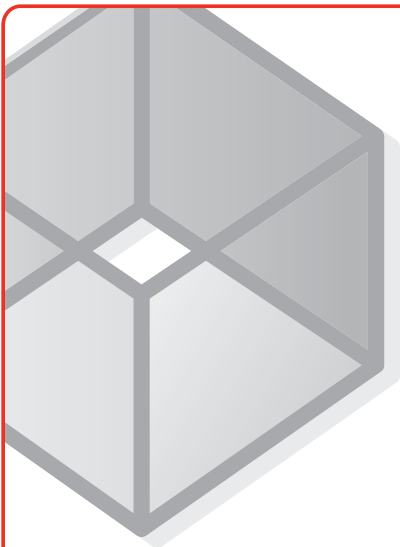
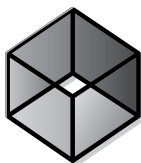


Maximizer[®] **CRM**12



Getting Started Guide **for Group and Enterprise Editions**

Maximizer Software
Simply Successful **CRM**



Maximizer[®] **CRM12**

Maximizer CRM 12 is specifically designed for small and medium-sized businesses and corporate divisions of large companies. By integrating sales, marketing, and customer service tools into one adaptable and affordable solution, Maximizer CRM 12 helps organizations realize their primary customer management goal of having many profitable and satisfied customers.

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

Installing Maximizer CRM

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

If you are using Maximizer CRM Web Access, you must install Maximizer server and Maximizer Components for Microsoft IIS. You can use different machines as the application server and the IIS server, or you can use one machine as both servers. Microsoft Internet Information Services (IIS) must already be installed and configured on your web server.

If you are using Maximizer CRM Windows Access, first install Maximizer server on the application server. Then, install

Maximizer workstation on each computer using Maximizer.

➤ **To install Maximizer**

1. Insert the Maximizer CRM disc. The server and workstation versions are on separate discs.
2. If the Setup window does not appear automatically, double-click the Autorun.exe file on the Maximizer CRM disc.
3. The Maximizer CRM Setup window appears. Select **Install Maximizer CRM Server/Workstation**. The Maximizer CRM Setup program starts.
4. Follow the on-screen instructions to complete the installation.

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

Working with Address Books

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

When you are ready to create your own Address Book, you can open the Administrator module to create the Address Book.

Sample Address Book - Escona Tutorial

When you install Maximizer, you have the option of installing sample Address Books. The Escona Tutorial Address Book includes several different pre-configured users with different security rights. It also includes sample data such as Address Book entries, opportunities, campaigns, customer service cases, user-defined fields, notes, and documents allowing you to see how the software lets you to manage your customer relationships.

When you first open Maximizer, explore the program's features using the data in the Escona Tutorial Address Book. To open Maximizer Web Access, enter the Web Access URL in a web browser. The URL is of the form: [Server Name]/MaximizerWebAccess. You can open Maximizer Windows Access from the Windows Start menu (Start > Program Files > Maximizer CRM > Maximizer CRM) or by double-clicking on the desktop icon. To log into the sample Address Book, use one of the following user IDs and passwords:

User ID - **JNAPOLI**

Password - **maximizer**

User ID - **MASTER**

Password - **control**

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



Maximizer CRM Basics

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

There are other main modules that comprise all your sales, marketing, and customer service information. The main modules include the Address Book, Opportunities, Customer Service, and Campaigns pages. Following panes, such as the Notes and User-Defined fields panes, appear under the main page and contain information related to the selected entry in the main page. When you select a different entry in the page, the following panes change to display information related to the selected entry.

Creating Companies, Individuals, and Contacts

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

- **Company** – Represents a group of people such as an organization, association, or business. A Company often has associated Contact entries.
- **Individual** – Represents a person who may not be associated with a company or organization. Like a Company entry, an Individual entry can have associated Contact entries.
- **Contact** – Represents people associated with a Company entry or, less frequently, an Individual entry.

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

➤ To create an Address Book entry

In the Address Book page, here are a few ways to add a new Address Book entry:

- From the **Edit** menu, select the type of Address Book entry you want to create. For example, select **Edit > Add Company**.
- Right-click, choose **Add**, and select one of the **Address Book** entry options.
- Next to **Add** in the view bar click the type of Address Book entry.

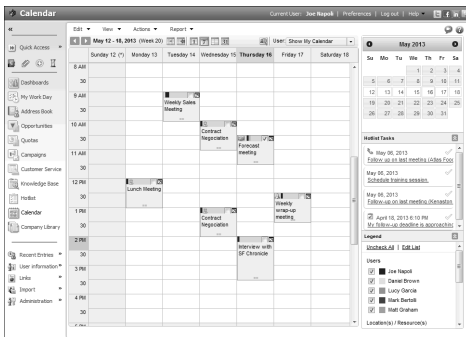
In the Details following pane, enter all relevant information for the entry.

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

The screenshot shows a web form for adding a new company entry. The form is divided into two main sections: 'Company information' and 'Key Fields for: General Customer'. The 'Company information' section includes fields for Company name (Through the Grape Vine Distributors), Department (Sales), Division, Phone numbers (Main: 77-555-4760, Fax, Cell, Mobile), Email addresses and website (Email: mcorne@mscorne.com, Email 2, Website: www.mscorne.com). The 'Key Fields' section includes fields for Category (Distributor), Contract Expiry Date, Last Service Date, Primary Interest (As an agent/distributor), Retail Wine Cost, Region (US - Southeast), Industry (Wine/Retail), Size of Client, First Contacted Date (May 16, 2013), Account Manager (Joe Hapsett), Full Account, Read Account, Territory, and Territory Status (Unassigned).

Calendar

The Calendar page allows you to schedule and view your appointments. You can see when others are unavailable, as well as view other users' calendars. Creating appointments is easy—just right-click in the **Calendar** page and choose **Add Appointment** or from the **Edit** tab, select **Add Appointment**. Also, you can easily create an appointment from the **Address Book** page. Right-click on the entry, and select **Schedule > Meeting**.



Hotlist Tasks

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

You can view
Calendar
appointments
and Hotlist tasks
scheduled for

the current entry in the Activities following pane. You can also add new appointments and tasks and schedule Action Plans.

Date/Time	User	Complete
Tuesday, May 21, 2013	Joe Napoli	<input checked="" type="checkbox"/>
Thursday, May 23, 2013	Joe Napoli	<input checked="" type="checkbox"/>
Friday, May 24, 2013 9:01	Joe Napoli	<input checked="" type="checkbox"/>
Sunday, May 26, 2013 11	Joe Napoli	<input checked="" type="checkbox"/>

Notes

The Notes following pane displays notes associated with the selected Address Book entry, customer service case, campaign, or opportunity. To add a note, in the **Notes** following pane, select **Add** from the view bar.

Notes are also displayed in the History pane. To add a plain text note, click in the text field at the top of the History pane, then enter the text for the note.

Click here to add a note. Last 12 Months filter applied

Joe Napoli added a note:
Hotlist Task Created: Prepare materials for upcoming training session. Interested in our entire product line with emphasis on lighter whites for the summer. With: Through the Grapevine Distributors. Scheduled by: Joe Napoli. Assigned to: Joe Napoli. Note...

Joe Napoli added a document:
Company Website
http://www.throughthegrapevine.com

User-Defined Fields

The User-Defined Fields following pane displays custom fields you create and associate with the selected Address Book entry, opportunity, campaign, or customer service case. If you have the necessary security rights, you can create and modify user-defined fields. To set up user-defined fields, in the left navigation pane, select **Administration > Set Up User-Defined Fields**.

Documents

The Documents following pane displays the document entries associated with the selected Address Book entry, opportunity, campaign, or customer service case. You can insert documents like invoices, sales sheets, letters, and faxes created with other products like Microsoft® Excel. You can also add hyperlinks to documents stored outside of the Address Book.

To insert a file or hyperlink, in the **Documents** following pane, next to **New** in the view bar, click **Document** or **Hyperlink**. You can also view documents from the History pane.

Use Microsoft® Word Integration to create documents in Word using information from your Maximizer entries.

Email

Use Maximizer to send email to your Address Book entries and automatically save the email message as a note or document with the selected Address Book entries, opportunities, or customer service cases. To send an email, first select the entries. Then, from the **Actions** menu, select **Write an Email**. Compose the email message using merge fields to include personalized information from the entries in the message. When you're finished, you can save the message as an email template to reuse later.

You can also use Microsoft® Outlook Integration to integrate your Maximizer Address Book with Outlook.

Sales and Opportunities

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

The screenshot displays the 'Opportunities' window in Maximizer CRM. The top section shows a list of 40 opportunities, with columns for Status, Company/Individual, Objective, Stage, Revenue, and Close Date. The 'In Progress' status is selected. Below the list, the 'Details' tab is active, showing a note added by Low Jones on June 05, 2012, at 4:08 PM. The note mentions a revenue change for the 'Edgar Bros.' opportunity.

Status	Company/Individual	Objective	Stage	Revenue	Close Date
In Progress	Ansel Wine Merchants	Do Seasonal Promotion - Main Offi	Negotiation	\$72,000.00	June
In Progress	Ansel Wine Merchants	Get Escosa on Wine List	Qualify Interests	\$167,000.00	August
In Progress	Amanett's Wine Shoppe	Get Escosa on Wine List 2	Make Initial Contact	\$62,895.00	August
In Progress	Capones River House	Get Escosa on Wine List	Qualify Interests	\$5,500.00	May 2
In Progress	Edgar Bros.	Sell Escosa Wine	Qualify Interests	\$120,000.00	June
In Progress	Farmer & Co.	Acquire as distributor 2	Not Started	\$75,000.00	May 1
In Progress	For All Occasions	Acquire as distributor	Presentation	\$37,500.00	May 2
In Progress	Happy Times Restaurant Supplies	Acquire as reseller	Customer's Review	\$98,000.00	April 1
Lost	Kewitch	Partnership	Customer's Review	\$215,000.00	Janua
Lost	Nehnings Sordits On Oakland	Get Escosa on Wine List	Negotiation	\$136,000.00	March
Lost	Vietchester Wine Warehouse	Partnership	Customer's Review	\$98,000.00	March

Low Jones added a note:
 "Revenue" has been changed from \$6,000.00 to \$120,000.00.
 Open - Delete - Print - June 05, 2012 4:08 PM

Low Jones added a note:
 Opportunity for: Edgar Bros.
 Follow Opportunity from 2012 - Edgar Bros. Wine

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

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

➤ To add an opportunity

1. Select the **Address Book** entry to which you want to add an opportunity. If you select a Contact, Maximizer adds the opportunity to the Company.
2. Right-click, and select **Create an Opportunity**. Or, from the **Actions** menu, select **Create an Opportunity**.
3. Enter the **opportunity details** working through the tabs from left to right.
4. Click **OK** to save the opportunity.

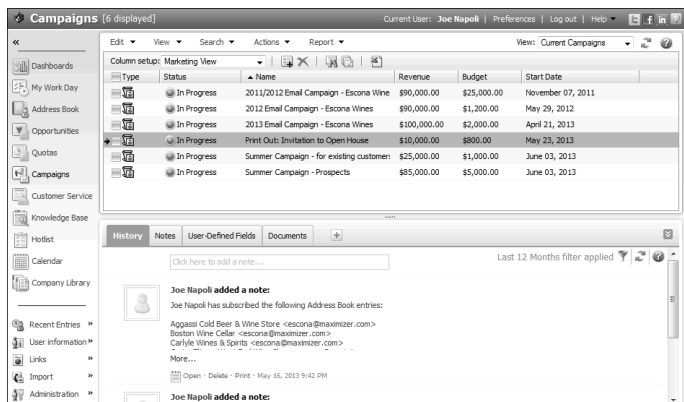
Working with Sales Quotas

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

Name	Fiscal Period	Quota	Weighted Forecast	Unweighted Forecast	Closed Sales	Lost Sales	% of Quota
Joe Napoli	FY 2013 - Q4	\$250,000.00	\$6,750.00	\$67,500.00	\$0.00	\$0.00	0%
Joe Napoli	FY 2013 - Q3	\$250,000.00	\$77,433.00	\$98,000.00	\$0.00	\$0.00	0%
Joe Napoli	FY 2013 - Q2	\$250,000.00	\$81,191.00	\$187,000.00	\$187,000.00	\$124,995.00	67%
Joe Napoli	FY 2013 - Q1	\$250,000.00	\$0.00	\$0.00	\$62,494.00	\$0.00	25%
Direct Coast Sales	FY 2013 - Q4	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Coast Sales	FY 2013 - Q3	\$249,999.99	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Coast Sales	FY 2013 - Q2	\$249,999.99	\$25,951.00	\$190,000.00	\$193,000.00	\$63,995.00	77%
Direct Coast Sales	FY 2013 - Q1	\$249,999.99	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q4	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q3	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q2	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q1	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q4	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q3	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q2	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q1	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q4	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q3	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q2	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Direct Office Sales	FY 2013 - Q1	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Channel Sales	FY 2013 - Q4	\$250,000.00	\$6,750.00	\$67,500.00	\$0.00	\$0.00	0%
Channel Sales	FY 2013 - Q3	\$250,000.00	\$77,433.00	\$98,000.00	\$0.00	\$0.00	0%
Channel Sales	FY 2013 - Q2	\$250,000.00	\$81,191.00	\$187,000.00	\$30,000.00	\$72,000.00	12%
Channel Sales	FY 2013 - Q1	\$250,000.00	\$0.00	\$0.00	\$17,494.00	\$0.00	7%

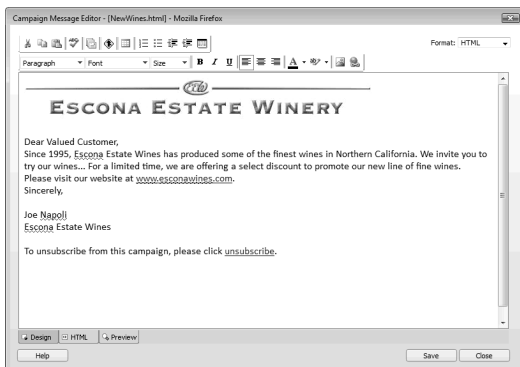
Marketing

Your marketing team can use the Campaigns module to perform, track, and measure cost-effective marketing campaigns that deliver more qualified leads to your sales people.



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

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



There are specific merge fields that make it simple to set up an automated campaign. The easiest way to use these merge fields in HTML is to create a message for an

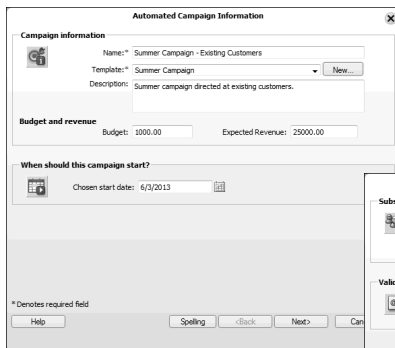
email activity using the Campaign Message Editor and insert the desired merge fields at the correct place in the message. The campaign merge fields can be useful for tracking customer information regarding resulting visits to your website and opened campaign emails. Refer to the *Maximizer CRM Online Help* for more information on using these merge fields.

Once you have created your campaign messages, you can create an automated campaign template (in the Campaigns page, select **Edit > Automated Campaign Templates**). Add activities to the template and link them to your campaign messages.

Automated campaigns are directly integrated with your Address Book entries so you can track lead sources, responses, and purchases through user-defined fields and the automatic creation of notes. To further analyze campaign results, use the detailed campaign reports.

➤ To launch an automated campaign

1. Open the **Campaigns** page.
2. From the **Edit** select, select **Add Automated Campaign**. Or right-click and select **Add Automated Campaign**.



Automated Campaign Information

Campaign information

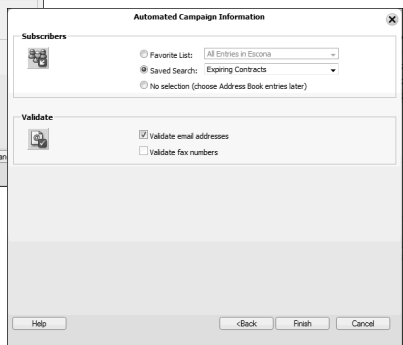
Name:* Summer Campaign - Existing Customers
 Template:* Summer Campaign [New...]
 Description: Summer campaign directed at existing customers.

Budget and revenue
 Budget: 1000.00 Expected Revenue: 25000.00

When should this campaign start?
 Chosen start date: 6/3/2013

* Denotes required field

Help Spelling <Back Next> Cancel



Automated Campaign Information

Subscribers

Favorite List: All Entries in Escrow
 Saved Search: Expiring Contracts
 No selection (choose Address Book entries later)

Validate

[x] validate email addresses
 [] validate fax numbers

Help <Back Finish Cancel

3. Choose the **template** on which this campaign is based. Also, enter the **name**, **description**, **budget**, and **expected revenue**.
4. Select the **date** to begin the campaign.
5. Choose the **Address Book entries** that you want to receive the campaign. The Favorite List option is effective for a large number of subscribers.
6. Select the **Validate email addresses** option to be notified of any blank email addresses or those missing the @ symbol or choose **Validate fax numbers** to be notified of invalid fax numbers.
7. Click **Finish** to save and launch the campaign.

Customer Service & Support

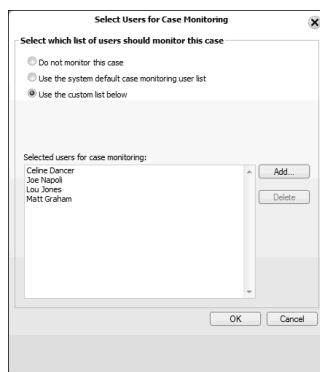
Maximizer enables customer service representatives to track and respond to service calls relating to matters such as billing inquiries, product issues, and frequently asked questions. When entering the details of a customer service case, enter information such as the assigned representative, follow-up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

The Customer Service page supports and enhances your existing customer service business processes. All Address Book entry customer service communication can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner.

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

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

Based on the follow-up deadline, a Hotlist task is automatically created for the assigned user when a case is created. The task is automatically modified when the follow-up deadline or assigned user is modified. And when the case is resolved, the task is marked as complete.



➤ To create a customer service case

1. Select the **Address Book** entry for which you want to add a case. If you select a Contact, Maximizer adds the case to the Company.
2. Right-click and select **Create a case**. Or from the **Actions** menu, select **Create a case**.
3. Enter the **case details** working through the tabs from left to right.
4. Click **OK** to save the case.

Customer Service Case - Faulty Product

Case Information | Notes | Documents | Activities

Basic Information | User Defined Fields | Solution Information & Billing

Company / Individual: Through the Grape Vine Distributors | Contact: Anzoa, Marilyn

Case description

Case number: (pending) | Elapsed time: (pending)

Subject: Training Request

Products / Services: All | Categories: California

Description: Marilyn has requested training on our entire product line.

Key Fields for: General Customer Service

Last Service Date	May 16, 2013	Case queue	Priority
Satisfaction	SLA	Case type	Other
		Case reason	Training not attended
		Case origin	In Person
		Follow-up deadline	May 17, 2013 12:17 AM
		Status	Escalated
		Case owner	Joe Napoli
		Assigned to	Joe Napoli
		Priority	High

OK Cancel

Share the Knowledge

Empower your staff and ensure they are armed with accurate information to answer your customer's toughest question. The knowledge base allows everyone to share technical articles, the answers to frequently asked questions, and other important customer service information in the form of knowledge base articles.

Information is a click away with fast keyword searching. You can then send the article to a customer to resolve their outstanding issue.

Knowledge Base Article

Article details

Article #: HQ4500011 | File type: .txt

Status: Draft | Owner: Joe Napoli

Creator: Joe Napoli | Last Modified: 5/16/2013 10:26 PM

Article description

Title: Chardonnay 2011 - Sour taste

Keywords: cork reaction sour bitter

Products / Services: Chardonnay | Categories: California

Article content

The problem has been verified by our Quality Control group. The following lots of Chardonnay 2011 have reacted with the cork and gone bad:

13987-13994
14002-14006

Distributors with products in these lots should contact their Escapa rep.

Help Spelling OK Cancel

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

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

Reporting

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

Dashboards

Designed for executives and upper management, dashboards show up-to-the-second indicators of your company's performance. With this type of information on your screen at all times, you can see in a glance how your company is doing and even see the indicators register activity from moment to moment. To access dashboards, click on the Dashboards icon.



Access Options

Web Access

Maximizer Web Access is a secure, web-browser interface to a Maximizer Address Book. Users can access all of their Address Book data using a web browser—no need to install an application on each computer.

Windows Access

Maximizer Windows Access can be installed as a stand-alone application on each user's workstation. Users can access all of the same features that are available in Web Access.

Mobile Access

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

Partner Access

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

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

Customer Access

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

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

Administrator Module

The Administrator module is typically used by a system administrator or other technically proficient staff to configure and manage the entire Maximizer application. Administrator module is installed by default on the Maximizer server. You can also access the module over the Internet, using Maximizer Web Access Administrator.

Manage Users

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

Manage Security Groups, and Teams

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

Web Access

Web Access site URLs can be defined in Administrator. By default, these URLs are set up during the installation of the

Maximizer Web components, but the values can be modified in the Web Access dialog box.

MaxMobile Administration

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

Importing and Upgrading Data

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

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

Document Administration

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

Time Zone Alignment

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

Additional Products

Mobile Access and MaxMobile

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

MaxExchange Synchronization Server

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

MaxSync for Microsoft Exchange

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

Workflow Automation Powered by KnowledgeSync

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

Maximizer CRM Customization Suite

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

Learn More About Maximizer CRM

- **Maximizer CRM Administrator's Guide & User's Guide**

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

- **Online Help** - How-to help is available in both Maximizer and Administrator providing you with step-by-step instructions for all areas of the applications. In Maximizer Web Access, click on the question mark in the main windows and dialog boxes to access context-sensitive help. In Maximizer Windows Access, detailed help that pertains specifically to each window, dialog box, and tab is available by pressing the F1 key when the window, dialog box, or tab is open.
- **Online Training** - <http://www.maximizer.com/education-training/online.html>
- **Professional Services** - <http://www.maximizer.com/professional-services/>
- **Maximizer Website** - <http://www.maximizer.com>
- **Knowledge Base** - <http://www.maximizer.com/knowledgebase>
- **Online Demonstration** - <http://www.maximizer.com/solutions/maxcrm/online-demo.html>
- **Supported Products** - <http://www.maximizer.com/support/products.html>

Maximizer CRM Goes Green!

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

- **From Maximizer Web Access** - Online help is available directly from Maximizer Web Access. Access it by clicking **Help** in the top-right corner of the application window.
- **On the Web** - The content on our support website is designed to provide you with as much information as possible in an environmentally friendly way. Free online Knowledge Base and FAQ articles are updated regularly on the technical support website:

Knowledge Base: www.maximizer.com/knowledgebase

Support: www.maximizer.com/support

- **From the DVD** - Documentation and installation instructions are available from the Maximizer CRM DVD. To view the files, insert the DVD into the DVD reader and click **View Documentation** on the **Autorun** screen.
- **From Maximizer CRM** - Online help and documentation in PDF format is available directly from Maximizer CRM. To access the files, click the **Maximizer** button in the top-left corner of the application window and choose one of the items from the **Help** menu. If you have questions about a specific function, dialog box, or window, press **F1** to receive context sensitive help.
- **From Administrator** - Online help and documentation in PDF format is available directly from Administrator. Access the files from the **File > Help** menu. Just like in Maximizer CRM, if you have questions about a specific function or dialog box, you can press **F1** to receive context sensitive help.
- **From the Windows Start Menu** - All Maximizer documentation can be accessed through the **Windows Start > Programs > Maximizer CRM > Documentation and Help** menu item.

Notice of Copyright

Published by Maximizer Software Inc.

Copyright ©1988-2013

All rights reserved.

Registered Trademarks and Proprietary Names

Product names mentioned in this document may be trademarks or registered trademarks of Maximizer Software Inc. or other hardware, software, or service providers and are used herein for identification purposes only.

Applicability

This document applies to Maximizer CRM 12 Summer 2013 Group and Enterprise Editions.

Maximizer Software Address Information

Corporate Headquarters Americas

Maximizer Software Inc.
208 West 1st Avenue
Vancouver, BC, Canada V5Y 3T2
+1 604 601 8000 phone
+1 604 601 8001 fax
+1 888 745 4645 support
info@maximizer.com
www.maximizer.com

Europe, Middle East, and Africa

Maximizer Software Ltd
Apex House, London Road
Bracknell, Berkshire
RG12 2XH United Kingdom
+44 (0) 1344 766900 phone
+44 (0) 1344 766901 fax
info@maximizer.co.uk
www.maximizer.co.uk

Asia

Maximizer Asia Limited
17/F, Regent Centre
88 Queen's Road Central
Central, Hong Kong
+(852) 2598 2811 phone
+(852) 2598 2000 fax
info@maximizer.com.hk
www.maximizer.com.hk

Australia

Maximizer Software Solutions Pty. Ltd.
Level 10, 815 Pacific Highway
Chatswood NSW 2067
Australia
+61 (0)2 9957 2011 phone
+61 (0)2 9957 2711 fax
info@maximizer.com.au
www.maximizer.com.au