

# **Maximizer<sup>®</sup>** **CRM12**



## **Administrator's Guide** for Entrepreneur Edition

**Maximizer Software**  
Simply Successful **CRM**



## Notice of Copyright

Published by Maximizer Software Inc.  
Copyright ©1988-2012  
All rights reserved.

## Registered Trademarks and Proprietary Names

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

## Applicability

This document applies to Maximizer CRM 12 software.

# Maximizer Software Address Information

## **Corporate Headquarters Americas**

Maximizer Software Inc.  
208 West 1st Avenue  
Vancouver, BC, Canada V5Y 3T2  
+1 604 601 8000 phone  
+1 604 601 8001 fax  
+1 888 745 4645 support  
info@maximizer.com  
www.maximizer.com  
Knowledge Base: [www.maximizer.com/knowledgebase](http://www.maximizer.com/knowledgebase)

## **Europe, Middle East, and Africa**

Maximizer Software Ltd  
2nd Floor, Apex House, London Road  
Bracknell, Berkshire  
RG12 2XH United Kingdom  
+44 (0) 845 555 99 55 phone  
+44 (0) 845 555 99 66 fax  
info@max.co.uk  
www.max.co.uk

## **Asia**

Maximizer Asia Limited  
17/F, Regent Centre  
88 Queen's Road  
Central, Hong Kong  
+(852) 2598 2888 phone  
+(852) 2598 2000 fax  
info@maximizer.com.hk  
www.maximizer.com.hk

## **Australia/New Zealand**

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

# Contents

<b>Chapter 1</b>	<b>Welcome to Maximizer.....</b>	<b>1</b>
	Grow Your Business with Maximizer.....	2
	Day-to-day Contact Management with Maximizer .....	2
	Administrator .....	5
	Maximizer Companion Applications.....	6
	Maximizer System Requirements .....	7
<b>Chapter 2</b>	<b>Installing Maximizer.....</b>	<b>9</b>
	Installation Checklist.....	10
	Third-Party Components Installed with Maximizer.....	12
	Windows Login Account Rights Required for Installation.....	13
	Upgrading from a Previous Version of Maximizer .....	14
	Removing Maximizer .....	15
	Choosing the License Server.....	16
	Installing Maximizer CRM.....	17
	Installing Maximizer in a Single-User Environment.....	17
	Installing Maximizer as a Host in a Multiple-User Environment.....	18
	Installing Maximizer as a Workstation in a Multiple-User Environment	19
	Installing Maximizer (Details).....	21
	Adding and Removing Maximizer CRM Components.....	29
	Installing Licenses.....	30
	Installing a License .....	30
	Applying a License .....	31
	Viewing Applied and In-Use Licenses .....	31
	Updating Maximizer Installations with Live Update.....	32
	Where to Go from Here.....	34
<b>Chapter 3</b>	<b>Creating or Upgrading Address Books.....</b>	<b>35</b>
	What is Administrator?.....	36
	Creating Address Books.....	38
	Checklist: Setting Up an Address Book.....	38
	Creating an Address Book .....	40
	Connecting to an Address Book.....	41
	Deleting Address Books.....	42
	Maximizer System Login Accounts.....	43

Changing the MASTER User Password .....	44
Upgrading or Converting an Address Book.....	45
Time Zone Alignment.....	46
Importing Vertical Templates .....	47

## **Chapter 4**

<b>Setting Up Users and Groups .....</b>	<b>49</b>
Adding a User to an Address Book.....	50
Enabled and Disabled Users .....	54
Changing a User's Password .....	55
User and Group Security .....	56
User Access Rights and User/Group Access Settings.....	57
Modifying User Access Settings.....	60
Security Groups .....	62
Default Security Groups in all New Address Books.....	63
Creating a New Security Group.....	64
Modifying Group Access Settings.....	66
Record Ownership .....	67
User Preferences .....	69

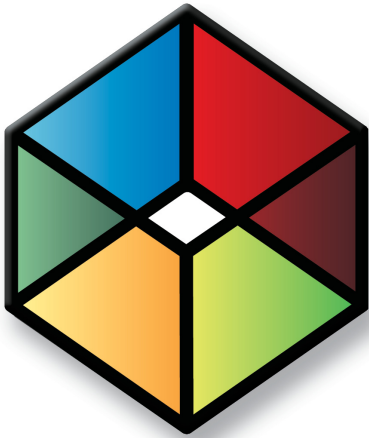
## **Chapter 5**

<b>Configuring an Address Book .....</b>	<b>71</b>
Address Book Preferences.....	72
Using Passwords .....	73
System Fields.....	74
Adding Custom Items to System Fields .....	74
Mandatory Fields.....	75
Preventing Duplicate Address Book Entries.....	76
Partial Matching.....	77
Permission to Create Duplicate Entries.....	78
Retrieving Private Entries with Duplicate Checking.....	78
Configuring Duplicate Address Book Entry Checking.....	78
Setting Up User-Defined Fields for an Address Book.....	80
Types of User-Defined Fields.....	80
User Access Rights for User-Defined Fields .....	81
Setting Up User-Defined Fields.....	82
Creating a New Folder for User-Defined Fields.....	83
Creating a New User-Defined Field.....	84
Adding Items to a Table User-Defined Field.....	86
Transferring User-Defined Fields between Address Books .....	87
Creating Key Fields Lists.....	89
Specifying Key Fields by Entry Type .....	89
Restricting Key Fields to Specific Users .....	90
Creating a Key Fields List .....	91
Recording Holidays in the Holiday Editor .....	93

<b>Chapter 6</b>	<b>Configuring Email, Phone, and Synchronization .....</b>	<b>95</b>
	Configuring Microsoft Outlook Synchronization .....	96
	Appointment and Task Synchronization .....	97
	Synchronization from Outlook to Your PDA .....	98
	Configuring Outlook Synchronization .....	98
	Configuring MaxMobile Wireless Server .....	101
	Enabling TAPI .....	103
	Requirements for Caller ID .....	103
	Phone Number Matching with TAPI .....	104
	Configuring Maximizer to Use TAPI .....	105
	Phone Masks .....	108
	Using Fax Software with Maximizer .....	109
<b>Chapter 7</b>	<b>Managing Address Book Data .....</b>	<b>111</b>
	Backing Up and Restoring Address Book Data .....	112
	Backing Up an Address Book .....	112
	Restoring an Address Book from a Backup .....	115
	Moving an Address Book to a Different Server .....	117
	Backing Up the Dictionary and Holiday Files .....	117
	Converting Embedded Documents to Linked Documents .....	118
	Verifying and Recovering Address Book Data .....	120
	Exporting Data from Maximizer .....	123
	Exporting Address Book Entries in XML Format .....	123
	Exporting Address Book Entries in Text Format .....	126
	Selecting Fields for Export .....	128
	Importing Address Book Data from MXI or XML Files .....	129
	Importing MXI or XML Files Using Advanced Import .....	129
	Unattended Import of MXI or XML Files .....	131
	Importing Data from Other File Formats .....	132
	Field Mapping .....	134
	Two-Tier Import .....	134
	Importing from Other Contact Managers .....	137
	Importing Data from ACT! and GoldMine .....	140
	Field Mapping for Outlook .....	150
	Transferring Entries between Address Books .....	151
	What Happens During a Transfer? .....	151
	Transferring Address Book Entries .....	152
	Transfer Summary Reports and Logging .....	153
	Adjusting Address Book Transfer Settings .....	154
	Purging Outdated Notes and Documents .....	155
	Using Log Files for Diagnosis .....	157
	System Reports .....	159
<b>Appendix A</b>	<b>Administrator's Reference .....</b>	<b>161</b>
	Recreating the Maximizer_Default User .....	162

Maximizer File Types .....	163
Maximizer XML Interface (MXI) .....	164
Top-Level Elements.....	164
ImportOptions Element .....	165
DetailDef Element .....	167
Individual Element .....	168
Company Element .....	170
Contact Element.....	171
Address Element.....	172
Note Element.....	173
Document Element .....	173
Element Details .....	174
<b>Index .....</b>	<b>179</b>





# CHAPTER 1 **Welcome to Maximizer**

## *Introducing Maximizer*

### In this chapter...

"Grow Your Business with Maximizer" on page 2

"Administrator" on page 5

"Maximizer Companion Applications" on page 6

"Maximizer System Requirements" on page 7

## Grow Your Business with Maximizer

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 sales opportunity management, scheduling, communication, Outlook integration, BlackBerry integration, a company library, and more.

### Key Benefits of Maximizer

- Manage customers better than your competitors by recording details of every relationship.
- Effectively track prospects to close more sales.
- Schedule your time and others.
- Manage an unlimited number of contacts.
- Integrate with Microsoft Outlook's email and calendar.
- Manage your business and free up valuable time with automatic reporting and analysis.
- Send personal letters and announcements linked to your contact's record with mail-merged letters, faxes, and emails.

## Day-to-day Contact Management with Maximizer

### Contact Management

- Manage an unlimited number of contacts.
- Record and view a complete history of all customer interactions, including faxes, emails, and calls.
- Tailor to your own needs by creating unlimited user-defined fields.
- Ensure accurate customer information through mandatory user-defined fields and duplicate record checking.
- Create and save your own custom views and layouts.
- Save and retrieve Favorite Lists of Address Book entries.

## Opportunity Management

- Manage a pipeline of opportunities from lead to close.
- Easily forecast revenue and cash flow using one of the many standard reports.

## Calendars and Scheduling

- Quickly schedule appointments, activities, and tasks related to contacts.
- View and print graphical calendars.
- Integrate with the Microsoft Outlook calendar.
- Schedule pop-up alarms and create prioritized task lists for yourself and others.
- Use the Peg Board to check other users' whereabouts.

## Word Processing, Fax, and Email

- Create letters, faxes, memos, and email messages stored under each contact for easy reference.
- Mail-merge contact information using built-in or custom templates for letters, faxes, and email.
- Create documents using the built-in Maximizer Word Processor, or using Microsoft Word or Corel WordPerfect.
- Send email messages instantly using a VIM- or MAPI-compliant email client.

## Marketing

- Share documents, collateral, and marketing projects in the central Company Library.
- Profile customers using your unique user-defined fields to identify trends and similarities.
- Monitor market information to achieve and maintain a competitive advantage.
- Create targeted and personalized announcements by letter, fax, or email, linked to your contacts' records.

## BlackBerry Access

- Easily access and update your Maximizer CRM information using a BlackBerry device.
- Integrate information from Maximizer with the native applications on your BlackBerry device.

## Website Integration

- Capture customer information with your own web forms using the Web Inquiry Form wizard.
- Provide your customers with peace of mind by automatically encrypting all credit card transactions with SSL transaction security.

## Reporting and Analysis

- Use advanced reporting to view consolidated activity and history information for each account.
- Create, view, and print pre-formatted and custom reports, including revenue forecasts, sales pipeline analysis, account activity, customer profiles, and more.
- Enhance your reports with charts, numerical calculations, and full-color graphics.

## Database and Administration

- Add new users to an Address Book.
- Add new user-defined fields at any time.
- Generate weekly activity reports for a particular group or contact.
- Coordinate group activities and information with security groups.
- Import data from other programs, including ACT!, GoldMine, and Outlook.
- Import data from a wide variety of databases, including ASCII, dBASE, Access, and XML.
- Back up and restore Address Books.

# Administrator

In addition to Maximizer, Administrator is a separate component used for managing administrative tasks. Typically, this component is handled by a technically proficient staff member to configure and manage the entire Maximizer application. For example, Administrator is used to create and manage Maximizer users, apply licensing, and create new Address Books.

You can also do tasks that are common to both Maximizer and Administrator such as backing up data, importing and exporting data, and producing reports.

Administrator can be accessed from the Maximizer program menu (Start > Programs > Maximizer > Administrator) or directly from Maximizer (Click the Maximizer button, and select Administrator).

## Maximizer Companion Applications

There's more to Maximizer than just the main modules. See the following descriptions of our Maximizer companion applications.

### MaxMobile

Combined with Maximizer, MaxMobile for BlackBerry forms a powerful suite of tools offering you all of the contact management features of Maximizer with the portability and convenience of a mobile device.

Whether at work or on the road, you always have access to current information about your clients or customers—names, addresses, appointments, tasks, and notes. Simply use either application to view, add, change, and delete records.

For information on using MaxMobile, see the *MaxMobile for BlackBerry Getting Started Guide*. For information on configuring MaxMobile, see the *MaxMobile Wireless Server Getting Started Guide*.

### MaxAlarm

MaxAlarm is a Maximizer companion application that automatically monitors appointments for one or more people in any number of Address Books. MaxAlarm automatically starts when you start your computer, and you can leave it running with or without running Maximizer and still be notified of appointments. You'll know if MaxAlarm is running because its icon appears in your Windows System Tray, which is in the lower right corner of your screen.

MaxAlarm is easy to use. Simply add one or more Address Books to MaxAlarm, minimize it, and then forget about it—until the Alarm dialog box pops up to remind you of an appointment. With MaxAlarm's Review feature, you can review today's appointments without opening an Address Book in Maximizer.

# Maximizer System Requirements

The hardware and software requirements for each type of Maximizer installation are listed in the following table. Please refer to the Maximizer website at [www.maximizer.com](http://www.maximizer.com) for updated information.

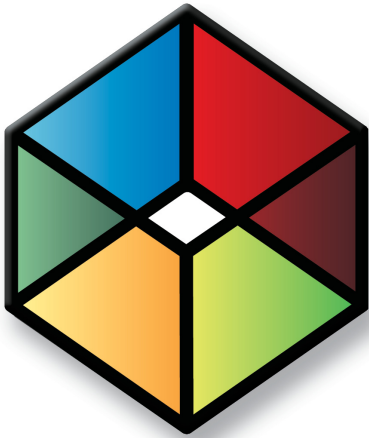
Note that these are the minimum system requirements for Maximizer, and your operating system may have higher requirements for some components, such as processor speed and RAM. Refer to your operating system documentation for its specific requirements.

Minimum Processor Speed	1.0 GHz (minimum) 2.0 GHz or faster (recommended)
Available RAM	512 MB (minimum); 1 GB (minimum for Windows Vista or Windows 7) 1 GB or more (recommended); 2 GB or more (recommended for Windows Vista or Windows 7)
Available hard disk space	1 GB (minimum) 2 GB or more (recommended)
Hard disk format	NTFS-formatted file system <sup>a</sup>
Minimum video resolution	SVGA (1024x768) or higher-resolution video adapter and monitor
Operating system	Microsoft Windows 7, 2008, Vista, XP, or 2003 (updated to their latest service packs) <sup>b</sup>
Email system	32-bit MAPI- or VIM-compliant
Internet browser	Microsoft Internet Explorer 8.0 or 9.0

- a. If you want to install Maximizer on a FAT32 file system, you should first convert the drive to an NTFS file system. For information on installing Maximizer on a FAT32 file system, visit the Maximizer Knowledge Base at [www.maximizer.com/knowledgebase](http://www.maximizer.com/knowledgebase).
- b. Microsoft Windows 7 Home Premium, Vista Home/Home Premium, XP Home, and XP Media Center are not supported in a network environment when logging in to a domain is required. Refer to your Microsoft documentation for details on how to set up networking in a workgroup environment.







## CHAPTER **Installing Maximizer** 2

### In this chapter...

- "Installation Checklist" on page 10
- "Third-Party Components Installed with Maximizer" on page 12
- "Windows Login Account Rights Required for Installation" on page 13
- "Upgrading from a Previous Version of Maximizer" on page 14
- "Installing Maximizer CRM" on page 17
- "Adding and Removing Maximizer CRM Components" on page 29
- "Installing Licenses" on page 30
- "Updating Maximizer Installations with Live Update" on page 32
- "Where to Go from Here..." on page 34

# Installation Checklist

The following steps are required to set up and install Maximizer:

- Step 1: Identify the Database Host
- Step 2: Ensure all Computers Meet the System Requirements
- Step 3: Verify Network Connectivity
- Step 4: Install Maximizer
- Step 5: Install Additional User Licenses
- Step 6: Activate the Software

## Step 1: Identify the Database Host

Identify the computer that will host the Maximizer database. In a single-user environment, the database is installed along with the Maximizer application. In a multi-user environment, you should choose one computer to host the database. All other computers where Maximizer is installed are workstations and will access information on the database host computer. Keep in mind that this computer must always be on. If it is turned off, other computers will not be able to access the Maximizer database.

By default, the Administrator module is installed only on the database host computer. You should choose a computer that is readily available to the user who will act as the Maximizer administrator as the database host.

If you are upgrading from an earlier version of Maximizer, all computers where you install Maximizer act as database hosts. You must choose one of these computers to host Maximizer licenses. For more information, see "Choosing the License Server" on page 16.

## Step 2: Ensure all Computers Meet the System Requirements

Verify that all computers where Maximizer will be installed meet the minimum system requirements. For details, see "Maximizer System Requirements" on page 7.

## Step 3: Verify Network Connectivity

All workstation computers access information on the database host using a network connection. Check for network connectivity between the host computer and all Maximizer Workstation computers. This steps applies only to multiple-user environments.

## Step 4: Install Maximizer

Install Maximizer components on all applicable computers. In a multiple-user environment, install Maximizer first on the database host (new installations) or on the license server (upgrades). Then, install Maximizer on all other computers. For more information, see “Installing Maximizer CRM” on page 17.

## Step 5: Install Additional User Licenses

Install licenses for any additional Maximizer users. This step is required only if you are installing Maximizer in a multiple-user environment. For more information, see “Installing Licenses” on page 30.

## Step 6: Activate the Software

Activate your Maximizer licenses. You can use Maximizer for a limited period of time before activating the software. Once this grace period is over, you will be unable to log in to Maximizer or administrator until you activate the software.

You are prompted to activate the software when you first log in. You can also activate the software from the Install Multi-user Licenses dialog box.

If you install additional licenses after activating Maximizer, you must activate the multi-user licenses in order to use them.

## Third-Party Components Installed with Maximizer

The Maximizer CRM installation includes the following third-party products:

- Microsoft SQL Server Express Database Engine
- Crystal Reports Viewer

The type of Maximizer installation determines which of these components are installed.

### Microsoft SQL Server Express Database Engine

Microsoft SQL Server Express is the database engine Maximizer uses to read and write data from the Address Book.

If you are running Maximizer in a multiple-user environment, SQL Server Express is installed on the database host. This computer stores the Maximizer databases (or Address Books). The other computers, workstations, access the SQL Server Express databases on the host computer.

If you are upgrading from an earlier version of Maximizer, SQL Server Express is installed on all computers where you install Maximizer.

### Crystal Reports

Maximizer CRM includes a report reader for Crystal Reports. You must install the full version of Crystal Reports to create reports for Maximizer, but you can view Crystal Reports in Maximizer without installing the full version. These reports are accessible from the Reports tab in Maximizer.

The Maximizer database host installation creates the following folder for shared reports:

**...\\All Users\\Application Data\\Maximizer\\SvrShare\\Reports\\  
<Address Book name>**

All folders and reports within this folder are accessible from Maximizer on workstation computers. Maximizer installs a set of standard reports, but you can also create your own custom, shared reports and save them in this folder. To access a shared report in Maximizer, from the Reports tab, select Crystal Report, and select the folder that contains the report.

The Maximizer CRM installations also create the following local folder for personal reports:

**...\\My Documents\\MaximizerReports**

This local folder is the default location for personal reports. You can create reports directly from Maximizer if you have a version of

Crystal Reports installed on your computer. Users must belong to the Crystal Reports Users security group to create personal reports from Maximizer. To create a personal report, from the Reports tab, select Crystal Report > Personal > Custom Report.

## Windows Login Account Rights Required for Installation

To install Maximizer CRM, you must be logged in to Windows using an account with Windows Administrator privileges. During installation, you may be required to reboot the computer, and then you must log in to Windows using an account with Windows Administrator privileges again so the installation can continue.

## Upgrading from a Previous Version of Maximizer

**ⓘ** ALWAYS back up the Address Book before upgrading Maximizer. For instructions on backing up, refer to “Backing Up and Restoring Address Book Data” on page 112. If you have customized the dictionary and holidays, also back up those files separately before upgrading.

If you are currently running an earlier version of Maximizer and want to upgrade, it is strongly recommended that you uninstall the previous version before proceeding with the upgrade.

However, if you absolutely require your Maximizer settings, such as Window layout, colors, fonts, etc., to be carried over to the new version, you can install the new version without uninstalling the previous version. The setup then prompts you to uninstall the previous version automatically, but this method does not overwrite your Maximizer settings.

### ➤ To upgrade to the new version of Maximizer

**1** Back up your Maximizer Address Book. Refer to “Backing Up and Restoring Address Book Data” on page 112 for instructions.

**2** If you have customized the dictionary and holidays, also back up those files separately before upgrading. For instructions, refer to “Backing Up the Dictionary and Holiday Files” on page 117.

**3** Uninstall Maximizer CRM, and any additional Maximizer components, such as MaxMobile, on all computers.

For instructions on uninstalling Maximizer, see “Removing Maximizer” on page 15.

**4** Install the new version of Maximizer.

During the installation, specify the Maximizer license server. For more information, see “Choosing the License Server” on page 16.

For detailed instructions on installing Maximizer, see “Installing Maximizer (Details)” on page 21.

**5** If you use Maximizer in a multiple-user environment, install additional user licenses.

For more information, see “Installing Licenses” on page 30.

**6** Activate the software.

You can activate the software and all installed licenses when you open Maximizer or Administrator and when you install multi-user licenses.

**7** Upgrade your Maximizer Address Book database to the new version, as described in “Upgrading or Converting an Address Book” on page 45.

## Removing Maximizer

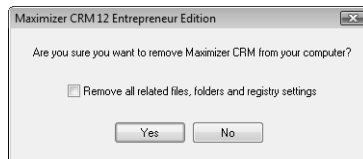
You can uninstall Maximizer to remove it from your computer. When you uninstall Maximizer CRM 12, you have the option of removing or keeping registry settings and program files. If you want to completely remove the program, you should select this option. If you want to reinstall Maximizer, you may want to keep these settings. Any settings stored in the database are not removed when you uninstall Maximizer.

**i** Uninstalling Maximizer does not uninstall your Address Book data. However, you should always back up your Address Book before uninstalling.

### ➤ To uninstall Maximizer

- 1 Click **Start > Settings > Control Panel > Add/Remove Programs**. In Windows Vista, click **Start > Control Panel > Programs and Features**.
- 2 In the list of currently installed programs, select **Maximizer CRM**.
- 3 Click **Change/Remove**. In Windows Vista, select **Uninstall/Change**.

If you are uninstalling Maximizer CRM 12, you have the option to remove all related files and registry settings from the computer. If you plan on reinstalling Maximizer, it's recommended that you do not select this option to preserve Maximizer settings on the computer.



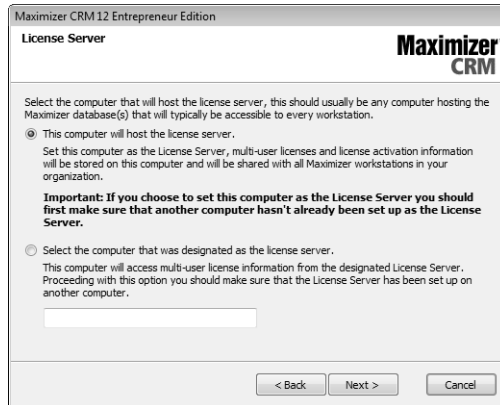
- 4 To remove all Maximizer files and settings from the computer, select **Remove all related files, folders, and registry settings**.
- 5 Click **Yes** to confirm.

The Remove Programs From Your Computer dialog box displays the uninstall progress.
- 6 If the Remove Shared File? dialog box opens, click **No To All**.
- 7 When the uninstall is complete, click **OK** to close the dialog box.
- 8 Reboot the computer.

## Choosing the License Server

This section applies only when you upgrade from an earlier version of Maximizer.

During the Maximizer installation, you must select a license server. Multiple-user licenses and license activation information are stored on the license server.



If you are using Maximizer in a single-user environment, the computer where Maximizer is installed acts as the license server.


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, you should select this computer to act as the license server as well.

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

When you log in to Maximizer from another computer, it connects to the license server and the licensing information is copied to the local computer. If you cannot access the license server for an extended period, you may disable this automatic connection to the license server in the Maximizer Multi-user Licenses dialog box. If any new licenses are installed and activated, the licensing information will not be recognized until the next time the computer connects with the license server.



# Installing Maximizer CRM

 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.

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

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

- **Single User** – All components are installed on the same computer including Maximizer, Administrator, and a new instance of Microsoft SQL Server Express. No other computers will access this computer.
- **Multiple User: Host** – All components are installed on the same computer including Maximizer, Administrator, and a new instance of Microsoft SQL Server Express. Other computers will access the database on this computer.
- **Multiple User: Workstation** – Maximizer is installed without any database components. The computer acts like a workstation and must connect to an existing database host installed on another computer.

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.

For information on installing each type of configuration, see the following sections:

- “Installing Maximizer in a Single-User Environment” on page 17
- “Installing Maximizer as a Host in a Multiple-User Environment” on page 18
- “Installing Maximizer as a Workstation in a Multiple-User Environment” on page 19
- “Installing Maximizer (Details)” on page 21

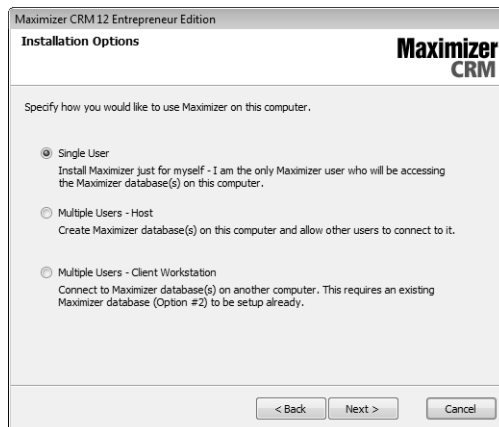
## Installing Maximizer in a Single-User Environment

This procedure explains how to install Maximizer in a single-user environment. In this configuration, the default installation includes both the Maximizer and Administrator modules as well as the SQL Server Express database engine. No other computers will access the Maximizer databases stored on this computer.

**i** The following procedure applies only to new Maximizer installations. If you are upgrading from a previous version of Maximizer, see "Installing Maximizer (Details)" on page 21.

➤ **To install Maximizer in a single-user environment**

- 1** Close all programs running on the computer.
- 2** Insert the Maximizer CRM disc.
- 3** Select **Install Maximizer CRM**.  
The InstallShield Wizard starts.
- 4** Click **Next** to begin the installation.
- 5** Read the license agreement, and click **Yes** to continue.
- 6** Enter your **Customer Number**, **Product Serial Number**, and your contact information, and click **Next**.
- 7** Select **Single User**, and click **Next**.



- 8** Follow the instructions in the remaining pages of the wizard to complete the installation.

For information on each screen in the wizard, see "Installing Maximizer (Details)" on page 21.

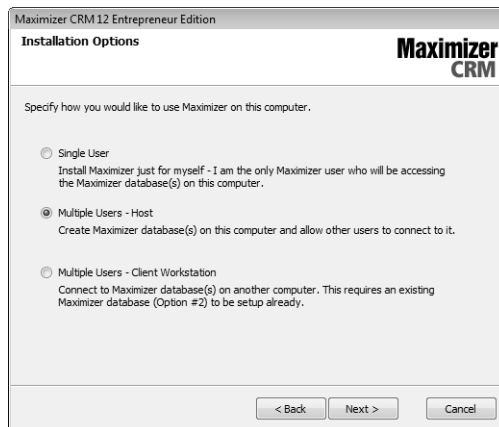
## Installing Maximizer as a Host in a Multiple-User Environment

This procedure explains how to install Maximizer as a database host in a multiple-user environment. In this configuration, the default installation includes both the Maximizer and Administrator modules as well as the SQL Server Express database engine. Other computers will access the Maximizer databases stored on this computer.

**i** The following procedure applies only to new Maximizer installations. If you are upgrading from a previous version of Maximizer, see “Installing Maximizer (Details)” on page 21.

➤ **To install Maximizer as a database host**

- 1** Close all programs running on the computer.
- 2** Insert the Maximizer CRM disc.
- 3** Select **Install Maximizer CRM**.  
The InstallShield Wizard starts.
- 4** Click **Next** to begin the installation.
- 5** Read the license agreement, and click **Yes** to continue.
- 6** Enter your **Customer Number**, **Product Serial Number**, and your contact information, and click **Next**.
- 7** Select **Multiple Users - Host**, and click **Next**.



- 8** Follow the instructions in the remaining screens of the wizard to complete the installation.

For information on each screen in the wizard, see “Installing Maximizer (Details)” on page 21.

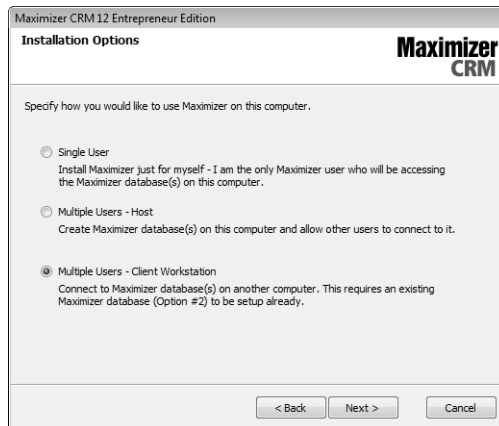
## Installing Maximizer as a Workstation in a Multiple-User Environment

This procedure explains how to install Maximizer as a workstation in a multiple-user environment. In this configuration, the default installation includes only the main Maximizer module. The computer will access information stored on the database host computer. During the installation, you must enter the name of the database host computer. Maximizer must be installed on the host computer before you install Maximizer on workstation computers.

**i** The following procedure applies only to new Maximizer installations. If you are upgrading from a previous version of Maximizer, see "Installing Maximizer (Details)" on page 21.

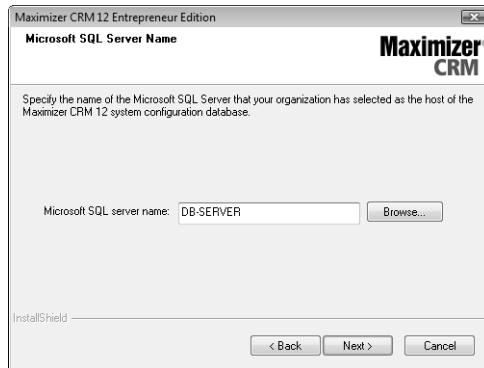
➤ **To install Maximizer as a workstation**

- 1** Close all programs running on the computer.
- 2** Insert the Maximizer CRM disc.
- 3** Select **Install Maximizer CRM**.  
  
The InstallShield Wizard starts.
- 4** Click **Next** to begin the installation.
- 5** Read the license agreement, and click **Yes** to continue.
- 6** Enter your **Customer Number**, **Product Serial Number**, and your contact information, and click **Next**.
- 7** Select **Multiple Users - Client Workstation**, and click **Next**.



- 8** Follow the instructions in the remaining pages of the wizard to complete the installation.

- In the **Microsoft SQL Server Name** screen, enter the name of the Maximizer host computer.



For information on each screen in the wizard, see “Installing Maximizer (Details)” on page 21.

## Installing Maximizer (Details)

The following procedure explains how to install Maximizer regardless of the type of installation. The instructions in this section complement the wizard to provide additional information.

### ► To install Maximizer

- 1 Close all programs running on the computer.
- 2 Insert the Maximizer CRM disc.

The setup starts automatically.

- 3 Select **Install Maximizer CRM**.

The InstallShield Wizard starts.

- 4 Click **Next** to begin the installation.
- 5 Read the license agreement, and click **Yes** to continue.
- 6 Enter your **Customer Number**, **Product Serial Number**, and your contact information, and click **Next**.

**i** If the setup doesn't start automatically, you can start it manually by running setup.exe from the Max folder of the disc (e.g., \Max\setup.exe).

**7** (This step applies to new installations only.) Select the type of installation, and click **Next**.

Maximizer CRM 12 Entrepreneur Edition

**Installation Options**

Specify how you would like to use Maximizer on this computer.

- ☒ **Single User**  
Install Maximizer just for myself - I am the only Maximizer user who will be accessing the Maximizer database(s) on this computer.
- ☐ **Multiple Users - Host**  
Create Maximizer database(s) on this computer and allow other users to connect to it.
- ☐ **Multiple Users - Client Workstation**  
Connect to Maximizer database(s) on another computer. This requires an existing Maximizer database (Option #2) to be setup already.

< Back   Next >   Cancel

- **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.

**8** (This step applies to upgrade installations only.) Specify the license server computer, and click **Next**.

Maximizer CRM 12 Entrepreneur Edition

**License Server**

Select the computer that will host the license server, this should usually be any computer hosting the Maximizer database(s) that will typically be accessible to every workstation.

- ☒ **This computer will host the license server.**  
Set this computer as the License Server, multi-user licenses and license activation information will be stored on this computer and will be shared with all Maximizer workstations in your organization.  
**Important: If you choose to set this computer as the License Server you should first make sure that another computer hasn't already been set up as the License Server.**
- ☐ **Select the computer that was designated as the license server.**  
This computer will access multi-user license information from the designated License Server. Proceeding with this option you should make sure that the License Server has been set up on another computer.

< Back   Next >   Cancel

- **This computer will host the license server** – Select this option to set this computer as the license server. If you install Maximizer on any other computers, the other computers will access Maximizer license information from the current computer.
- **Select the computer that was designated as the license server** – Select this option if you have already set another computer as the license server, and specify the name of the license server computer.

For information on license servers, see “Choosing the License Server” on page 16.

**9** Click **Next** to install Maximizer components to the default location.

– or –

Click **Browse**, select a destination folder, and click **Next**.

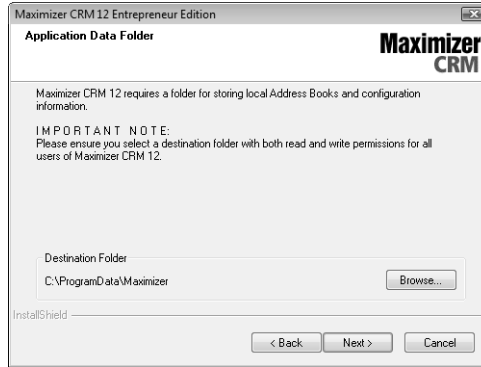


**i** Do not change any default share names, file names, file locations, folder names, or folder locations after installing Maximizer. If you want to use names and locations other than the defaults, change them during the installation.

**10** Click **Next** to use the default folder for shared configuration information.

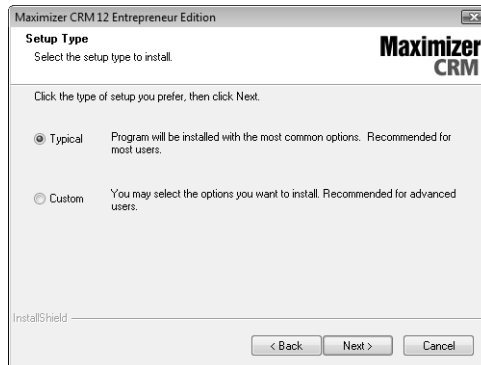
– or –

Click **Browse**, select a local shared folder, and click **Next**.



By default, Maximizer setup creates the folder **...All Users\Application Data\Maximizer**, and it creates a shared subfolder called **AddrBks**.

**1 1** Select a setup type, and click **Next**.



- **Typical** – installs a default set of software, such as drivers. It also installs a default set of Maximizer applications. Maximizer recommends that you select the Typical installation, unless you have a specific reason not to.
- **Custom** – enables you to select specific Maximizer modules to install. Select this option only if you have a specific reason to alter the default Maximizer installation provided by the Typical installation.

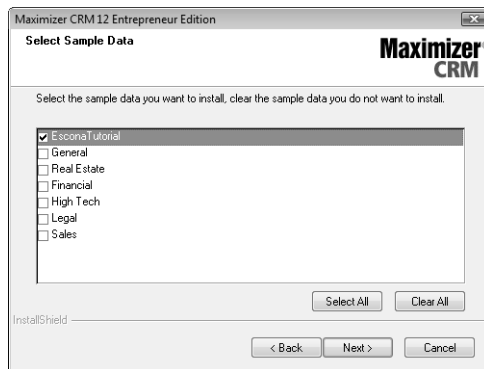
**1 2** If you have Microsoft Outlook or Microsoft Word installed on this computer, the wizard prompts you to integrate either or



both of those applications with Maximizer. Select which applications to integrate, and click **Next**.

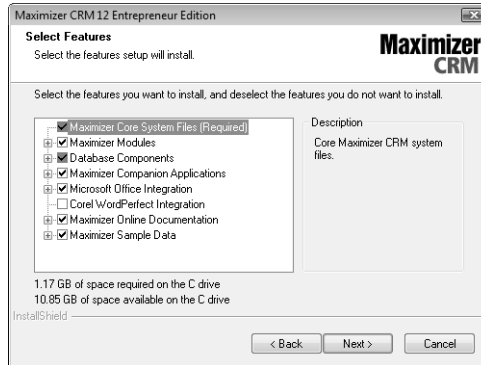


**1 3** (This step applies only to Typical installations in Single User and Multiple User - Host configurations.) Select which sample Address Books to install.

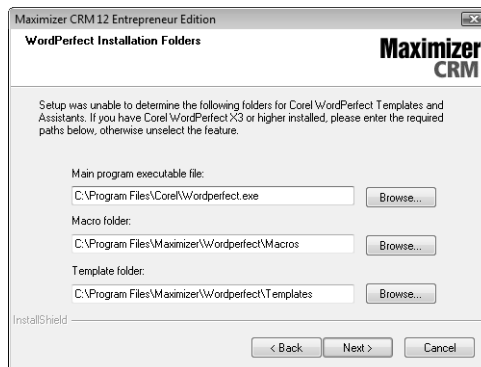


**1 4 (This step applies to Custom Installations only.)** Select which features to install, and click **Next**.

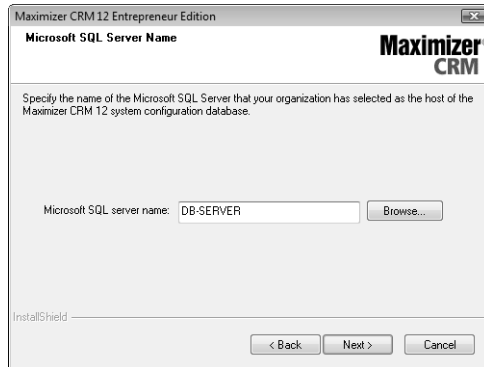
If you would like to select additional components, click the + to expand the selection.



**1 5 (This step applies to the Core WordPerfect Integration option only.)** If the setup cannot locate Core WordPerfect Office on the computer, it prompts you to provide the path to these files and folders. Click **Browse** to select the correct paths, and click **Next**.

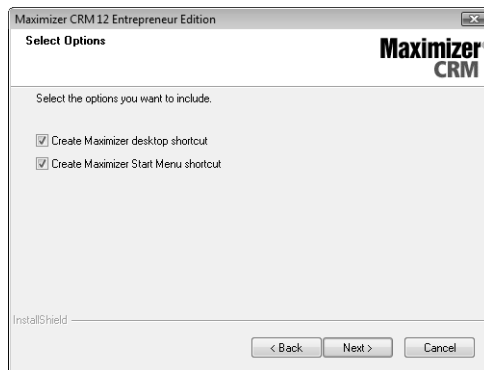


- 1 6** (This step applies only to the Multiple User - Client Workstation configuration.) Enter the name of, or browse to, the Maximizer host computer, and click **Next**.



- 1 7** Select any of the following options, and then click **Next**:

- **Create Maximizer desktop shortcut** – This option creates an icon on the Windows desktop that runs Maximizer when you double-click it.
- **Create Maximizer Start Menu shortcut** – This option creates a shortcut to Maximizer on the Windows Start menu.



- 1 8** Review the installation settings, and click **Next**.

- 1 9** The wizard displays an installation progress indicator. After the installation is complete, click **OK** to close the message box.

The installation may prompt you to restart your computer.

**20** Click **Finish** to close the wizard and restart the computer (if necessary).

**21** If your computer needed to restart, log in to Windows using an administrator account. This step is required to complete the installation.

# Adding and Removing Maximizer CRM Components

Maximizer enables you to add and remove specific components of the software without having to reinstall Maximizer itself.

## ➤ To add or remove Maximizer CRM components

- 1** Close all programs running on the computer
- 2** Insert the Maximizer disc.
- 3** On the Setup disc Autorun screen, select **Install Maximizer CRM**.

If the setup doesn't start automatically, you can start it manually by running setup.exe from the Max folder of the disc (e.g., \Max\setup.exe).

- 4** Select **Modify**, and click **Next**.

Checkboxes are automatically selected for any currently installed components.

- 5** Select the checkbox beside any components to add.

- 6** Clear the checkbox beside any components to remove.

If a component is already installed, and you want to keep it, do not clear the checkbox beside that component.

- 7** Click **Next**.

Maximizer begins the update.

 Expand the branches to add or remove sub-components.

## Installing Licenses

Maximizer comes with a default single-user license. When you purchase licenses from Maximizer Software, you receive a Product License Number (PLN), which includes licenses for a specified number of users.

Maximizer licenses are stackable. When you apply new licenses, they are added to your current license count. For example, if you have already installed a license for two users and you want to upgrade to five users, you need to install a new PLN for three users. However, if you have only the default single-user license, you must install a new PLN for the total number of users, in this example, five users.

Note that the MASTER user account is always enabled, and it consumes a license only if you are logged in to Maximizer using the MASTER user account.

The following sections contain information on installing Maximizer licenses:

- “Installing a License” on page 30
- “Applying a License” on page 31
- “Viewing Applied and In-Use Licenses” on page 31

## Installing a License

After you install Maximizer or purchase additional licenses, you must install the Product License Numbers (PLN).

If you install additional multi-user licenses after activating Maximizer, you must activate the licenses before using them.

### ➤ To install a product license number (PLN)

- 1** Run Administrator.
- 2** Select **Utilities > Install Multi-User License**.
- 3** Enter the PLN.
- 4** Click **Install License**.
- 5** Repeat steps 3 and 4 to install any additional licenses.
- 6** To activate the licenses, click **Activate**. And in the Activation dialog box, click **Activate** again.
- 7** Click **Close**.

Administrator closes automatically.

The next step is to apply the PLN(s) to the Address Books.

## Applying a License

After you have installed a PLN, you must apply it to the Maximizer Address Book(s).

### ➤ To apply a product license number (PLN)

- 1** After installing a PLN, start Administrator.
- 2** Open and close each Address Book that you are applying licenses to.

The license has now been applied to the Address Book(s).

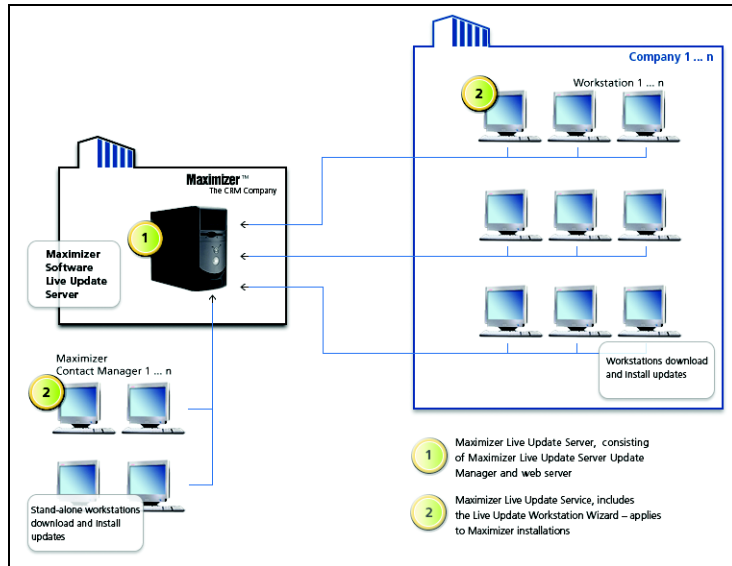
## Viewing Applied and In-Use Licenses

### ➤ To view the number of applied and in-use licenses

- In Administrator, select **Reports > Current Users**.

## Updating Maximizer Installations with Live Update

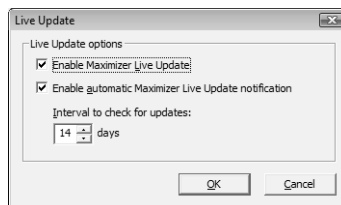
The Live Update Wizard connects to the Maximizer Live Update Server and downloads any available updates for your local Maximizer installation.



By default, Live Update is enabled, automatic notifications are enabled, and the interval to check for updates is set to 1 day. You can modify these preferences as required in Administrator.

### ► To configure Live Update preferences

- 3 In Administrator, select **File > Preferences**.
- 4 On the System Options tab, click **Live Update**.
- 5 Update any of the preferences as desired, and click **OK**.





**i** Live Update options in Administrator are accessible through the Live Update button on the System Options tab in File > Preferences.

### ➤ To start the Live Update Wizard

- If the **Enable automatic Maximizer Live Update notification** option is selected in the Live Update options in Administrator, a message box (shown below) notifies you when new updates are available. Click **OK** to start the Live Update Wizard.  
– or –
- In Administrator, select **Help > Maximizer Live Update**. In Maximizer, click the **Maximizer** button, and select **Help > Maximizer Live Update**.

### ➤ To download software updates from the server

- 1** Start the **Live Update Wizard** as described above.



- 2** Click **Next**.

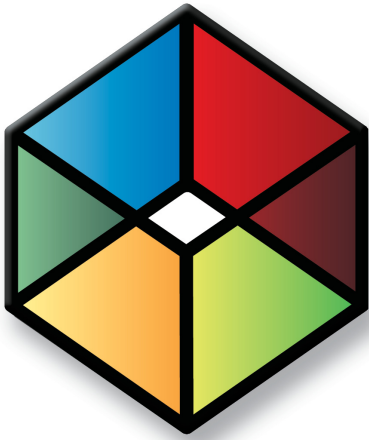
The Live Update Wizard connects to the Live Update Server to check for any available updates.

- 3** Select the update(s) to download.
- 4** Click **Next** to download the selected updates.
- 5** Click **Finish** to close the wizard.

The downloaded executable file should launch immediately to start the installation.

## Where to Go from Here...

- Create a new Address Book or upgrade an existing Address Book to the latest version of Maximizer, as described in chapter 3 "Creating or Upgrading Address Books" on page 35.
- Create login accounts for Maximizer users and assign users to security groups, as described in chapter 4 "Setting Up Users and Groups" on page 49.
- Configure Address Book preferences, including duplicate Address Book entry handling, user-defined fields, and key fields, as described in chapter 5 "Configuring an Address Book" on page 71.
- For more information on converting a database, please refer to chapter 7 "Managing Address Book Data" on page 111.



# CHAPTER 3 **Creating or Upgrading Address Books**

## In this chapter...

- "What is Administrator?" on page 36
- "Creating Address Books" on page 38
- "Connecting to an Address Book" on page 41
- "Deleting Address Books" on page 42
- "Maximizer System Login Accounts" on page 43
- "Changing the MASTER User Password" on page 44
- "Upgrading or Converting an Address Book" on page 45
- "Time Zone Alignment" on page 46
- "Importing Vertical Templates" on page 47

## What is Administrator?

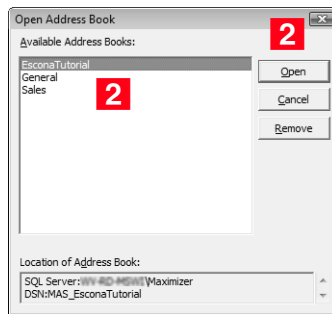
Administrator is the administrative center of Maximizer. Use it to complete the following tasks:

- Create and configure Address Books.
- Set up user-defined fields for different types of entries.
- Manage Maximizer application settings.
- Customize Maximizer fields and settings.
- Manage users and security groups.

Once Administrator is running, you can open any Address Book and perform administrative tasks. There will be no database conflicts if you open an Address Book while it is in use by another user. (However, you should ensure all users have logged out before backing up or restoring the Address Book.)

### ➤ To log in to Administrator

- 1** Click **Start > Programs > Maximizer CRM > Administrator**.
- 2** Select an Address Book, and click **Open**.



**i** The default MASTER user password is "control", unless it has already been changed to another password in any Maximizer Address Book.

- 3** Enter the MASTER User ID and password, and click **OK**.



The Address Book opens in Administrator.

➤ **To open an Address Book**

- 1** In Administrator, select **File > Open Address Book**.
- 2** Select an Address Book, and click **Open**.
- 3** Enter the MASTER User ID and password, and click **OK**.

## Creating Address Books

**i** Sample Address Books are installed with Maximizer and demonstrate how a company would use Maximizer. Do not use the sample Address Book for your own data.

**i** For information about transferring Address Book information, refer to "Importing Address Book Data from MXI or XML Files" on page 129 and "Transferring Entries between Address Books" on page 151.

Once you have familiarized yourself with Maximizer by using a sample Address Book, such as Escona Tutorial, your first administrative task is to set up a new Address Book.

Administrator makes it easy to create your Address Book in a few steps, and even enables you to create it using some of the settings from an existing Address Book, such as preferences, templates, user-defined fields, and macros.

Once you've created the Address Book, set up user accounts and configure security and preferences. If you need to add entries from another Address Book, Maximizer can transfer those entries to the new Address Book. Any user can transfer Address Book information, provided that they have sufficient security privileges in their account.

The following sections contain information on creating Address Books in Maximizer:

- "Checklist: Setting Up an Address Book" on page 38
- "Creating an Address Book" on page 40

### Checklist: Setting Up an Address Book

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

- 1 Create the new Address Book.** Refer to "Creating an Address Book" on page 40.
- 2 Change the MASTER user password.** Refer to "Changing the MASTER User Password" on page 44.
- 3 Enable security for an Address Book.** This applies only if there are multiple users in your Address Book. To enable security, select the **Enable security** option on the **System Options** tab in Administrator preferences. Refer to "Address Book Preferences" on page 72.
- 4 Add users to the Address Book.** When a new Address Book is created, it contains only the MASTER user account. Create an account for each Maximizer user. Refer to "Adding a User to an Address Book" on page 50.

Note that if you are not running Maximizer in a multi-user environment, you do not need to add user accounts or set up user and group security.

- 5 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 56.

- 6 Test the Address Book.** In Maximizer, log in to the Address Book with one or more of the new user accounts, or as the MASTER user if you did not create any new user accounts.

## Creating an Address Book

Use Administrator or Maximizer to create new Address Books.

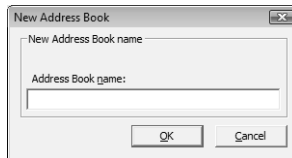
After the new Address Book is created and added to the list of Address Books in Maximizer, each networked computer receives the updated Address Book list when logging in.

### ➤ To create a new Address Book

**1** In Administrator, select **File > New Address Book**.

– or –

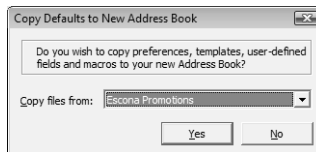
In Maximizer, in the top-left corner of the window, click the **Maximizer** button, and select **New Address Book**.



**2** Type the name of the new Address Book in the **Address Book name** field, and click **OK**.

**3** Click **OK**.

If you are creating the Address Book from the database host computer, Maximizer prompts you to copy defaults from an existing Address Book to the new Address Book.



**i** This option is not available if you are creating an Address Book from a workstation.

**4** Click **Yes** to copy the default settings, or click **No** to create a blank Address Book.

Maximizer creates the new Address Book.



# Connecting to an Address Book

Maximizer allows you to connect to any Address Book on a computer running SQL Server Express. This procedure applies only to users who have upgraded from previous versions of Maximizer.

## ➤ To connect to an Address Book

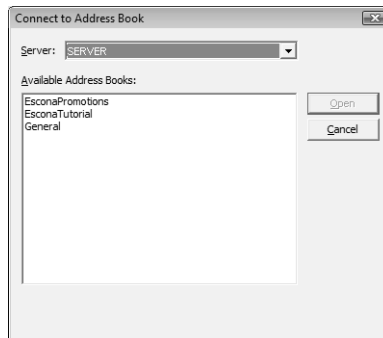
**1** From Administrator, select **File > Connect to Address Book**.

– or –

From Maximizer, in the top-left corner of the window, click the **Maximizer** button, and select **Connect to Address Book**.

**2** In the **Connect to Address Book** dialog box, select the computer that hosts the Address Book to which you would like to connect.

**3** Choose an Address Book from the **Available Address Books** list and click **Open**.



**4** When you are connected to the Address Book, you are prompted with a message saying the connection was successful. Click **OK** to close the message dialog box.

Once the connection to an Address Book is established, it appears in the Open Address Book window. You can use the Remove button in the Open Address Book dialog to remove it from the available Address Book list.

## Deleting Address Books

You can remove any existing Address Books from Address Book lists. When you remove the Address Book, the data remains in the database. You can later employ the database to log in to the Address Book again.

### ➤ To remove an Address Book

- 1** Select **File > Open Address Book**.
- 2** Select the Address Book, and click **Remove**.
- 3** At the prompt, click **OK**.
- 4** Enter the MASTER password for the Address Book.
- 5** Click **OK**.

# Maximizer System Login Accounts

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

- **MASTER** is required to log into the Administrator module of Maximizer.
- **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.
- **maximizer\_default** is a system login created in the Maximizer instance of Microsoft SQL. It is only used by Maximizer and cannot be used to login to Maximizer or Microsoft SQL. If this user is missing see “Recreating the Maximizer\_Default User” on page 162.

When you create a new Maximizer Address Book, the MASTER user account is created automatically. This account is required to log in to the Administrator module of Maximizer and to perform administrative tasks.

It is important to leave the MASTER user accounts enabled the default settings. Maximizer requires these accounts to function correctly. The MASTER user account consumes a license only if you are logged into Maximizer with the MASTER user account.

It is important to change the password for the system login accounts from the default immediately after creating an Address Book. For instructions on changing the account passwords, refer to “Changing the MASTER User Password” on page 44.

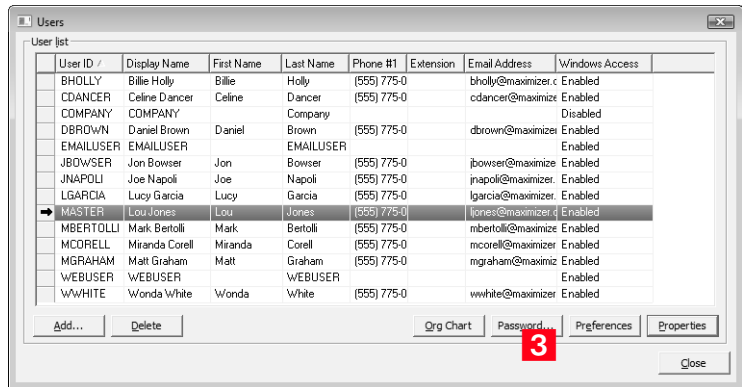
## Changing the MASTER User Password

**i** If the MASTER password for an existing Address Book has been changed, and then you create a new Address Book, the new Address Book will have the same password as the existing Address Book, and not "control".

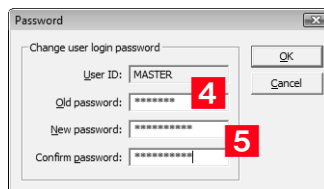
The default password for the MASTER user is **control**. For security reasons, you should change this password immediately after creating a new Address Book.

### ➤ To change the MASTER user password

- 1** In Administrator, log in to the Address Book as MASTER.
- 2** Select **File > Manage Users**.
- 3** Select **MASTER** from the user list and click **Password**.



- 4** In the **Old password** field, type **control** (or the current password if you have changed the MASTER password before).
- 5** In the **New password** and **Confirm password** fields, type the new MASTER user password, and click **OK**.



The MASTER user password is updated.

# Upgrading or Converting an Address Book

You can upgrade an Address Book by opening it in Administrator or Maximizer. Administrator also has a built-in utility to convert existing Maximizer databases from older versions to the current version, and to convert Maximizer Pervasive databases to Maximizer SQL databases.

You should always back up the Address Book before upgrading. For instructions on backing up, refer to “Backing Up and Restoring Address Book Data” on page 112. For older databases, refer to the User’s Guide for your previous version of the software. If you have customized the dictionary and holidays, also back up those files separately before upgrading.

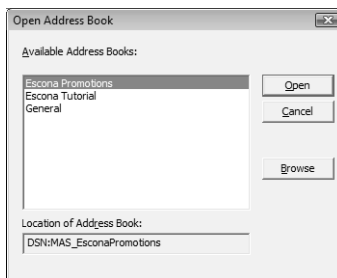
After upgrading a database, you should always perform an Address Book validation and recovery. For further information, refer to “Verifying and Recovering Address Book Data” on page 120.

**i** If you are upgrading Maximizer Pervasive databases, do not uninstall Pervasive until you have successfully upgraded all of the Pervasive databases.

**i** Note that the Browse button is used to locate Maximizer files that are in a Pervasive (Btrieve) database format. It is not applicable to a SQL Server Address Book.

## ➤ To upgrade a Maximizer Address Book

- 1** Ensure Maximizer is closed before proceeding with the upgrade.
- 2** If you have an Address Book open in Administrator, select **File > Close Address Book**.
- 3** Select **Utilities > Upgrade Maximizer Address Book**.
- 4** Select **Yes** when prompted to continue.
- 5** If the Address Book does not appear in the list, click the **Browse** button to browse to the location of your Pervasive (Btrieve) Address Book files and click **OK**. Then, enter an Address Book name and click **OK**.
- 6** Select the Address Book from the available Address Book list, and click **Open**.



The upgrade process begins.

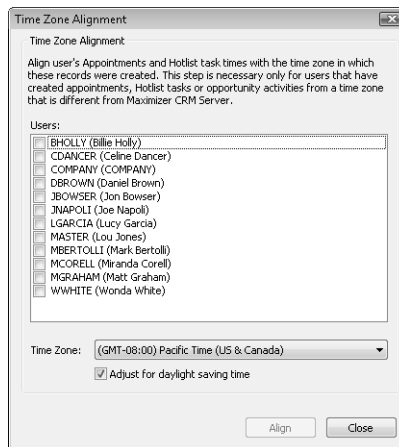
## Time Zone Alignment

After upgrading your database, use the Time Zone Alignment utility to align users' appointment, Hotlist task, and opportunity activity times with the time zone in which these records were created. This step is necessary only for users that have created appointments, Hotlist tasks, or opportunity activities from a time zone that is different than the Maximizer CRM Server.

**i** Users can only be aligned once.

### ► To align time zones

- 1** Select **Utilities > Time Zone Alignment**.
- 2** Select all users that belong to a specific time zone.
- 3** From the **Time Zone** drop-down list, select the time zone of the users.
- 4** Select the **Adjust for daylight saving time** option if the selected users are in a time zone or region that observes daylight saving time.
- 5** Click **Align**.
- 6** Repeat steps 2 to 5, as necessary, for all applicable users and time zones.



# Importing Vertical Templates

Maximizer provides vertical templates for several industries. You can import any of these vertical templates into your Address Book. A vertical template creates industry-specific user-defined fields, action plans, search catalogs, column setups, document templates, etc. in your Maximizer Address Book.

## ➤ To import a vertical template

- 1** Log in to the Address Book in Administrator or Maximizer.

You must be logged in as MASTER to import a vertical template.

- 2** In Administrator, select **File > Import > Vertical Templates > [industry]**.

– or –

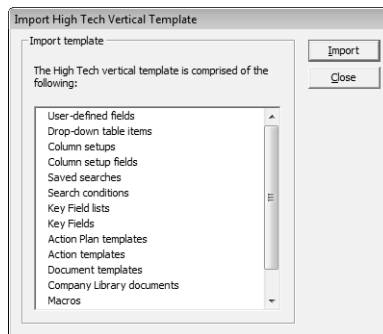
In Maximizer, in the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Vertical Templates.> [industry]**.

The Import [industry] Vertical Template dialog box opens, displaying the items included in the template.

- 3** Click **Import**.

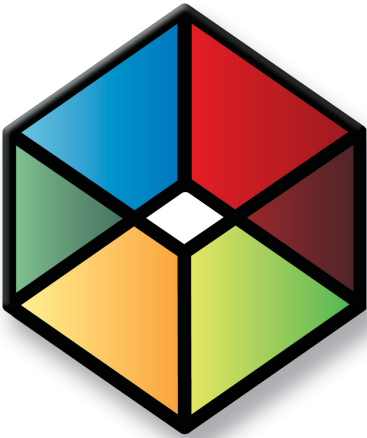
Items in the list are highlighted as the import process advances.

When the import process is complete, an Import Summary displays the number of items imported with the vertical template.









# CHAPTER 4 **Setting Up Users and Groups**

In this chapter...

"Adding a User to an Address Book" on page 50

"Changing a User's Password" on page 55

"User and Group Security" on page 56

"Security Groups" on page 62

"Record Ownership" on page 67

"User Preferences" on page 69

# Adding a User to an Address Book

Log in as the MASTER user in Administrator to perform setup or administrative tasks. The default password for MASTER is “control”, but it may be different if it has already been changed in any Address Book. To use Maximizer, you should create a personal user ID for yourself.

- i** If you are using Maximizer in a single-user environment and do not want to use user security, simply use the MASTER user account.

**i** The user’s name and contact information can be inserted as merge fields in the word processor.

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.

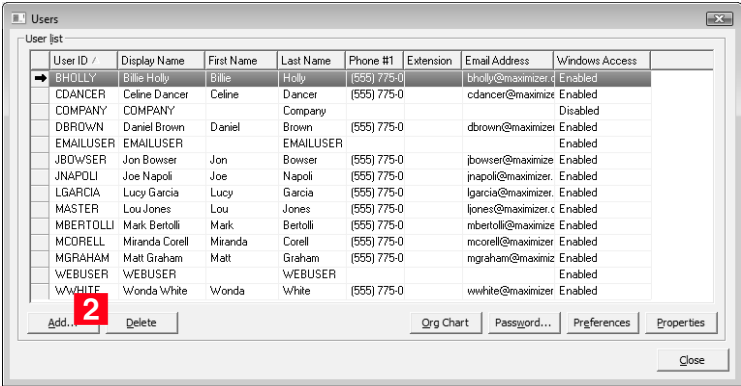
Use the User Properties dialog box to enter a user’s name and contact information, assign user-defined fields, specify access rights, and add a user to security groups. Note that you can also add users to security groups using the Security Groups module.

➤ **To add a new user to the Address Book**

- 1** Select **File > Manage Users**.

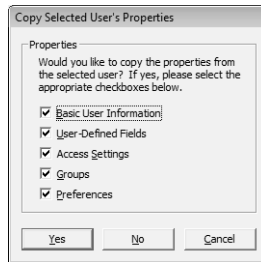
The Manage Users dialog box opens.

**2** Click **Add**.



The Copy Selected User’s Settings dialog box opens.

- 3** Click **Yes** to copy the settings from the selected user, or **No** to start with the default settings.



The Add User dialog box opens.

- 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 an email address specified to send email from Maximizer.
  - Under **Module login**, ensure **Enabled** is selected next to **Windows Access**.  
You must have an available user license to enable the user.

The screenshot shows the 'Add User' dialog box with the 'General' tab selected. A red box with the number '4' highlights the 'Position' field. The form contains the following fields and sections:

- Name and position:** User ID, Mr/Ms, First name, Initial, Last name, Salutation, Display name, Position (highlighted with a red box and '4'), Reports to.
- Company and main address:** Company (Escona Estate Wines), Dept. (Sales), Division (US - West), Address 1 (1344 Eastside Road), Address 2, City/Town (Petaluma), St/Co/Prov (CA), Zip/Postcode (94954), Country (USA).
- Phone numbers and phone extensions:** 1: (555) 775-0999, 2: (555) 775-0900, 3: , 4: , fax.
- Security:** Public (selected), Private.
- Internet information:** Email, Webgate (http://www.escona.com).
- Module Login:** Windows Access, Enabled.

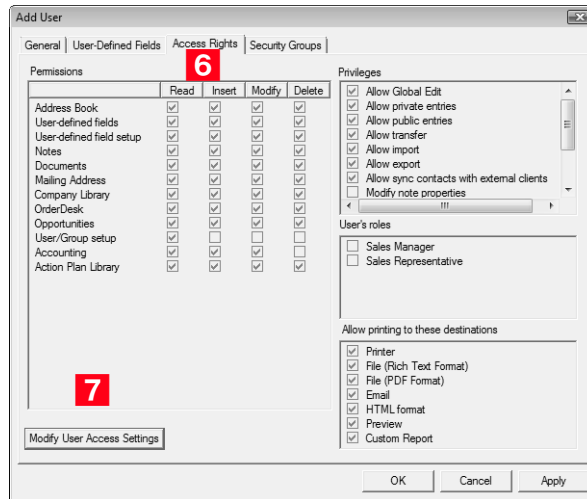
Buttons at the bottom: OK, Cancel, Apply.

- 5** In the **User-Defined Fields** tab, select the values of any user-defined fields, as appropriate.

You can set up these custom fields in the File > Set Up User-Defined Fields dialog box. Refer to “Setting Up User-Defined Fields for an Address Book” on page 80 for more information.

- 6** Select the **Access Rights** tab.

- 7** 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 56.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 57.

- 8** Click **OK** to save the changes to the access settings.
- 9** In the Security Groups tab, select any security groups to which the user should belong.

(To add groups, use the File > Security Groups dialog box.)

- 10** Click **OK**.

The default user password is **maximizer**. Ensure that you or the user create a new password from the Manage Users dialog box.

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. Any additional users must be disabled. Disabled users cannot log in to Maximizer. But other users can add disabled users to appointments.

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.

# Changing a User's Password

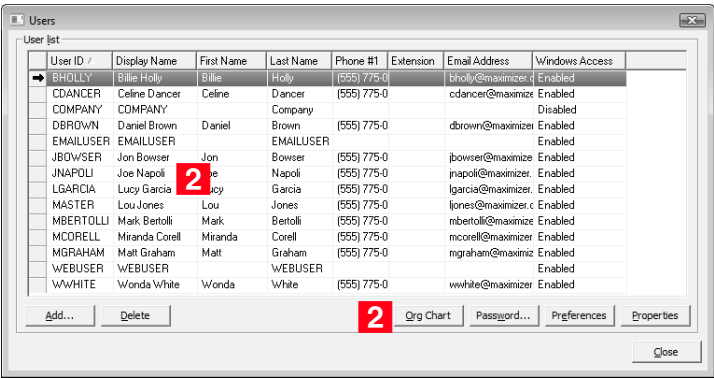
The following procedure explains how to change user passwords in Administrator. However, users can also change their own passwords in Maximizer by selecting Manage Users from the User Management group on the Setup tab.

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

- 1** In Administrator, select **File > Manage Users**.

The Manage Users dialog box opens.

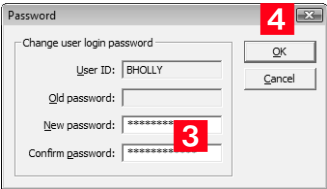
- 2** Select the Maximizer user, and click **Password**.



**i** The default password for a new user is "maximizer".

The Password dialog box opens.

- 3** Type the new password, then retype it on the next line to confirm it.
- 4** Click **OK** to save the new password.



# 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 60). 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
<input checked="" type="checkbox"/>	Granted	Granted
<input checked="" type="checkbox"/>	Denied	n/a
<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>


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
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



## 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 window
User-defined fields	Values in user-defined fields
User-defined field setup	User-defined field definitions
Notes	Notes attached to entries Users must have the Delete checkbox selected to be able to use the File > Purge > Notes function.
Documents	Documents attached to entries Users must have the Delete checkbox selected to be able to use the File > Purge > Documents function.
Mailing Address	Mailing addresses of Address Book entries
Company Library	Files and folders in the Company Library
OrderDesk	Entries in the OrderDesk window
Opportunities	Entries in the Opportunities window
User/Group setup	Users and Security Groups <ul style="list-style-type: none"> <li>• If the user does not have any User/Group Setup rights, other users' or groups' properties are not accessible.</li> <li>• If the user has read rights only, the related tabs are visible, but information cannot be modified.</li> <li>• Insert, Modify, and Delete rights provide the corresponding access rights to all user and group properties.</li> </ul>
Accounting	Accounting transactions. This access right applies only to earlier versions of Maximizer.
Action Plan Library	Action plan templates in the Action Plan Library

## Privileges

Privilege	Grants authorization to . . .
Allow Global Edit	Perform global edits of Address Book entries in Maximizer. Consider advising users with this privilege to back up the Address Book before making significant changes with Global Edit.
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 transfer	Transfer Address Book entries between Maximizer Address Books. If you do not select this option, the menu items for transferring are disabled.
Allow import	Import Address Book entries between Maximizer Address Books or from external applications. If you do not select this option, the commands for importing are disabled.
Allow export	Export Address Book entries between Maximizer Address Books, and export information to Microsoft Excel. If you do not select this option, the commands for exporting are disabled.
Allow sync contacts with external clients	Synchronize Address Book entries and notes using Outlook Synchronization. However, users can still synchronize calendar appointments or Hotlist tasks without this access right.
Modify note properties	Change the values of the date, time, and creator fields in notes.
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. 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.
Modify other users' general information	Change information in the General and User-Defined Fields tabs of the user properties for other users. Modifying a user's general information, such as Last Name, First Name, Company, and Phone Number, does not have to be restricted to the MASTER user. In many cases, an administrative assistant or a receptionist can be granted the rights to modify user's general information without compromising the security of Maximizer. This privilege allows the user to have access to all Maximizer users' general information without giving them full security rights to the Address Book.

### User's Roles

User Role	Grants authorization to . . .
Sales Manager	Re-assign the Account Manager field to a different user. 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.

## Allow printing to these destinations

Printing to certain destinations, such as files or email, can pose security risks for your organization. For example, a user could print important data fields to a file. This file would then contain information in a format that could easily be transported elsewhere. Consider these security risks in balance with the improved business processes that can be achieved by using print destinations other than Printer.

Destination	Grants authorization to . . .
Printer	Print to the default printer.
File (Rich Text Format)	Print to a .RTF file.
File (PDF Format)	Print to a .PDF file.
Email	Attach the report to an email message, usually in a .RTF file.
HTML Format	Print to a .HTM file.
Preview	Display a preview of the print output on the screen.
Custom Report	Open and print reports from the Crystal Reports option in the Reports tab in Maximizer. Note that the user cannot create custom reports unless he or she is also a member of the Crystal Reports Users security group.

## Modifying User Access Settings

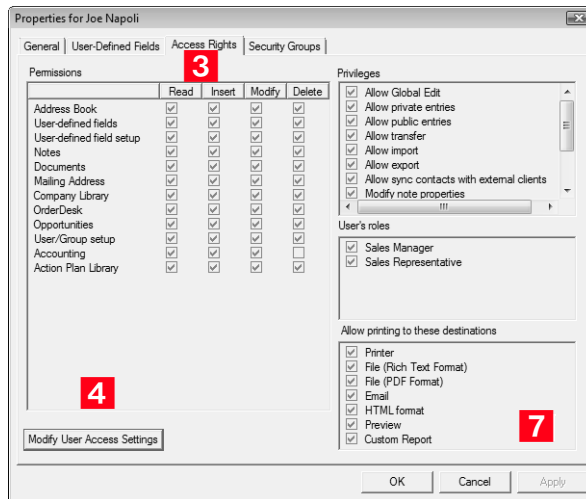
For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 56.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 57.

### ➤ To modify access settings of an existing user

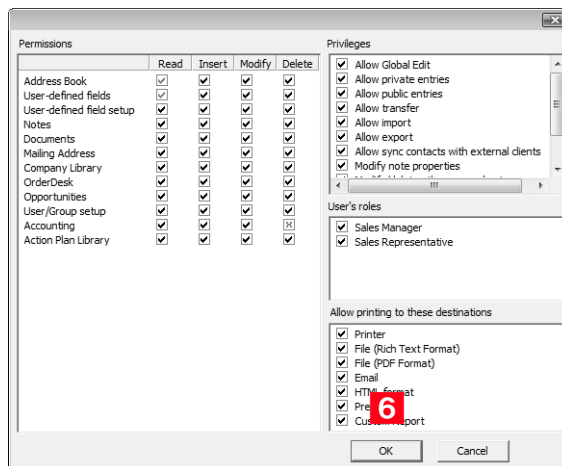
- 1** Select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Properties**.

**3** Select the **Access Rights** tab.



**4** Click **Modify User Access Settings**.

**5** Modify any of these settings as appropriate.



**6** Click **OK** to close the Access Settings.

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

# Security Groups

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

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.

The properties, access settings, and group members are specified in the Group dialog box.

	Read	Insert	Modify	Delete
Address Book	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User-defined fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User-defined field setup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mailing Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company Library	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
OrderDesk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User/Group setup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Accounting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Action Plan Library	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Privileges**

- ☐ Allow Global Edit
- ☐ Allow private entries
- ☐ Allow public entries
- ☐ Allow transfer
- ☐ Allow import
- ☐ Allow export
- ☐ Allow sync contacts with external clients

**User's roles**

- ☐ Sales Manager
- ☒ Sales Representative

**Allow printing to these destinations**

- ☒ Printer
- ☐ File (Rich Text Format)
- ☐ File (PDF Format)
- ☐ Email
- ☒ HTML format
- ☒ Preview
- ☒ Custom Report

## 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 56.

### Group Members

You can add or remove users from the group in the Members tab of the Group dialog box.

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

## Default Security Groups in all New Address Books

Every new Address Book contains several security groups, described in the following table. Only the MASTER user belongs to these groups by default, but you can add additional users to each group.

Security Group Name	Group ID	Enables group members to...
Accounting	ACCTNG	Restrict accounting transaction notes to members of this group. This security group applies only to previous versions of Maximizer.
Crystal Reports Users	R_CRU	Generate new reports from the Crystal Reports option in the Reports tab in Maximizer.

## 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 56.

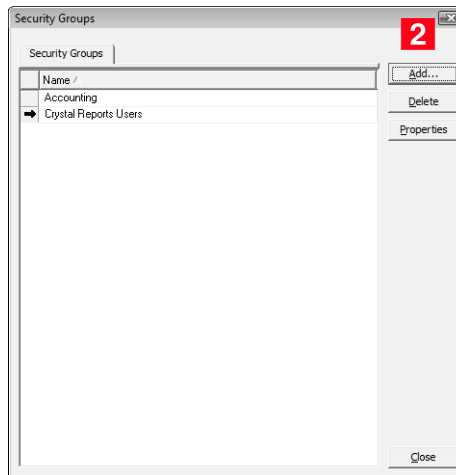
For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 57.

### ➤ To create a new security group and assign members

**1** Select **File > Security Groups**.

**2** Click **Add**.

**i** The Security Groups command is also available in Maximizer if the logged-in user has Insert rights for User/Group setup. On the Setup tab, select Security Groups from the User Management group.



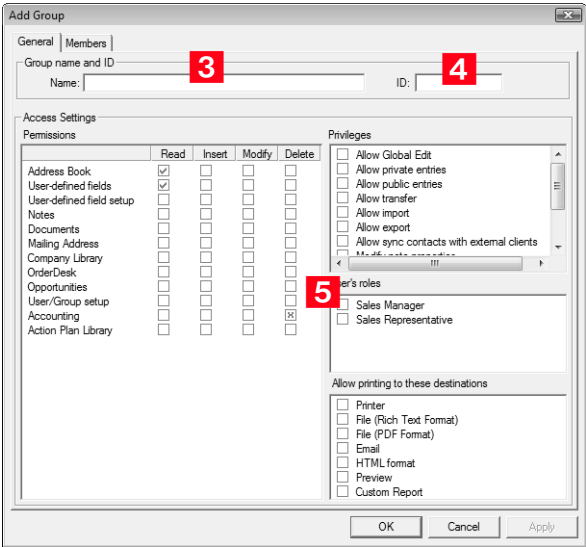
**3** Enter a **Group Name**.

**4** Enter a unique **Group ID** (up to 6 characters). The first character of the Group ID must be a letter.

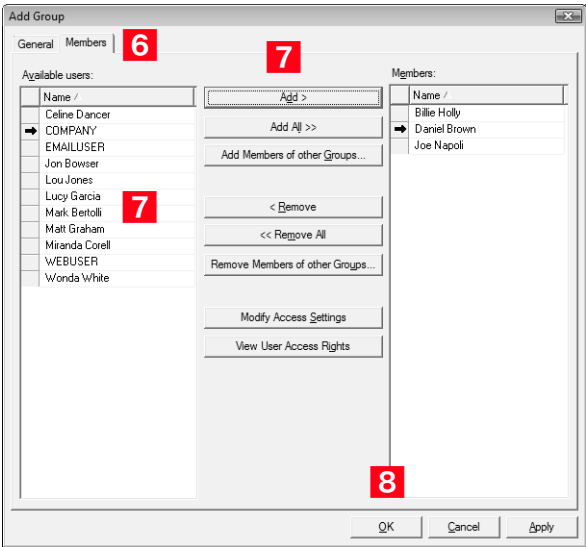
**5** Assign **Access Settings** to the group.





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 a user to add to the security group, and click **Add**. Repeat to add additional users.



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

 Click **OK** to save the new security group.


## 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 56.


For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 57.

### ➤ To modify access settings of an existing group

 Select **File > Security Groups**.

 Select the group name.

 Click **Properties**.

 Select the appropriate settings for the group, and click **OK**.

## 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.

Note for Anzoza, Marylyn

Appointment Modified  
Conference Call: Confirm contract details

With:  
Marylyn Anzoza

Appointment details:  
Date: Wednesday January 4, 2012  
From: 3:00 PM [Pacific Standard Time]  
Until: 4:00 PM [Pacific Standard Time]

Priority:

Attendees Invited:

Properties

Date: January 6, 2012  
Time: 3:14 PM  
Creator: Joe Napoli

Details

Full access: Joe Napoli  
Read access: [Sales]

OK Cancel

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.

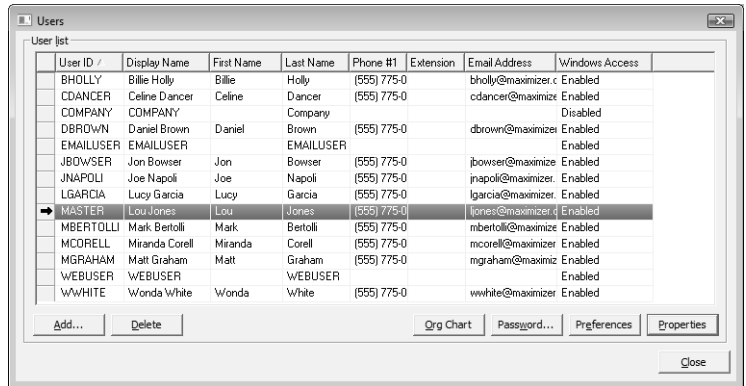
Field	Value	Description
Owner	Public	All users can view and modify the entry, regardless of their user or group security settings.
	User	Only the specified user can view or modify the entry.
	Group	Only members of the specified group can view or modify the entry, regardless of their user or group security 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.

# 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.

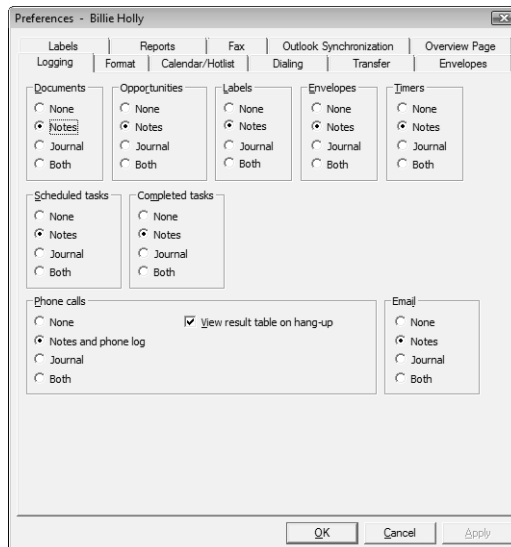
## ➤ To set Address Book user preferences

- 1** Select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Preferences**.

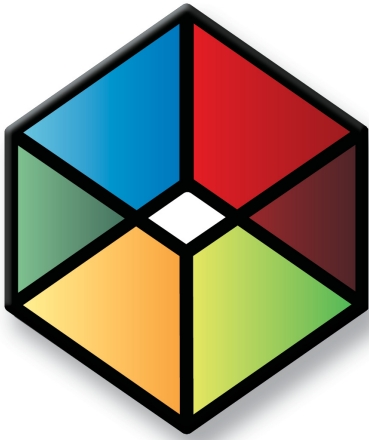


**i** See the *Maximizer CRM User's Guide* for more information on user-related preferences.

- 3** Set the user-related preferences on each of the tabs.







# CHAPTER 5 **Configuring an Address Book**

In this chapter...

- "Address Book Preferences" on page 72
- "System Fields" on page 74
- "Mandatory Fields" on page 75
- "Preventing Duplicate Address Book Entries" on page 76
- "Setting Up User-Defined Fields for an Address Book" on page 80
- "Creating Key Fields Lists" on page 89
- "Recording Holidays in the Holiday Editor" on page 93

## Address Book Preferences

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

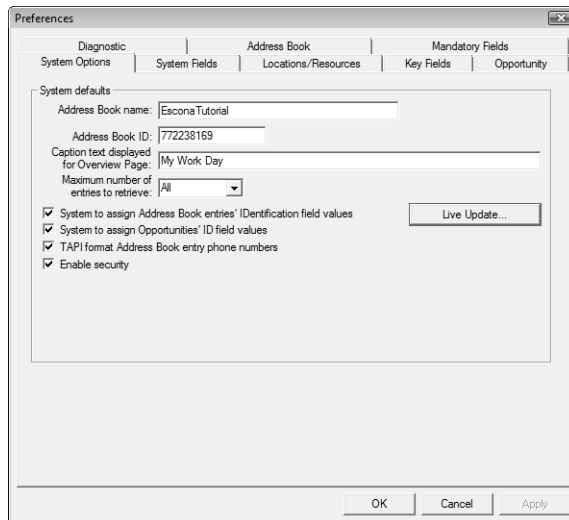
In this section,	You can set the following preferences:
Address Book	<ul style="list-style-type: none"> <li>Values available in the Category field for Address Book entries.</li> <li>Fields to check for duplication of Address Book entries (refer to "Preventing Duplicate Address Book Entries" on page 76 for more information).</li> </ul>
Diagnostic	<ul style="list-style-type: none"> <li>Log file settings for Maximizer modules. Note that users can also set Diagnostic preferences in Maximizer.</li> </ul>
Key Fields	<ul style="list-style-type: none"> <li>Key field lists available on the Basic Information tab of Address Book entries and opportunities (refer to "Creating Key Fields Lists" on page 89 for more information).</li> </ul>
Location/Resource	<ul style="list-style-type: none"> <li>Locations available for appointments.</li> <li>Resources available for appointments.</li> </ul>
Mandatory Fields	<ul style="list-style-type: none"> <li>Mandatory or optional data entry requirements for basic fields in Address Book entries and opportunities.</li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>Opportunity stages and probabilities of close.</li> <li>Opportunity confidence rating schemes.</li> <li>Opportunity completion reasons.</li> </ul>
System Fields	<ul style="list-style-type: none"> <li>Add, modify, and delete note and document categories.</li> <li>Add, modify, and delete values of the products/services and categories (in opportunities and appointments) fields.</li> </ul>



In this section,	You can set the following preferences:
System Options	<ul style="list-style-type: none"> <li>• Address Book name and ID.</li> <li>• System-assigned Address Book entry IDs, and opportunity IDs.</li> <li>• Overview page caption.</li> <li>• Default settings for Maximum entries field in Maximizer search dialog boxes.</li> <li>• TAPI phone number format.</li> <li>• Turn user security on, forcing users to log in whenever they turn on Maximizer.</li> <li>• Live Update options.</li> </ul>

➤ **To set Address Book preferences**

- 1** Select **File > Preferences**.
- 2** Set the Address Book preferences on each of the tabs.



## Using Passwords

If you apply a user password for an Address Book, all Address Books on the server hosting the Address Book will use the same password. It is not possible to have different passwords for different Address Books for the same user on the same computer.

## System Fields

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

- **System Fields** – The Category fields in notes and documents, and the Products/Services and Categories fields in opportunities and appointments.
- **Locations/Resources** – The Location and Resources fields in appointments.
- **Opportunity** – The Stage, Confidence Rating, and Completion Reason fields in opportunities.
- **Address Book** – The Category field in Address Book entries.

### Adding 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.

#### ► To add an item to a system field

**1** In Administrator, select **File > Preferences**.

**2** Select the tab that contains the system field.

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

**3** If you are working in the System Fields or Locations/Resources tabs, select the field in the list on the left.

The current list of values for the field are displayed on the right.

In the other tabs, the current list of values is displayed under the field name.

**4** To the right of the list, click **Add**.

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

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

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

# Mandatory Fields

You can set up lists of mandatory fields in Administrator. When users save entries, they are prompted to specify values for any mandatory fields that do not have values.

You can specify mandatory system fields in the Mandatory Fields preferences. You can also specify that user-defined fields must be mandatory when you create or modify the user-defined field.

You can set up different lists of mandatory fields for Companies, Individuals, Contacts, and opportunities.

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.

## ➤ To set a field as mandatory/optional

- 1** In Administrator, select **File > Preferences**.
- 2** Select the **Mandatory Fields** tab.
- 3** From the **Show mandatory entries for** drop-down list, select the type of entry that 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 **OK** to save the changes.

## Preventing Duplicate Address Book 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.

**i** For information about preventing duplicates when importing data, refer to the sections about importing in chapter 7 "Managing Address Book Data" on page 111.

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
<b>Duplicate Check List 1:</b>	1. Full Name/Company Name 2. All Phone Numbers 3. None
<b>Duplicate Check List 2:</b>	1. Full Name/Company Name 2. Zip/Postal 3. None
<b>Duplicate Check List 3:</b>	1. None 2. None 3. None

**i** 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:

**i** 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.

**i** If the Address Book has been upgraded from a previous version of Maximizer, and duplicate checking was enabled, partial matching is enabled after upgrading the Address Book to the new version.

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.

## Configuring Duplicate Address Book Entry Checking


### ➤ To configure duplicate Address Book entry checking

- 1** In Administrator, select **File > Preferences**.
- 2** Select the **Address Book** tab.
- 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.

## Setting Up User-Defined Fields for an Address Book

Although the information you can record in Maximizer covers the basics, you probably want to record additional information, such as budgets, income, interests, number of employees, or other data. You can record this information in Maximizer with user-defined fields, which are custom fields for storing information in any of the following categories:


 User-defined fields can be created and modified in both Administrator and Maximizer (if users have the necessary rights).

- **Address Book entries:** Available in the Address Book window
- **Opportunities:** Available in the Opportunities window.
- **User accounts:** Available in the user properties dialog box.

Once you have created a user-defined field, users can enter data in the field.

### Types of User-Defined Fields

There are different types of user-defined fields. Each type has different properties and uses.

 Encrypted user-defined fields cannot be searched, transferred, imported, or exported.

- **Alphanumeric user-defined fields** record any alphanumeric text (letters and numbers) up to a maximum number of characters that you specify. Alphanumeric fields can be encrypted for security protection. Note that you cannot disable or enable encryption once you have created the field.
- **Date user-defined fields** can store a specific date or an annually recurring date.
- **Numeric user-defined fields** record any numeric value you wish to keep for the Address Book entries. If you specify a number of decimal places for the user-defined field, you can use this field type for monetary amounts.
- **Table user-defined 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, no more than one value can be selected from the list, which is particularly useful for fields where it wouldn't make sense to select more than one value.
- **Yes/No user-defined fields** contain either a yes or no value. Since the field always contains a yes or no, the mandatory attribute is disabled.



## User Access Rights for User-Defined Fields

As the Address Book administrator, you are responsible for creating user-defined fields in Administrator for Maximizer users. However, you can give any user the ability to create, change, or delete user-defined fields in Maximizer by enabling the following access rights in Administrator (See “Modifying User Access Settings” on page 60):

- 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.

For information about assigning user access rights, refer to “User and Group Security” on page 56.

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 screenshot shows the 'Add User-Defined Field' dialog box. It contains the following fields and options:

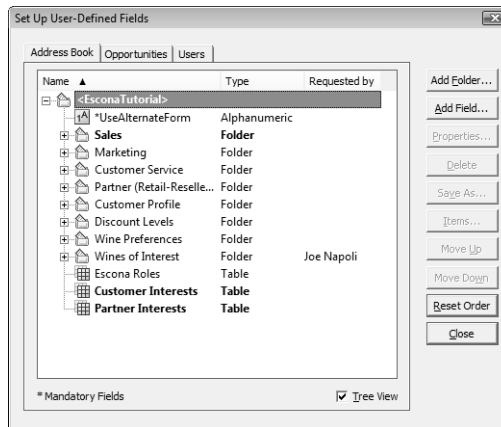
- Folder Name:** <Esconca Tutorial>
- Field Name:** (empty text box)
- Type:** Table (dropdown menu)
- Field may be added to:**
  - ☒ Companies
  - ☒ Individuals
  - ☒ Contacts
- Attributes:**
  - ☐ Single value only
  - ☐ Include in Hotlist
  - ☐ Encrypted
  - ☐ Set to hidden
  - ☐ Annually recurring event
  - ☐ Retain year
  - ☐ Mandatory
- Maximum field length:** 29 (spinner)
- Number of decimals:** 0 (spinner)
- Full access:** Public (dropdown menu)
- Read access:** Public (dropdown menu)
- Creation Details:**
  - Creator:** Lou Jones
  - Requested by:** Lou Jones
  - Description:** (text area)
- Buttons:** Spelling, OK, Cancel

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 Administrator, select File > Set Up User-Defined Fields. In Maximizer, from the Setup tab, select User-Defined Fields. 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.

## Mandatory User-Defined Fields and System Fields

Some user-defined fields are displayed in bold or with an asterisk:

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

## Sort order

You can change the order of fields and folders:

- **Drag and drop** – You can use the mouse to drag and drop fields or folders to a different position in the list. Dragging it onto a field places it immediately below that field. Dragging onto a folder places it at the top of the list inside that folder. Holding the mouse on a folder for about a second expands the folder, and then you can continue dragging the item to a specific position in that folder.
- **Move Up and Move Down buttons** – Click the Move Up and Move Down buttons to move a field or folder up or down in the list. These buttons only move items within their current folder level. You cannot use them to move items in or out of folders.
- **Reset Order** – Use the Reset Order button to sort items in alphabetical order. All user-defined fields and folders in the selected folder are resorted.

## Creating a New Folder for User-Defined Fields

You can group similar user-defined fields into folders and sub-folders to a maximum folder depth of 3 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're looking for.

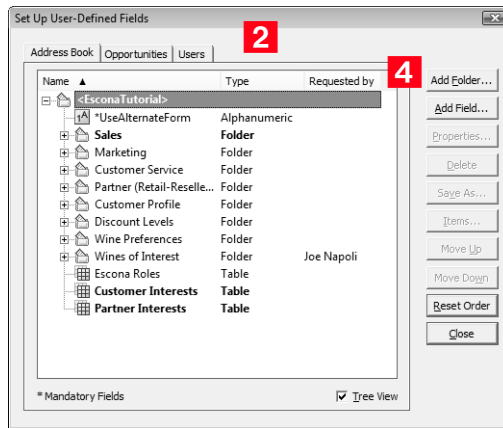
### ➤ To create a new folder

- 1** Select **File > Set Up User-Defined Fields**.
- 2** Select the tab for the category of user-defined field to create.
- 3** To create a top-level folder, select the Address Book name at the top of the list.

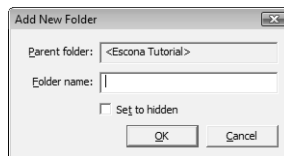
– or –

To create a folder within an existing folder, select the existing folder.

**4** Click **Add Folder**.



**5** Enter a name for the new folder, and click **OK**.



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

The new folder now appears in the Set Up User-Defined Fields dialog box.

**6** If necessary, move the new folder to a different position in the list.

## Creating a New User-Defined Field

Create user-defined fields for Address Book entries, opportunities,, and user accounts.

➤ **To create a new user-defined field**

**1** Select **File > Set Up User-Defined Fields**.

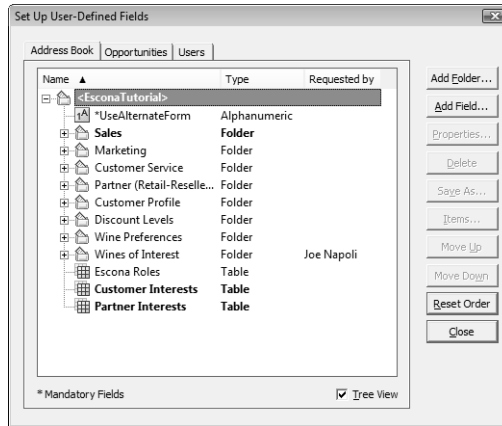
**2** Select the tab for the category of user-defined field to create.

**3** Select an existing folder, inside which to create a new field.

– or –

Select a user-defined field. The new field will be created at the same level as the selected user-defined field.

**4** Click **Add Field**.



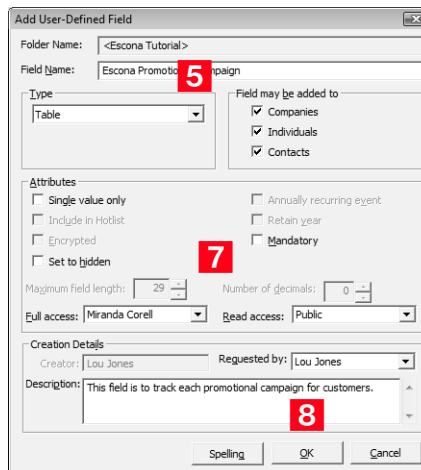
**i** User-defined field and folder names cannot contain forward slash or backward slash characters (/ \).

**5** In the **Field Name** field, type a name for the user-defined field.

**6** From the **Type** drop-down list, select the type of user-defined field you want to add.

**7** Specify the properties of the user-defined field.

**8** Click **OK**.



## Adding 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 table user-defined field, you should add the items to the field as well. However, while using the user-defined field in Maximizer, users may find a need to add an item to the list. A user can add items to a table user-defined field on-the-fly if the user account has sufficient privileges.

### ► To add items to a table user-defined field

**1** Select **File > Set Up User-Defined Fields**, and select the tab for the category of user-defined field.

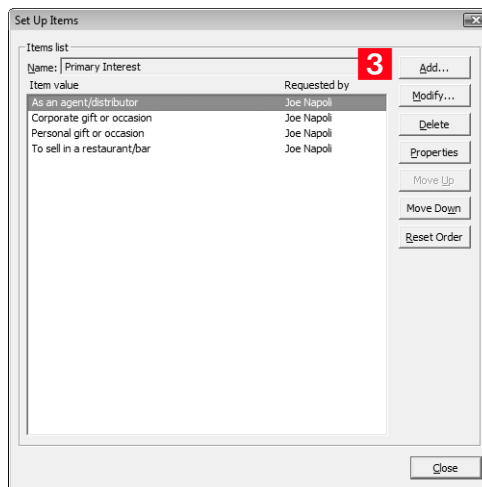
**2** Select the table user-defined field, and click **Items**.

– or –

Double-click the table user-defined field.

The list of existing items for the table user-defined field is displayed.

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



**4** Enter the name of the item.

**i** If you set the item to hidden, the user can hide it from the Available values list by deselecting the Show hidden items option. The user must also ensure that the item is not selected in the list. If it is, the item will still be displayed.

- 5** In the **Requested by** field, select the name of the user who requested the item creation.
- 6** Click **OK**.

- 7** Repeat these steps to add any additional items to the table user-defined field.

## Transferring User-Defined Fields between Address Books

### ➤ To transfer user-defined fields between Address Books

**i** Encrypted user-defined fields cannot be transferred between Address Books.

- 1** In Maximizer, select the **Maximizer** button and select **Import/Export/Transfer > User-Defined Fields**.
- 2** In the Transfer User-Defined Fields dialog box, select the user-defined fields to transfer.
- 3** Click the **Transfer** button.

- 4** To copy the data into a target Address Book that is accessible from the computer, select the **Direct Address Book access**

transfer method. Accessible Address Books are listed in **Available target Address Books**.

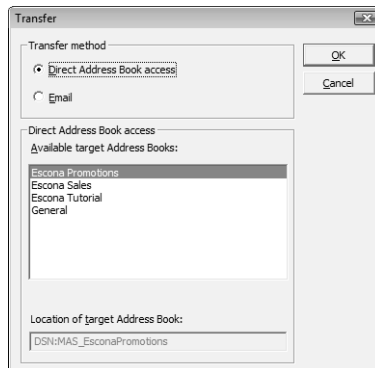
– or –

If the target Address Book is not listed, select the **Email** transfer method. The data is compressed into a .MET file and attached to an email message.

- 5** If you selected **Direct Address Book access**, select the target Address Book, click **OK**, and log on to the Address Book. Maximizer transfers the user-defined fields and notifies you when the transfer is complete.

– or –

If you selected **Email**, click **OK**. Maximizer creates an email message with the user-defined fields attached in a .MET file. Type an email address in the **To** field, and click **Send**.





## Creating Key Fields Lists

Key Fields are important user-defined fields and system fields that are highlighted on the Basic Information tab in Address Book entries and opportunities, 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 a specific user or group, or for all users.

The following sections contain information on creating lists of Key Fields:

- “Specifying Key Fields by Entry Type” on page 89
- “Restricting Key Fields to Specific Users” on page 90
- “Creating a Key Fields List” on page 91

### Specifying Key Fields by Entry Type

You can create an unlimited number of Key Fields lists. Key Fields are available for the entry types described in this section.

The fields available for each entry type correspond to the related type of field and the related Maximizer entries. For example, within a Key Fields list, the Opportunity Key Fields entry type may contain only opportunity detail fields and user-defined fields, and these Key Fields will be available only in the Opportunity dialog box in Maximizer.

There are different list of Address Book entry Key Fields for Companies, Individuals, and Contacts. Only fields for the type of Address Book entry (Company, Individual, or Contact) are available for each Key Fields entry type. For example, only fields that are available for Contact Address Book entries will be available for Contact Key Fields entry types.

<b>Key Fields Entry Type</b>	<b>Type of User-Defined Field</b>	<b>Visible in Maximizer Entry Type</b>
Company	Address Book entry fields for Companies	Companies
Individual	Address Book entry fields for Individuals	Individuals

Key Fields Entry Type	Type of User-Defined Field	Visible in Maximizer Entry Type
Contact	Address Book entry fields for Contacts	Contacts
Opportunity	Opportunity user-defined fields	Opportunities

## Restricting Key Fields to Specific Users

The Key Fields in the Basic Information tab of Address Book entries are visible only to the user or group specified as the owner of the Key Fields list. 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.

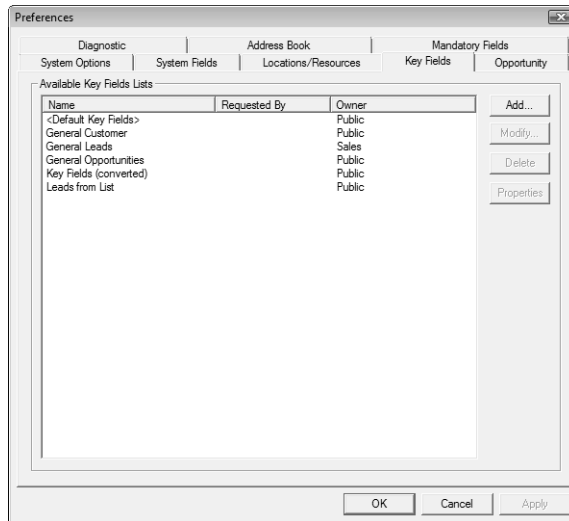
## Creating a Key Fields List

Create Key Fields lists, as described in the following procedure.

### ➤ To create a Key Fields List

**i** The Default Key List is created by default for all Address Books. Fields can be added to this list, but the list cannot be deleted.

- 1** In Administrator, select **File > Preferences**.
- 2** Select the **Key Fields** tab.
- 3** Click **Add**.

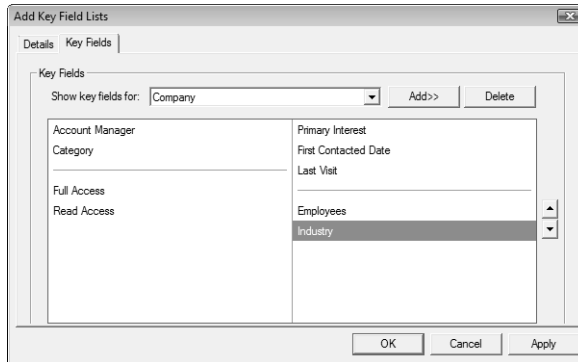


- 4** In the **List name** field, enter a name for the Key Fields list.
- 5** From the **Owner** drop-down list, select the user or security group with access to the Key Field list, or leave it as Public and if necessary, specify who the Key Fields list was requested by.
- 6** Select the **Key Fields** tab and from the **Show key fields for** drop-down list, select the type of Maximizer entry to assign Key Fields to.
- 7** Add any number of user-defined fields and system fields to the Key Fields list.
  - Click **Add** select **Key Field**, select a system or user-defined field, and click **Insert**.
  - To insert a separator, click **Add**, and select **Separator**.  
Separators are used to group the Key Fields into visible groups. If you add a separator at the top or bottom of the

**i** The Owner field determines which users will see these fields in their Key Fields list in Maximizer.

list, or if you add two separators in a row, the separators will be suppressed when the entry is viewed in Maximizer.

- Use the Move buttons to reposition the selected field or separator in the list.



**8** 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 entry.

**9** Click **OK** to save the Key Fields list.

## Recording Holidays in the Holiday Editor

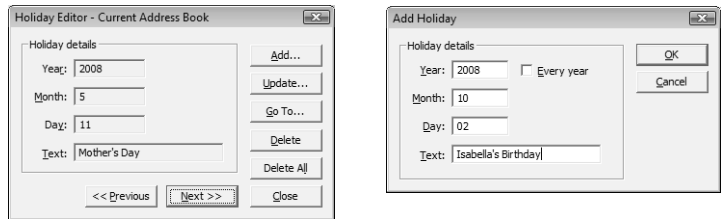
The Holiday Editor is a utility you can use to add or edit holidays in the Maximizer calendar. By default, the Holiday Editor contains many North American holidays. The holidays listed in the Holiday Editor also appear in the Calendar window in Maximizer. You can use Administrator to modify or delete existing holidays, or add new holidays.

If you wish to add personal holidays or events to your calendar, such as “Alice’s birthday”, you must create a yearly recurring appointment using the Calendar window in Maximizer.

The Holiday Editor’s data file—Mxzhol.nam—is inserted in the Maximizer program folder when you install Maximizer. In this location, you use Administrator’s Holiday Editor to manage one set of holidays for your installation of Maximizer.

### ➤ To add a holiday to your calendar

- 1 In Administrator, select **Utilities > Holiday Editor**.
- 2 Click **Add**.
- 3 Enter the details of the new holiday.
- 4 Click **OK** to close the Add Holiday dialog box.

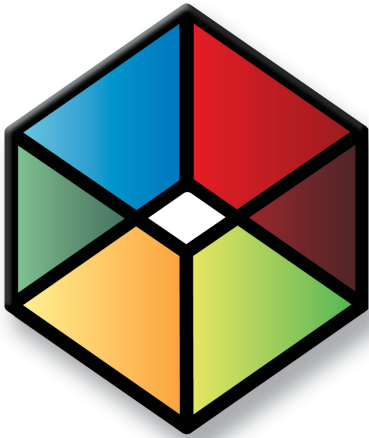


### ➤ To share your holidays with another Maximizer workstation

- Copy the **Mxzhol.nam** file from your Maximizer program folder to the program folder on the other computer.

Note that this replaces any existing holidays on the destination computer with your own.





# CHAPTER 6 **Configuring Email, Phone, and Synchronization**

In this chapter...

"Configuring Microsoft Outlook Synchronization" on page 96

"Configuring MaxMobile Wireless Server" on page 101

"Enabling TAPI" on page 103

"Phone Masks" on page 108

"Using Fax Software with Maximizer" on page 109


## Configuring Microsoft Outlook Synchronization

 Outlook Synchronization works with Microsoft Outlook only.

Outlook Synchronization mirrors select appointments, tasks, and Address Book entries between Maximizer and Microsoft Outlook to ensure the entries exist in both programs and that they both contain the same information.

Outlook Synchronization settings are configured on a per-user basis, and each Maximizer user has one set of configuration settings. Typically, users configure their own Outlook Synchronization settings in Maximizer by going to the Setup tab and selecting Preferences. However, you can also configure their settings through Administrator's user preferences.

Outlook Synchronization preferences enable you to select which entries will be synchronized:

 For information on how Maximizer and Outlook fields are mapped to each other in Outlook Synchronization, refer to "Field Mapping" on page 134.

- For appointments and tasks, only entries scheduled within the specified date ranges will synchronize, with the exception of recurring appointments and tasks, as described in the following section. These settings apply to appointments and tasks in both Maximizer and Outlook.
- For Maximizer Address Book entries, only the entries belonging to the selected Favorite List will synchronize with Outlook. Those entries will be assigned to the specified Outlook category.
- For Outlook contacts, only the contacts assigned to the specified category will synchronize with Maximizer. Those entries will be assigned to the selected Favorite List in Maximizer.
- Products/Services and Categories are synchronized to Outlook if you are using Microsoft Outlook Synchronization. Attendees, resources, and any notes you add to an appointment are also synchronized. These items appear as part of the appointment dialog box in Outlook.

Outlook Synchronization preferences also enable you to specify how often to synchronize and how to handle conflicts when the same entry has been modified in both Outlook and Maximizer.

Maximizer can synchronize only with Outlook profiles on the same machine. When configuring a user's Outlook Synchronization settings through Administrator, you must manually enter the Outlook profile name, but it cannot be verified until the Outlook Synchronization process runs on the user's machine. If you don't know the Outlook profile name, leave the field blank and the user can select it through Maximizer's user preferences. When Outlook Synchronization runs, it checks that the configuration has a valid Outlook profile name. If not, Outlook Synchronization logs the error.



## Appointment and Task Synchronization

When Outlook Synchronization is configured, it can synchronize select appointments and tasks between the Maximizer Address Book and Microsoft Outlook. Only those appointments and tasks scheduled within the specified date ranges will synchronize, with the following exceptions:

- if an instance of a recurring appointment occurs within the specified date range, all instances of the recurring appointment will be synchronized
- if a task is scheduled prior to the specified date range, but the "Carry forward unfinished tasks" option is selected, the task will be synchronized

You can also specify whether to synchronize private appointments and/or tasks.

### Recurring Appointments

Recurring appointments in Microsoft Outlook synchronize to Maximizer as recurring appointments unless they have no end date. If the recurring appointment has no end date, only the first occurrence synchronizes with Maximizer, not the recurrences. To synchronize recurring appointments with Maximizer, always provide an end date.

Note that while it is possible to modify the Private property of a single instance of a private appointment in Maximizer, this property can be changed only for the entire series of recurring appointments in Outlook. Therefore, if you change the Private property of a single instance of a recurring appointment in Maximizer, this change will not be synchronized to Outlook.

### Recurring Tasks

If you synchronize a recurring task from Outlook, and then mark the task as complete in Maximizer, Maximizer cannot create the next instance of the recurring task. You should mark the task as complete in Outlook, which will create the next instance of the task, and then re-synchronize with Maximizer.

If you synchronize a recurring task from Outlook, and then delete the task in Maximizer, all instances of the recurring tasks are deleted. If you want to delete a single instance of a recurring task, you should delete the task in Outlook and then re-synchronize with Maximizer.

## Group Appointments

When using Outlook Synchronization, group appointments in Maximizer synchronize to Outlook for the current user only. However, the synchronized appointment in Outlook includes all the locations, resources, and attendees information in the appointment notes.

## Synchronization from Outlook to Your PDA

In addition to synchronizing Maximizer data with Outlook, you can synchronize information from Outlook to your PDA. There are several selections of available software to perform this synchronization. Please consult with your PDA manufacturer or supplier for more information.

## Configuring Outlook Synchronization

### ➤ To configure Outlook Synchronization

- 1** In Administrator, select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Preferences**.
- 3** Select the **Outlook Synchronization** tab.

The screenshot shows the 'Preferences - Billie Holly' dialog box with the 'Outlook Synchronization' tab selected. The dialog has several sections:

- Logging**: Labels, Reports, Fax, Outlook Synchronization, Overview Page.
- Synchronization frequency**:
  - ☒ Synchronization every: 1 Hour(s)
  - ☐ Synchronization daily at: 12:33:45 PM
  - ☐ Never (manual synchronization)
- Conflict resolution**:
  - ☒ Maximizer CRM overrides
  - ☐ Outlook overrides
- Options**:
  - Outlook profile: [Empty]
  - ☒ Synchronize appointments from: 5 Day(s) before today to 2 Week(s) after today.
    - ☐ Include private appointments
  - ☒ Synchronize tasks from: 5 Day(s) before today to 2 Week(s) after today.
    - ☐ Include private tasks
    - ☐ Carry forward unfinished tasks
  - ☒ Synchronize Address Book entries. Phone Mapping...
    - Synchronize Address Book entries from Favorite List: All Entries in Escena
    - Synchronize Contacts from Outlook Category: Maximizer

Buttons at the bottom: OK, Cancel, Apply.

- 4** In the **Synchronization frequency** group box, specify how often Maximizer should synchronize with Outlook.

If you select **Never (manual synchronization)**, the user must synchronize manually by selecting the **Tools** tab and clicking **Synchronize with Outlook** in the **Office** group.

- 5** In the **Conflict resolution** group box, select the desired method of handling entries that have been changed in both Maximizer and Outlook since the last synchronization.

- 6** In the **Outlook profile** field, enter the name of the user's Outlook profile. This information must be obtained from the user's computer.

To ignore the computer name when synchronizing, select the **Ignore computer name** checkbox.

**i** Do not select Ignore computer name if the user uses multiple computers and synchronizes to a different Outlook profile on each computer.

- 7** To synchronize appointments, select the **Synchronize appointments** checkbox and specify the date range of appointments to synchronize.

Private appointments will not be synchronized unless the **Include private appointments** checkbox is also selected.

- 8** To synchronize tasks, select the **Synchronize tasks** checkbox and specify the date range of tasks to synchronize.

Private tasks will not be synchronized unless the **Include private tasks** checkbox is also selected.

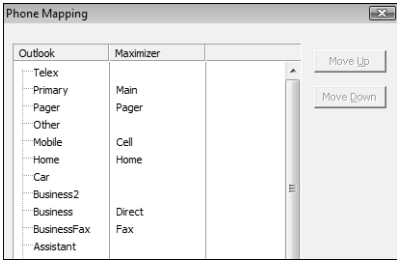
To also synchronize incomplete tasks that are scheduled prior to the specified date range, select the **Carry forward unfinished tasks** checkbox.

- 9** To synchronize Maximizer Address Book entries and Outlook contacts, select the **Synchronize Address Book entries** checkbox. Note that this option is used to synchronize a personal Contacts Address Book list. For information on selecting the Outlook address list for integration with Maximizer, see the *Maximizer CRM User's Guide*.

**i** The Synchronize Address Book entries checkbox is disabled if the user does not have the "Allow sync contacts with external clients" access right.

- 10** To specify the mapping between Outlook phone number fields and Maximizer phone number fields, click the **Phone Mapping**

button, select the Maximizer phone number field to map to each Outlook phone number field, and click **OK**.



Do not map all Outlook phone number fields. Maximizer supports only four phone numbers for each Address Book entry. If an Outlook contact has more than four phone numbers, and more than four types are mapped between Outlook and Maximizer, not all the Outlook phone numbers can be synchronized with Maximizer.

- 1

1

In the **Synchronize Address Book entries from Favorite List** drop-down list, select the Maximizer Favorite List to synchronize.
- 1

2

In the **Synchronize Contacts from Outlook Category** drop-down list, select the Outlook category to synchronize.
- 1

3

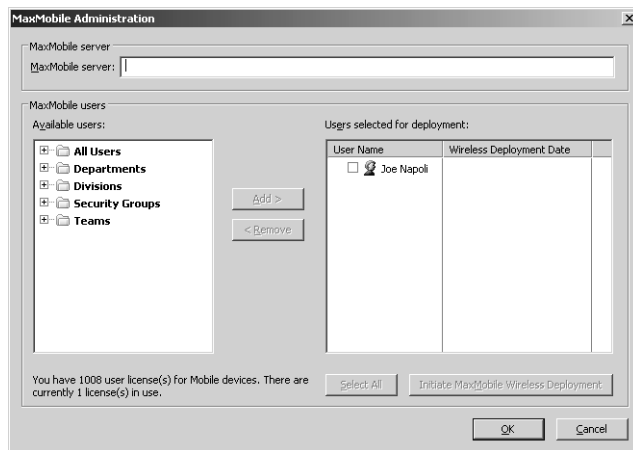
Click **OK**.

# Configuring MaxMobile Wireless Server

Before users can use MaxMobile, the administrator must configure the wireless server in Administrator. The number of users allowed to use MaxMobile is controlled through your product license number.

## ➤ To configure MaxMobile Wireless Server

- 1 In Administrator, open the Address Book to use with MaxMobile.
- 2 Select **File > MaxMobile Administration**.



- 3 Enter the URL of the MaxMobile Wireless Server. The URL should be in the following format:

**http://[server\_name]:port/MaxMobileService**

**https://[server\_name]:port/MaxMobileService**

- 4 For each **user, department, division, and security group** using MaxMobile, select the name from the **MaxMobile users** list and click **Add** to move the item to the **Users selected for deployment** list.

This enables MaxMobile for these users as shown below in the Module Login section of a user's properties. Use the Remove button to remove an item from this list.

Note that you can also enable MaxMobile for users in the General tab of the Properties dialog box for a user.

For more information about deploying MaxMobile, see the *MaxMobile Wireless Server Getting Started Guide*.

Properties for Joe Napoli

General

User-Defined Fields

Access Rights

Groups / Teams

Windows Authentication

Name and position

User ID: jnapoliMr. JoeNapoliFirst name: JoeInitial: Last name: NapoliSalutation: Dear < >:Display name: Joe NapoliPosition: PresidentReports to:

Company and main address

Company: Escona Estate WinesDept.: ExecutiveDivision: CAN - EastAddress 1: 1344 Eastside RoadAddress 2: City/Town: PetalumaSt/Co/Prov: CAZip/Postcode: 94954Country: USA

Phone numbers and phone extensions

1: (555) 775-09822: (555) 775-0900 fax3: 4:

Security

☒ Public☐ Private

Module Login

Windows Access

Enabled

Web Access

Disabled

Mobile

Enabled

Internet information

Email: jnapoli@maximizer.comWebsite: http://www.escona.com

OK

Cancel

Apply

## Enabling TAPI

Maximizer can use TAPI (Telephony Application Programming Interface) to detect incoming phone numbers (using caller ID) and log the phone conversation for the matching Address Book entry.

The following requirements must be met to use TAPI with Maximizer:

- Your telephone system must be TAPI-enabled.
- Your phone system's TAPI driver must be installed.
- Your computer's modem must be compatible with TAPI.

You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.

- Maximizer must be configured for TAPI.

## Requirements for Caller ID

Specific requirements are essential to implement caller ID detection:

- Caller ID service from the local telephone company.
- TAPI-compliant hardware that is Caller-ID capable.
- A TSPI component (such as an .INF file driver) for your Caller-ID enabled TAPI hardware (e.g., UniModemV)
- Microsoft TAPI software components.

Even if you meet these requirements, caller ID may not operate properly, especially if your local telephone company uses a different standard for caller ID than your TAPI driver. Call your local phone company to obtain more information regarding your caller ID standard and compare it to the standard used by the TAPI driver.

## Reasons Why Caller ID May Not Work

If you use a TAPI-enabled modem (as opposed to a PBX, H.323, or other TAPI hardware), and your telephone company provide MESH-format caller ID information (rather than SDM, another common format), caller ID call detection is unlikely to work. Microsoft's UniModemV TAPI driver and MODEM.INF file, provided with most TAPI modems, do not support MESH caller ID format, which means your modem (and Maximizer) may never receive caller ID information from TAPI. If your modem manufacturer provides its own TAPI modem or PBX driver and the appropriate INF file, or you are able to obtain SDM-format caller ID, you might have more success.

## Phone Number Matching with TAPI

When Maximizer uses TAPI to detect an incoming phone call, it matches the phone call to a Maximizer Address Book entry and logs the call as a note for the entry. Depending on your TAPI configuration in Maximizer, it uses either the “Smart Phone Number Matching” or “Exact Phone Number Matching” algorithm to determine which Address Book entry matches the incoming phone number.

### Smart Phone Number Matching

By default, Maximizer uses the Smart Phone Number Matching algorithm to determine which Address Book entry matches the incoming call.

When a call comes in, Smart Phone Number Matching looks for all Address Book entries with phone numbers ending with the incoming phone number string and displays those Address Book entries in a list so you can select the correct entry.

For example, if the incoming phone number string is four digits, Maximizer displays a list of all Address Book entries ending in those four digits.

Smart Phone Number Matching matches the digits from right to left. The number of matched digits required for matching is equal to the shorter length of the two phone numbers.

The following table illustrates Smart Phone Number Matching for four-digit and seven-digit incoming phone numbers.

Address Book entry phone number	Does the incoming four-digit phone number (2314) match?	Does the incoming seven-digit phone number (732-2314) match?
9-604-732-2314	Yes	Yes
1-604-732-2314	Yes	Yes
403-732-2314	Yes	Yes
732-2314	Yes	Yes
497-2314	Yes	No
2314	Yes	Yes
3514	No	No
14	Yes	Yes



## Exact Phone Number Matching

If you select the “Enable exact number matching” checkbox in the TAPI preferences in Maximizer, it uses the Exact Phone Number Matching algorithm instead of Smart Phone Number Matching. Exact Phone Number Matching considers an Address Book entry to match the incoming call only if both numbers contain exactly the same phone number with the specified number of digits.

By default, Exact Number Matching requires both phone numbers to be seven digits, but you can change the required number of digits.

The advantage of Exact Phone Number Matching is that when Maximizer finds an Address Book entry that matches exactly, you do not need to select it from a list of possible matches, as you do with Smart Phone Number Matching.

The following table illustrates Exact Phone Number Matching for four-digit and seven-digit incoming phone numbers.

<b>Address Book entry phone number</b>	<b>Does the incoming four-digit phone number (2314) match?</b>	<b>Does the incoming seven-digit phone number (732-2314) match?</b>
9-604-732-2314	No	No
1-604-732-2314	No	No
403-732-2314	No	No
732-2314	No	Yes
497-2314	No	No
2314	Yes	No
3514	No	No
14	No	No

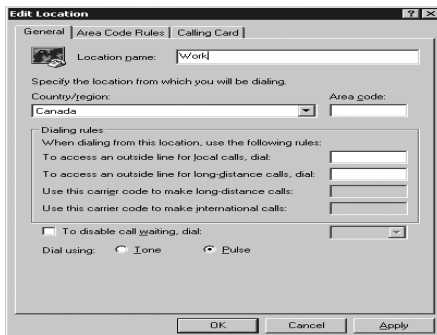
## Configuring Maximizer to Use TAPI

Before you can configure Maximizer to use TAPI, you must have a TAPI-enabled telephone system, and your computer’s modem must be configured to use TAPI. You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.

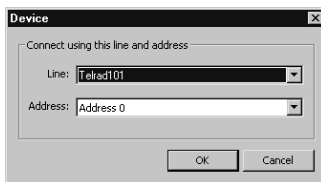
### ➤ To configure Maximizer to use TAPI

- 1** Select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Preferences**.

- 3 Select the **Dialing** tab.
- 4 Under **Method**, select **TAPI**.
- 5 Under **TAPI**, click **Properties**.
- 6 Fill in your location information, and click **OK** to return to the Dialing Preferences.

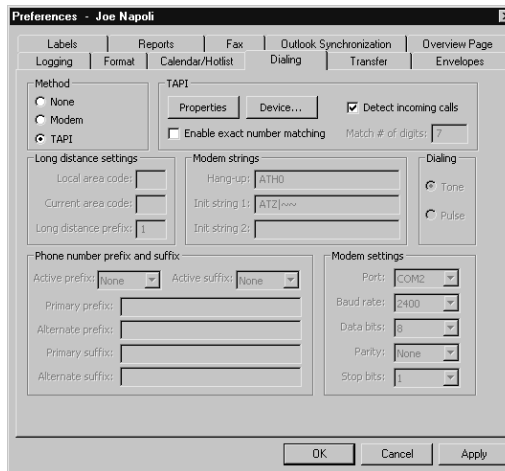


- 7 Click **Device**.



- 8 From the **Line** drop-down list, select the TAPI device name, and click **OK**.
- 9 Select the **Detect incoming calls** option.

- 10** If desired, select the **Enable exact number matching** option, and specify the number of phone number digits to match.



- 11** Click **OK** to close the Preferences dialog box.

# Phone Masks

 Exercise caution when working in the Windows Registry.

The registry entry (HKEY\_CURRENT\_USER\Software\Maximizer Software\Maximizer\Modules\AMGR\INTL\Phone Mask) overrides the default format of a phone number with the phone mask provided as a value. The mask uses # to indicate digits and can include any other characters (e.g., + - ,). If the Phone Mask registry key does not exist, you must create it as a String value.


The mask formats from right to left. For example, if the phone mask value is ###-####, but a user enters a 10-digit phone number (e.g., 1234567890), the result would be formatted as 123456-7890. If the value has fewer digits than the mask allows, the extra (left-most) placeholders are not used.

The following table shows how some examples of how phone numbers are displayed using phone masks:

Phone Mask	Digits	Value Typed In	Value Displayed
Not specified	7	1234567	123-4567
"	10	1234567890	123456-7890
###-####	7	1234567	123-4567
"	10	1234567890	123456-7890
(###) ###-####	7	1234567	123-4567
"	10	1234567890	(123) 456-7890
+1 (###) ###-####	7	1234567	123-4567
"	10	1234567890	+1 (123) 456-7890
### ## #####-#####	15	123456789012345	123 45 6789-012345

The Phone Mask value affects the display of phone numbers in Maximizer program dialog boxes and window lists. The Phone Mask value is read during program startup.

## Using Fax Software with Maximizer

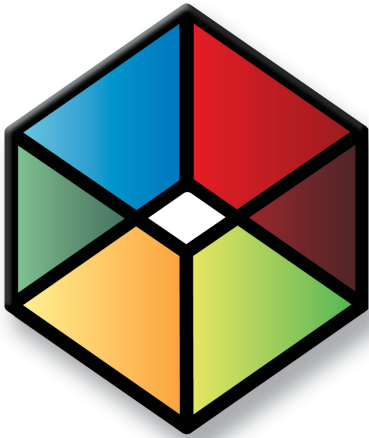
 Visit the Maximizer website at [www.maximizer.com](http://www.maximizer.com) to obtain an updated list of supported fax applications.

You can set up Maximizer for faxing anytime after you have installed the fax modem and fax application.

To fax any document with Microsoft Fax, simply select the fax driver in place of a printer when you print the document. The Maximizer Word Processor also supports merging directly to faxing software, which enables you to perform broadcast faxing.

For information about setting up Microsoft Fax, refer to your Windows operating system documentation.





# CHAPTER 7 **Managing Address Book Data**

## In this chapter...

- "Backing Up and Restoring Address Book Data" on page 112
- "Converting Embedded Documents to Linked Documents" on page 118
- "Verifying and Recovering Address Book Data" on page 120
- "Exporting Data from Maximizer" on page 123
- "Importing Address Book Data from MXI or XML Files" on page 129
- "Importing Data from Other File Formats" on page 132
- "Transferring Entries between Address Books" on page 151
- "Purging Outdated Notes and Documents" on page 155
- "Using Log Files for Diagnosis" on page 157
- "System Reports" on page 159

## Backing Up and Restoring Address Book Data

This section explains how to back up and restore Maximizer Address Book database files, which contain the majority of your Maximizer data, including Address Book entries, opportunities, etc. However, if your Address Book uses a custom dictionary or holidays, you must back up those files separately.

The following sections contain information on backing up Address Book data in Maximizer:

- "Backing Up an Address Book" on page 112
- "Restoring an Address Book from a Backup" on page 115
- "Moving an Address Book to a Different Server" on page 117
- "Backing Up the Dictionary and Holiday Files" on page 117

### Backing Up an Address Book

There are two types of backup procedures available:

- **Regular Backup.** This backup procedure requires the Address Book to be closed. Regular backup can be performed only in Maximizer.
- **Quick Backup.** This backup procedure is performed on an open Address Book. You can perform a Quick Backup from either or Maximizer. If security is enabled, you will need access to the MASTER user password.

### Regular Backup

 The extension of the backup file is .BAK.

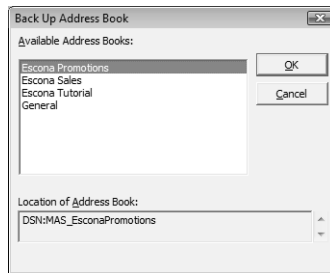
A regular backup is saved by default to the folder containing the SQL database files for the Address Book. If you don't want to save the backup to this location, you can browse to another one.

#### ➤ To perform a regular backup

- 1** To verify currently logged in users, open the Address Book in Administrator and select Reports > Current Users. Ensure that no users are logged into the Address Book you want to back up.
- 2** In Administrator, close the Address Book and select **Utilities > Back Up Address Book.**



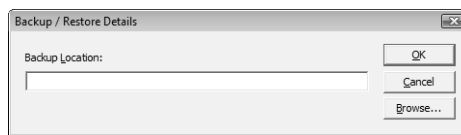
- 3** Select the Address Book to back up, and click **OK**.



- 4** Enter the MASTER user password, and click **OK**.



The Backup / Restore Details dialog box opens.

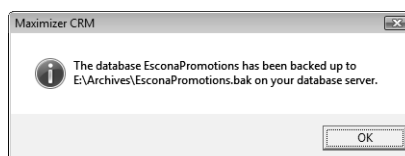


- 5** Select the backup folder:

- If you want to save the backup to the default location, leave the Backup Location field blank.
- If you want to save the backup file to a different folder, click **Browse**. Select a folder for the backup file and click **OK**.

**i** The default location is where the SQL database files for the Address Book are stored.

Maximizer starts backing up the files. Depending on the size of the Address Book, the backup could take several minutes or several hours. A message box confirms that the backup is complete. The backup file name is displayed.



- 6** Click **OK**.

## Quick Backup

The advantage of using Quick Backup is that you can perform frequent backups of any open Address Book.

If you choose to save the backup to the default location, Quick Backup creates a subfolder named Backup in the same folder as the Address Book files.

The backup file name includes the current date as an identifier. For example, the following backup file was created from a Quick Backup performed on March 23, 2007. (The backup was saved to the following default location).

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial\_20070323\_01.BAK

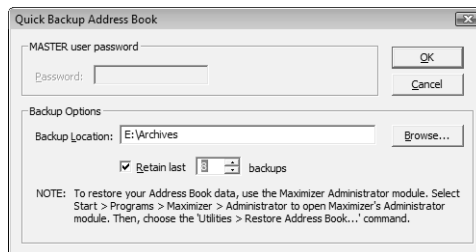
The “\_01” is added to the file name to differentiate between backups from the same day, so a second backup on the same day would be saved as follows:

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial\_20070323\_02.BAK

Quick Backup also lets you determine how many backups are kept. If you were to set Quick Backup to retain only five backups, then when you create the sixth backup, Quick Backup deletes the oldest backup.

### ► To perform a Quick Backup

- 1 Open the Address Book to back up.
- 2 Select **File > Quick Backup**.



- 3 Enter the MASTER user password.

If this box is disabled, continue to the next step.

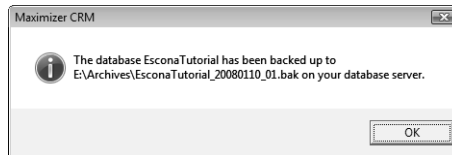
**4** Select the backup folder:

If you want to save the backup file to the default location (Address Book folder), leave the Backup Location field blank.

If you want to save the backup file to a different location, click Browse. Select a folder in the Browse for Folder dialog box and click OK. The location is displayed in the Backup Location field.

**5** Specify the number of previous backups to retain.**6** Click **OK** to begin backing up.

When the Quick Backup is complete, a message box confirms that the backup was successful. The backup file name and location are displayed.

**7** Click **OK**.

## Restoring an Address Book from a Backup

If you lose or damage your Address Book, you can restore it to a previously backed up version. When you perform a restore, existing Address Book data is replaced with backup Address Book data.

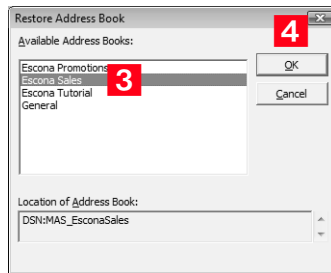
➤ **To restore an Address Book**

**1** To determine if users are logged in, open the Address Book in Administrator and select Reports > Current Users. Ensure that the Address Book you want to restore is not currently open by a user.

**2** In Administrator, close the Address Book and select **Utilities > Restore Address Book**.

**3** Select the Address Book to restore.

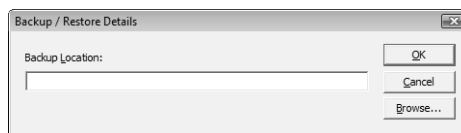
**4** Click **OK**.



**5** Enter the MASTER user password, and click **OK**.

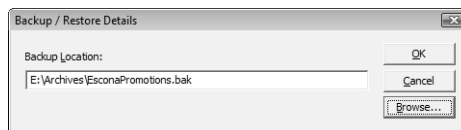


The Backup / Restore Details dialog box opens.



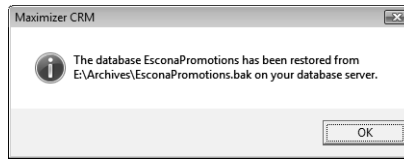
**6** Click **Browse**, select the backup file you want to restore, and click **Open**.

The full path of the backup file is displayed in the Backup Location field.



**7** Click **OK**.

Maximizer restores the Address Book from the selected backup file. A message box confirms that the restore is successful.



## Moving an Address Book to a Different Server

You can use the backup and restore functionality to move an Address Book to a different computer.

### ► To move an Address Book

- 1** Backup up the Address Book. For more information, see “Backing Up an Address Book” on page 112.
- 2** Move the backup Address Book (.BAK) file to the new computer.
- 3** Restore the Address Book on the new computer. For more information, see “Restoring an Address Book from a Backup” on page 115.

## Backing Up the Dictionary and Holiday Files

The Maximizer dictionary and holiday files are not backed up as part of the Address Book backup procedure(s) described previously. Therefore, if you have customized the dictionary or holidays, you need to back up those files separately, especially before upgrading or re-installing Maximizer.

To back up the dictionary and holiday files, copy them from the following location and paste them to another location, preferably the same location where your Address Book is backed up.

The user dictionary file is unique to each Maximizer workstation, so you will need to back up this file for each workstation.

User Dictionary File Location:

...\Program Files\Maximizer\MaData6\Userdict.lex

Holiday File Location:

...\Program Files\Maximizer\MaData6\Mxzhhol.nam

**i** By default, the Maximizer program folder is C:\Program Files\Maximizer. If Maximizer was installed in a different folder, then change the path accordingly.

## Converting Embedded Documents to Linked Documents

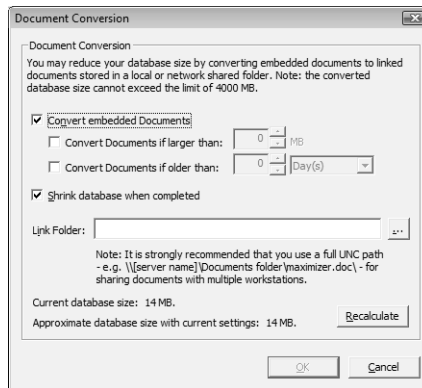
Maximizer has a built-in utility in Administrator for converting embedded documents to linked documents. This allows you to manage the size of your Address Book.

If necessary, you can move your linked documents from one location to another.

**Note** that a converted Address Book size cannot exceed 4 GB (4000 MB). If you are upgrading a Pervasive.SQL database to SQL Express, and the Address Book size exceeds 4 GB, the upgrade process is stopped and the initial state of the Pervasive.SQL is retained.

### ➤ To convert embedded documents to linked documents

- 1 In Administrator, select **File > Document Administration > Convert Embedded Documents**.



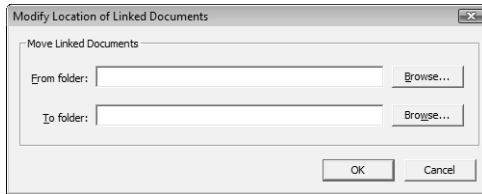
- 2 Select the **Convert embedded documents** checkbox.
- 3 Specify the document size and age limits. If these values are left as zeros, all embedded documents regardless of size/age are converted to linked documents.
- 4 Optionally, select the **Shrink database when completed** checkbox. This reduces the size of the Address Book once the conversion is complete. If you haven't chosen to convert your embedded documents, this reduces the size of the Address Book by removing any unused space.
- 5 Specify the folder in which linked documents will be stored in the **Link Folder** field.

You should use the full UNC path as the location. For example, enter \\[computer name]\Linked Documents\. To ensure the correct UNC path is used, browse to computer and folder where the linked documents are to be stored.

- 6 Click the **Recalculate** button after revising the conversion settings to estimate the size of the Address Book with the revised settings.

➤ **To modify the location of linked documents**

- 1 In Administrator, select **File > Document Administration > Move Linked Documents**.



- 2 Specify the folder where the linked documents were previously stored in the **From folder**.
- 3 Specify the new folder where the linked documents will be stored in the **To folder**.

You should use the full UNC path for both folders.

# Verifying and Recovering Address Book Data

 You can verify and recover only one Address Book at a time.

Address Book verification enables you to quickly identify and resolve invalid and orphan items in your Address Book. You should always run Address Book verification and recovery after upgrading or restoring an Address Book. Also, if database views have not been created for any user-defined fields and are needed for generating reports, use Address Book verification and recovery to create the missing database views.

Address Book verification and recovery identifies the following Address Book items.

Address Book Item	Description
Orphan Contacts	Contacts that are not associated with a Company record.
Orphan alternate addresses	Addresses that are not associated with an Address Book record.
Orphan notes	Notes that are not associated with an Address Book entry or opportunity.
Opportunity records with invalid Start_Date field value	Opportunities whose start date does not match the earliest Sales Step start date.
Notes with undefined Entity Type	Notes that do not have an entity type value (Address Book entry, opportunity, or user) assigned to the record.
Orphan Link Records	Opportunities that do not have a related Address Book entry.
Broken Company Library links	Company Library links that try to connect to a missing document (link exists but the document is missing).
Orphan Company Library links	Company Library links that link to a missing Company Library folder (document exists, link exists, but the Company Library folder is missing).
Orphan Company Library documents	Company Library documents not listed in the Company Library folders (document exists but the link is missing).
Misplaced Document records	Documents whose Owner field contains an incorrect value.



Address Book Item	Description
User-defined fields that do not have associated database Views	User-defined fields for which a database view has not been created.
Invalid Table UDF Item records	Table user-defined field items that have the wrong type (Company, Individual, Contact, etc.).
Invalid/orphan Table UDF values	Table user-defined field values that reference non-existent table items.

**i** To see recovered entries, you must log in as MASTER or have rights to open other users' entries.

When you choose to recover the Address Book, Maximizer transfers recovered Address Book entries into a single entry called "Recovered on [date of recovery]", and it transfers recovered Company Library documents into a single folder called "Recovered on [date of recovery]". You can then view the recovered entries and either delete or move them as needed.

➤ **To verify an Address Book**

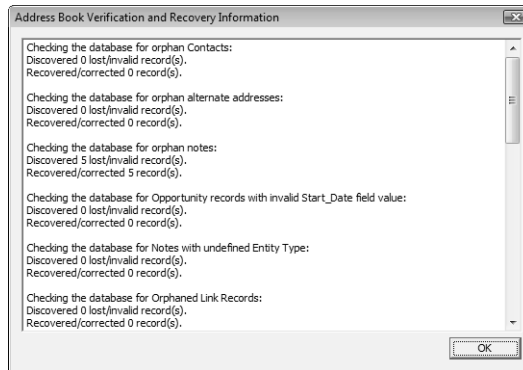
- 1** In Administrator, open the Address Book.
- 2** Select **File > Address Book Verification**.
- 3** Choose either the **Verify Only** or **Verify and Recover** option, and click **OK**.



**i** If you select Verify Only and Maximizer detects invalid records, it prompts you to recover them.

Maximizer runs the Address Book verification process, as well as the recovery process if you selected the second option. When it is complete, you see the Address Book Verification and Recovery

Information dialog box, which contains a summary of each verification performed and the results of the verification.



- 4 If you selected the **Verify and Recover** option, open the Address Book in Maximizer, and view the **Recovered on [date]** Address Book entry. You can then delete or move the recovered entries.

# Exporting Data from Maximizer


You can export Address Book entries from Maximizer only, not Administrator.

Exporting Address Book entries creates a text file or XML file containing information from the current Address Book. It exports any Companies and Individuals selected in the Address Book list. If no Address Book entries are selected, it exports all Companies and Individuals currently displayed in the list.

The following sections contain information on exporting data from Maximizer:

- “Exporting Address Book Entries in XML Format” on page 123
- “Exporting Address Book Entries in Text Format” on page 126
- “Selecting Fields for Export” on page 128

## Exporting Address Book Entries in XML Format

 The unique ID is exported with each Company or Individual, but unique IDs for contacts are not exported.

By default, exporting Address Book entries in XML format exports name, address, phone number, email address, and company details information from the Basic Information tab of the selected Companies and Individuals (or all entries in the list if none are selected). You can easily import this file into another Address Book.

You can optionally export the following additional information:

 These options are available for XML export only, not CSV or tab-delimited exports.

- **Include contacts** exports the contacts associated with the exported Address Book entries.
- **Include Opportunities** exports Opportunities associated with the exported Address Book entries.
- **Include UDFs** exports all Address Book user-defined fields associated with the exported Address Book entries, along with their attributes, and in the case of table user-defined fields, any items they contain. Keep in mind that exporting user-defined fields increases the length of time required for the export process, and not selecting this option improves speed.
- **Include notes** exports notes associated with the exported Address Book entries, including date and time, owner, creator, type, and text fields.
- **Include documents** exports documents associated with the exported Address Book entries, including date and time, document type, document name, creator, owner, as well as the document data itself.
- **Support non-English characters** converts the contents of the exported XML file to Unicode format, which is required for languages using more than one byte per character, such as

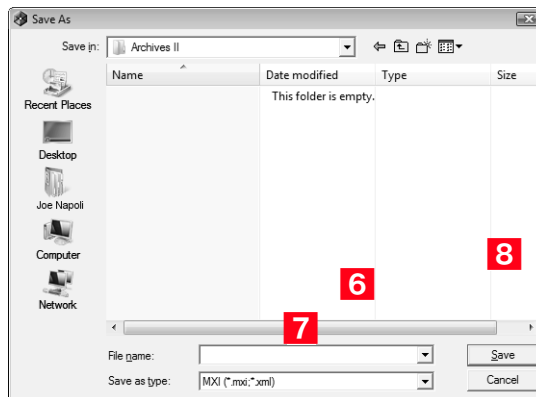
Chinese. If you don't select this checkbox, characters will be exported in ASCII format.

► **To export Address Book entries in XML format**

- 1** In Maximizer, open the Address Book window.
- 2** Select the Companies and Individuals to export. If you don't select any entries, Maximizer will export all entries currently displayed in the Address Book list.
- 3** In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer Address Book entries**

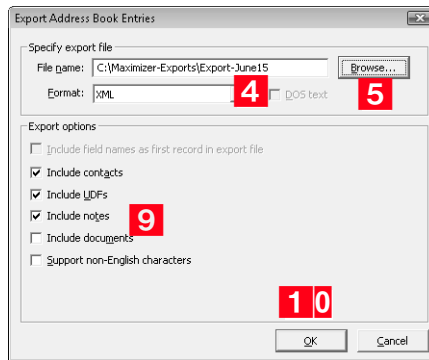
The Export Address Book Entries dialog box opens.

- 4** From the **Format** drop-down list, select **XML**.
- 5** Click the **Browse** button.



- 6** Specify the destination location and **File name** for the exported file.
- 7** In the **Save as type** drop-down list, select either **MXI** or **XML**.

**8** Click **Save**.



**9** Select any of the **Export options**, as needed. Each of the options is described before this procedure.

**10** Click **OK**.

Maximizer exports the Address Book entries and additional data as selected in the options to the specified file.

## Exporting Address Book Entries in Text Format

**i** User-defined fields that contain more than one item are not supported in a CSV or tab-delimited export. Use XML export instead.

Exporting to comma-separated values (CSV) format creates a file with a .CSV extension, which is readable by spreadsheets such as Microsoft Excel and many other programs.

Exporting to tab-delimited format creates a text (.txt) file with tabs separating each field value. This file is readable by any program that supports .txt files.

Exporting to these formats exports selected Companies and Individuals in the Address Book, but you do not have the option of exporting Contacts.

Unlike XML Format, exporting to CSV and tab-delimited format enables you to specify individual fields to export, including Address Book user-defined fields.

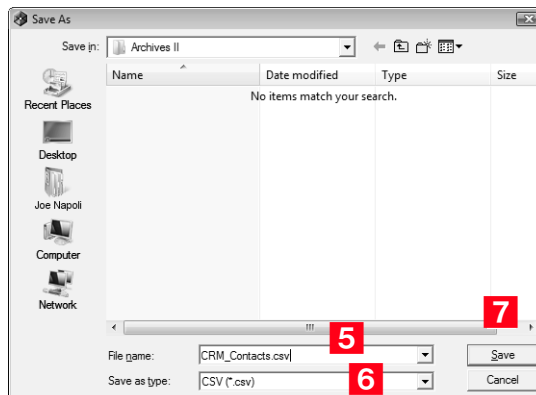
You can also export Notes associated with the Companies or Individuals. You have the option of exporting all notes or most recent notes.

### ➤ To export Address Book entries in CSV or tab-delimited format

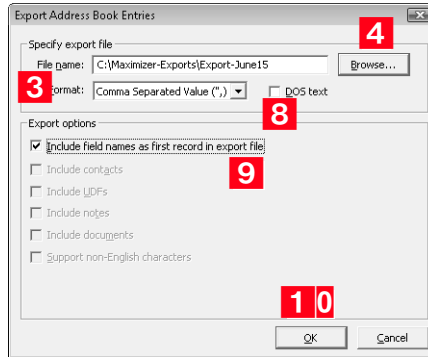
- 1** In Maximizer, open the Address Book window.
- 2** In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under Export, select **Address Book entries**.

The Export Address Book Entries dialog box opens.

- 3** From the **Format** drop-down list, select **Comma Separated Value** or **tab-delimited**.
- 4** Click the **Browse** button.



- 5 Specify the destination location and **File name** for the exported file.
- 6 Verify that the format you selected previously appears in the **Save as type** field.
- 7 Click **Save**.



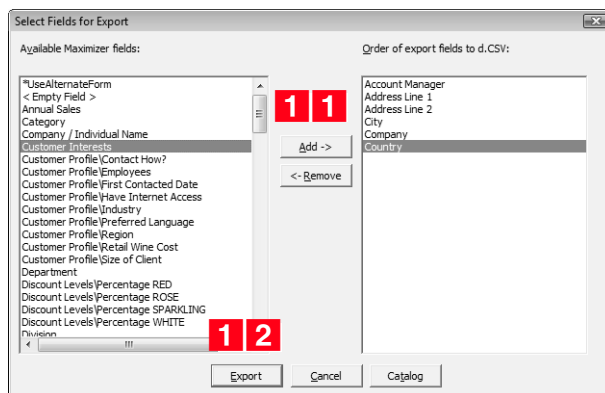
- 8 Select the **DOS text** checkbox to export data that is in DOS standard ASCII.

If the data is in ANSI ASCII (Windows default), do not select the checkbox.

- 9 If you want the field names to be exported as the first record in the exported file, similar to a headings row, select the **Include field names as first record in export file** checkbox.

- 10 Click **OK**.

The Select Fields for Export dialog box opens.



**1 1** From the **Available Maximizer fields** list, select the fields to export by selecting each field and clicking **Add**.

– or –

Click **Catalog** to retrieve a previously saved export list.

**1 2** Click **Export** to begin the export process.

## Selecting Fields for Export

**i** You cannot export encrypted user-defined fields.

When exporting to CSV or tab-delimited format, you must select which fields to export, and in which order. The Select Fields for Export dialog box has two columns: the left column lists the Address Book entry basic fields, user-defined fields, and two fields for notes; the right column is initially blank. Select the fields to export from the left column and add them to the right column.

The order of fields in the right column is the order in which they will be exported. If you need to change the order of any fields, select each one and click Remove to delete it from the list; then, in the right column, select the field after which you want to place another field. Fields added to the right column appear directly below the field currently selected in the right column.

Once you have established the order of export fields as you would like it, you can click the Catalog button to save the export list for future exports. In the Export Catalog dialog box, click Add to create a new saved export list, or click Save to overwrite an existing export list. The Retrieve button opens an existing export list.



## Importing Address Book Data from MXI or XML Files

You can use Administrator or Maximizer to import Address Book entries and other data from MXI (Maximizer XML Interface) or XML Files.

After importing Address Book entries into Maximizer, you can identify the imported records by selecting the **View** tab, and selecting **All Lists** from the **Favorite List** group in the Address Book window. A list of imported Address Book entries is stored in a favorite list named according to the file format and import date and time.

The following sections contain additional information on importing data from MXI and XML files:

- “Importing MXI or XML Files Using Advanced Import” on page 129
- “Unattended Import of MXI or XML Files” on page 131

### Importing MXI or XML Files Using Advanced Import

For more control over importing MXI files, or to import XML files, use the Advanced Import method described below, which enables you to specify a number of preferences about how to import the file.

#### ➤ To import from an MXI or XML file

 Always back up the Address Book before importing.

- 1** In Administrator, select **File > Import > Advanced Import**.
- 2** For the **File name** field, click **Browse** and locate the .XML or .MXI file to import.

Once you have selected the file to import, Maximizer fills in the Log File field automatically.

- 3** Specify any import options in the other group boxes, or just use the default values.

**4** Click **OK** to begin the import.

The screenshot shows the 'Advanced Import' dialog box. It has a title bar with a close button. The main area is divided into four sections: 'Select XML or MXT import file', 'Address Book entry update options', 'Contact update options', and 'Client ID generation'. The first section has a 'File name' field with the path 'C:\MaximizerImports\ABEntries-June15.xml' and a 'Browse...' button. The second section has four radio buttons: 'Always insert', 'Use Identification field to match entries', 'Use Name field to match entries' (which is selected), and 'Use this user-defined field to match entries:'. The third section has the same four radio buttons, with 'Use Name field to match entries' selected. The fourth section has three radio buttons: 'Follow system setting' (selected), 'Always system generated', and 'Use values from the import file'. At the bottom right are 'OK' and 'Cancel' buttons. Red numbered callouts are placed over the dialog: '2' over the 'Browse...' button, '3' over the 'Use Name field to match entries' radio button in the Address Book section, and '4' over the 'OK' button.

Maximizer imports the data and then displays the number of records inserted, updated, and failed for each record type.

**5** Click **OK** to close the message box.

## Unattended Import of MXI or XML Files

An alternative to Advanced Import is an unattended import, which you can initiate by double-clicking the MXI or XML file or by passing parameters to the Maxwin executable (MaxWin.exe) through a command-line interface. When using unattended import, you may choose to specify some of the import preferences within the MXI or XML file itself.

### Importing MXI or XML Files by Double-Clicking

#### ➤ To import an MXI or XML file by double-clicking

- 1** Locate the MXI file on the computer.
- 2** Double-click the file.
- 3** Select the Address Book to import into, and click **Open**.
- 4** Enter your **User ID** and **Password** in the Login dialog box, and click **OK**.

Maximizer imports the data, and then displays a message identifying the number of records inserted, updated, and failed for each record type.


- 5** Click **OK**.

Maximizer displays a message with the name of the Favorite List, which lists the imported Address Book entries.

- 6** Click **OK** to view the Favorite List.

### Importing MXI or XML Files from the Command Line

To import an MXI or XML file from a command line, call Maxwin.exe with the following command-line syntax:

 The command-line syntax shown here uses sample parameter values.

```
Maxwin.exe /DATABASE "EsconaTutorial" /USERID "JNAPOLI"  
/PASSWORD "maximizer" /FILE="d:\ABentries051013.mxi"
```

Keep the following points in mind:

- Only one space is allowed after the DATABASE, USERID, and PASSWORD keywords.
- Values must be surrounded by double quotation marks.
- The equal sign (=) after the FILE keywords must NOT have space before or after it.
- The FILE parameter must be the last parameter.

## Importing Data from Other File Formats

You can use Administrator to import Address Book information from other sources, such as ACT!, GoldMine, or Outlook.

After importing Address Book entries into Maximizer, you can identify the imported records by clicking the **View** tab, and selecting **All Lists** from the **Favorite Lists** group, in the Address Book window. A list of imported Address Book entries is stored in a favorite list named according to the file format and import date and time.

Administrator provides the following methods of importing data. The best import method depends on the type of data you are importing.

- **Address Book Entries:** This method imports entries from a CSV (comma-separated values) or tab-delimited text file that is created when you export from Maximizer or another application. Outlook, for example, can export its address book to a text file. When you import from a text file, you must choose to import all the entries as Companies/Individuals or as Contacts, or you can do a two-tier import to import Companies/Individuals first and then import the associated Contacts. For more information, refer to "Two-Tier Import" on page 134.
- **ACT! or GoldMine Database:** Importing an ACT! or GoldMine database is straightforward because Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. Refer to "Importing Data from ACT! and GoldMine" on page 140.
- **Other Contact Manager Database:** This option enables you to import a variety of data file formats, including Organizer, Clipper, dBASE, FoxBase, and FoxPro, among others. For more information, refer to "Importing from Other Contact Managers" on page 137.

Use the following table to determine which import method to use.

<b>File Type</b>	<b>Import Method(s) (File &gt; Import &gt; ...)</b>
ACT! 1.x, 2.x, 3.x, 4.x, 2000, 6.x (*.dbf)	ACT! 6.0 or 2004 or earlier
ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012	ACT! 2005–2012 and ACT! Premium for Workgroups 2005–2012
GoldMine 2.x, 3.x, 4.x, 5.x, 6.x (*.dbf)	GoldMine 6.7 or earlier
GoldMine 6.7 Corporate Edition (MSSQL)	GoldMine 6.7 Corporate Edition or earlier
GoldMine 8.x Premium Edition (Firebird SQL, MSSQL)	GoldMine Premium Edition 8.x
Organizer 1.x (*.org)	Other Contact Manager Database
Delimited (*.txt, *.prn)	Other Contact Manager Database
Comma Delimited (*.csv) Tab Delimited (*.txt)	Address Book Entries
Clipper Summer '87 (*.dbf)	Other Contact Manager Database
Clipper 5.x (*.dbf)	Other Contact Manager Database
dBase III, III+, IV (*.dbf)	Address Book Entries
dBase V (*.dbf)	Other Contact Manager Database
Visual dBase 5.x (*.dbf)	Other Contact Manager Database
FoxBase/FoxBASE+ (*.dbf)	Other Contact Manager Database
FoxPro 1.x, 2.x (*.dbf)	Other Contact Manager Database
Visual FoxPro 3.x (*.dbf)	Other Contact Manager Database

## Field Mapping

**i** When you import from a recognized database type, such as GoldMine or ACT!, Maximizer automatically maps the fields for you.

When importing some types of data files, you need to map (create an association between) the fields in the source file and the fields in Maximizer. Keep in mind that different applications name their fields differently. For example, the field for a company name is called "Company" in Outlook and "Company or Individual" in Maximizer.

When you are importing a file type that requires you to map fields Field Mapping dialog box opens where you can map Maximizer fields to fields in the source file. For each field in the source file, select one of the available Maximizer fields, and click Add to map the fields. Select a corresponding Maximizer field for every field in the source file. If there is no corresponding field, select <Skip Field> from the list of Maximizer fields. When you have finished mapping the fields, the Order of Import (middle column) displays the corresponding Maximizer field beside each field in the Fields from File column.

## Two-Tier Import

**i** If you import a Company record, and an existing Company record in the database has an identical "Company" field, then the records are considered duplicates, and Maximizer will not import the duplicate Company record. However, Maximizer will import duplicate Individual and Contact records.

Many contact management programs keep two types of address book entries:

- Companies
- Contacts for Companies

Maximizer keeps its Address Book entries organized in a similar way:

- Companies/Individuals
- Contacts (associated with a Company or Individual)

The Import Address Book Entries function enables you to perform a two-tier import. In a two-tier import, you first import Company entries as Companies/Individuals Address Book entries, and then you import the people as Contacts.

Two-tier importing is only applicable to comma-separated value files, tab-delimited files, dBase III, III+, or IV, or XML files using the File > Import > Address Book Entries command.

### ➤ To import Address Book entries (two-tier import)

**i** Always back up the Address Book before importing.

**1** From the **File** menu, select **Import > Address Book Entries**.

The Import Address Book Entries dialog box opens.

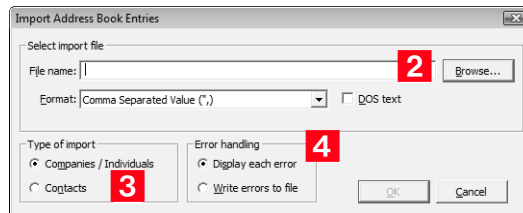
**2** Click **Browse** and locate the file to import.

**i** User-defined fields containing more than one available item are not supported in a CSV (comma-separated values) import. Use the Advanced Import feature or MTI (Maximizer Transfer Interface) as an alternative.

**3** Select the **Companies / Individuals** option to import all records in the source file as Company or Individual Address Book entries.

(After you complete this procedure, repeat it a second time to import the Contacts. If you choose not to do a two-tier import, just select either **Companies / Individuals** or **Contacts**.)

**4** Click **OK**.



The Select Fields for Import dialog box opens.

**5** In the **Available Maximizer fields** column, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**.

Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

**i** To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

For example, if the first field in the right column is First Name, select First Name from the Available Maximizer fields.

For fields that contain more than one value such as non-single valued table user-defined fields, and full/read access fields, each value must be its own column in the file and the same field must be mapped to each of those items.

The fields listed in the Available Maximizer Fields column is slightly different, depending on whether you selected Companies / Individuals or Contacts as the Type of Import in step 3.

**i** You can save the field mapping for reuse by clicking the Catalog button.

- 6** To convert text that is in capital letters (uppercase) into mixed case, select the **Convert to name case** checkbox.
- 7** Many comma-delimited data files use the first line as a column header. To exclude the first line from being imported, select the **Do not import first record; it is a header** checkbox.
- 8** Click **Import**.

The data from the source file now imports into Maximizer.

- 9** Repeat this procedure a second time to import the second tier, except select **Contacts** instead of **Companies / Individuals** as the Type of Import in step 3.



## Importing from Other Contact Managers

The instructions below describe importing data from a contact manager other than ACT! or GoldMine. For information about importing from ACT! or GoldMine, refer to “Importing Data from ACT! and GoldMine” on page 140.

 Always back up the Address Book before importing.

### ➤ To Import Contacts from another type of contact management database

- 1** Select **File > Import > Other Contact Manager Database**.

The Import Databases dialog box opens.

- 2** From the **List files of type** drop-down list, select the file format of the database you are importing.

- 3** Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** drop-down list to access the network drive.

- 4** In the **Import Options** group box, select the options you want to include. Depending on the type of database you are importing, some of these options may not be available.

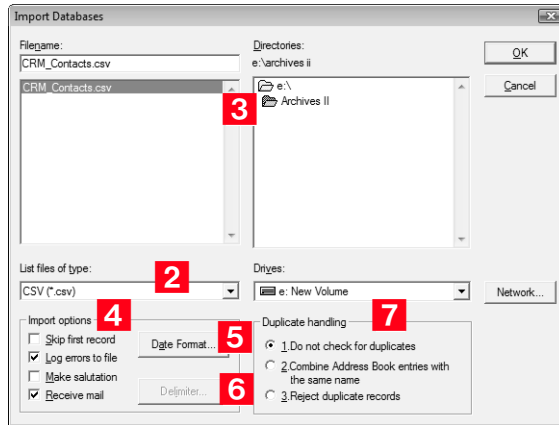
- 5** If you are importing a character delimited text file, you must specify a **Date Format**.

To do so, click the **Date Format** button, select the date format used in the source file, and click **OK**.

- 6** If you are importing a .txt or .prn file, you must also specify the character used as the field **Delimiter** in the import file.

Click the **Delimiter** button, select the delimiter type, and click **OK**.

- 7** In the **Duplicate handling** group box, select one of the options to specify what Maximizer should do when it encounters duplicate Address Book entries, and click **OK**.



The Select Fields for Import dialog box opens.

- 8** In the **Contact fields** or **Address Book entries fields** lists, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**. Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

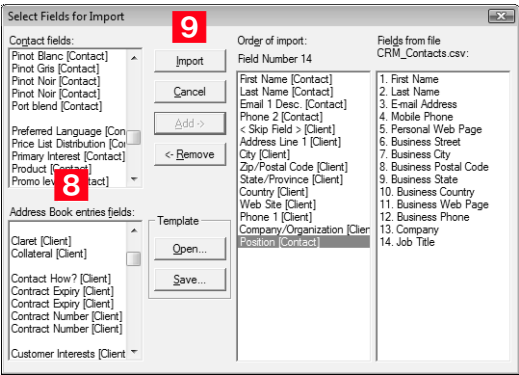
**i** To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

For example, if the first field in the right column is First Name, select First Name from the Contact fields or Address Book entries fields list.

Use **Contact fields** to create Contacts for Companies or Individuals.

Use **Address Book entries fields** to create Company or Individual Address Book entries.

**9** Click **Import** to begin the import process.



Once Maximizer imports the data from the import file, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings.

The Error Log appears next displaying the location of the import error message file. If you want to view this file, make a note of where it is located. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

## Importing Data from ACT! and GoldMine

**i** Duplicate Contacts are created on the second Import of the same ACT! or GoldMine database.

This section describes the procedure for importing data from ACT! or GoldMine, as well as the field mapping for data imported into Maximizer.

### Importing Contacts from ACT! 6.0, 2004, or Earlier, or from GoldMine 6.5 or Earlier

**i** Always back up your Maximizer Address Book before importing data.

**i** When importing GoldMine Contacts, GoldMine must be installed on the same machine as Maximizer; the Borland database engine is required during the import.

#### ➤ To import contacts from ACT! 6.0, 2004, or earlier, or from GoldMine 6.5 or earlier

**1** From the **File** menu, select **Import > ACT! 6.0 or 2004 or earlier**.

– or –

Select **Import > GoldMine 6.5 or earlier**.

The Import Databases dialog box opens. The file type is selected for you automatically.

**2** Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** field drop-down list to access the folder.

**3** In the Import Options group box, select the **Log Errors to File** checkbox if you want to log any errors that occur during the import process to a text file.

All other options in the Import Options group box are handled automatically by Maximizer.

**4** Specify how you want duplicate records handled, and click **OK**.

If duplicate records are found in the data, the option you select here determines whether or not duplicate records are combined. They will be added to the Address Book.

Maximizer requires that each Address Book entry be assigned a unique Address Book entry ID. If the import record contains an Address Book entry ID that is the same as an existing Maximizer Address Book entry or Contact, the Address Book entry ID of the imported entry is automatically changed when that entry is added to Maximizer and this action is recorded in the import error message file.

**5** Click **OK** to begin the Import process.

During the import process, a status indicator appears on the screen. Click **Cancel** if you want to halt the import process.

**i** The Errorlog.txt file appears in the same folder as the import file. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

**6** Once the data is imported, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, or merged, and the number of records with associated import warnings. Click **OK** to close the message box.

## Importing from ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012

There are two methods of importing from an ACT! 2005–2012 database. The first method explains how to import from ACT! when both ACT! and Administrator are installed on the same machine. The second method explains how to import from ACT! when ACT! and Administrator are on separate machines.

### ➤ **To import from ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012 – Primary Method**

**1** Make sure you are logged into Windows as an administrator on the SQL Server machine. Also ensure no users are logged into the ACT! database.

**2** In Administrator, log into the Address Book where you want to import the ACT! database.

**3** In Administrator, select **File > Import > ACT! 2005-2012 and ACT! Premium for Workgroups 2005-2012**.

The Reattaching ACT! databases process may take several minutes.

**4** Select the ACT! database to import from the drop-down list, and click **OK**.

Maximizer imports the database. When the import is complete, it displays the Import Statistics dialog box.

**5** Click **OK** to close the dialog box.

The import is complete.

### ➤ **To import from ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012 – Secondary Method**

**1** Back up your ACT! database in ACT!.

The Backup is typically saved to C:\Documents and Settings\<User Name>\My Documents\ACT\ACT for Win 7\Databases\

**2** In the Backup folder, there should be a zip file. Open this zip file and extract the .BAK file that contains the name of your ACT! database in the filename.

**i** Always back up your Maximizer Address Book before importing data.

- 3 The extracted file is a SQL backup. Restore this backup to a normal SQL 2005 (or later) server.

See your SQL Server documentation for details on how to restore backups.

- 4 Once the backup is restored, create a DSN to point to the database on the SQL Server. For instructions on creating a DSN, refer to the procedure below.

- 5 Start Administrator.

- 6 Open the Address Book to import the data into.

- 7 Select **File > Import > ACT! 2005-2012 and ACT! Premium for Workgroups 2005-2012**.

- 8 Click **OK** on the message box.

- 9 Click the **Machine Data Source** tab, select the DSN you created in step 4, and click **OK**.

You will be prompted for your sa password.

- 10 Enter the sa password, and click **OK**.

Maximizer begins importing the data.

➤ **To create a DSN to point to the database on the SQL Server**

- 1 Open **Control Panel > Administrative Tools > Data Sources (ODBC)**.

- 2 Click the **System DSN** tab, and click the **Add** button.

- 3 Select **SQL Server**, and click **Finish**.

- 4 Give a meaningful name and description, select the SQL server where you placed the restored backup, and click **Next**.

- 5 Select the **With SQL Server authentication** option, fill in the Login ID as **sa**, enter the sa password, and click **Next**.

- 6 Select **Change the default database to**, select the restored ACT! database from the drop-down list, and click **Next**.

- 7 Click **Finish**.

- 8 Click the **Test Data Source** button to make sure the DSN was configured correctly.

- 9 Click **OK** and then **OK** again to save the DSN.

## Importing from GoldMine 6.7 Corporate Edition (or Earlier) SQL Databases

**i** Always back up your Maximizer Address Book before importing data.

### ➤ To import from a GoldMine 6.7 Corporate Edition (or earlier) SQL database

- 1** Start Administrator.
- 2** Select **File > Import > GoldMine 6.7 Corporate Edition or earlier**.
- 3** Click **OK** on the message box.
- 4** Click the **Machine Data Source** tab, select the GoldMine DSN, and click **OK**.

You will be prompted for your sa password.

- 5** Enter the sa password, and click **OK**.

Maximizer begins importing the data.

## Importing from GoldMine 8.x Premium Edition SQL Databases

Maximizer supports importing data from GoldMine 8.x Premium Edition with MSSQL or Firebird SQL.

**i** Always back up your Maximizer Address Book before importing data.

### ➤ To import from a GoldMine 8.x Premium Edition SQL database

- 1** If you are importing from GoldMine 8.x with Firebird SQL, convert the Firebird SQL database to MSSQL. You can convert the database in GoldMine 8.02 or later. (In GoldMine, select **Tools > Database > New Databases**.) For more information, see the GoldMine documentation.
- 2** In Administrator, select **File > Import > GoldMine Premium Edition 8.x**.
- 3** Click **OK** in the message box.
- 4** Click the **Machine Data Source** tab, and select **GoldMine DSN**. Click **OK**.

You will be prompted for your sa password.

- 5** Enter the sa password, and click **OK**.

Maximizer begins importing the data.

## Setting User Passwords and Properties After Import

Note that if a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. After importing data, you can set each user's password, preferences, and properties manually.

### ➤ To set user passwords, preferences, and properties after import

- 1** In Administrator, select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Password, Preferences, or Properties** to specify the user settings.

## ACT! Data Conversion

The following table describes field mapping between ACT! and Maximizer. Before importing data into Maximizer, export the data from ACT! to a DBF file and use the DBF file for the import.

<b>ACT! 2000 (5.0), 6.0, or 2004–2012</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Company	Company	Yes	
Contact	First Name & Last Name	Yes	ACT! Contacts are imported as Contacts in Maximizer and the basic information about each Contact such as email address are imported into the Basic Info tab in the Address Book entry dialog box. If any of the information associated with the Contact cannot be mapped to a Maximizer field in this tab, the information is imported as user-defined fields. In ACT!, First and Last Name belong to the same single field. The correct names may not be properly imported into Maximizer. For example, a Contact 'Toni Spooner (female)' in ACT! is imported into Maximizer as "Toni Spooner" in the First name field and "(female)" in the Last name field.
Title	Position	Yes	
Department	Department, Position	Yes	In Maximizer, Department is populated with the Department information of the first Contact and the rest in the Position field separated by comma.



<b>ACT! 2000 (5.0), 6.0, or 2004–2012</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Phone	Phone 1	Yes	Adds “Business” to the Phone Description field in Maximizer.
Fax	Phone 2	Yes	Adds FAX to Extension field in Maximizer.
Toll-Free	Phone 3	Yes	Adds “Toll-Free” to the Phone Description field in Maximizer.
Mobile	Phone 4	Yes	Adds CELL to Extension field in Maximizer.
Alt Phone		No	
Ticker	UDF Ticker Symbol	Yes	Adds UDF to Company.
ID/Status	Category	Yes	
Address	Address	Yes	First address line in ACT! is imported as Address 1 in Maximizer. Second line goes to Address 2. Address comes from one of the Contacts for this Company and if there is no address, it may end up empty. Alternate addresses are added to Maximizer from different Contacts of the Company and alternate addresses are named by that Contact. The same address is not added but renamed by the other Contact. For some Contacts, the appropriate alternate address may not be selected.
Address	Division		Division in Maximizer may be populated by the address line in ACT!.
City	City/Town	Yes	Imported correctly to main and alternate addresses.
State	St/Co/Prov	Yes	Imported correctly to main and alternate addresses.
Zip	Zip/Postcode	Yes	Imported correctly to main and alternate addresses.
Country	Country	Yes	Imported correctly to main and alternate addresses.
Salutation	Salutation	Yes	
Referred By	UDF Referred By	Yes	Adds UDF to Company.
Web Site	Website	Yes	Imported into the Company’s website field.
E-mail Address	Email	Yes	Imported into the Contact’s email field.
Last Result	Creates Table UDF named “Result”	Yes	Adds Company Table UDF with corresponding items selected for each Contact.

<b>ACT! 2000 (5.0), 6.0, or 2004–2012</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Assistant		No	
Asst. Title		No	
Asst. Phone		No	
User fields for Contacts and Companies (ACT! 2005–2012 & ACT! 2005–2012 Premium only)	Creates UDFs for Contacts and Companies with the same name as in the source database	Yes	These fields can be renamed and can be changed to different field types. Any fields that are of MEMO type or are more than 120 Characters are converted to Notes in Maximizer.
User 1...User 15 (ACT! 2000 (5.0), 6.0, or 2004 only)	Creates UDFs named "Details Field 1"... "Details Field 15"	Yes	Adds UDFs to Company. Some UDFs that belong to some different Contacts in ACT! may be lost.
Users	Users	Yes	ACT! users are imported into Maximizer as users. Passwords are set to "maximizer" if the import was done using a DBF file. Users are displayed in the Administrator's Manage Users dialog box which may be accessed by selecting File > Manage Users. If a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. By default, passwords for users are set to "maximizer". Passwords can be changed manually for each imported user.
Notes	Notes	Yes	
Schedule Call Schedule To-do Schedule Appointment Schedule Personal Activity	Hotlist Task	Yes	The Company name of some conflicting tasks may not be preserved. The Duration information in ACT! is not imported to Maximizer.
Schedule Meeting	Appointments	Yes	Recurring appointments are not imported.
Notes Attachments	Notes Attachments	No	
Document	Document	No	
Groups	Groups	No	

<b>ACT! 2000 (5.0), 6.0, or 2004–2012</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Sales/ Opportunities	Opportunities	No	
History (ACT! 2005-2012 & ACT! 2005-2012 Premium only)	Notes	Yes	Each entry from the History tab in ACT! becomes a Note in Maximizer.

## GoldMine Data Conversion

The following table describes field mapping between GoldMine and Maximizer.

Note that Action, Call, and Appointment notes in GoldMine 6.x and 8.x may be in HTML format. When you import these notes into Maximizer, they contain HTML tags.


<b>GoldMine 5.x, 6.x, &amp; 8.x</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Company	Company	Yes	
Contact First Name Initial Last Name	First Name Initial Last Name	Yes	GoldMine's Contact field contains (First Name) (Initial) (Last Name) separated by spaces. In Maximizer, appropriate fields are populated accordingly.
Title	Position	Yes	
Dept	Dept.	Yes	In Maximizer, Dept. is populated with the department of the main Company's Contact.
Asst	Assistant (UDF)	Yes	Adds UDF to Contact record.
Source	Contact type (UDF)	Yes	Adds UDF to Contact record.
Address	Address1 & Address2	Yes	Address from the main Contact becomes the main Company address. The first line in the Address field from GoldMine goes to Address1 in Maximizer. The second line goes to Address2. The third line from GoldMine is NOT imported.  Alternate Addresses in Maximizer are created from the addresses of the Contact from the Contacts tab in GoldMine. Appropriate Alternate Addresses are selected for imported Contacts.
City	City/ Town	Yes	Imported correctly to main and alternate addresses.

<b>GoldMine 5.x, 6.x, &amp; 8.x</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
State	St/Co/Prov	Yes	Imported correctly to main and alternate addresses.
Zip	Zip	Yes	Imported correctly to main and alternate addresses.
Country	Country	Yes	Imported correctly to main and alternate addresses.
Phone 1-3	Phone 1-3	Yes	Appropriate extensions are imported.
Fax	Phone 4	Yes	Adds FAX to Extension field in Maximizer.
E-mail	Email	Yes	Email address of the main Contact is imported. Email addresses of Contacts from the Contacts tab in GoldMine are also imported.
Web Site	Website	Yes	Imported to main Contact record.
Contact Type	Contact Type	Yes	Adds UDF to Contact record.
Business	Business	Yes	Adds UDF to Contact record.
Interest	Interest	Yes	Adds UDF to Contact record.
Accnt Mngr	Accnt Mngr	Yes	Adds UDF to Contact record.
Open	Open	Yes	Adds UDF to Contact record.
Summary	Note	Yes	A note containing details from the Summary tab is created for the Company.
Role Status Account Type Account Size No. of Users Key Interest Competitor Platform	User role Purchase Status Account Type Account Size Users Key Interest Competitor Platform	Yes	Appropriate UDFs are created in Maximizer and populated with proper values.
Notes	Note	Yes	A note is created for the Contact in Maximizer and contains all the notes from the Notes tab in GoldMine.
Documents	Document	No	

<b>GoldMine 5.x, 6.x, &amp; 8.x</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Users	Users	Yes	<p>GoldMine's users are imported into Maximizer as users. Users are displayed in the Administrator's Manage Users dialog box, which is accessible through the File &gt; Manage Users menu.</p> <p>If spaces are included in a user name, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary.</p> <p>After import, users' Windows Access and Mobile Access are disabled in Maximizer and must be enabled by the administrator.</p> <p>By default, passwords for users are set to "maximizer". Passwords can be changed manually for each imported user.</p>
Details	Notes	Yes	For every detail, a note is created. Details are referred to as Profiles in the notes.
Pending	Hotlist Task	Yes	Each entry from the Pending tab in GoldMine is imported as Hotlist task in Maximizer.
Calendar	Hotlist Tasks	Yes	Calls and Activities from GoldMine's Calendar are imported as Hotlist tasks in Maximizer.
Referrals	Notes	Yes	A note is created for every Referral. Referrals are called References.
History	Notes	Yes	Each entry from the History tab in GoldMine becomes a Note in Maximizer.
Members		No	
Tracks		No	
Links		No	
Opptys		No	
Projects		No	
Partner	Notes	Yes	Limited information is imported.
Email text (email)	Documents	Yes	Imports email as documents in the Documents window. This feature is supported for GoldMine 8 only.


## Field Mapping for Outlook

The following table describes the field mapping that is used in Outlook Synchronization.

 For more information on Outlook Synchronization, refer to "Configuring Microsoft Outlook Synchronization" on page 96.

Microsoft Outlook	Maximizer
Appointments	
Subject	Subject
Start and End time date	Date
Start time	Start time
End time	End time
Reminder	Alarm time
Toggle alarm	Toggle alarm
Importance	Priority
Private	Private
Location	Location
Note (text box)	Note (text box)
Tasks	
Due date	Date
Alarm time	Time
Subject	Activity
End time	End time
Reminder set	Alarm set
Priority	Priority
Private	Private

# Transferring Entries between Address Books

 Encrypted user-defined fields cannot be transferred or exported to another Address Book.

Importing refers to copying data from an external database into a Maximizer Address Book. However, transferring refers to copying data between Maximizer Address Books. Transferring data is ideal for merging Address Books together and sharing entries and setups.

Entries cannot be transferred using Administrator. You must use Maximizer.

Transfer rights can be set on a per-user basis, although some field transfer options apply to all users.

The following sections contain information on transferring entries between Address Books:

- “What Happens During a Transfer?” on page 151
- “Transferring Address Book Entries” on page 152
- “Transfer Summary Reports and Logging” on page 153
- “Adjusting Address Book Transfer Settings” on page 154

## What Happens During a Transfer?


Once you start a transfer, Maximizer uses the following rules to determine which records to copy from the source Address Book into the target Address Book:

- **Address Book entry IDs:** If an Address Book entry ID number from the source Address Book does not exist in the target Address Book, the Address Book entry is inserted into the target Address Book.
- **Address Book entry names:** If the Address Book entry ID number from the source exists in the target Address Book, Maximizer compares the source and target Address Book entry names.

If the names are different, Maximizer changes the ID number in the target Address Book and inserts the entry as a new Address Book entry.

If the Address Book entry names are the same, they are considered to be duplicate entries. In this case, Maximizer merges duplicate Address Book entries in the target Address Book.

- **Date and Time:** Maximizer also checks the date and time of the record. It will not overwrite data in the target Address Book that has been modified more recently than the data in the source Address Book.

 Note that each Address Book entry has a unique ID.

## Transferring Address Book Entries

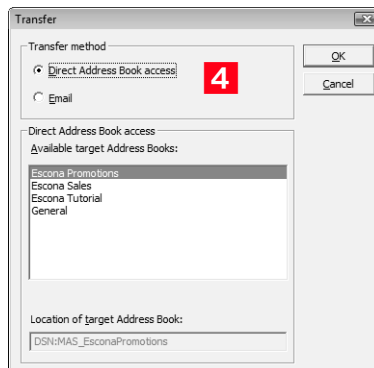
**i** For more information about transferring other information such as column setups, see the online help.

**i** To see if you have transfer and export rights, go to File > Users (select your user ID) > Properties > Access Rights.

By default, when you transfer Companies or Individuals, the following are included: all associated Contacts, user-defined fields, notes, files, appointments, Hotlist tasks, and opportunities. Encrypted user-defined fields cannot be transferred.

### ► To transfer Address Book entries

- 1** In the Address Book window in Maximizer, select the entries to transfer.
- 2** In the top left corner of the window, click the **Maximizer** button.
- 3** In the **Import/Export/Transfer** sub-menu, select **Address Book Entries** from the **Transfer** section.
- 4** Select **Direct Address Book Access** or **Email** as the transfer method.
- 5** If you have chosen to transfer your Address Book entries using **Direct Address Book access**, select the **target Address Book** before clicking **OK**.



A login dialog box appears.

- 6** Type your **User ID** and **Password** to log into the target Address Book, and click **OK**.

The Transfer Address Book Entries dialog box appears.



- 7** Select items associated with the entries that you want to include in the transfer from the **Transfer options** section.

For example, you can choose whether to include user-defined fields, documents, notes, appointments, Hotlist tasks, and opportunities.

- 8** Enter a **Message to log to notes** to be logged for each Address Book entry affected by the transfer in the source Address Book, if necessary.

- 9** To set the advanced options, click the **Advanced** button.

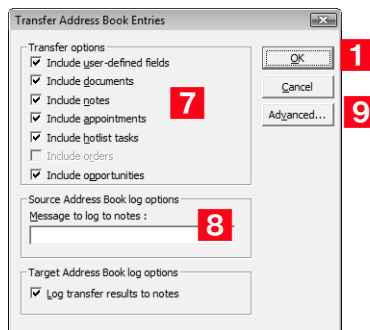
See the **F1** help for more information on each available option.

- 10** Click **OK** to begin the transfer.

When the transfer is complete, the Transfer Summary displays the results of the transfer.

If you chose to email the data, Maximizer prepares the transfer file (with an .MET extension) as an email file attachment and displays the Compose Mail Message dialog box.

- 11** **(Applies to Email transfer only.)** Enter the email address where you would like the transfer sent. See the Maximizer online help topic, Receiving Maximizer Data by Email, for detailed instructions on receiving a transfer by email.



## Transfer Summary Reports and Logging

Each time you transfer Address Book entries, Maximizer displays a transfer summary report. The report indicates the number of data items inserted, modified, bypassed, and deleted. It also displays the transfer setting used and other related information. You can print this report for your records.

As well, for each Address Book entry updated in the target Address Book, Maximizer can optionally add a note. The note summarizes the fields that have been added, changed, and deleted. This feature can also be used if you want to find the data that has been added or modified. After a transfer, simply do a search by notes.

## Adjusting Address Book Transfer Settings

 Only the MASTER user can modify protection on fields.

You can set the options for transferring information between the open Address Book and other Address Books. Some of these are system options, which apply to all users; others are user-specific options, which apply to the selected user only.

Regardless of a user's transfer settings, encrypted user-defined fields cannot be transferred or exported to another Address Book.

### ► To adjust transfer settings for one user or all users

- 1** Select **File > Manage Users**.
- 2** Select a Maximizer user, and click **Preferences**.
- 3** Select the **Transfer** tab.
- 4** In the **Protect fields from update** list, double-click any fields you don't want included in the transfer.
  - transfer options apply to all users.
  - **User specific** field options apply to the selected user only.
- 5** In the **Transfer options** group box, set your transfer preferences.
- 6** In the **Advanced options** group box, set your advanced transfer preferences, which are described below:
  - The **Overwrite duplicates** option overwrites the target Address Book entry with source Address Book entry information when duplicate records are found.
  - The **Use record modify flag** option sets a flag to "on" when an Address Book entry is added or modified. Maximizer uses it as an internal check to determine if the Address Book entry has been modified since the last transfer.
  - The **Reset record modify flag** option resets the record modify flag back to null (not modified) for each transferred record.
- 7** If you don't want Maximizer to add a note for every Address Book entry that is added or updated in the target Address Book, clear the **Log transfer results to notes** checkbox.
- 8** Click **OK** to finish.

## Purging Outdated Notes and Documents

After a long period of activity, you may want to delete outdated notes and documents using Administrator's purge feature.

When you purge notes, you must specify the note types to delete.

Note Type	Creation Method
Accounting	Created from accounting transactions. Applicable only to previous versions of Maximizer.
Email	Notes created in the Address Book window when you send an email to one or more Address Book entries.
History	Created when opportunities are added or changed. History notes can be printed or searched only from these windows.
Incoming call	Created when you receive a phone call.
Mail-out	Created when users print labels, envelopes, or letters using the Maximizer Word Processor's merge feature. Mail-out notes are also created when users send an email to more than one Address Book entry.
Manual	Added manually to the Notes window.
Opportunity	Created in the Address Book window when opportunities are added or changed. Opportunity notes can be printed or searched only from the Address Book window.
Other	Third-party or custom notes created by the administrator.
Outgoing call	Created when phone an Address Book entry.
Tasks	Created when appointments or Hotlist tasks are scheduled or completed.
Timed notes	Created when the Timer is used while writing a note.
Transfer log	Notes logged when Address Book entries are transferred between Address Books.

The purge command deletes all notes, with the exception of other user's private notes (unless the user purging the notes has rights to delete other users' notes), in the specified date range for all Address Book entries in the open Address Book. You should back up the Address Book before purging notes.

➤ **To purge notes**

- 1** In Administrator, open the Address Book you want to clean up.
- 2** Select **File > Purge > Notes**.
- 3** Specify a date range.  
Maximizer deletes notes dated between the specified dates.
- 4** Select the type(s) of notes to delete, and click **OK**.

➤ **To purge documents**

- 1** In Administrator, open the Address Book you want to clean up.
- 2** Select **File > Purge > Documents**.
- 3** Specify a date range.  
Maximizer deletes documents dated between the specified dates.
- 4** If you want to purge private documents belonging to other users, select the **Delete other users' private documents** option.
- 5** Click **OK**.

## Using Log Files for Diagnosis

One of the most powerful tools in diagnosing a Maximizer installation is the automated logging feature. Maximizer supports logging for a number of server and client components.

You can control the amount of detail that is logged for various modules. The range of logging levels is 0 through 7:

- 0 = logging disabled
- 1 = least detailed
- 7 = most detailed

You can also control the frequency in which the log files are purged and if the information is sent to the Windows event log.

Logs are written into the default folder “\Program Files\Maximizer\Logs”. You can define logging preferences in Administrator and Maximizer. These preferences control the following registry keys.

Component	Registry Key	Log File
Maximizer (AMGR)	HKEY_LOCAL_MACHINE\SOFTWARE\Maximizer\Software\Maximizer\Modules\AMGR	AMGR_yyyymmdd.log
Administrator (ADMN)	HKEY_LOCAL_MACHINE\SOFTWARE\Maximizer\Software\Maximizer\Modules\ADMN	ADMN_yyyymmdd.log

### ➤ To set logging preference values

**1** In Maximizer, click the **Setup** tab and select **Preferences**. In Administrator, select **File > Preferences**.


**2** Select the **Diagnostic** tab.

If you want logs for all modules saved in one specific location, specify a default folder where your log files will be saved. If you don't specify a location in this field or a location per module, logs are saved in the Logs folder where Maximizer is installed (e.g., Program Files\Maximizer\Logs).

**3** Select a module from the **Preferences for this module** drop-down list.


- 4** If you want logs related to a module saved in a specific location, specify a folder in the **Module log folder** field.
- 5** Select a logging detail level from the **Maximizer log level** drop-down list.
- 6** Set your other logging preference values such as the frequency logs are purged. By default, logs are purged after 5 days.
- 7** Repeat the previous steps to configure logging for any other module(s).
- 8** Click **OK**.

# System Reports

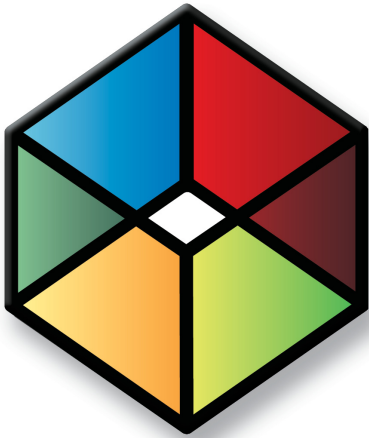
 HTML reports can be opened easily in Microsoft Excel, where you can edit the data as required.

The Reports menu in Administrator enables you to quickly create a number of reports about the open Address Book, as described below.

Report	Information Reported
User ID List	<ul style="list-style-type: none"><li>• Total number of users in the Address Book</li><li>• Total number of security groups in the Address Book</li></ul> <p>For each user in the Address Book:</p> <ul style="list-style-type: none"><li>• User ID</li><li>• Display Name</li><li>• First and Last Name</li><li>• Phone number</li><li>• Email Address</li><li>• Maximizer Login Enabled/Disabled status</li><li>• User's Roles (Access Rights)</li></ul> <p>For each security group in the Address Book:</p> <ul style="list-style-type: none"><li>• Group Name</li><li>• Group ID</li><li>• Group members</li></ul>
User-Defined Fields	<ul style="list-style-type: none"><li>• Folder (if applicable) and field name</li><li>• Type of entry the field is applicable to (Company, Individual, Contact, Opportunity, or User)</li><li>• Full Access and Read Access</li><li>• Type (Table, Date, Alphanumeric, Numeric, Yes/No)</li><li>• Creator</li><li>• Requested by</li><li>• Description</li><li>• Attributes</li><li>• Items in table user-defined fields</li><li>• Usage count (only if Show Usage Count checkbox selected in Print Report dialog box)</li></ul>

Report	Information Reported
Address Book Summary	<p>Total number of each of the following types of entries in the current Address Book:</p> <ul style="list-style-type: none"><li>• Users</li><li>• Security groups</li><li>• Companies and Individuals</li><li>• Lowest, highest, average, and total number of contacts per Company and Individual</li><li>• Opportunities (total and per status)</li><li>• User-defined fields (total and per type)</li><li>• User-defined field entries (total and per type)</li><li>• Notes</li><li>• Documents</li></ul>
Current Users	<ul style="list-style-type: none"><li>• Number of licenses in use</li></ul> <p>For each user currently logged into the Address Book:</p> <ul style="list-style-type: none"><li>• User name</li><li>• Computer name</li><li>• Date and time logged in</li><li>• Maximizer module connected</li></ul> <p>Licenses installed:</p> <ul style="list-style-type: none"><li>• Product license number (PLN)</li><li>• Computer name</li><li>• Product</li><li>• User count</li><li>• Description</li><li>• Total number of applied licenses</li></ul> <p> This report displays on-screen rather than printing. To print the report, press Alt and Print Screen to capture the report window to the Windows clipboard, and then paste it into a word processor or graphics program.</p>





# APPENDIX **A** **Administrator's Reference**

In this chapter...

"Recreating the Maximizer\_Default User" on page 162

"Maximizer File Types" on page 163

"Maximizer XML Interface (MXI)" on page 164

## Recreating the Maximizer\_Default User

The maximizer\_default security login is created during the initial installation of Maximizer.

The following are steps to recreate the Maximizer\_Default user if it is not in the list of security logins in SQL.

➤ **To create the maximizer\_default security login**

- Select **Utilities > Repair Database**.

## Maximizer File Types

The following table lists the extensions of file types created in the registry during the Maximizer installation.

Extension	Application	Comment
.MDE	MaxWin.exe	Maximizer Data Exchange file used by email transfer (prior to version 7 – now .MET)
.MEC	ecMeclm.exe	OrderDesk's order data file
.MET	MaxWin.exe	Maximizer Email Transfer files (version 7 and higher)
.MXD	MaxWord.ter	Maximizer Document extension
.MXI	MaxWin.exe	Maximizer XML format data file
.MTI	MaxWin.exe	Maximizer Transfer Interface (CSV format data file – elaborate or skip CSV altogether; manual says EDI, flags, etc.)

The following table lists the extensions of file types used by Maximizer. These file types have no association in the registry.

Extension	Application	Comment
.ETF	MaxWord.ter	Template files used by MaxWord

## Maximizer XML Interface (MXI)

Maximizer enables you to import Address Book entries from Maximizer or other applications using XML. If the records were exported from Maximizer in MXI (Maximizer XML Interface) or XML format, you can import them back into Maximizer directly. However, to import records from other applications in XML format, you must ensure that the XML file conforms to the Maximizer XML schema.

After you have converted your data to XML format, you can use the Import command to import this data into an Address Book.

The names of and relationships between the elements in the Maximizer XML schema correspond to the Maximizer Address Book fields, with a few exceptions. Several elements are named "Detail...". These elements correspond to user-defined fields:

- **DetailDef** – Definition of a user-defined field.
- **DetailDate** – Date user-defined field.
- **DetailNumber** – Numeric user-defined field.
- **DetailString** – Alphanumeric user-defined field.
- **DetailList** – Single-value table user-defined field.
- **DetailListMulti** – Multiple-value table user-defined field.
- **DetailBoolean** – Yes/no user-defined field.

The following sections outline the tree-structure hierarchy of Maximizer XML elements. The first section outlines just the top-level elements, and the following sections outline the elements below the top-level. Mandatory elements are shown in bold, and are mandatory only if their parent element is used.

### Top-Level Elements

The <AllData> element is the root element, which contains the following elements, which contain all other elements. For specific information about each of the elements, refer to the appropriate section.

#### <AllData>

<ImportOptions>

See ImportOptions Element.

</ImportOptions>

<DetailDef>

See DetailDef Element for sub-elements.

</DetailDef>

<Individual>

See Individual Element for sub-elements.

</Individual>

<Company>

See Company Element for sub-elements.

</Company>

</AllData>

## ImportOptions Element

The <ImportOptions> element and its sub-elements describe how Address Book entries should be imported.

```
<ImportOptions>
  <ClientIdGeneration></ClientIdGeneration>
  <LogFile></LogFile>
  <LogLevel></LogLevel>
  <ClientOptions>
    <MatchMode></MatchMode>
    <MatchDetail></MatchDetail>
  </ClientOptions>
  <ContactOptions>
    <MatchMode></MatchMode>
    <MatchDetail></MatchDetail>
  </ContactOptions>
</ImportOptions>
```

The following table describes the values of each of the <ImportOptions> elements. The valid values for each element are listed in the Value column. The Equivalent Field column identifies the field in the import dialog boxes that sets the same import option.

Element Name	Valid Values	Equivalent Field(s) in Maximizer	Description
ClientIdGeneration	Setting	n/a	If the imported Address Book entry contains a Client ID, it uses the Client ID of the imported entry. If the imported Address Book entry does not contain a Client ID, it creates a new Client ID for the imported Address Book entry.
	System	n/a	Creates a new Client ID for each imported Address Book entry.
	File	n/a	Uses the Client IDs of the Address Book entries being imported.
LogFile		n/a	Path and filename where the log file should be saved (e.g., c:\folder\file.log).
LogLevel	0	n/a	Do not log (leaving this element value blank has same result).
	1	n/a	Log errors only.
	5	n/a	Log record additions and field changes.
	7	n/a	Record all details (very large log file size).
ClientOptions	n/a	n/a	Client Options apply to Company and Individual Address Book entries; Contact Options apply to Contact Address Book entries. Client Options and Contact Options are defined in the nested <MatchMode> and <MatchDetail> elements.
ContactOptions	n/a	n/a	

Element Name	Valid Values	Equivalent Field(s) in Maximizer	Description
MatchMode	AlwaysInsert	n/a	Inserts all Company, Individual, and Contact records from the import file and does not match imported records to existing records. Duplicate entries may result.
	Id	n/a	Uses Address Book identification values as the criteria for matching records. For Company and Individual records, this option uses the Client ID field to match entries. For Contact records, this option uses the Client ID and Contact Number fields to match entries.
	Name	n/a	Company records will use the Company field, and Individual and Contact records will use the Last Name field as the criteria for matching records.
	Detail	n/a	Specifies an alphanumeric user-defined field to use as the criterion for matching records. Only Address Book entry user-defined fields that apply to the applicable record type appear in this list.
MatchDetail		n/a	Name of the alphanumeric user-defined field to use to match entries when MatchMode is set to Detail.

## DetailDef Element

The <DetailDef> element and its sub-elements describe the user-defined field definitions. If the user-defined field includes a description, it appears in the <Description> element. If it is a table user-defined field, the table items each appear in the <ListItem> elements.

```
<DetailDef Name="" Type="">
  <Description></Description>
  <ListItem></ListItem>
</DetailDef>
```

Much of the information about the user-defined field is stored in the element's attributes, which are described in the following table.

Attribute	Data Type	Valid Values	Description
Name	string		Name of the user-defined field.
Type	string	Multiple Single Date String Number	<p>Indicates the type of user-defined field:</p> <ul style="list-style-type: none"> <li>Multiple = Table user-defined field that allows selection of multiple items.</li> <li>Single = Table user-defined field that allows selection of single item only.</li> <li>Date = Date user-defined field.</li> <li>String = Alphanumeric user-defined field.</li> <li>Number = Numeric user-defined field.</li> <li>Boolean = Yes/No user-defined field.</li> </ul> <p>This attribute also applies to the &lt;Detail&gt; elements within other elements.</p> <p>The maximum length of the Type attribute is 80 characters.</p>
Companies	string	No Yes	Indicates whether the user-defined field can be assigned to Company, Individual, or Contact Address Book entries.
Individuals	string	No Yes	
Contacts	string	No Yes	
DateAnnual	string	Yes	Applies to Date user-defined fields only. Yes = Annually recurring event.
RetainYear	string	Yes	Applies to Annually Recurring Date user-defined fields only. Yes = Retain year in annually recurring dates.
Hotlist	integer	1	Applies to Date user-defined fields only. 1 = Create Hotlist task.
Length	integer		Applies to Alphanumeric user-defined fields only. Indicates the maximum length of the field value.

## Individual Element

The <Individual> element describes an Address Book entry for an Individual. Mandatory sub-elements are shown in bold.

```

<Individual>
  <ContactNo></ContactNo>
  <FirstName></FirstName>
  <LastName></LastName>
  <Initial></Initial>
  <MrMs></MrMs>
  <Title></Title>
  <Salutation></Salutation>

```



```

<Phone>
    <Number></Number>
    <Extension></Extension>
    <Description></Description>
</Phone>
<Email>
    <Address></Address>
    <Description></Description>
</Email>
<Department></Department>
<Division></Division>
<ReportsTo></ReportsTo>
<AssignedTo></AssignedTo>
<Category></Category>
<DoNotSolicitBy></DoNotSolicitBy>
<Website></Website>
<Created></Created>
<LastModified></LastModified>
<SalesLead></SalesLead>
<Address>
    See Address Element.
</Address>
<DetailDate Name=""></DetailDate>
<DetailNumber Name=""></DetailNumber>
<DetailString Name=""></DetailString>
<DetailList Name=""></DetailList>
<DetailListMulti Name="">
    <Value></Value>
</DetailListMulti>
<Note>
    See Note Element.
</Note>
<Document>
    See Document Element.
</Document>
<Id></Id>

```

```

    <Firm></Firm>
    <Contact>
        See Contact Element.
    </Contact>
</Individual>

```

## Company Element

The <Company> element describes an Address Book entry for a Company. Mandatory sub-elements are shown in bold.

```

<Company>
    <Id></Id>
    <Name></Name>
    <Department></Department>
    <Division></Division>
    <Phone>
        <Number></Number>
        <Extension></Extension>
        <Description></Description>
    </Phone>
    <Email>
        <Address></Address>
        <Description></Description>
    </Email>
    <Website></Website>
    <AssignedTo></AssignedTo>
    <Category></Category>
    <DoNotSolicitBy></DoNotSolicitBy>
    <Created></Created>
    <LastModified></LastModified>
    <SalesLead></SalesLead>
    <Address>
        See Address Element.
    </Address>
    <DetailDate Name=""></DetailDate>
    <DetailNumber Name=""></DetailNumber>
    <DetailString Name=""></DetailString>

```

```

<DetailList Name=""></DetailList>
<DetailListMulti Name="">
    <Value></Value>
</DetailListMulti>
<Note>
    See Note Element.
</Note>
<Document>
    See Document Element.
</Document>
<Contact>
    See Contact Element.
</Contact>
</Company>

```

## Contact Element

The <Contact> element describes an Address Book entry for a Contact. This element is nested within the <Individual> and <Company> elements. Mandatory sub-elements are shown in bold.

```

<Contact>
    <ContactNo></ContactNo>
    <FirstName></FirstName>
    <LastName></LastName>
    <Initial></Initial>
    <MrMs></MrMs>
    <Title></Title>
    <Salutation></Salutation>
    <Phone>
        <Number></Number>
        <Extension></Extension>
        <Description></Description>
    </Phone>
    <Email>
        <Address></Address>
        <Description></Description>
    </Email>

```

```

<Department></Department>
<Division></Division>
<ReportsTo></ReportsTo>
<AssignedTo></AssignedTo>
<Category></Category>
<DoNotSolicitBy></DoNotSolicitBy>
<Website></Website>
<Created></Created>
<LastModified></LastModified>
<SalesLead></SalesLead>
<Address>
    See Address Element.
</Address>
<DetailDate Name=""></DetailDate>
<DetailNumber Name=""></DetailNumber>
<DetailString Name=""></DetailString>
<DetailList Name=""></DetailList>
<DetailListMulti Name="">
    <Value></Value>
</DetailListMulti>
<Note>
    See Note Element.
</Note>
<Document>
    See Document Element.
</Document>
</Contact>

```

## Address Element

The <Address> element describes the address of an Address Book entry. This element is nested within the <Individual>, <Company>, and <Contact> elements.

```

<Address>
    <Description></Description>
    <AddressLine1></AddressLine1>
    <AddressLine2></AddressLine2>

```

```
<City></City>
<StateProvince></StateProvince>
<Country></Country>
<ZipCode></ZipCode>
</Address>
```

## Note Element

The `<Note>` element describes any notes for Address Book entries. This element is nested within the `<Individual>`, `<Company>`, and `<Contact>` elements. Mandatory sub-elements are shown in bold. The body of the note is stored in the `<Text>` element.

```
<Note>
  <Date></Date>
  <Creator></Creator>
  <Owner></Owner>
  <Type></Type>
  <Text></Text>
</Note>
```

## Document Element

The `<Document>` element describes any Documents for Address Book entries. This element is nested within the `<Individual>`, `<Company>`, and `<Contact>` elements. Mandatory sub-elements are shown in bold. The body of the document is stored in the `<DocData>` element.

```
<Document>
  <DocumentId></DocumentId>
  <Name></Name>
  <Date></Date>
  <Creator></Creator>
  <Owner></Owner>
  <Extension></Extension>
  <DocData></DocData>
</Document>
```

## Element Details

The following table lists all the elements in the Maximizer XML schema in alphabetical order and describes the following properties of each:

- **Element Name** – The name of the XML element. An element name may be listed more than once if it has different properties depending on its parent element. Most of the element names correspond to Maximizer field names.
- **Parent Element(s)** – The name of the XML element(s) within which the element is nested. If an element with the same name and same properties may exist within more than one parent element, all parent elements are listed.
- **Min. Occur.** – The minimum number of times the element must occur within its parent element. A value of 1 indicates that the element is mandatory, and a value of 0 indicates it is not.
- **Max. Occur.** – The maximum number of times the element may occur within its parent element.
- **Data Type** – The type of data that may be stored in the element.
- **Max. Length** – The maximum length of the element contents. If this value is blank, there is no maximum length.

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Address <sup>a</sup>	Email	1	1	string	120
Address <sup>a</sup>	Individual Company Contact	0	1	none <sup>b</sup>	
AddressLine1	Address	0	1	string	80
AddressLine2	Address	0	1	string	80
AllData	none	1	1	none <sup>b</sup>	
AssignedTo	Individual Company Contact	0	1	string	11
Category	Individual Company Contact	0	1	string	
City	Address	0	1	string	80
ClientIdGeneration	ImportOptions	0	1	string	
ClientOptions	ImportOptions	0	1	none <sup>b</sup>	
Company	AllData	0	unlimited	none <sup>b</sup>	
Contact	Individual Company	0	unlimited	none <sup>b</sup>	

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
ContactNo	Individual Contact	0	1	integer	
ContactOptions	ImportOptions	0	1	none <sup>b</sup>	
Country	Address	0	1	string	80
Created	Individual Company Contact	0	1	dateTime	
Creator	Note Document	0	1	string	80
Date	Note Document	1	1	dateTime	
Department	Individual Company Contact	0	1	string	80
Description <sup>a</sup>	Phone Email	0	1	string	22
Description <sup>a</sup>	Address	0	1	string	80
Description <sup>a</sup>	DetailDef	0	1	string	
DetailDate	Individual Company Contact	0	unlimited	date	
DetailDef	AllData	0	unlimited	none <sup>b</sup>	
DetailList	Individual Company Contact	0	unlimited	string	80
DetailListMulti	Individual Company Contact	0	unlimited	none <sup>b</sup>	
DetailNumber	Individual Company Contact	0	unlimited	double	
DetailString	Individual Company Contact	0	unlimited	string	120
Division	Individual Contact Company	0	1	string	80
DocData	Document	0	1	string	

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Document	Individual Company Contact	0	unlimited	none <sup>b</sup>	
DocumentId	Document	0	1	integer	
Email	Individual Company Contact	0	3	none <sup>b</sup>	
Extension	Phone Document	0	1	string	22
Firm	Individual	0	1	string	80
FirstName	Individual Contact	0	1	string	80
Id	Individual Company	1	1	string	23
ImportOptions	AllData	0	1	none <sup>b</sup>	
Individual	AllData	0	unlimited	none <sup>b</sup>	
Initial	Individual Contact	0	1	string	80
LastModified	Individual Company Contact	0	1	dateTime	
LastName	Individual Contact	1	1	string	80
LeadHandling	ImportOptions	0	1	string	
ListItem	DetailDef	0	unlimited	string	80
LogFile	ImportOptions	0	1	string	
LogLevel	ImportOptions	0	1	integer	
MatchDetail	ClientOptions ContactOptions	0	1	string	
MatchMode	ClientOptions ContactOptions	1	1	string	
MrMs	Individual Contact	0	1	string	80
Name	Company Document	1	1	string	80
Note	Individual Company Contact	0	unlimited	none <sup>b</sup>	
Number	Phone	1	1	string	22



Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Owner	Note Document	0	1	string	80
Phone	Individual Company Contact	0	4	none <sup>b</sup>	
ReportsTo	Individual Contact	0	1	string	80
SalesLead	Individual Company Contact	0	1	boolean	
Salutation	Individual Contact	0	1	string	80
StateProvince	Address	0	1	string	80
Text	Note	1	1	string	
Title	Individual Contact	0	1	string	80
Type	Note	0	1	string	80
Value	DetailListMulti	1	unlimited	string	80
Website	Individual Company Contact	0	1	string	120
ZipCode	Address	0	1	string	80

- a. This element is listed more than once because of differing properties depending on which element is the parent element.
- b. This element cannot contain a value. It can contain only other elements.



# Index

## A

- access rights 56—57
- access settings 56—57
  - modifying user access settings 60
  - security groups 62
- accounting
  - permissions 57
  - security group 63
- accounts
  - COMPANY 43
  - MASTER 43
- ACT!, importing from 140, 144
- Action Plan Library permissions 57
- activating 11
  - licenses 30
- Address Book
  - adding users 50
  - backing up 112—115
  - converting 45
  - creating 38—41
  - exporting data 123—129
  - holidays 93
  - ID 73
  - importing data 129—140
  - moving 117
  - name 73
  - permissions 57
  - preferences 72
  - restoring from backup 115
  - Short ID 73
  - summary report 160
  - updating 45
  - upgrading 45
  - verification and recovery 120
- Address Book entries
  - categories 72
  - duplicate checking 76
  - exporting 123
  - importing 129—140
  - mandatory fields 72
  - synchronizing with Outlook 96—100
  - transferring 151—154
  - verification and recovery 120
- Administrator
  - overview 5
- Advanced Import 129—132
- Allow Global Edit privilege 58
- Allow printing to these destinations 60
- Allow private entries privilege 58, 68

- Allow public entries privilege 58
- Allow Sync Contacts with External clients privilege 58
- Allow transfer and import/export 58
- alphanumeric user-defined fields 80
- appointments
  - locations and resources 72
  - with Outlook Synchronization 97

## B

- backing up
  - Address Book 112—115
  - dictionary file 117
  - holiday file 117
- browser
  - system requirements 7

## C

- caller ID 103
- categories, Address Book entries 72
- Company Library
  - permissions 57
  - verification and recovery 120
- COMPANY user account 43
- completion reasons
  - opportunities 72
- Configuring 101
- converting an Address Book 45
- Crystal Reports 12
  - Crystal Reports Users security group 63
- Current Users report 31, 160
- Custom Report, printing access rights 60

## D

- database
  - backing up 112—115
  - creating an Address Book 38—41
  - restoring from backup 115
  - upgrading 45
- database host 10, 17—18
- date user-defined fields 80
- default password 55
- diagnostics 72
- dictionary file 117
- display name (user) 51
- documents
  - deleting old 155
  - permissions 57

- drivers
  - PBX 103
  - TAPI 103
- duplicate checking for Address Book entries 76

## E

- email
  - system requirements 7
  - transfer Address Book data by 152
- encrypted user-defined fields 80, 87
- ETF files 163
- exact phone number matching 105
- exporting
  - access rights required 58, 152
  - Address Book entries 123
- extensions, file extensions 163

## F

- fax software 109
- field mapping, data imports 134
- fields
  - Full Access field 68
  - Key Fields 89
  - mandatory and optional 72
  - mapping for import 134, 140
  - Owner field 68
  - Read Access field 68
  - system 72
  - user-defined fields 80—88
- files
  - dictionary 117
  - holidays 117
  - types in Maximizer 163
- Full Access field 68

## G

- global edit, privileges 58
- GoldMine, importing from 140, 147
- groups
  - access settings 56—57
  - Accounting security group 63
  - creating security groups 64
  - Crystal Reports Users security group 63
  - modifying access settings 66
  - permissions 57
  - privileges 58
  - record ownership 67
  - roles 59
  - security groups 62—67
  - user and group setup permissions 57
  - User ID List report 159

## H

- hard disk space, system requirements 7
- Holiday Editor 93
- holidays, file 117
- Hotlist, locations and resources 72

## I

- importing
  - access rights required 58
  - Address Book entries 129—140
  - field mapping 134, 140
  - vertical templates 47
- installing 21
  - database host 18
  - licenses 30
  - Maximizer 9—34
  - Maximizer licenses 30
  - Maximizer server 17
  - single-user 17
  - upgrading from a previous version 14
  - Windows login account 13
  - workstations 19
- Internet browser
  - system requirements 7

## K

- Key Fields 89

## L

- license server 10, 16
- licenses
  - installing 30
- Live Update 32—33
  - wizard 32
- locations, for appointments 72
- logging
  - Address Book transfers 153
  - import error log file 139
  - log files 72
  - Maximizer Email Service Log Files 159

## M

- mailing address permissions 57
- mandatory
  - fields 72
  - user-defined fields 82
- mapping fields for import 134, 140
- MASTER
  - password 44
  - user account 43
- MaxAlarm 6

- Maximizer
  - companion applications 6
  - installation 9—34
  - installing server 17
  - licenses 30
- Maximizer Email Service Log Files 159
- MaxMobile 6
  - synchronization privileges 58
- MDE files 163
- MEC files 163
- memory, system requirements 7
- MSG format
  - for caller ID 103
- MET files 163
- MET transfer file 152
- Microsoft Outlook Synchronization 96—100
  - privileges 58
- Microsoft SQL Server Express 12
- Microsoft TAPI 103
- MODEM.INF file 103
- modems
  - TAPI 103
- Modify note properties privilege 58
- Modify other users' general info only privileges 59
- Modify other users' private entries privileges 59
- Modify/delete other owners' notes privileges 58
- modifying
  - group access settings 66
- moving
  - Address Book 117
- MTI files 163
- multiple-user licensesPLNs (product license numbers), see licenses
- MXD files 163
- MXI (Maximizer XML Interface) files 129—132, 163
- Mxzh01.nam file 117
- My Work Day
  - caption text 73

## N

- network 10
- notes
  - deleting old 155
  - permissions 57
  - privileges 58
  - types 155
- numeric user-defined fields 80

## O

- operating system, system requirements 7
- opportunities
  - completion reasons 72
  - confidence ratings 72
  - IDs 73

- permissions 57
- probability of close 72
- stages 72
- verification and recovery 120
- optional fields 72
- options, system 73
- OrderDesk, permissions 57
- Outlook Synchronization, see Microsoft Outlook Synchronization
- overview page caption text 73
- owner field 68

## P

- passwords
  - changing 55
  - default 55
  - MASTER user 44
- PBX drivers 103
- permissions
  - groups 57
  - users 57
- phone
  - TAPI phone number format 73
- phone calls
  - TAPI 103
- phone masks 108
- phone numbers
  - matching with TAPI 104
- preferences
  - Address Book 72
  - user 72
  - user preferences 69
- printing
  - access rights 60
  - system reports 159
- private
  - entries (privileges) 58
  - records 67
- privileges (users and groups) 58
- probabilities of close (opportunities) 72
- processor speed, system requirements 7
- public entries (privileges) 58
- public records 67

## Q

- quick backup of Address Book 114

## R

- RAM, system requirements 7
- ratings schemes 72
- Read Access field 68
- record ownership 67
- recovering an Address Book 120

- removing installations 15
- reports 159—160
  - Crystal Reports 12
  - current users 31
  - printing access rights 60
  - system 159
  - transfer summary 153
- resources, for appointments 72
- restoring
  - Address Book from backup 115
- roles (User's Roles) 59

## S

- sales
  - Sales Manager user role 59
  - Sales Representative user role 59
- SDM format 103
- security
  - privileges 58
  - security groups 62—67
  - users and groups 56—57
  - view rights 152
- security groups 62—67
  - access settings 56—57
  - Accounting security group 63
  - creating 64
  - Crystal Reports Users security group 63
  - modifying access settings 66
  - permissions 57
  - privileges 58
  - record ownership 67
  - roles 59
  - user and group setup permissions 57
  - User ID list report 159
- servers
  - installing Maximizer 17
- single-user installations 17
- smart phone number matching 104
- sort order of user-defined fields 83
- stages (opportunities) 72
- synchronization
  - Outlook Synchronization, see Microsoft Outlook Synchronization
- system
  - fields 72
  - login accounts 43
  - options 73
  - reports 159
  - user-defined fields 82
- system requirements
  - Maximizer CRM 7

## T

- table user-defined fields 80
  - adding items 86
- TAPI 103
  - called ID 103
  - configuring 105
  - exact phone number matching 105
  - phone number format 73
  - phone number matching 104
  - smart phone number matching 104
- tasks
  - with Outlook Synchronization 97
- transferring
  - access rights required 58, 152
  - Address Book entries 151—154
  - data by email using MET file 152
  - user-defined fields 87
- TSPI 103
- two-tier import 134—136
- types of files in Maximizer 163

## U

- UniModemV 103
- uninstalling 15
- upgrading 10, 16—17
  - Address Book 45
  - Maximizer 14
- User ID List report 159
- user-defined fields 80—88
  - adding table items 86
  - encrypted 80
  - folders 83
  - Key Fields 89
  - permissions 57
  - report 159
  - sort order 83
  - transferring 87
  - types 80
  - user access rights 81
  - verification and recovery 121
- userdict.lex file 117
- users
  - access rights and settings 56—57
  - adding to Address Book 50
  - changing password 55
  - Current Users report 160
  - current users report 31
  - modifying user access settings 60
  - permissions 57
  - preferences 69, 72
  - privileges 58
  - record ownership 67
  - security 152

- system login accounts 43
- transport and export rights 152
- user and group setup permissions 57
- User ID List report 159
- User's Roles 59
- user-defined field access 81

## **V**

- verify and recover Address Book 120
- vertical templates 47
- video resolution, system requirements 7

- views
  - security rights 152

## **W**

- web browser
  - system requirements 7
- Windows Registry 108
- workstations 17, 19

## **X**

- XML files 129—132

