





Maximizer is a contact manager designed to help individuals, home offices, and small businesses succeed by helping them maximize their time, create satisfied customers, and increase sales.

With Maximizer, users can easily manage and profile customers and prospects, track every sale from lead to close and maintain long-lasting relationships well after the initial sale has been made. Maximizer is a solution that incorporates contact management with areas such as sales opportunity management, task scheduling, communication, and email integration.

# Installing Maximizer CRM

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

An installation wizard steps you through the process of installing the software on the computer.

You must be logged in to Windows as an administrator to install Maximizer. After installation, you may be prompted to restart the computer, and then you must log in as an administrator again to complete the installation.

# **New Installations of Maximizer**

If you are installing Maximizer for the first time, you can select one of the following database configurations:



• **Single User** – Select this option to install all Maximizer components on the same computer where no other computers will access Maximizer information.



• **Multiple Users: Host** – Select this option to install Maximizer as a database host where other computers will access the information on this computer.



• Multiple Users: Client Workstation – Select this option to install Maximizer as a workstation that connects to shared information on the host computer.

# **Upgrade Installations of Maximizer**

If you are upgrading from an older version of Maximizer, the single user installation is automatically run on all computers that had the existing version of Maximizer. Users can connect to databases stored on other computers using the **Connect To** command in Maximizer and Administrator. Once connected to another database, the Address Book (database) can be opened using the **Open Address Book** command.

It is very important to back up your Address Books before proceeding with an upgrade to your software.

#### License Server

During an upgrade installation, a license server must be selected. If you are using Maximizer in a multiple-user environment, only one computer acts as the license server. If you use a specific computer to host Maximizer databases, typically, this computer acts as the license server as well.

Ensure you install Maximizer first on the license server computer, and then install on the other computers. When you install Maximizer on the other computers, you must select the license server computer.

#### ≻ To install Maximizer

- 1. Insert the Maximizer CRM disc.
- If the Setup window does not appear automatically, double-click the Autorun.exe file on the Maximizer CRM disc.
- The Maximizer CRM Setup window appears. Select Install Maximizer CRM. The Maximizer CRM Setup program starts.
- 4. Follow the instructions in the remaining pages of the wizard to complete the installation.

## **Applying Licensing and Activating Your Software**

- 1. In Administrator, choose **Utilities** > **Install Multi-User** License.
- Enter the Product License Number and click the Install Multi-User License button. Repeat this step to install additional licenses.
- 3. To activate the licenses, click the **Activate** button. And in the **Activation** dialog box, click **Activate** again.
- 4. Open the Address Books to which you are applying licensing.

This applies your licensing for Maximizer CRM. By default, a single license is available for use with Maximizer CRM.

For detailed instructions on various installation configurations, upgrading, and licensing of the product, refer to the *Maximizer CRM Administrator's Guide*. You can access the guide from your Maximizer CRM disc. From the **Setup** window, click **View Maximizer CRM Documentation**.

#### **Working with Address Books**

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

#### To open an Address Book

- 1. In the top-left corner of any of the main windows, click the **Maximizer** button, and select **Open Address Book**.
- 2. Double-click on an **Address Book** name in the Open Address Book dialog box or select the **Address Book** and click **Open**.

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

- > To connect to an Address Book (upgrades only)
- From Maximizer, in the top-left corner of the window, click the Maximizer button, and select Connect to Address Book. From Administrator, select File > Connect to Address Book.
- In the Connect to Address Book dialog box, select the computer that hosts the Address Book to which you want to connect.
- 3. Choose an Address Book from the **Available Address Books** list and click **Open**.

#### Sample Address Book - Escona Tutorial

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

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

User ID - JNAPOLI Password - maximizer User ID - MASTER Password - control

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

# **Maximizer CRM Basics**

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

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

## **Creating Companies, Individuals, and Contacts**

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

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

#### > To create an Address Book entry

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

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

Entry > Company.

🔁 Copy 📧 Favorite List. \* 🔄 📝 Actions \* 🕃 Preferences 🝰 Edit Basic Information User-Defined Fields Name and address Other information \*Company: Through the Grape Vine Distributor Phone Main -Dept.: Fax Ŧ Division: Cel Address 1: 5214 Michaels Way Address 2: Suite 714 Address. Email add ises / Website 🔐 City/Town: St/Co/Prov: Email ▼ escona@maximizer.co Email 2 -Zin/Postal: Country: Email 3 -Website: Key Fields for: <a>Content</a> <a>Co Do not solicit by Full Access Public Category Distributor Read Access Territory Partner Territory Status Sales Lead Unassigned No . Account Manager Joe Napoli Lead status notes required field OK ⊆ancel Apply

- Right-click, choose Add, and select one of the Address Book entry options.
- Press the Insert key in the Address Book window to add a new Company.

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

## Calendar

The Calendar window allows you to schedule and view your appointments. You can see when others are unavailable, as well as view other users' calendars.

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Creating appointments is easy—right-click in the **Calendar** window and choose **Add Appointment**. **Or**, from the **Home** tab, select **Appointment** from the **Create** group. You can also create an appointment from the **Address Book** window by dragging the entry to the **Calendar** window icon.

#### Email

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

#### **Hotlist Tasks**

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

#### Notes

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

#### **User-Defined Fields**

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

#### **Documents**

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

# Sales and Opportunities

Opportunity management helps you and your colleagues manage your sales processes. Sales prospects may range from single businesses to multiple corporations or governments. Opportunities help you define and strengthen your selling methodology.

You can use opportunities to formalize your sales processes and effectively schedule the selling process among all members of your sales team. You can also forecast the probability of successfully closing your opportunities.

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| TT Percent                                 | @ In Progress Horse and A        | acher Wines Do Seasonal Promotion     | Customer's Review        | \$9,503        | 00 March 18, 2012           |                       |
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Refer to the Escona Tutorial sample Address Book for examples of opportunities (in the **Opportunities** window). Refer to the *Maximizer CRM User's Guide* for details on how the probability of close for an opportunity is calculated.

#### ➤ To add an opportunity

1. Select the Address Book entry to which you want to add an

want to add an opportunity. If you select a Contact, Maximizer adds the opportunity to the Company.

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

| The Best Spirits - Get Escona                        | on Wine List                    |                        |                 |                          | ×     |
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| Objective: Get Esc                                   | ona on Wine List                |                        |                 |                          |       |
| Products/Services: Chardon                           | nay, Pinot Blanc, Pinot Gris, F | liesling, Zinfar       | Categories:     | alfomia                  |       |
| Description: Opportu                                 | nity for Escona to be added to  | their wine list se     | sason           |                          | *     |
| Stage: Make Initial C<br>Key Fields for; General Opp | ortact                          | Confiden               | ice rating: Wam | 1                        | •     |
| Region   |                                 | Status                 |                 | In Progress              |       |
| Store size   | Under 2,000 square feet         | Start date             |                 | February 7, 2012         |       |
| Wine Preference                                      |                                 | Close date             |                 | February 29, 2012        |       |
| Number of Retail Lines                               | 3-5                             | Next action<br>Revenue |                 | \$250.000.00             |       |
|  |                                 | Cost                   |                 | \$500.00                 |       |
|  |                                 | Leader                 |                 | Joe Napoli [Team Leader] |       |
|  |                                 |                        |                 |                          |       |
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**Opportunity** from the **Create** group.

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

#### **The Sales Pipeline**

With a single click, you can view the current opportunities in the pipeline. The Opportunity Pipeline report graphically displays all opportunities that you select to include grouped by opportunity stage. The Opportunity Pipeline report can also be modified using Crystal Reports. To view the Opportunity Pipeline report, select the Display Opportunity Pipeline Report icon in the View bar of the Opportunities window. You can select to generate the report for all opportunities in the Address Book or for only selected opportunities in the current list.

# Reporting

Use the reporting features in Maximizer to keep track of your company's progress. Maximizer comes with a number of built-in reports that you can access from the Reports tab or from the Print group in the Home tab.

The Reports tab gives you access to every type of Maximizer report, independent of the window in Maximizer that is open. For example, if



you are in the Address Book window, and want to print an opportunity report, on the Reports tab, select Opportunities > [type of report]. The Opportunities window automatically opens and the report extracts information from the current opportunities list. The Print group on the Home tab prints reports strictly related to the window that is currently open.

The Crystal Reports viewer is installed automatically with Maximizer and is accessible from the Reports tab. Maximizer installs a set of standard Sales reports, but you can also create your own custom, shared reports and save them in the Maximizer Reports folder (in My Documents) where they can be accessed from the Reports tab in Maximizer. To create or modify reports, you must have the full Crystal Reports program installed.

Maximizer enables you to quickly and easily export selected entries from a Maximizer window to a Microsoft Excel spreadsheet. Maximizer exports the currently selected entries for the active controlling or following window using the column setup and coloring rule displayed in that window. If no entries are selected, it exports all displayed entries.

# **Administrator Module**

Administrator is the administrative center of Maximizer. It is used to configure and manage the entire Maximizer application. To install Administrator on a workstation, you must select the custom installation option and select Administrator as an installed component.

#### **Manage Users**

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

#### **Manage Security Groups**

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

## **MaxMobile Administration**

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

## **Importing and Upgrading Data**

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

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

#### **Document Administration**

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

## **Time Zone Alignment**

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

# Troubleshooting

Although not typical, under certain circumstances, you may experience issues with the installation and/or upgrade of Maximizer CRM. The following section outlines solutions to some issues that have been identified.

## **Configuring Windows Firewall for Maximizer CRM 12**

If you use Microsoft Windows Firewall, you may need to configure the firewall to allow computers running Maximizer CRM to connect with each other. Windows Firewall is enabled by default on most computers. It may block some programs and ports needed for connections with the Microsoft SQL Server Express database.

You should check the configuration of Windows Firewall on every computer running Maximizer and add exceptions for the SQL Server Express components.

To configure Windows Firewall for Maximizer CRM 12 Entrepreneur Edition, you must complete the following steps:

- Determine the SQL Server Express dynamic port number.
- Open the SQL Server Express port.
- Create exceptions for the SQL Server Service and SQL Server Browser Service.

#### To determine the SQL Server Express dynamic port number

- 1. Open SQL Server Configuration Manager.
- 2. In the left pane, expand **SQL Server Network Configuration**, and select **Protocols for MAXIMIZER**.
- 3. Right-click on TCP/IP, and select Properties.
- Select the IP Addresses tab, locate IPAII, and make a note of the value of the TCP Dynamic Ports field.
- > To open the SQL Server Express port in Windows 7
- 1. Open Windows Firewall (Start > Control Panel > Windows Firewall).
- 2. In the left pane, click **Advanced Settings**.
- 3. In the left pane, click Inbound Rules.
- 4. In the right pane, click **New Rule**.
- 5. Select **Port**, and click **Next**.
- 6. Select **Specific local ports**, enter the SQL Server Express dynamic port number noted above, and click **Next**.
- 7. Select Allow, select Domain, and click Next.
- 8. Enter a name for the rule, and click **Finish**.
- 9. In the left pane, click **Outbound Rules**, and repeat Step 4 to 8 for the same port number.

#### To open the SQL Server Express port in Windows Vista or Windows XP

- 1. Open Windows Firewall (Start > Control Panel > Windows Firewall).
- In Windows Vista, click Allow a program through Windows Firewall in the left pane. In Windows XP, select the Exceptions tab.
- 3. Click Add Port.

- 4. Specify the SQL Server Express dynamic port number noted above and a name for the port, and click **OK**.
- 5. In the **Program** or **Port** column, select the checkbox next to the name specified for the port.
- To create exceptions for the SQL Server Service and the SQL Server Browser Service
- 1. Open Windows Firewall (Start > Control Panel > Windows Firewall).
- 2. In Windows 7 or Vista, click **Allow a program through Windows Firewall** in the left pane. In Windows XP, select the Exceptions tab.
- 3. If you are using Windows 7, click **Change Settings**.
- Select the checkbox next to sqlbrowser.exe and sqlservr. exe. If sqlbrowser.exe or sqlservr.exe is not listed in the list of programs, click Allow another program (Windows 7) or Add program (Windows Vista or XP). Then, click Browse, navigate to the program, and select it. Then, click Add or OK to add the program to the list of exceptions.

By default, the programs are stored in the following folders in 32-bit versions of Windows:

- sqlbrowser.exe C:\Program Files\Microsoft SQL Server\90\ Shared\
- sqlservr.exe C:\Program Files\Microsoft SQL Server\ MSSQL10.MAXIMIZER\MSSQL\Binn\

By default, the programs are stored in the following folders in 64-bit versions of Windows:

- sqlbrowser.exe C:\Program Files (x86)\Microsoft SQL Server\90\Shared\
- sqlservr.exe C:\Program Files (x86)\Microsoft SQL Server\ MSSQL10.MAXIMIZER\MSSQL\Binn\

# Unable to Connect to Address Books on Other Computers

After configuring Microsoft Windows Firewall, you may still have problems connecting to shared Address Books on other computers. To troubleshoot this issue, you should check the SQL Server configuration on the computer hosting the Address Books and on the computers connecting to the Address Books.

- To configure SQL Server Express on the computer hosting the Address Books
- 1. Open SQL Server Configuration Manager.
- 2. In the left pane, expand **SQL Server Network Configuration**, and select **Protocols for MAXIMIZER**.
- Next to Named pipes and TCP/IP, verify that the status is set to Enabled.
- 4. To change the status, right-click on the entry, and select **Enabled**.
- 5. In the left pane, select SQL Server Services.
- Right-click on SQL Server (MAXIMIZER), and select Restart.

#### To configure SQL Server on computers connecting to the Address Books

- Open SQL Server Client Network Utility. In Windows 7 and Vista, click Start, type cliconfg, and press Enter. In other versions of Windows, select Start > Run, type cliconfg, and press Enter.
- 2. In the **Disabled protocols** list, select **Named pipes** and **TCP/IP**, and click **Enable** to move the items to the **Enabled protocols by order** list.
- 3. Select the **Alias** tab, and click **Add**.
- 4. In the Server alias field, enter [server name]\ MAXIMIZER, where [server name] is the name of the server and click OK.
- 5. Click **OK** again to save the changes in the SQL Server Client Network Utility.
- 6. Open Maximizer and try to connect to the Address Book on the server.

#### Unable to Open Address Book After Upgrading to Maximizer CRM 12

This issue occurs after upgrading from Maximizer 9 or earlier to Maximizer CRM 12 and converting a Pervasive database to a SQL database. When you attempt to open the Address Book, the DSN value for the database is empty.

To fix this issue, complete the following procedures:

- Check the DSN value of the Address Book.
- Install SQL Server Management Studio if you do not have this program installed.
- Add the DSN value for the Address Book to the Maximizer configuration database.

#### > To check the DSN value of the Address Book

• In Administrator, select **File > Open** and under **Location of Address Book** check the value next to DSN. If there is no value listed for the Address Book, add the value manually to the Maximizer configuration database.

#### > To install SQL Server Management Studio

- 1. Open **Programs and Features** (Windows 7 or Vista) or **Add** or **Remove Programs** (earlier versions of Windows).
- Select Maximizer CRM 12 Entrepreneur Edition, and click Change. The Maximizer CRM 12 installation wizard opens to the Welcome screen.
- 3. Select **Modify**, and click **Next**. The Add or Remove Features screen opens.
- 4. Under Database Components, select SQL Server Management Studio Express, and click Next.
- 5. Click **Next** to run the installation and then click **Finish** to complete the installation.

#### > To add the DSN value for the Address Book to the Maximizer configuration database

- Open SQL Server Management Studio. You may be prompted about setting up SQL Server Management Studio for first time use.
- 2. With Windows Authentication selected, click Connect.
- 3. In the **Object Explorer** pane, expand the **Databases** > **MaConfig** > **Tables** folder.
- Right-click on dbo.MaConfig, and select Edit Top 200 Rows. The MaConfig table opens. This table contains settings for all of the Address Books on this computer, as well as some global settings.
- Locate the row with the database name in the eSection column and SERVICE\_WORKSPACE\_PATH in the eKey column. This column lists the name of the database that the setting applies to. The database name is the same as the Address Book name with the spaces omitted.
- In the eValue column, enter DSN:MAS\_[DatabaseName], where [DatabaseName] matches the value in the eSection column. This column lists the value of the setting.
- 7. Open the Address Book in Maximizer.

## **Pervasive Database Issues**

- If you are unable to view your Address Book in the list, or if you moved your Pervasive database files, you upgrade your Address Book by choosing Utilities > Upgrade Address Book, browsing to the location of your files (\*.MAX or \*.SAV files), and entering an Address Book name. Then, click OK to complete the upgrade process.
- The Pervasive database engine is needed to upgrade your existing Address Books. If you are prompted with a message saying that "the Pervasive database engine is required", the Pervasive Workgroup engine, which is required for the upgrade, is no longer installed on the computer. Install the Pervasive Workgroup engine by following the instructions described in the following page: http://www.maximizer.com/support/maxcrm/maxcrm100\_ pervasive.html
- If you are prompted with a message saying that "the Pervasive database engine must be running in order to perform an upgrade", find and delete the Pervasive locator file (~PVSW~.LOC file) before you upgrade the Address Book.

## **Move Your SQL Database to Another Computer**

- 1. Back up your Address Book (SQL database). Refer to the instructions in the Maximizer CRM Administrator's Guide.
- 2. Locate the SQL database file (.BAK file) and copy it to the computer where Maximizer CRM is installed.
- 3. Open Administrator on the computer you are moving the database to and create a new Address Book. Ensure all of your Address Books are closed.
- 4. Select Utilities > Restore Address Book.
- 5. Select **File > Open Address Book**, choose the Address Book from the list, and click **OK**.
- 6. Enter the MASTER password when you are prompted and click **OK**.

- Click the **Browse** button and browse to the location of the SQL backup file of the Address Book ([Address Book name]. BAK file).
- 8. Click **OK** to finish restoring the Address Book.

#### Unable to Log In After an Upgrade

When you upgrade Address Books from previous versions of Maximizer, there may be irregularities in passwords for users that exist in both an upgraded Address Book and a pre-existing Address Book. This occurs if the passwords are different for the same user. In this circumstance, the user must log in twice to the upgraded database.

- 1. First, enter the user name and password for the pre-existing Address Book(s). A new dialog box opens and you are then be prompted for a second password.
- 2. Enter the password for the newly upgraded Address Book.
- 3. Then, change the password for the user in the upgraded Address Book to be the same as the pre-existing password.

# Learn More About Maximizer CRM

- Maximizer CRM User's Guide & Administrator's Guide The Maximizer CRM manuals are available in Adobe® PDF format. You need to have the Adobe Acrobat Reader installed to be able to read the online guides. To download the reader free of charge, go to www.adobe.com and see the Acrobat products section of the website.
- Online Contents Help How-to help is available in both Maximizer and Administrator providing you with step-by-step instructions for all areas of both applications.
- **Context Sensitive Help** In Maximizer CRM, detailed help that pertains specifically to each window, dialog box, and tab is available by pressing the F1 key when the window, dialog box, or tab is open.
- Online Training http://www.maximizer.com/education-training/ online.html
- Knowledge Base http://www.maximizer.com/knowledgebase

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