns, see "Create an Email Template for Web-to-Lead Form Links" on page 350.

View or Modify an Existing Web-to-Lead Form

To complete this procedure, you must have the Allow import privilege and the required permissions for inserting and updating Address Book entries and User-Defined Fields.

1. In the left navigation pane, hover your mouse over ***Administration***, and select ***Web-to-Lead Forms*** from the pop-up window.

   The Web-to-Lead Forms dialog box opens.

2. Select the ***Work with an existing form*** option.

   The Selected Web-to-Lead Form group becomes enabled.

3. Select the ***View/Modify the selected form*** option and click the ellipsis button for the ***Selected Web-to-Lead Form*** field.

   The Web-to-Lead Form Catalog dialog box opens.

4. Select the existing Web-to-Lead Form that you want to view or modify in the Available Web-to-Lead Forms list, and click ***OK***.

5. Click ***Next***.

   The Web-to-Lead Form Properties dialog box opens with the Name and Description of the selected Web-to-Lead Form displayed.

6. Follow the instructions in the Web-to-Lead Form wizard to make changes to the Web-to-Lead Form.

Create a New Web-to-Lead Form Based on an Existing One

To complete this procedure, you must have the Allow import privilege and the required permissions for inserting and updating Address Book entries and User-Defined Fields.

1. In the left navigation pane, hover your mouse over ***Administration***, and select ***Web-to-Lead Forms*** from the pop-up window.

   The Web-to-Lead Forms dialog box opens.

2. Select the ***Work with an existing form*** option.

   The Selected Web-to-Lead Form group becomes enabled.

3. Select the ***Create a new form based on the selected form*** option and click the ellipsis button for the ***Selected Web-to-Lead Form*** field.

   The Web-to-Lead Form Catalog dialog box opens.

4. Select the existing Web-to-Lead Form that you want to use as a template for your new form in the Available Web-to-Lead Forms list, and click ***OK***.

5. Click ***Next***.

   The Web-to-Lead Form Properties dialog box opens with the Name and Description of the selected Web-to-Lead Form displayed.

6. Follow the instructions in the Web-to-Lead Form wizard to create the new Web-to-Lead Form

Create an Email Template for Web-to-Lead Form Links

Before completing this procedure you must have created a Web-to-Lead Form for updating existing entries, and have uploaded the form to your website so that it is available to your Address Book entries.

This procedure uses merge fields in an email message template to send unique Web-to-Lead Forms links to each Address Book entry in an automated campaign. Before completing this procedure, you should familiarize yourself with the use of merge fields in email messages in automated campaigns by reviewing the “Campaigns” chapter.

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

   The Message Library dialog box opens.

2. Click ***New***.

   The Campaign Message Editor dialog box opens.

3. From the Format drop-down list, select ***HTML***.

4. Enter your email message.

5. Place the cursor in the location where you want to insert a link to your Web-to-Lead Form and click the ***Insert Link*** toolbar button.

   The Create Link dialog box opens.

6. Fill in the information for the hyperlink, and click OK.

   In the ***Text*** field, enter the text that you want the link to appear as to the recipient. If you leave this field blank, the full URL will appear as the link in your message.

   If you want to display a tooltip when the recipient hovers over the link, enter it in the ***Tooltip*** field.

It's important that you use the Insert Link toolbar button for entering your hyperlink. If you type the URL, the web form will not work properly.

You can also create a link to your Web-to-Lead Form in the same way when sending an email to Address Book entries directly from the Address Book page.

In the ***URL*** field, enter the full URL where your Web-to-Lead Form is hosted and add the ***[WebFormID]*** merge field to the end. The URL should look like this:

WebFormAddress[WebFormID], where *WebFormAddress* is the full URL of your Web-to-Lead Form.

You must include the square brackets in your URL around the WebFormID.

For example, your URL might look something like this: http://www.mycompany.com/webtoleadform.html[WebFormID] where "http://www.mycompany.com/webtoleadform.html" is the URL of the Web-to-Lead Form.

When the email is sent, the [WebFormID] merge field generates unique identifiers for each Address Book entry which are passed to the Web-to-Lead Form as URL parameters.

The link is added to the email.

7 Click ***Save***.

The Add Campaign Message dialog box opens.

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

The email campaign message is added to the Campaign Message Library and can be used in a campaign activity to send a link to the Web-to-Lead Form to your Address Book entries.

When the email template is added to a campaign activity and sent to subscribed Address Book entries, the [WebFormID] merge field is merged to create a unique link to the Web-to-Lead Form for each of the email recipients. When a recipient clicks on the link they are directed to the form which will only update their Address Book entry.

Advanced Customization of Web-to-Lead Forms

Web-to-Lead Forms in Maximizer are very flexible. You can customize the generated HTML source of Web-to-Lead Forms to adapt the form to the look-and-feel of your website or to add custom JavaScript behaviors. You can also integrate Web-to-Lead forms with custom applications by capturing information about the submitted form in your landing page in order to perform further actions with the new or updated Address Book entries.

Customizing Web-to-Lead Forms HTML Source

By modifying the generated HTML source, Maximizer CRM Web-to-Lead Forms can be customized to suit the requirements of your website. By default, the generated HTML source for Web-to-Lead forms includes an HTML form containing the content of the form, some simple formatting using CSS styles, and some JavaScript validation of mandatory fields and submitted values. You can revise the HTML to change the structure of the form, update the CSS styles to adapt the look of the form, and modify the JavaScript to alter the behavior of the form.

Modifications of the generated HTML source should only be done by someone with expert knowledge of HTML, CSS, and JavaScript technologies. To implement any customizations of your Web-to-Lead Forms, consult your webmaster or other web-development professional.

Below are just a few of the customizations you can do by modifying the generated HTML source of a Web-to-Lead Form:

- Change the appearance of the form and the fields within the Web-to-Lead Form. By modifying the CSS styles for the Web-to-Lead Form you can change the look and feel of the page to fit with the rest of your website.
- Change the structure of fields within the Web-to-Lead Form. By changing the definitions and attributes of the INPUT tags within the Web-to-Lead Form you can make fields hidden, set default values, and change input types.
- Change the behavior of the Web-to-Lead Form. By adding JavaScript functions you can add custom validation or auto-formatting to the fields in the Web-to-Lead Form.
- Embed the Web-to-Lead Form within an existing webpage by copying the entire contents of the BODY tag, including both the HTML and JavaScript code, in the generated HTML source into an existing webpage.

Keep the following points in mind when modifying the HTML source of a Web-to-Lead Form:

- Do not modify the ACTION attribute of the FORM tag or the NAME attributes of any of the fields. If any of these values are changed the Web-to-Lead Form will not work.
- If you modify the definition of an input field in the Web-to-Lead Form HTML source and the content of the field contains data that is not recognized by Maximizer CRM as valid, the field will not be saved when the form is submitted. For example, if you modify a Yes/No user-defined field included in the Web-to-Lead Form to allow alphanumeric input, the value will not be saved.
- When copying the BODY tag contents of the Web-to-Lead Form to an existing webpage, if you do not update the CSS styles or also copy the CSS styles from the HEAD tag of the generated HTML source to your target webpage, the form will not have any formatting applied to it.

Capturing Submitted Entry Identification in a Landing Page

When a customer submits a Web-to-Lead Form, the Client Id and Contact number of the Address Book entry that is created or updated are passed to the landing page as URL parameters. By reading these parameters in your landing page, you can perform further actions with the submitted entry using custom Maximizer integrations. The parameters are passed as “id” and “contact”, where “id” contains the client identification number of the submitted Address Book entry and “contact” contains the contact number. Both of the parameters are encoded as hexadecimal strings using the US-ASCII character set, so they must be decoded before you can use them.

For more information about developing custom integrations with Maximizer, see the *Maximizer CRM Customization Suite* documentation.

Dynamically Generate Links to Web-to-Lead Forms

Instead of sending links to your Web-to-Lead Forms directly to Address Book entries using email from within Maximizer, you can generate dynamic links on-the-fly from within a custom application that is integrated with Maximizer. To generate a link to a Web-to-Lead Form for updating Address Book entries, you simply need to pass the Client Id and Contact Number of the Address Book entry you wish to update as parameters to the Web-to-Lead Form URL. The parameter names used are “id” and “contact”, so a generated URL takes the following form:

http://{WebFormURL}?id={Client_Id}&contact={Contact_Number}
where “{WebFormURL}” is the full external URL of your Web-to-Lead Form, “{Client_Id}” is the ClientId of the Address Book entry and “{Contact_Number}” is the Contact_Number.

Company Information

You can quickly access information on other Maximizer users. 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.

View a Phone List of Maximizer Users

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.

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.

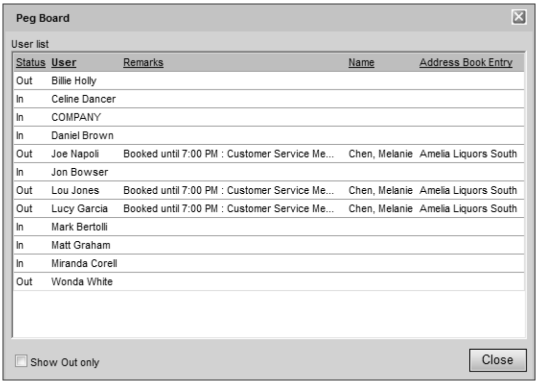
First name	Last name	Email	Phone 1	Phone 2, ext.
Celine	Dancer	cdancer@maximizer.com	(555) 775-0899	(555) 775-0900 Ext. fax
Daniel	Brown	dbrown@maximizer.com	(555) 775-0984	(555) 775-0900 Ext. fax
Jon	Bowser	jbowser@maximizer.com	(555) 775-0983	(555) 775-0900 Ext. fax
Joe	Napoli	jnapoli@maximizer.com	(555) 775-0982	(555) 775-0900 Ext. fax
Lucy	Garcia	lgarcia@maximizer.com	(555) 775-0981	(555) 775-0900 Ext. fax
Lou	Jones	ljones@maximizer.com	(555) 775-0987	(555) 775-0900 Ext. fax
Mark	Bertolli	mbertolli@maximizer.com	(555) 775-0978	(555) 775-0900 Ext. fax
Miranda	Corell	mcorell@maximizer.com	(555) 775-0977	(555) 775-0900 Ext. fax
Matt	Graham	mgraham@maximizer.com	(555) 775-0976	(555) 775-0900 Ext. fax
Wonda	White	wwhite@maximizer.com	(555) 775-0973	(555) 775-0900 Ext. fax

Check the Peg Board

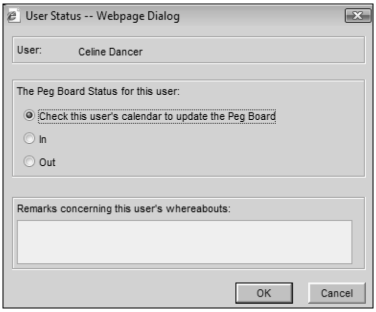
The Peg Board works with the calendar to show you each user's current status. At a glance, you can check to see if a specific user is in the office or is busy. You can also sign users in and out of the Peg Board.

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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