Maximizer CRM Live

Administrator's Guide

Published By |
MAXIMIZERCRM

Notice of Copyright

Published by Maximizer Software Inc.
Copyright ©1988-2016
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 Live software.

Maximizer Software Address Information

Corporate Headquarters
Americas

Maximizer Services Inc.
208 W. 1st Avenue
Vancouver, BC V5Y 3T2
Canada

Phone +1 604 601 8000
Fax +1 604 601 8001
Support +1 888 745 4645

Email info@maximizer.com
Website www.maximizer.com
Knowledge Base: www.maximizer.com/knowledgebase

Europe, Middle East, and Africa

Maximizer Software Ltd.
1 The Courtyard, Eastern Road
Bracknell, Berkshire RG12 2XB
United Kingdom

Phone +44 (0) 1344 766 900

Email enquiries@maximizer.com
Website www.maximizer.com/uk

Australia/New Zealand

Maximizer Software Solutions Pty. Ltd.
Level 1, Suite 14, 32 Delhi Road
North Ryde, New South Wales 2113
Australia

Phone +61 (0) 2 9957 2011
Email info.anz@maximizer.com
Website www.maximizer.com/au

Contents

Chapter 1 **Address Books 1**
What is Administrator? 2
Address Books 3
Maximizer System Login Accounts 4

Chapter 2 **Setting Up Users, Groups, and Teams 5**
Adding a User to an Address Book 6
Enabled and Disabled Users 7
Changing User Passwords 9
Resetting User Passwords 9
User and Group Security 10
User Access Rights and User/Group Access Settings 11
Modifying User Access Settings 14
Security Groups 15
Creating a New Security Group 15
Modifying Group Access Settings 16
Record Ownership 17
Sales Teams 18
User Preferences 20

Chapter 3 **Configuring an Address Book 21**
Address Book Preferences 22
Set Address Book Preferences 23
System Fields 24
Add Custom Items to System Fields 24
Modifying System Table Fields in Maximizer 25
Auditing Changes to Entries 26
About Auditing 26
Enable Auditing 26
Purge the Audit Log 27
System Audit Report 27
View the System Audit Report 27
User-Defined Fields 29
Types of User-Defined Fields 29
Access Rights for User-Defined Fields 30
Setting Up User-Defined Fields 30

Sorting User-Defined Fields 31
Move a User-Defined Field or Folder to Another Folder 31
Create a Folder for User-Defined Fields 32
Create a User-Defined Field 32
Add Items to a Table User-Defined Field 33
Formula User-Defined Fields 34
Conditional Expressions for Formulas 34
Mandatory Fields 37
Set a System Field as Mandatory 37
Set a User-Defined Field as Mandatory 38
Rules for Mandatory User-Defined Fields 38
Set a User-Defined Field as Mandatory Given Conditions 39
Mandatory Rules Using Table Fields 39
Writing Formulas and Mandatory Rules 41
Arithmetic Expressions 41
Alphanumeric Functions 42
Date Functions 48
Numeric Functions 51
Comparison Statements in Formulas and Mandatory Rules 53
Logical Operators for Formulas and Mandatory Rules 54
Key Fields Lists 55
Key Fields for Different Types of Entries 55
Restricting Access to Key Fields 56
Create a Key Fields List 56
Preventing Duplicate Entries 58
Partial Matching 59
Permission to Create Duplicate Entries 60
Retrieving Private Entries with Duplicate Checking 60
Configure Duplicate Checking for Address Book Entries 60
Email Notification for Opportunities/Customer Service Cases 61
Assign Email Notification Templates 61
Set Default Opportunity/Case Monitors 62
Security 63
About Account Lockout 63
Set Account Lockout Rules 63
Unlock a User Account 64
About Mobile Access Security 64
Hide Keep Me Logged In Option 64

Chapter 4 Configuring Email and Phone 65
Configuring Email Server Settings 66
Override the Hosted Email Server 66
Configure the Maximizer Email Service 66
Test SMTP Connection 68
Configure Email Accounts for Campaign Monitoring 69
Complying with Anti-Spam Regulations 71

About Anti-Spam Compliance in Maximizer 71
About Email Profiles 72
Voice Over IP and Instant Messaging 73
Voice Over IP and Instant Messaging URLs 73
Configure a Voice-Over IP or Instant Messaging Integration.....74

Index 75

CHAPTER 1

Address Books

In this chapter...

"What is Administrator?" on page 2

"Address Books" on page 3

"Maximizer System Login Accounts" on page 4

What is Administrator?

Administrator is the administrative center of Maximizer. Use it to complete the following tasks:

- Set up user-defined fields for different types of entries.
- Manage Maximizer application settings.
- Customize Maximizer fields and settings.
- Manage users, sales teams, and security groups.

➤ To log in to Administrator

1. From Maximizer CRM Live, in the left pane, hover your mouse over **Administration**, and select **Administrator** from the pop-up.

   The Address Book opens in Administrator.

Address Books

Use this list to help you set up a new Maximizer Address Book. Perform these steps in the order shown here.

1. **Sign up for you Maximizer CRM Live account.** The Maximizer Address Book is created when you sign up.
2. **Set your password.** Refer to “Changing User Passwords” on page 9.
3. **Add users to the Address Book.** When a new Address Book is created, it contains only the MASTER and your personal user accounts. Create an account for each Maximizer user. Refer to “Adding a User to an Address Book” on page 6.
4. **Set up security for users and security groups.** You may want some users to have more access to your Address Book data than other users. Administrator lets you restrict access to specific users and groups of users. Refer to “User and Group Security” on page 10.
5. **Test the Address Book.** In Maximizer, log in to the Address Book with one or more of the new user accounts.

Maximizer System Login Accounts

When a new Maximizer Address Book is created, the following login accounts are created automatically:

- **MASTER** is a system login that is used when migrating an on-premise Maximizer CRM Address Book to Maximizer CRM Live. It is disabled by default in new Maximizer CRM Live Address Books and cannot be used to log in to Maximizer unless it is enabled.
- **COMPANY** is used for the company calendar, which displays company events in the Maximizer calendar. Company calendar events are created under the COMPANY user account. This user account provides read-only access of its calendar to all users. This account is disabled by default. However, if the account is enabled and used to log in to Maximizer, it consumes a Maximizer license.

If they remain disabled, these default accounts do not consume any Maximizer licenses. They only consume Maximizer licenses if they are enabled and used to log in to Maximizer.

CHAPTER 2

Setting Up Users, Groups, and Teams

In this chapter...

"Adding a User to an Address Book" on page 6
"Changing User Passwords" on page 9
"User and Group Security" on page 10
"Security Groups" on page 15
"Record Ownership" on page 17
"Sales Teams" on page 18
"User Preferences" on page 20

Adding a User to an Address Book

As the Address Book administrator, you already have a user ID set up for you. Log in as an administrative user in Administrator to perform setup or administrative tasks.

Before a user can log in to Maximizer, you must assign that person a Maximizer user ID. All security in Maximizer is based on user IDs and the rights you assign to them. You should also assign a user Display Name, which easily identifies the user throughout Maximizer. When you fill in the First name and Last name fields in the Add User dialog box, the Display name field is completed automatically to include the user's first and last name together. You can change this display name.

While adding the user, you must supply a valid email address for the user. After adding the user, an email message is sent to the user with login information and a link to validate the user account and email address. Users must be validated to log in to Maximizer. Once logged in, the user is prompted to specify a password.

Use the User Properties dialog box to enter a user's name and contact information, specify access rights, and add a user to security groups and sales teams. Note that you can also add users to security groups and sales teams using the Groups/Teams module.

➤ To add a new user to the Address Book

1. In the left pane, click **Users**.

   The list of users is displayed.

2. Click **Add**.

   The Copy User's Properties dialog box opens.

3. To copy the properties from an existing user, select the user from the drop-down list, and click **OK**.

4. In the **General** tab, fill in the basic information for this user.
   - In the **User ID** field, enter unique identification for the user.

     The user must specify the User ID to log in to Maximizer.
   - The **Display name** field fills in automatically with the user's first and last names. You can change the display name.
   - The **Dept** and **Division** fields affect where the user is displayed in user-selection lists (for example, in the Add Appointment dialog box).
   - In the **Email** field, enter an email address for the user.

The user must have a valid email address to log in to Maximizer CRM Live. A validation email message is sent to the email address when the new user is saved.

- Under **Module login**, ensure **Enabled** is selected next to **Web access**.

  Users enabled for Web Access can log in to Maximizer CRM Live and Mobile Access. You must have an available user license to enable the user.

- Under **Time Zone**, specify the time zone for the user.

  Users can also specify the time zone in Maximizer.

5. Select the **Access Rights** tab.

6. Click **Modify User Access Settings**, and set up the access settings for the user.

   For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 10.

   For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 11.

7. Click **Save Settings** to save the changes to the access settings.

8. In the **Groups/Teams** tab, select any security groups and sales teams to which the user should belong.

9. Click **Save**.

   The new User ID and its associated information now appear in the User list.

Enabled and Disabled Users

You can create any number of users in your Address Book. However, you must have licenses for all enabled users. The total number of users across all products cannot exceed the number of available licenses. Any additional users must be disabled. Disabled users cannot log in to Maximizer. But other users can add disabled users to appointments and can specify disabled users as opportunity and customer service case monitors.

Disabled users can also be selected as the senders of campaign email messages. For example, you may want to send a campaign activity from a generic email address. You can set up a disabled user for that email address and then select that user in the "From" address of the campaign activity. To send the email activity from the disabled user using the hosted email server, you must ensure the user's email address has been validated.

You cannot enable a user when you are at your limit of licensed users. You must first disable an existing enabled user, and then enable the user.

The following procedures explain how to enable and disable Maximizer users and how to add and validate a disabled user.

➤ To enable or disable a user

1. In the left pane, click **Users**.
2. Click the User ID of the user you want to enable or disable.
3. Next to **Web Access**, from the drop-down list, select **Enabled** or **Disabled**.
4. Click **Save**.

➤ To add and validate a disabled user

1. If you are at the limit of licensed users, disable an existing enabled user.

   You can enable the selected user again once the email address of the new user is validated.
2. Create a new user account for the disabled user:
   - In the **Email** field, enter a valid email address that you want to use for the disabled user.
   - Under **Module Login**, next to **Web Access**, ensure **Enabled** is selected.

     You can disable the user account after validating the email address.

   An email message is sent to the new user.
3. Using the email account of the new user, open the email message sent to the user.
4. In the email message, click the link to log in to Maximizer as the new user.

   The email address of the user is validated.
5. In Administrator, disable the new user and, if necessary, enable any users that you disabled in Step 1.

Changing User Passwords

The following procedure explains how to change user passwords in Administrator. However, users can also change their own passwords in Maximizer in the user preferences. And new users set their passwords when they first log in to Maximizer.

➤ To set and change a user's password in Administrator

1. In the left pane, click **Users**.

   The list of users is displayed.

2. Select the Maximizer user, and click **Password**.
3. Type the new password, then retype it on the next line to confirm it.
4. Click **Save** to save the new password.

Resetting User Passwords

Use the Reset Password command to remove the current passwords from multiple users. Email messages are sent to the users with login information. Users can use the link in the email message to log in to Maximizer and validate their email addresses if they are not yet validated. Once they are logged in, users are prompted to supply new passwords.

➤ To reset user passwords

1. In the left pane, click **Users**.

   The list of users is displayed.

2. Select the checkbox next to the user ID of the users whose passwords you want to reset.

   You can click the checkbox in the heading row to select all users in the current page.

3. Click **Reset Password**.
4. Click **Yes** to confirm the change.

   An email message is sent to the selected user.

User and Group Security

As the Administrator, you can restrict each user's access rights to types of entries, essentially providing per-module security. User access rights are accessible by going to the Access Rights tab of a user's properties (see "Modifying User Access Settings" on page 14). These user access rights consist of the access settings (security settings) of the user account as well as the access settings of any security groups the user is a member of. For example, if the Opportunity Delete permission is not set in the user's access settings, but is granted in the access settings of a group the user is a member of, then the user is granted Delete permissions to Opportunity entries.

Each checkbox contains one of the following potential values:

Checkbox State	Access Setting	Access Right
☑	Granted	Granted
☒	Denied	n/a
☐	Not set	Not granted

The following table illustrates user access rights derived from user and group access settings.

User Access Setting	+ Group Access Setting	= User Access Right
☐	☐	☐
☐	☑	☑
☑	☐	☑
☐	☒	☐
☒	☐	☐
☑	☒	☐
☒	☑	☐
☒	☒	☐
☑	☑	☑

If the user belongs to more than one group, the conflict illustrated below results in the user not being granted the access right.

User or Group Access Setting	+ User or Group Access Setting	+ User or Group Access Setting	= User Access Right
☐	☑	☒	☐

User Access Rights and User/Group Access Settings

The following tables describe each of the user access rights and user or group access settings.

If a Read permission is denied (X), then the Insert, Modify, and Delete permissions are automatically disabled. A user cannot have Insert, Modify, or Delete permissions without having Read permission.

Permissions

Permissions	**Controls the selected user's or group's right to view, add, change, or remove . . .**
Address Book	Entries in the Address Book page
User-defined fields	Values in user-defined fields
User-defined field setup	User-defined field definitions
Notes	Notes attached to entries.
Documents	Documents attached to entries
Mailing Address	Mailing addresses of Address Book entries
Company Library	Files and folders in the Company Library
Opportunities	Entries in the Opportunities page
Campaigns	Entries in the Campaigns page
Customer Service	Entries in the Customer Service page
Knowledge base	Articles in the Knowledge Base page
User/Group setup	Users and Security Groups • If the user does not have any User/Group Setup rights, other users' or groups' properties are not accessible. • If the user has read rights only, the related tabs are visible, but information cannot be modified. • Insert, Modify, and Delete rights provide the corresponding access rights to all user and group properties.
Action Plan Library	Action plan templates in the Action Plan Library
Quotas	Entries in the Quotas page
Dashboards	Dashboard entries

Privileges

Privilege	Grants authorization to . . .
Allow Global Edit	Perform global edits of Address Book entries in Maximizer.
Allow private entries	Add entries that are not visible to other users. The user can use the Owner, Full Access, or Read Access fields to create private entries or restrict entries to a group or a user.
Allow public entries	Add entries that are visible to all other users in the Address Book. Note that the Allow private entries and Allow public entries options cannot be denied at the same time. If both of these options are denied in two different groups a user belongs to (i.e., the checkboxes contain an x), the user is granted the Allow private entries right by default.
Allow import	Import Address Book entries from external applications. If you do not select this option, the commands for importing are disabled.
Allow export	Export information to Microsoft Excel. If you do not select this option, the commands for exporting are disabled.
Modify system tables	Add, modify, or delete available values (items) of system fields, such as City and Category in Address Book entries. See "System Table Fields" on page 14 for more information.
Modify note properties	Change the values of the date, time, and creator fields in notes.
Modify email templates	Create and modify email templates.
Modify key fields	Create and modify key fields lists from Maximizer.
Modify/delete other owners' notes	Change and delete other users' notes. However, to be able to view other users' private notes, the user must have the "Modify other users' private entries" privilege enabled.

Privilege	Grants authorization to . . .
Modify other users' private entries	View and modify entries marked as private that belong to other users. This security privilege will override any other security settings for entries, including any settings based on security groups, so if a user has this privilege enabled, the user has full read and modify access to all entries, regardless of the entry's Full Access, Read Access, or Owner settings. This security privilege is very powerful and should be granted with caution.
Allow manage currencies	Access the Currency Library in Maximizer, and add, edit, or delete entry currencies
Read audit log	View the audit log for entries.

User's Roles

User Role	Grants authorization to . . .
Administrator	Log in to Administrator and perform tasks based on the user's security settings.
Customer Service Manager	Have customer service cases assigned or escalated to the user. It also allows the user to change the value of the Case owner field. This role also contains all functions of the Customer Service Representative role.
Customer Service Representative	Have customer service cases assigned to the user.
Knowledge Base Approver	Approve Knowledge Base articles. A newly created article is assigned a draft status until it is opened and assigned a different status by an approver.
Sales Manager	Re-assign the Account Manager field to a different user, use territory alignment, and create or modify quota templates. This role also contains all functions of the Sales Representative role.
Sales Representative	Be assigned to the Account Manager field. A Sales Representative can assign the Account Manager field to other Sales Representatives only if the Account Manager field is already assigned to the user or it is empty and not assigned to another user.

System Table Fields

Items (available values) for the following fields can be added, modified, or deleted for users who are granted the **Modify system tables** privilege.

Field	Description
Address Book Entry Fields	Mr/Mrs, Position, Salutation, Company, Department, Division, City, St/Prov, Country, Email Description, Phone Description, Do Not Solicit By, Category, and Lead Source
Phone Fields	Subject and Phone Call Result
Hotlist Task and Appointment Fields	Activity and Priority
Campaign Fields	Products/Services and Categories
Customer Service Fields	Products/Services, Categories, and Subject
Opportunity Fields	Products/Services, Categories, Objective, and Next Action

Modifying User Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 10.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 11.

➤ To modify access settings of an existing user

1. In the left pane, click **Users**.
2. Click on the User ID of the Maximizer user.
3. Select the **Access Rights** tab.
4. Click **Modify User Access Settings**.
5. Modify any of these settings as appropriate.
6. Click **Save Settings** to close the Access Settings.
7. Click **Save** to save the changes.

Security Groups

A security group is a group of users, usually belonging to a functional group such as a Finance department, who have access to entries related to their group and have specific security access settings. A user may be a member of more than one security group.

It is important to note that groups have access settings, but they do not have access rights that users do.

Group Name and ID

Every security group has a name and an ID that identify the group. Changing the name has no effect on the group functionality. However, you cannot change the group ID. If you ever need to recreate these security groups, it is imperative that you use the correct security group IDs. (The group name is irrelevant.)

Group Access Settings

A security group has Access Settings that affect the level of access its members have within the Address Book. It is important to note that granting an Access Setting to a group does not necessarily mean that all members of the group will have that Access Right. The level of access each individual user has to the Address Book is controlled by the Access Settings of the user account and the Access Settings of any groups the user belongs to. For more information about user and group Access Settings, refer to "User and Group Security" on page 10.

Group Members

You can add or remove users from the group in the Members tab of the Security Group page.

You can also add or remove a user from any groups on the Groups/Teams tab of the User properties.

Creating a New Security Group

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 10.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 11.

➤ To create a new security group and assign members

1. In the left pane, click **Security Groups**.
2. Click **Add**.

3. Enter a **Group Name**.
4. Enter a unique **Group ID** (up to 6 characters). The first character of the Group ID must be a letter.
5. Assign **Access Settings** to the group.

   Access Settings for the group affect the Access Rights of all users who are members of the group.
6. Select the **Members** tab.
7. From the **Available Users** list, select the users to add to the security group, and click **Add**.
8. Click **Save** to save the new security group.

To remove a user, select the user from the Members list, and click Remove.

Modifying Group Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 10.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 11.

➤ To modify access settings of an existing group

1. In the left pane, click **Security Groups**.
2. Select the group name.
3. Select the appropriate settings for the group, and click **Save**.

Record Ownership

In Maximizer, many entries have an Owner field, or Full Access and Read Access fields. These fields control who can view or edit the entry. Users can access their own private records, all publicly owned records, and private records owned by their group. For example, the user “Alice” of the “Finance” group can view all of her own records, all records owned by the “Finance” group, and all Public records.

Sometimes it’s important to allow users to have private entries because some entries aren’t meant to be shared with your entire organization. In Maximizer, it’s possible to specify Full Access and Read Access to specific users or groups for each entry in the Address Book. In addition to Address Book entries, you can specify ownership of notes, documents, and other types of entries.

When a user creates a new Address Book entry, he or she can designate access for that entry. Full Access or Read Access can be granted to specific users or groups, or it can be Public.

To be able to use the Owner, Full Access, or Read Access fields, the user must have the “Allow private entries” access right enabled.

Field	Value	Description
Owner	Public	All users can view and modify the entry, regardless of their user or group security settings.
	User	Only the specified user can view or modify the entry.
	Group	Only members of the specified group can view or modify the entry, regardless of their user or group security settings.
Full Access	Public	All users can modify the entry, regardless of their user or group security settings. Note that the Read Access field becomes disabled if Full Access is set to Public.
	User	Only the specified user can modify the entry.
	Group	Only members of the specified group can modify the entry, regardless of their user or group security settings.
Read Access	Public	All users can view the entry.
	User	Only the specified user can view the entry.
	Group	Only members of the specified group can view the entry.

Sales Teams

If your company or organization is using opportunity management, you can set up sales teams. Sales teams are used for sales opportunities in Maximizer.Teams help leaders delegate and manage opportunities in Maximizer. Team leaders can delegate tasks in an opportunity to team members.

A team is composed of a team leader and team members:

- **Team Leader**: In a team, one person is designated as a team leader who has the right to make changes to the opportunity, as well as to the opportunity's team.
- **Team Member**: A regular team member does not have the right to change the opportunity or the team. The member's role is to perform the tasks the team leader assigns.

A team member has either edit, audit, or standard rights, as described below. The team leader always has edit rights.

If you have someone in mind as a team member with edit rights, it saves time to assign rights in Administrator rather than on a per-opportunity basis.

- **Edit**: Allows a member full access to all opportunities assigned to the team. Members with this type of access have full team leader rights and may modify the status of an opportunity and may also reassign tasks.
- **Audit**: Allows a member to view all opportunities assigned to him/her.
- **Standard**: Allows for basic rights to "work" (apply steps) opportunities. These rights do not allow the member to change a status of an opportunity.

Security, or access rights, cannot be assigned to sales teams. Therefore, to control the security of more than one user, you must set up a security group for the team members.

➤ To create a new sales team

1. Select **File** > **Security Groups and Teams**.
2. In the left pane, click **Teams**.
3. Click **Add**.
4. On the **General** tab, enter a team name.
5. Select the **Members** tab.
6. From the **Available Users** list, select the users to add to the team, and click **Add**.

   To remove a user, select the user from the Members list, and click **Remove**.

7. In the **Members** list, select a member to assign as the Leader, and select Leader from the **Status** drop-down list.

   There can be only one leader in the team.

8. For each member other than the Leader, select the appropriate member right from the **Rights** drop-down list.

9. Click **Save** to save the new team.

User Preferences

The Address Book administrator is responsible for setting up initial user preferences in Administrator. However, users can change many of their user preferences in Maximizer.

➤ To set Address Book user preferences

1. In the left pane, click **Users**.
2. Select the Maximizer user, and click **Preferences**.
3. Set the user-related preferences on each of the tabs.

CHAPTER 3

Configuring an Address Book

In this chapter...

"Address Book Preferences" on page 22
"System Fields" on page 24
"Auditing Changes to Entries" on page 26
"User-Defined Fields" on page 29
"Mandatory Fields" on page 37
"Writing Formulas and Mandatory Rules" on page 41
"Key Fields Lists" on page 55
"Preventing Duplicate Entries" on page 58
"Email Notification for Opportunities/Customer Service Cases" on page 61
"Security" on page 63

Address Book Preferences

You can set Address Book preferences in Administrator. The following table outlines the settings available in each section of the Preferences.

In this section	You can set the following preferences:
Address Book	• Values available in the Category field for Address Book entries. • Fields to check for duplication of Address Book entries.
Auditing	Auditing preferences for Address Book entries.
Campaigns	• Campaign completion reasons. • Settings for campaign monitoring.
Customer Service	• Customizable values for the Billing type, Subject, Case origin, Case queue, Case reason, Status, and Case Type fields. • Default case response time and case status. • Settings to disallow direct changes to case fields. • Default case monitoring lists. • Assign or unassign email templates for user and customer notification.
Email Server Settings	Option to override the hosted email server and specify settings for an SMTP email server.
Key Fields	Key field lists available for Address Book entries, opportunities, campaigns, and customer service cases.
Locations and Resources	Locations and resources available in appointments.
Mandatory Fields	Mandatory and optional data entry requirements for system fields in Address Book entries, opportunities, campaigns, and customer service cases.
Opportunities	• Opportunity stages and probabilities of close. • Opportunity confidence rating schemes. • Opportunity completion reasons. • Opportunity monitoring lists.
Security	Account lockout and Mobile Access security options.

In this section	You can set the following preferences:
System Fields	• Add, modify, and delete note and document categories. • Add, modify, and delete values of the products/services and categories (in opportunities, campaigns, customer service cases, and appointments) and Do Not Solicit By (in Address Book entries) fields.
System Options	• Address Book name. • System-assigned customer service IDs. • Overview page caption. • Partner notification of assigned Address Book entries or opportunities. • User/group setting which determines if lists of users/groups display only groups to which the current user belongs and other users in the groups in fields such as Read Access and Full Access. • Multi-currency. • Start of the fiscal year. • Maximum number of entries to return in Mobile Access.

Set Address Book Preferences

1. In the left section of the page, click **Preferences**.

   The Preferences section opens.

2. Click the link related to the section for which you want to set preferences.

   For example, click System Options.

3. Set Address Book preferences for each of the sections.

System Fields

You can set up custom values for system fields in the following sections in the preferences:

- **System Fields –** The Category fields in notes and documents, the Do not solicit by field in Address Book entries, and the Products/Services and Categories fields in opportunities, campaigns, customer service cases, and appointments.
- **Locations/Resources –** The Location and Resources fields in appointments.
- **Customer Service –** The Billing Type, Case or Article Subject, Origin, Queue, Reason, Status, and Type fields in customer service cases.
- **Opportunity –** The Stage, Confidence Rating, and Completion Reason fields in opportunities.
- **Campaigns –** The Completion Reason field in automated campaigns.
- **Address Book –** The Category field in Address Book entries.

Add Custom Items to System Fields

You can use Administrator to add custom items to system fields. The steps may differ slightly depending on the field.

1. In the left pane, under **Preferences**, select the section that contains the system field.

   You can modify system fields in the System Fields, Locations/Resources, Customer Service, Opportunity, Campaign, and Address Book preferences.

2. If you are working in the System Fields preferences, expand the root folder to display the list of fields to edit.

3. Expand the plus sign next to the field.

   The current list of values are displayed under the field name.

4. Click **Add New Value**.

5. Enter the name of the item.

6. If necessary, enter other properties of the item.
   - For most fields, specify the user who requested the item.
   - For the **Status** field in customer service cases, select the actions (assign, escalate, or resolve) for which you want to apply the item.

- For the **Stage** field in opportunities, specify the range of the probability of close to apply to the stage.
- For the **Completion reason** field in opportunities and campaigns, specify the completion status the item applies to.

7 Click **Save** to finish adding the item.

Modifying System Table Fields in Maximizer

End users can modify values of some system table fields directly in Maximizer. Users must have the Modify system table fields privilege to change the values. The following fields can by changed:

- **Address Book entry fields –** Mr/Mrs, Position, Salutation, Company, Department, Division, City, St/Prov, Country, Email Description, Phone Description, Do Not Solicit By, Category, Lead Source, and Related Address Book Entry Relationship Type
- **Phone fields –** Subject and Phone Call Result
- **Task and appointment fields –** Activity and priority
- **Campaign fields –** Products/Services and Categories
- **Customer service fields –** Products/Services, Categories, and Subject
- **Opportunity fields –** Products/Services, Categories, Objective, and Next Action

Auditing Changes to Entries

You can set up auditing preferences for Address Book entries, opportunities, and customer service cases. By enabling the auditing feature, you can manage audit logs and view the system audit report.

About Auditing

Maximizer has the ability to log a history of changes made to entries in your Address Book. When Auditing is enabled, a history of the changes made to the basic fields, user-defined fields, notes, and documents of your entries is automatically saved to the audit log.

You have to enable and configure Auditing preferences for the Address Book module to allow users to view audit logs.

The size of your Address Book database may increase substantially when Auditing is turned on. The current size of the audit log file is displayed in the Auditing preferences page.

Enable Auditing

You can enable auditing options to log changes to entries in your Address Book.

1. In the left pane, under **Preferences**, select **Auditing**.
2. Click **Edit Audit Settings** to enable auditing options for your entries.
3. For each of the entry types you want to Audit, select the changes you wish to log.
   - Select the **Fields** checkbox to track changes made to basic fields and user-defined fields.
   - Select the **Notes** checkbox to track changes made to notes.
   - Select the **Documents** checkbox to track changes made to documents.
4. Click **Save**.

The Audit log ignores Full and Read Access settings for user-defined fields, notes, and documents and displays history for all changes, regardless of security settings.

Purge the Audit Log

You can manage the database storage used by the audit log history by deleting old audit logs.

1. In the left pane, under **Preferences**, select **Auditing**.
2. Under **Manage audit log**, specify a **Delete logs older than** interval.
3. Click **Delete**.
4. Click **Yes** to confirm audit log deletion.

   Audit log entries created before the specified interval are deleted.

System Audit Report

Auditing allows you to track modifications made in user-defined fields, notes and documents for entries in your Address Book. You can report on the audit history using the system audit report to retrieve the change history for your entries.

The system audit report contains details of each of the changes made to your entries, including the date the change was made, the user who made the change, along with the action that was taken and the value that was changed.

You can filter the changes included in the system audit report to include changes made by all users or only by a particular user. You can also filter the report by a specific date range. After you generate it, you can export the report to Excel for further customization and analysis.

View the System Audit Report

You can generate a system audit report to show the changes made to your entries in your Address Book over a specified date range.

1. In the left pane, under **Preferences**, select **Auditing**.
2. Under **View system audit report**, select the options for the report.
   - From the **Report for** drop-down list, select the type of entries to include in the report.
   - Specify the **Date range**.

- From the **User** drop-down list, select the user whose changes you want to include in the report.

3 Click **View Report** to generate the report.

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.
- **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.

You can include user-defined fields in Key Fields lists displayed in the Details tab for Address Book entries, opportunities, and customer service cases and in the Basic Information tab of open campaigns.

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.

  You can use alphanumeric user-defined fields to record URLs for entries. The fields are displayed as hyperlinks in Key Fields lists.
- **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. Formula user-defined fields can return 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. You can also specify that currency symbols are displayed with the field.

- **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.

Access Rights for User-Defined Fields

The Maximizer adminstrator user can create user-defined fields at any time in Administrator. You can also give any user the ability to create, change, or delete user-defined fields in Maximizer by enabling the following access rights in Administrator:

- The User-defined fields access right enables the user to assign values to user-defined fields, but not create fields.
- The User-defined field setup access right enables the user to create new user-defined fields.

You can also restrict user access to a specific user-defined field. The user-defined field properties has options for Full Access (read and write) and Read Access (read-only) permissions.

The Full Access and Read Access fields contain a drop-down list of users, groups, and Public. Select which user(s) the Full Access or Read Access permission applies to:

- **Public –** Assigns the user-defined field access permission to all users.
- **[user] –** Assigns the user-defined field access permission to an individual user.
- **[security group] –** Assigns the user-defined field access permission to all members of a security group.

Setting Up User-Defined Fields

User-defined fields are created and modified in the Set Up User-Defined Fields dialog box in Maximizer and the User-Defined Fields page in Administrator. The fields and folder are organized in a tree view. There can be multiple levels of folders, each containing other folders or user-defined fields. The folder structure allows a maximum of three folder levels.

You can set up different lists of user-defined fields for each type of entry. 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 User-Defined Fields page determines the order that user-defined fields display for users.

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

Use the Reset Order button to sort items in alphabetical order. All user-defined fields and folders in the selected folder are resorted.

Move a User-Defined Field or Folder to Another Folder

1. In the left pane, under **User-Defined Fields**, select the category of user-defined fields that you want to work with.
2. To search for a field, enter all or part of a field name in the search box and click the search icon.

   All matching fields in the list are highlighted, and the number of matching fields is displayed.
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 pane, under **User-Defined Fields**, select the category of user-defined fields that you want to work with.
2. 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.
3. Click **Add Folder**.
4. Enter a name for the new folder, and click **Save**.

   The new folder now appears in the user-defined fields list.

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.

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

Create a User-Defined Field

To complete this procedure, you must have Insert permission for user-defined field setup.

You can create user-defined fields for Address Book entries, opportunities, campaigns, and customer service cases in the Set Up User-Defined Fields dialog box.

1. In the left pane, under **User-Defined Fields**, select the category of user-defined fields that you want to work with.
2. 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.

3. Click **Add Field**, and select the type of user-defined field you want to add.
4. In the **Name** field, type a name for the user-defined field.
5. 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.
6. Specify the properties of the user-defined field.
7. Click **Save**.

   The user-defined field is added to the list.

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.

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 pane, under **User-Defined Fields**, select the category of user-defined fields that you want to work with.
2. To search for a field, enter all or part of a field name in the search box and click the search icon.

   All matching fields in the list are highlighted, and the number of matching fields is displayed.
3. Select the table user-defined field, and click **Items**.

   The list of existing items for the table user-defined field is displayed.
4. Click **Add New Value**.
5. Type a name for the item, and specify the other properties of the item.
6. Click **Save**.
7. Repeat steps 4 to 6 to add any additional items to the table user-defined field.

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

Formula User-Defined Fields

Formula user-defined fields calculate values based on other basic or user-defined fields. Because they are calculated from values of other fields, values for formulas fields can be viewed in entries but cannot be set manually.

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.

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.

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

Conditional Expressions for Formulas

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. Comparison statements can use the following operators:
  - **==** to check that two values are equal to each other.
  - **!=** to check that two values are not equal to each other.
  - **>** to check that the first value is greater than the second value.
  - **<** to check that the first value is less than the second 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 second value.

  Comparison statements can be combined with logical operators:
  - **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.
- **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.

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.

Mandatory Fields

You can specify that system fields and user-defined fields are mandatory. System fields are set as mandatory in Administrator. User-defined fields are set as mandatory when creating the user-defined fields in Administrator or 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.

When you create or modify entries, Maximizer checks that all mandatory fields have values. If any mandatory fields are empty, you are prompted to enter a value for the field. If you are working in the Details pane, any user-defined fields that are empty are added to the current Key Fields list.

Set a System Field as Mandatory

You can set up different lists of mandatory fields for Companies, Individuals, Contacts, customer service cases, opportunities, and automated campaigns.

Some system fields, such as Company name and Full access, are mandatory by default. In the Mandatory Fields preferences, they are displayed as "Always Mandatory". The other fields are optional by default, but you can specify that any of the fields must be mandatory.

Use this procedure to set a system field as mandatory or optional.

1. In the left pane, under **Preferences**, click **Mandatory Fields**.
2. Click **Modify Options**.
3. Click the plus sign beside the type of entry the field applies to.

   The list of system fields for the entry is displayed with the fields' current status: Optional, Always Mandatory, or Mandatory.
4. Select the field.
5. Click **Mandatory** or **Optional**.

   The status of the field is changed to Mandatory or to Optional.
6. Click **Save** to save the changes.

Set a User-Defined Field as Mandatory

To complete this procedure, you must have Modify permission for user-defined field setup.

Use this procedure to set an existing user-defined field as always mandatory.

1. In the left pane, under **User-Defined Fields**, select the category of user-defined fields that you want to work with.
2. To search for a field, enter all or part of a field name in the search box and click the search icon.

   All matching fields in the list are highlighted, and the number of matching fields is displayed.
3. Click on the user-defined field.
4. In the **Mandatory** section, select **Always mandatory**.
5. Click **Save** to save the changes.

Rules for Mandatory User-Defined Fields

When you work with Address Book entries, opportunities, or customer service cases, you can specify that user-defined fields are mandatory if a rule is matched. For example, you can write a rule that makes a user-defined field mandatory only when the category for an Address Book entry is set to "Partner". When users set the value of the Category field to Partner, they are prompted to set a value for the user-defined field when they save the entry.

A mandatory rule consists of a comparison statement. It may compare a field with a value or with another field. Or it may compare formulas using the same syntax as formula user-defined fields.

You can create comparison statements with the following symbols.

- **==** to check that two values are equal to each other.
- **!=** to check that two values are not equal to each other.
- **>** to check that the first value is greater than the second value.
- **<** to check that the first value is less than the second 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 second value.

Comparison statements are often combined with logical operators to add multiple statements together.

- **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.

While the comparison statements may be simple, say to compare a field with a value or with another field, you can also write more complex rules. Within the comparison statements, you can include arithmetic operators (+, -, * /) and alphanumeric, date, and numeric functions to create complex formulas.

Set a User-Defined Field as Mandatory Given Conditions

To complete this procedure, you must have Modify permission for user-defined field setup.

Use this procedure to set a user-defined field as mandatory when a specified rule is matched. This procedure applies only to user-defined fields for Address Book entries or opportunities.

1. To search for a field, enter all or part of a field name in the search box and click the search icon.

   All matching fields in the list are highlighted, and the number of matching fields is displayed.
2. Click on the user-defined field.
3. In the **Mandatory** section, select **Mandatory based on rule**.
4. In the text field, enter the rule.

   Click **Insert Field** to add basic or user-defined fields to the rule.
5. Click **Save** to save the changes.

Mandatory Rules Using Table Fields

When you create mandatory rules that compare table fields, the values in the fields are treated like alphanumeric fields.

To compare a table field that contains multiple values, the comparison statement must include the same text that's displayed in the Maximizer interface, including all values for the field. For example, the statement [Category] == "Partner" will be true only if the only value set in the Category field is "Partner". If the Category field includes the "Distributor" value as well, the rule would validate with the following statement: Category == "Distributor, Partner".

You can use the Search function to locate text in multiple-value table fields.

To check that one of multiple values are set in a table field, use the OR operator in the rule. To check that two (or more) values are set in a table field, use the AND operator in the rule.

Example: Mandatory rule for table field using OR

The following rule validates if either the Distributor or Partner value is set in the Category field:

(Search("Partner",[Category]) > 0) OR (Search("Distributor",[Category]) > 0)

Example: Mandatory rule for table field using AND

The following rule validates if both "Distributor" and "Partner" are set in the Category field:

(Search("Partner",[Category]) > 0) AND (Search("Distributor",[Category]) > 0)

Writing Formulas and Mandatory Rules

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

Formula user-defined fields calculate values based on other basic or user-defined fields. You can write formulas consisting of arithmetic expressions, alphanumeric, date and numeric functions, as well as conditional expressions.

When you work with Address Book entries, opportunities, or customer service cases, you can specify that user-defined fields are mandatory if a rule is matched. Rules for mandatory user-defined fields are similar to the formulas in formula user-defined fields. A mandatory rule consists of a comparison statement. It may compare a field with a value or with another field. Or it may compare formulas using the same syntax as formula user-defined fields. Comparison statements can contain any of the elements included in formulas, including alphanumeric, date, and numeric functions.

Arithmetic Expressions

Using the basic arithmetic symbols, you can include arithmetic expressions in formula user-defined fields and in rules for mandatory user-defined fields. Combine multiple expressions to create complicated arithmetic formulas.

Formula user-defined fields and rules for mandatory user-defined fields can use the following symbols:

- **+** for addition.

  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.

  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.

  Multiply numeric values together.

- **/** for division.

  Divide numeric values by other numeric values.

- **( )** for nested operations.

  Use parentheses to create more complex operations on several numeric values or to combine multiple comparison statements.

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 in formula user-defined fields and in rules for mandatory user-defined 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.
- **Lowercase –** Converts a string to lower-case characters.
- **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.

- **Uppercase –** Converts a string to upper-case characters.
- **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.

Lowercase

Converts a string to lower-case characters. Use this function or the Uppercase function with the Search function and with equal (==) statements to compare alphanumeric values when you do not care about the case of the string.

Syntax

Lowercase(Alphanumeric**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string to convert to lower case.

Example

```
Lowercase([City])=="vancouver"
```

This example of a mandatory rule checks for the value "Vancouver" in the City field. The rule validates if an entry has the values "Vancouver", "vancouver", or "VANCOUVER" in the City field.

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. This function is case sensitive.

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. To ignore the case of the string, include the Lowercase or Uppercase function in this parameter.
StartInt	Integer	(Optional) The starting character to search.

Examples

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.

Search("Partner", [Category]) > 0

This example of a mandatory rule searches for the value "Partner" in the Category field. This rule validates if an entry has the category set to "Partner" even if the there are other values set in the Category field as well.

Search("wine", Lowercase([Company_Name])) > 0

This example of a mandatory rule searches for the text “wine” in the company name ignoring the case. This rule validates if the Company Name field includes the text "Wine", "wine", or "WINE".

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.

Parameter	Data Type	Description
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.

Uppercase

Converts a string to upper-case characters. Use this function or the Lowercase function with the Search function and with equal (==) statements to compare alphanumeric values when you do not care about the case of the string.

Syntax

Uppercase(Alphanumeric**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string to convert to upper case.

Example

Uppercase([City])=="VANCOUVER"

This example of a mandatory rule checks for the value "Vancouver" in the City field. The rule validates if an entry has the value "Vancouver", "vancouver", or "VANCOUVER" in the City field.

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 in formula user-defined fields and in rules for mandatory user-defined 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 values in formula user-defined fields and in rules for mandatory 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.

Comparison Statements in Formulas and Mandatory Rules

Rules for mandatory user-defined fields consist of comparison statements. Formula user-defined fields may also include comparison statements if the formulas include conditional expressions, using “If” statements.

You can create comparison statements with the following symbols.

- **==** to check that two values are equal to each other.

  For example, **[Category] == “Partner”** verifies that the Category field is set to “Partner”.

- **!=** to check that two values are not equal to each other.

  For example, **[Category] != “”** verifies that the Category field is not empty, i.e. it has a value.

- **>** to check that the first value is greater than the second value.

  For example, **[Annual Sales] > 20000** verifies that the Annual Sales user-defined field has a value greater than 20,000.

- **<** to check that the first value is less than the second value.

  For example, **[Contract Expiry Date] < [Last Service Date]** verifies that the Contract Expiry Date field is earlier than the Last Service Date field.

- **>=** 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 second value.

Comparison statements are often combined with logical operators to add multiple statements together.

You can compare any values including alphanumeric, date, and numeric values. Alphanumeric values are compared by checking the alphabetical order of the string. When you compare values from table fields, they are treated as alphanumeric values.

Comparison statements are case sensitive. If you want to ignore the case of fields, include the Lowercase or Uppercase function in the statement. For example, [City] == "Vancouver" is true only if the value of the City field is set to "Vancouver". However, Lowercase([City]) == "vancouver" is true if the value of the City field is set to "Vancouver", "vancouver", or "VANCOUVER".

To compare a table field that contains multiple values, the comparison statement must include the same text that’s displayed in the Maximizer interface, including all values for the field. For example, the statement [Category] == "Partner" will be true only if the only value set in the Category field is "Partner". If the Category field includes the "Distributor" value as well, the rule would validate with the following statement: Category == "Distributor, Partner".

You can use the Search function to locate text in multiple-value table fields.

Logical Operators for Formulas and Mandatory Rules

You can use logical operators to build more complex comparison statements in formula user-defined fields and in rules for mandatory fields.

You can use the following logical operators:

- **Or –** Combines two comparison statements where either one of the statements is true.

  For example, **[Category] == "Partner" OR [Category] == "Distributor, Partner"** is true if the Category field has either the "Partner" value alone or has both the "Partner" and the "Distributor" values.

- **And –** Combines two comparison statements where both of the statements is true.

  For example, **[Category] == "Partner" AND [Annual Sales] > 20000** is true if the Category field has the "Partner" value and if the Annual Sales field is greater than 20,000.

- **Not –** Negates a comparison statement.

  For example, **NOT ([Category] == "Partner" AND [Annual Sales] > 20000)** is true in all cases where the previous example is false.

Key Fields Lists

Key Fields are important user-defined fields and system fields that are highlighted on the Details tab for Address Book entries, opportunities, and customer service cases, and on the Basic Information tab in campaigns, making them more readily accessible.

You can choose any user-defined fields and some system fields to include in the Key Fields lists. You may want to select mandatory fields as Key Fields, so users don't miss them when creating new records. You may also select frequently used fields, making it easier for users to quickly enter these values. And you may select fields important to a particular group of users because different Key Field lists can be defined for specific users and groups, or for all users.

Key Fields for Different Types of Entries

Each Key Fields list contains different sets of fields for each type of entry. For example, you can create a new Key Fields list and add different sets of fields for Companies and Opportunities. When you add new fields to the list for opportunities, you can add only opportunity basic fields and user-defined fields. When you open the Opportunity dialog box in Maximizer, only the fields added to the opportunities list will be displayed.

When you work with Address Book entries, you can set up separate lists of Key Fields for Companies, Individuals, and Contacts. As well, each type of Address Book entry has different lists for sales leads and for regular entries. For example, Individual - Lead Key Fields appear only in Individual Address Book entries that are marked as sales leads.

Add fields to the Key Fields list for only the types of entries that you want to make the Key Fields list available to. If the Key Fields list contains no fields for a specific type of entry, the list will not be available when you view that type of entry.

Each Key Fields list can contain separate lists for the following types of entries:

- **Company Lead –** For Companies marked as sales leads.
- **Company –** For Companies that are not marked as sales leads.
- **Individual Lead –** For Individuals marked as sales leads.
- **Individual –** For Individuals that are not marked as sales leads.
- **Contact Lead –** For Contacts that are marked as sales leads.
- **Contact –** For Contacts that are not marked as sales leads.
- **Opportunity –** For opportunities.

- **Campaign –** For campaigns
- **Customer Service –** For customer service cases.

Restricting Access to Key Fields

The Key Fields lists in the Details tab of the following pane orin the Basic Information tab are visible only to the users or groups specified as having Read Access to the Key Fields lists. However, other users may still be able to access the fields in the list through the User-Defined Fields tab or through other Key Fields lists. Assigning a field to a Key Fields list does not determine who can access the field. The field is available as a Key Field only to users with access to both the user-defined field and to the Key Fields list.

Create a Key Fields List

1. In the left pane, under **Preferences**, select **Key Fields**.
2. Click **Add**.
3. Enter the properties for the Key Fields list.
   - In the **List name** field, enter a name for the Key Fields list.
   - In the **Description** field, enter a description for the Key Fields list.

     The description is displayed as a tooltip when a user selects the Key Fields list.

     The description is displayed only in Key Fields lists for Address Book entries, opportunities, and customer service cases.
   - In the **Full access** and **Read access** fields, select the user or security group with access to the Key Field list.

     The Read access field determines which users will see these fields in their Key Fields list in Maximizer.
   - If necessary, from the **Requested by** field, select the user who requested the Key Fields list.
4. Select the **Key Fields** tab and from the **Show key fields for** drop-down list, select the type of Maximizer entry to assign Key Fields to.
5. Add user-defined fields and system fields to the list.
   - Click **Add Field**, select a system or user-defined field, and click **Insert**.

     You can insert multiple fields without leaving the dialog box.
   - To search for a field, enter all or part of a field name in the search box and click the search icon.

All matching fields in the list are highlighted, and the number of matching fields is displayed.

- When you are finished adding fields, click **Close** to close the dialog box.
- If necessary, select a user-defined field in the list, and modify the text in the **Description** field.

  The description of the field is the same as the description specified when you modify the user-defined field. If you change the description here, it is also changed for other occurrences of the user-defined field. This text is displayed as a tooltip in the Key Fields list.

The description is displayed only in Key Fields lists for Address Book entries, opportunities, and customer service cases.

6 Organize your fields into groups with separators and titles.

- Click **Add Separator** to add a line between fields.
- Click **Add Group Title** and type title text to add static text to the Key Fields list.

You can add group titles only to Key Fields lists for Address Book entries, opportunities, and customer service cases.

- Click and drag to move elements, including fields, separators, and titles, around in the list.

  You can also use the arrow buttons to move the selected element around in the list.

You can format the list in two columns or keep all of the information in a single column.

7 If necessary, from the **Show Key Fields for** drop-down list, select a different type of entry, and add fields to the list for that type of entry.

8 Click **Save** to save the Key Fields list.

Preventing Duplicate Entries

When more than one Address Book entry exists for the same person or organization, the entries are considered duplicates. These duplicates may occur when users create a new Address Book entry without determining whether an entry already exists for the person or organization. They can also occur when entries are created automatically by operations such as importing. Duplicate entries are undesirable because information related to the person or organization becomes fragmented. You can prevent most duplicate entries by using Maximizer's duplicate Address Book entry checking options.

You can configure duplicate checking in the Address Book preferences in Administrator.

You can prevent most duplicate Address Book entries by specifying up to three combinations of fields that must be unique to each entry. If a user attempts to create a new Address Book entry, and the values of any of those field combinations match an existing entry, Maximizer does not allow the duplicate entry to be created.

A combination of fields that must be unique to each entry is called a "duplicate check list". You can create up to three duplicate check lists, using up to three fields in each list.

Maximizer considers an entry to be a duplicate if the values of all fields from List 1, or all fields from List 2, or all fields from List 3 match an existing entry.

The default duplicate check lists, described below, effectively prevent most duplicate entries:

Check List	**Fields**
Duplicate Check List 1:	1. Full Name/Company Name 2. All Phone Numbers 3. None
Duplicate Check List 2:	1. Full Name/Company Name 2. Zip/Postal 3. None
Duplicate Check List 3:	1. None 2. None 3. None

The "Full Name/Company Name" matching field checks the Full Name of Individual or Contact entries and checks the Company field of Company entries. The "Company for Individual" matching field checks the Company field of Individual entries.

When a user creates a new Address Book entry in Maximizer, and Maximizer detects it as a potential duplicate Address Book entry, the user is presented with the following list of options:

- **Merge with selected entry –** The newly created or modified Address Book entry merges with, and overwrites, the existing (selected) entry. If a duplicate entry is private, this option is unavailable.
- **Edit selected entry –** The existing (selected) Address Book entry opens, allowing it to be edited by the user. Any information entered in the newly created entry that was detected as a duplicate must be re-entered. If a duplicate entry is private, this option is unavailable.
- **Add the new entry –** This option adds the new entry. It is available only under certain circumstances. If a user or group has permission to create duplicate entries ("Duplicates may be entered by" field in the Address Book tab), he or she has the option to create duplicate entries. This option is also available if partial matching is enabled and Maximizer finds a partial match. If a duplicate entry is private, only users with the ability to enter duplicates can create the duplicate entry.

Partial Matching

Partial matching identifies an entry as a possible duplicate even if not all fields in any of the duplicate check lists are the same in both the new entry and an existing entry.

With partial matching, the order of the fields (1st, 2nd, 3rd) in the duplicate check lists is important, as described in the following scenarios:

If the first field only is defined in the list (the second and third fields are set to None), partial matching doesn't apply because matching one field is a complete match.

- If the first and second fields only are defined in the list (the third field is set to None), an entry is considered a possible duplicate if only the first field matches.
- If all three fields are defined in the list, an entry is considered a possible duplicate if only the first field matches, or if both the first and second field match.

If the first field doesn't match, an entry is never considered a possible match, even if the second and/or third field matches.

Maximizer displays the list of possible duplicates in order of number of fields matched.

By default, partial matching is disabled. To turn partial matching on, select the "Allow partial match" checkbox.

The "Allow partial match" checkbox applies to all Duplicate Check Lists. You cannot allow partial matches for some lists and not for others.

Partial matching is relevant only if no exact matches exist. If all the fields in any of the duplicate check lists match an existing entry, it is considered a duplicate entry, and partial matching does not apply. However, if Maximizer finds no exact matches, it returns a list of entries matching any of the fields from the duplicate check lists.

Permission to Create Duplicate Entries

If some users or groups require the ability to create duplicate Address Book entries, you can select a user or group from the "Duplicates may be entered by" drop-down list. If more than one user requires this ability, add those users to a new security group and then select that group from this drop-down list.

Retrieving Private Entries with Duplicate Checking

When a private entry is found by duplicate checking, the name of the entry is displayed, but the details of the entry are not. Also, when this type of entry is found, the merge entry and open entry functionality is disabled.

Configure Duplicate Checking for Address Book Entries

1. In the left pane, under **Preferences**, select **Address Book**.
2. Select the **Duplicate Checking** tab, and click **Modify**.
3. Select **Check for duplicates when adding Address Book entries**.
4. From the **Duplicate check list** drop-down list, select one of the Duplicate Check Lists.
5. In the **Fields to match for the selected list** box, select the first, second, and third fields to match.

   You can select up to three fields, but selecting all three fields is not required.
6. Repeat the previous two steps to configure any of the other Duplicate Check Lists.
7. To enable partial matching, select **Allow partial match**.
8. If you want any users or groups to be able to create duplicate entries, select the name of the user or group from the **Duplicates may be entered by** drop-down list.

Email Notification for Opportunities/Customer Service Cases

Maximizer can send email to customers, partners, and users when the status of customer service cases or opportunities changes.

Maximizer includes default notification messages that are sent to users and customers. Each action can also have separate templates sent to customers/partners and to users.

Maximizer sends email messages to customers, and users when you assign, escalate, or resolve customer service cases. You can configure the email notifications in the Notification tab of the Customer Service preferences in Administrator.

Users have the option to send the notification while performing the specified actions in Maximizer. User notification email messages are sent to the users identified in the Owner and Assigned To fields for the case.

You can also create default case and opportunity monitoring lists in Administrator. Email messages are sent to users when cases or opportunities are modified. Users can specify what changes to receive notification for in their preferences. Users can also assign monitors to specific cases and opportunities.

Assign Email Notification Templates

Use this procedure to assign email notification templates for customer service cases. The templates must already be created in the desktop version of Administrator.

1. In the left pane, under **Preferences**, click **Customer Service**.
2. Select the **Notification** tab.
3. Click **Modify**.
4. In either the **Customer Template** or **User Template** column, locate the row for the action, and click the **+** icon at the right side of the cell.

   You can also click the x icon to remove the selected template from the action.

   The Email Notification Template Library opens.
5. Select an existing template from the list and click **Save**.

   The template is now associated with the action name for customers or users.
6. Click **Save** to save the changes.

Set Default Opportunity/Case Monitors

You can set up default opportunity and customer service case monitoring lists in Administrator. Users can assign the default list of monitors to opportunities and cases in Maximizer. Users can also specify custom lists of opportunity and case monitors in specific entries.

1. In the left pane, under **Preferences**, click **Opportunities** or **Customer Service**.
2. Select the **Monitoring** tab.

   The current list of users assigned for monitoring is displayed.
3. Click **Select users for opportunity/case monitoring**.
4. In the **Available Users** list, select users to add to the list and clear the selection beside users to remove from the list.
5. Click **Save** to save the changes.

Security

To prevent unauthorized access to Maximizer by repeated attempts at guessing a user's password, you can set account lockout settings to automatically lock out Maximizer users after a certain number of failed login attempts occur within a specified duration.

You can also prevent users from staying logged in to Mobile Access. When this option is disabled, users will no longer be able to select the option to stay logged in on the Mobile Access login screen and will be required to log in again each time they use Mobile Access.

About Account Lockout

The account lockout settings allow you to specify rules for locking out Maximizer user accounts due to failed login attempts. You can specify the number of invalid login attempts that are allowed before the Maximizer user account is locked out, as well as the duration during which the failed attempts must occur.

If Maximizer detects the specified number of invalid login attempts for a Maximizer user within the lockout duration, the user account will be locked out.

Once a Maximizer user account has been locked out, the user will not be able to use their Maximizer user account to log in. If the user tries to log in, an error message will be displayed indicating that their account is locked out.

In order for a locked out user to log in to Maximizer again, their account must be unlocked in Administrator.

Set Account Lockout Rules

Use this procedure to set the number of invalid login attempts that are allowed before a Maximizer user account is locked out and to set the lockout duration.

1. In the left pane, under **Preferences**, select **Security**.
2. Click **Modify Settings**.
3. Specify the account lockout settings.
   - Enter the number of invalid login attempts that are allowed before the account is locked.
   - Enter the lockout duration.
4. Click **Save**.

By default, 5 invalid login attempts are allowed and the default lockout duration is 30 minutes.

Unlock a User Account

Use this procedure to unlock a locked Maximizer user account in order to allow the user to log in again.

1. In the left pane, under **Preferences**, select **Security**.
2. Click **Modify Settings**.

   Any locked Maximizer user accounts are displayed in the **Locked user account(s)** table.
3. Uncheck the **Locked** checkbox next to the user you want to unlock.
4. Click **Save**.

About Mobile Access Security

The **Keep me logged in** option on the Mobile Access login page allows users to stay logged in and to avoid having to enter their username and password each time they open Mobile Access.

To prevent unauthorized access in the event that a user's mobile device is lost or stolen, you can hide the **Keep me logged in** option to require that users enter their username and password each time they open Mobile Access.

Hide Keep Me Logged In Option

Use this procedure to hide the **Keep me logged in** option on the Mobile Access login page and to require users to log in each time they use Mobile Access.

1. In the left pane, under **Preferences**, select **Security**.
2. Click **Modify Settings**.
3. Select the **Hide Keep me logged in option in the login page** option.
4. Click **Save**.

CHAPTER 4

Configuring Email and Phone

In this chapter...

"Configuring Email Server Settings" on page 66

"Configure Email Accounts for Campaign Monitoring" on page 69

"Complying with Anti-Spam Regulations" on page 71

"Voice Over IP and Instant Messaging" on page 73

Configuring Email Server Settings

You can configure the email server settings that are used for email functionality in Maximizer.

Override the Hosted Email Server

By default, all email functionality in Maximizer uses the hosted email server. But you can override these settings and specify settings for your own email server.

1. In the left pane, expand the **Preferences** section, and select **Email Server Settings**.
2. Click **Modify Options**.
3. Select **Override the hosted email server settings**.

   The email server settings are displayed.
4. Specify settings for your SMTP server:
   - **SMTP Server –** Enter the outgoing (SMTP) server.
   - **SMTP Port –** Enter the port for the SMTP server.
   - **SMTP server requires authentication –** Select this option if the SMTP server requires authentication.

     Specify the account name and password for the user with the required permission to the SMTP server.
   - **SMTP server has SSL/TLS enabled –** Select this option if Secure Sockets Layer (SSL) or Transport Layer Security (TLS) is enabled on the SMTP server.
   - **Static Sender –** Enter the email address that messages are sent from.

     When recipients reply to email messages, they are addressed to this email address.
   - **Static Footer –** Enter additional text to add at the end of all email messages.
5. Click **Save**.

Configure the Maximizer Email Service

1. In the left pane, expand the **Preferences** section, and select **Email Server Settings**.
2. Click **Modify Options**.

3. Set the **Service cycle time check**.

   The service cycle time check controls how often the Maximizer Email Service processes the email activities in automated campaigns. By default, this option is set to 1 minute.

4. To send large quantities of email messages, select the **Enable sending in batch mode** option, and set the **Batch size**.

   If you are using an ISP, it's important to control the email batch settings.

5. Choose a character set from the **Character set used by email service** drop-down list.

   This is the friendly name for the character set. The actual name of the character set is shown in the field on the right of the drop-down list.

   This character set is used for all outgoing email sent by the Maximizer Email Service.

6. Enter a URL in the **URL of Campaign Manager Statistics** field.

   This URL specifies the URL of the script that redirects the email recipients to the Landing page URL (as specified in the Add Email Activity dialog box), which is included in automated email activities.

7. Select **Activate services for the currently open Address Book**.

   This checkbox must be enabled to use automated email campaigns, customer service case email notifications, and appointment reminders by email.

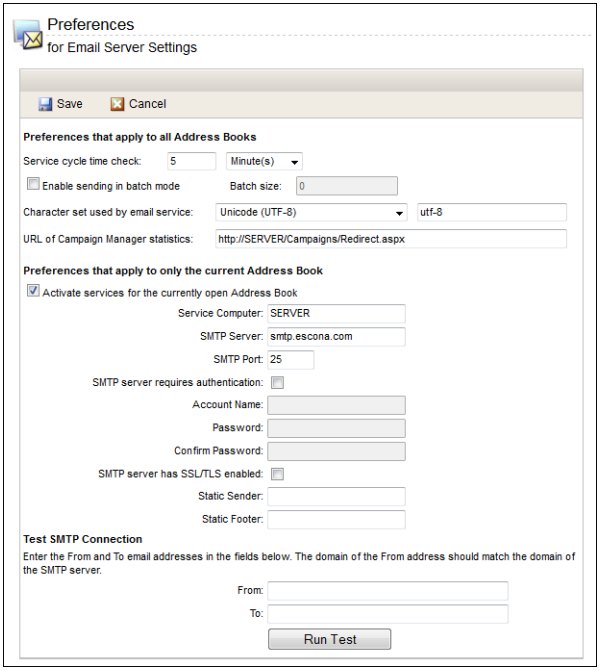
8. Specify settings for your SMTP server:

   - **SMTP Server –** Enter the outgoing (SMTP) server.
   - **SMTP Port –** Enter the port for the SMTP server.
   - **SMTP server requires authentication –** Select this option if the SMTP server requires authentication.

     Specify the account name and password for the user with the required permission to the SMTP server.
   - **SMTP server has SSL/TLS enabled –** Select this option if Secure Sockets Layer (SSL) or Transport Layer Security (TLS) is enabled on the SMTP server.
   - **Static Sender –** Enter the email address that messages are sent from.

     When recipients reply to email messages, they are addressed to this email address.
   - **Static Footer –** Enter additional text to add at the end of all email messages.

9 Click **Save**.



Test SMTP Connection

After configuring your SMTP server settings you can test the SMTP connection to ensure the settings are correct.

1 In the left pane, expand the **Preferences** section, and select **Email Server Settings**.

2 Click **Modify Options**.

3 If necessary, select **Override the hosted email server settings**.

4 Enter the email addresses to use for the test:

- **From –** Enter the email address to use as the From address for the test email. The domain of the From address should match the domain of the SMTP server.
- **To –** Enter the email address to which the test email is sent.

5 Click **Run Test**.

A test email is sent to the specified email address. If an error occurs when trying to send the email, an error message is displayed with information to help correct the problem.

Configure Email Accounts for Campaign Monitoring

To track some statistics for email campaigns, you must specify the settings for the IMAP server and email accounts used for monitoring bounces and replies for campaign email activities. Maximizer tracks the number of email messages sent to these accounts and generates statistics for each campaign.

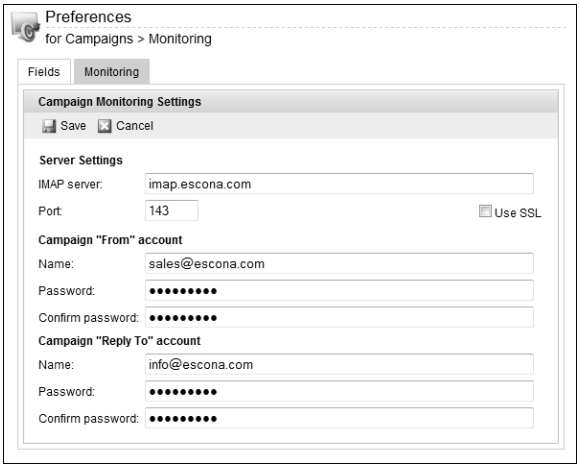
You must specify settings for the same email accounts that are specified as the “From” and “ReplyTo” addresses in the Email Addresses tab of a campaign email activity.

1. In the left pane, under **Preferences**, click **Campaigns**.
2. Select the **Monitoring** tab.
3. Click **Modify**.
4. Under **Server settings**, specify settings for the IMAP email server.
   - In the **IMAP Server** field, enter the URL for the IMAP server.
   - In the **Port** field, enter the port number for the IMAP server.
   - Select **SSL** if Secure Sockets Layer (SSL) is enabled on the IMAP server.
5. Under **Campaign “From” account**, specify the name and password for the email account that appears as the “From” address in campaign messages.

   This account must match the email address specified as the “From” address in the Email Addresses tab of campaign email activities.
6. Under **Campaign “Reply To” account**, specify the name and password for the email account to which to send replies.

   This account must match the email address specified as the “ReplyTo” address in the Email Addresses tab of campaign email activities.

   If the From and Reply To accounts are the same, you need to specify the credentials only once, in either section. The specified email account is monitored for both replies and bounces.



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

Complying with Anti-Spam Regulations

Maximizer has the ability to prevent sending email messages without the recipient's consent to facilitate compliance with the anti-spam regulations.

About Anti-Spam Compliance in Maximizer

Maximizer can help you comply with anti-spam regulations by preventing certain types of email from being sent from Maximizer without the recipient's consent.

Maximizer allows you to set up different email types for which you can specify whether recipient consent is required or not in order to receive that type of email. You can manage the consent, or opt-in settings for your email recipients via the email profile of each Address Book entry's email address.

When sending an email type that requires consent from Maximizer, the email profiles of the recipients are checked to ensure that they have consented, or opted-in to receive that type of email, and the email will only be sent to those recipients who have opted-in to that email type.

For example, you could create an email type called "Marketing" to be used when sending promotional email, and another email type called "Service" to be used when sending customer service emails, and specify that consent is required for the "Marketing" type emails, but is not required for the "Service" type emails. When sending a "Marketing" type email, the email would not be sent to any recipients who have not opted-in to receive promotional emails. On the other hand, since no consent is required when sending a "Service" type email, the email would be sent without checking the email profiles of the recipients.

You can use the "Do Not Solicit By" field to prevent automated campaign emails from being sent to your Address Book entries. If the "Do Not Solicit By" field is set to "Email" for an entry, no automated campaign emails will be sent to that entry, regardless of the entry's other email profile settings.

About Email Profiles

Maximizer allows you to set up different email types for which you can specify whether recipient consent is required or not in order to receive that type of email. You can manage the consent, or opt-in settings for your email recipients via the email profile of each Address Book entry's email address.

When sending an email type that requires consent from Maximizer, the email profiles of the recipients are checked to ensure that they have consented, or opted-in to receive that type of email, and the email will only be sent to those recipients who have opted-in to that email type. The email types available in Maximizer can be configured by your system administrator.

If no email type is configured in Maximizer then the default value will be blank for email type. You can manage the email profile and opt-in information for your Address Book entries in the Details tab of the following pane in the Address Book page.

You can set up email profiles for the email addresses of each company, individual, or contact in your Address Book. The email profile for each email address allows you to select the email types that the entry has opted-in to for that email address. You can select multiple opt-in email types for each email address. For each email type that has been opted-in to, you can specify the Opt-in date, the date that opt-in consent expires, and a comment about the opt-in consent. The email profile for each email address can be viewed by hovering over the email address in the Details tab of the following pane in the Maximizer Address Book page.

Voice Over IP and Instant Messaging

You can integrate Maximizer with external Voice Over Internet Protocol (VOIP) and Instant Messaging (IM) software using URLs formatted for the specific application. In Administrator, you can specify the format of the URL, including any phone numbers or user-defined fields defined in Maximizer. Then, in Maximizer, users can access the formatted URLs from the Phone Call dialog box. The VOIP or IM application is launched using field values from the Maximizer entry. Users can take notes on the call in Maximizer and log notes with the entry.

Voice Over IP and Instant Messaging URLs

In Administrator, you can specify up to four URLs to integrate with VOIP and IM software. Each URL can include Maximizer merge fields, including the phone number and phone number extension fields and any user-defined fields.

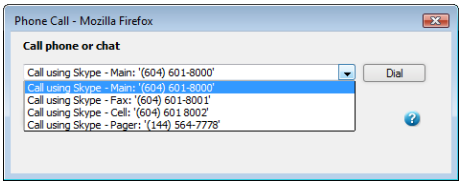
You must type in merge fields manually into the URL, using the following formats:

- **[PhoneNumber] –** Includes any of the phone number fields defined for the entry in the URL. If you have an entry with three phone numbers defined, users can choose any of the phone numbers when calling the entry.
- **[Extension] –** Includes any of the phone number extension fields defined for the entry in the URL.
- **[User-defined field name] –** Includes the specified user-defined field from the root folder in the URL.
- **[Folder name/User-defined field name] –** Includes the specified user-defined field from the specified folder in the URL.

Example: URL for calling with Skype

skype:[PhoneNumber]?call

This URL will launch a Skype call using phone number fields defined for the entry. When users make phone calls from Maximizer, they can select to use Skype with any of the phone number fields defined for the entry.



Example: URL for video calling with a Skype ID

skype:[Contact Info/SkypeID]?call&video=true

This URL launches a Skype video call using a Skype user name stored as the "SkypeID" user-defined field in the "Contact Info" folder.

Configure a Voice-Over IP or Instant Messaging Integration

You can configure up-to four integrations with Voice-Over IP (VOIP) and Instant Messaging (IM) software in Administrator.

1. In the left pane, under **Preferences**, click **System Options**.

   Under VOIP/IM Integrations, you can view any VOIP or IM integrations defined in the Address Book.

2. Click **Modify Options**.
3. Next to **Description**, enter a description for the VOIP/IM integration.
4. Next to **URL**, specify the URL for the VOIP/IM integration including any Maximizer merge fields in square brackets.

   You can include the [PhoneNumber] and [Extension} merge fields, as well as any user-defined fields.

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

Index

A

access rights 10—11
access settings 10—11
    modifying user access settings 14
    security groups 15
accounts
    COMPANY 4
    MASTER 4
Action Plan Library permissions 11
adding 32
adding items to 33
addition, in user-defined fields 41
Address Book
    adding users 6
    permissions 11
Address Book entries 29
Administrator user role 13
Allow Global Edit privilege 12
Allow manage currencies 13
Allow private entries privilege 12, 17
Allow public entries privilege 12
alphanumeric functions 42
alphanumeric user-defined fields 29, 42
AND operator in formula user-defined fields 35, 39, 54
arithmetic expressions in 41
arithmetic in user-defined fields 41

C

campaigns 29
    permissions 11
ceiling function 51
Company Library
    permissions 11
COMPANY user account 4
comparing values in formula user-defined fields 53
conditional expressions in 34
creating 32
customer service
    Customer Service Manager user role 13
    Customer Service Representative user role 13
    permissions 11
customer service cases 29

D

Date function 48
date functions 48
date user-defined fields 29, 48
Day function 48
Dayofweek function 36, 49
display name (user) 6
division, in user-defined fields 41
documents
    permissions 11

F

fields
    Full Access field 17
    Owner field 17
    Read Access field 17
floor function 51
folders 26—27, 32
folders for 26—27, 32
for user-defined fields 26—27, 32
formula 34
formula user-defined fields 29, 34, 41—42, 48, 51
Full Access field 17
functions for 42, 48, 51

G

global edit, privileges 12
groups
    access settings 10—11
    creating security groups 15
    modifying access settings 16
    permissions 11
    privileges 12
    record ownership 17
    roles 13
    security groups 15—17
    user and group setup permissions 11

I

If expressions in formula user-defined fields 34
items, in user-defined fields 33

K

Knowledge Base
    Knowledge Base approver user role 13
    permissions 11

L

Len function 43

M

mailing address permissions 11
MASTER
    user account 4
Mid function 44
Modify note properties privilege 12
Modify other users' private entries privileges 13
Modify/delete other owners' notes privileges 12
modifying
    group access settings 16
Month function 49
multiplication, in user-defined fields 41

N

NOT operator in formula user-defined fields 35, 39, 54
notes
    permissions 11
    privileges 12
numeric functions 51
numeric user-defined fields 29, 51

O

opportunities 29
    permissions 11
OR operator in formula user-defined fields 34, 39, 54
owner field 17

P

passwords
    changing 9
permissions
    groups 11
    users 11
preferences
    user preferences 20
private
    entries (privileges) 12
    records 17
privileges (users and groups) 12
public entries (privileges) 12
public records 17

Q

quotas
    permissions 11

R

Read Access field 17
record ownership 17
roles (User's Roles) 13
Round function 52

S

sales
    Sales Manager user role 13
    Sales Representative user role 13
sales teams 18
Search function 44
security
    privileges 12
    security groups 15—17
    users and groups 10—11
security groups 15—17
    access settings 10—11
    creating 15
    modifying access settings 16
    permissions 11
    privileges 12
    record ownership 17
    roles 13
    user and group setup permissions 11
setting up 30
Show hidden items 33
sorting 31
Substitute function 45
subtraction, in user-defined fields 41
system
    login accounts 4
System Field Privileges 14

T

table user-defined fields 30, 33
teams
    sales 18
Text function 46
types 29

U

user-defined fields 26—27, 29—32, 34
    permissions 11
user-defined fields for 29
users
    access rights and settings 10—11
    adding to Address Book 6
    changing password 9
    modifying user access settings 14
    permissions 11
    preferences 20
    privileges 12
    record ownership 17
    system login accounts 4
    user and group setup permissions 11

User's Roles 13

V

Value function 47

Y

Year function 50
yes/no user-defined fields 30