Maximizer® CRM 12

User's Guide
for Entrepreneur Edition

Maximizer Software
Simply Successful CRM

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Applicability

This document applies to Maximizer CRM 12 software.

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CHAPTER 1

Welcome to Maximizer

Introducing Maximizer

In this chapter...

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 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[a]
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)[b]
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.

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 2

Getting Started

Start working in Maximizer CRM

In this chapter...

Maximizer CRM

Maximizer CRM is specifically designed for small and medium-sized businesses and corporate divisions of large companies. Maximizer CRM helps organizations realize their primary customer management goal of having many profitable and satisfied customers.

Throughout this document, Maximizer CRM is referred to as Maximizer.

Throughout the customer life cycle, as prospects move from the marketing department to the sales department, and as customers are passed onto service departments, Maximizer enables an organization to communicate with its customers through multiple channels, to share information, and to organize individual and team efforts.

Maximizer is a complete software solution that brings together elements of contact management, and other related applications to meet the sales challenges of modern businesses.

- Managing your company's lists of Companies, Individuals (people not associated with a Company), and Contacts (people associated with a Company or Individual).
- Keeping track of your scheduled appointments and tasks.
- Sending letters, faxes, or email messages to one or many recipients.
- Managing incoming orders and inquiries from your online catalog—payment, refunds, shipping, and reporting.
- Organizing and accessing your sales and marketing literature in a shared library.
- Generating reports from any of the lists—Address Book entries, opportunities, Hotlist tasks, and additional information you keep on your entries.

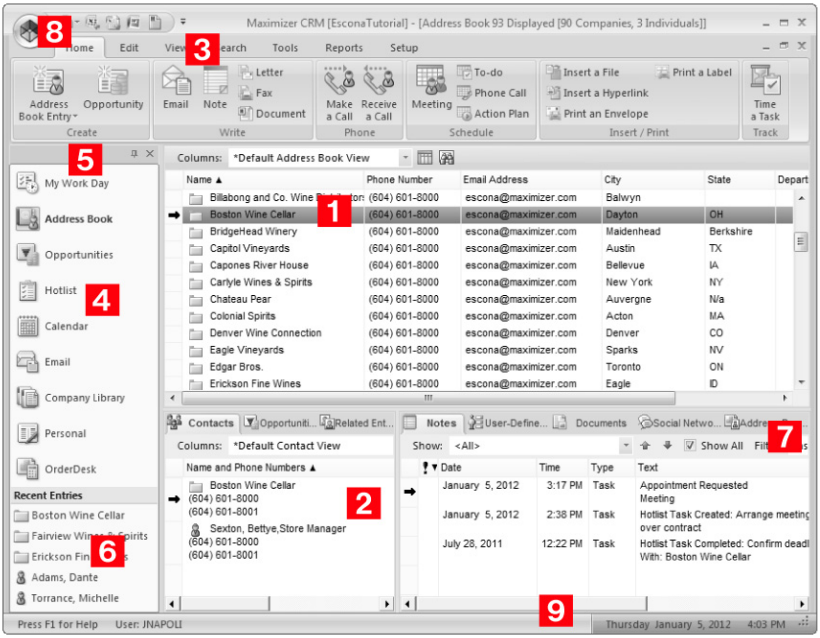
Maximizer Interface

Information in Maximizer is displayed in lists, which means that it can be sorted and arranged in rows and columns. Lists make it easy to see many entries at once and customize your views. Different types of information are viewed in different windows in Maximizer. You can easily move from window to window to access different types of entries.

Keep the following points in mind when working with the Maximizer windows.

1. Select or open **entries** in the list to view information and perform tasks on the entries.
2. View information and attached entries for the current entry in the tabbed **following windows**.
3. Use the **tabs** at the top of the window to access all commands that are available in the current window. Each tab organizes tasks into groups. Select an icon to perform the task. You can also right-click to select common tasks from the shortcut menu.
4. Select an **icon** in the icon bar to move to a different window.
5. At the top of the icon bar, use the button with the **pin graphic** on it to hide or display the full icon bar.
6. In the **Recent Entries** area, select an Address Book entry that you have recently viewed to add it to the current list quickly.
7. Use the **view bars** in a window to filter your list and access common tasks and the column setup.
8. In the top-left corner of the window, select the **Maximizer** icon to access additional tasks, such as opening and closing an Address Book, printing reports, and viewing the online help.

9 Watch the **status bar** to see the current user, date, and time.



Main Windows and Following Windows

The Maximizer interface contains main windows and tabbed following windows. The contents of the following windows depend on the current entry in the main list. For example, the Notes following window displays only the notes attached to the current entry in the main window.

When you select entries in the following windows, the commands available in the context menu and tabs update and apply to the selected entries in the following windows, not in the main windows.

Keep the following points in mind when working in the following windows.

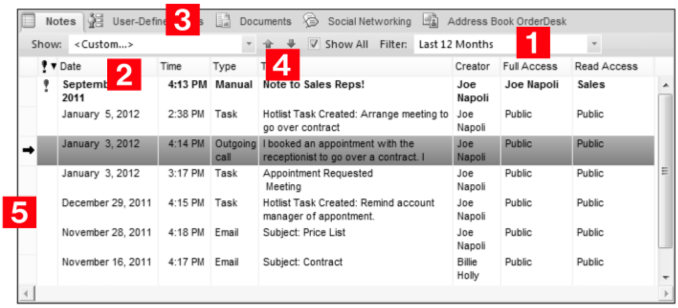
1 Use the **Filter** drop-down list to filter the entries displayed in the list.

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

3 Select the other tabs to navigate to other following windows and view additional information on the current entry.

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

5 Click and drag the top and side borders of the following window to change its size.



Maximizer Windows

The main Maximizer window is the Address Book window, which lists the Companies, Individuals, and Contacts in your Maximizer database (Address Book). The following list provides a brief description of each main window accessible from Maximizer.

My Work Day

The My Work Day page is an area where everyone in your company using Maximizer can view Hotlist tasks, and appointments.

Address Book

The Address Book window contains all the information about your prospects, customers, business and professional associates, or any other group of people you deal with on a regular basis. It links you to related information about each Address Book entry, such as Contacts, Hotlist tasks, opportunities, documents, user-defined fields, and orders and inquiries.

Opportunities

The Opportunities window tracks your sales opportunities. It helps you and your colleagues manage your sales processes. Opportunity management defines and strengthens your selling methodology.

Use the Opportunities following window to view the opportunities associated with the entries selected in the Address Book window.

Hotlist

The Hotlist is a to-do list of tasks and reminders that are usually timeless. The Hotlist is where you record actions and follow-up activities related to your interactions with Companies, Individuals, and Contacts. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

Calendar

The Calendar window allows you to schedule, print, and view your appointments with Maximizer users or Address Book entries. Because the calendar works with the Peg Board feature, you can make sure that when you have an appointment, others can see when you are busy or out of the office. If you need to be reminded of an appointment, Maximizer can sound an alarm in advance of the appointment or task.

Email

The Email window provides you with the ability to send, receive, and preview email within Maximizer using your existing email system. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily. Additionally, you can transfer data files by email.

Company Library

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

Personal

The Personal window contains the Journal and Expenses windows, which provide a location to keep notes and financial records that are not associated with Address Book entries.

OrderDesk

When you receive orders or inquiries from your website, you can manage them using the OrderDesk window. You can use the same OrderDesk window to enter a new order, capture a payment for an order, pre-authorize a payment for an order, complete a preauthorized payment for an order, and refund a payment for orders that come to you by telephone, mail, or other methods. OrderDesk allows you to track the status of your inquiries and orders, whether your customers have received a response or had their order fulfilled.

Use the Address Book OrderDesk following window to view the orders and inquiries associated with the entries selected in the Address Book or Opportunities window.

Contacts

The Contacts window displays the current Contacts for the Company or Individual selected in the Address Book, Hotlist, or Opportunities window. You can use this window to add, update, or delete a Contact.

Notes

The Notes window records your Address Book activities and displays only those notes that belong to the selected Address Book entry or opportunity.

User-Defined Fields

The User-Defined Fields window displays the custom fields for the selected Address Book entry, or opportunity. You assign values to these fields, and, if your system administrator has given you the access rights, you can add, change, or delete user-defined fields.

Documents

The Documents window displays the document entries for the selected Address Book entry or opportunity. You can add new documents, as well as files not created in Maximizer, modify documents, or delete documents.

Social Networking

The Social Networking following window lets you link Address Book entries with profiles on LinkedIn and view details from the LinkedIn profile directly in the window.

Opening Address Books

Address Books can be opened in Administrator or Maximizer. There are no conflicts if you open an Address Book while it is being used by other users.

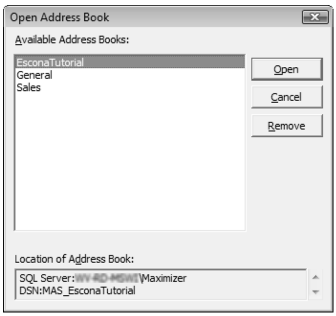
The following sections contain information on opening Address Books:

- "Open an Address Book" on page 16
- "Log In to the Current Address Book as Another User" on page 17
- "Connect to an Address Book" on page 17

Open an Address Book

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

   The Open Address Book dialog box opens.



2. Select the Address Book to open, and click **Open**.

   The Login dialog box opens.

3. Type your password and click **OK**.

   The name of the Address Book appears in the application title bar.

The default password for new users and for the users in the sample Address Books is "maximizer".

Log In to the Current Address Book as Another User

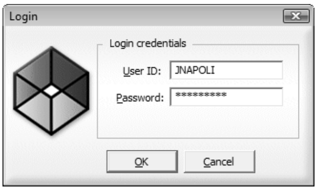
1. In the top-left corner of the window, click the **Maximizer** button, and select **Login**.

   – or –

   At the bottom of the window, double-click in the **User** section of the Maximizer status bar.

   The Login dialog box opens.

2. Enter a **user ID** and **password**.
3. Click **OK**.



Connect to an Address Book

Maximizer allows you to connect to any shared Address Book on another computer. Once you have connected to an Address Book, you can access the Address Book from the Open Address Book dialog box.

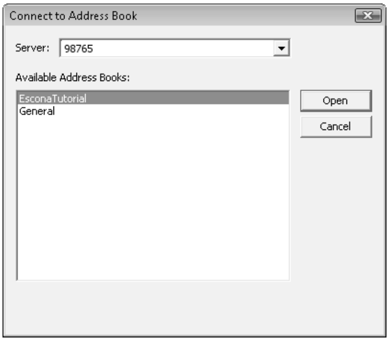
This procedure applies only to users who have upgraded from previous versions of Maximizer.

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

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

   The Connect to Address Book dialog box opens.

2. Select the computer that hosts the Address Book to which you would like to connect.
3. Select an Address Book from the **Available Address Books** list and click **Open**.



Once you connect to the Address Book, you are prompted with a message saying the connection was successful.

4. Click **OK** to close the message.

Lists of Entries

Maximizer is list-based. You can customize the information listed by changing the column setup, saving a Favorite List, or using a view filter. In some windows, you can tell how many entries and what types of entries are displayed in the current list by reading the title bar.

Filters are available for every window that has a View bar. Filters control the type and amount of data you want to see at any given time. Filters contain options that are specific to the type of data that is displayed in each window.

The following sections contain additional information on working with lists in Maximizer:

- "Types of Entries" on page 19
- "Sorting Entries" on page 19
- "Select Entries" on page 20
- "Display only Selected Entries" on page 20
- "Remove All Entries from a List" on page 21

Types of Entries

Almost all of the information displayed in Maximizer is displayed in a list, including notes and documents attached to entries, Hotlist tasks, and Calendar appointments. Maximizer contains main modules that list the following types of entries.

- **Address Book entries –** The main type of entry in Maximizer. They include Companies, Individuals, and Contacts that are attached to Companies or Individuals.
- **Opportunities –** Entries to keep track of sales opportunities. They are associated with Address Book entries.

Sorting Entries

An important part of viewing information in a list-based window is sorting your list by different columns. By clicking on a column title, you can re-sort your list by that column. If you click the column title again, the list sorts in reverse order.

Sorting entries by column works from left to right. For example, if you sort by a column that contains the City/Town field, entries with the same city/town will be sorted by the next column to the right. If you wish to change the order of the columns, you must change the column setup.

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

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

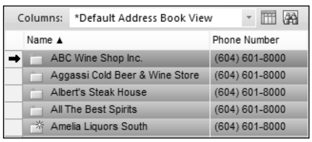
Select Entries

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

You can also select multiple entries to perform commands on many entries at the same time. The current entry may or may not be one of the selected entries. The current entry is shaded with a different color than the selected entries.

You can customize the color of current and selected entries. On the Setup tab, select Window > Window Settings > Set Color > Current/All Window from the Workspace group.

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



- To clear selected entries, on the **Edit** tab, select **De-select All** from the **List** group.
- To reverse which entries in the list are selected, on the **Edit** tab, select **Invert Selection** from the **List** group.

Display only Selected Entries

1. Select the entries that you want to display.
2. On the **Edit** tab, select **Make List Current** from the **List** group.

   The other entries are removed from the list.

Remove All Entries from a List

- On the **View** tab, select **Clear List** from the **Filter** group.

My Work Day

My Work Day is an area where everyone in your company using Maximizer can see Hotlist tasks and appointments.

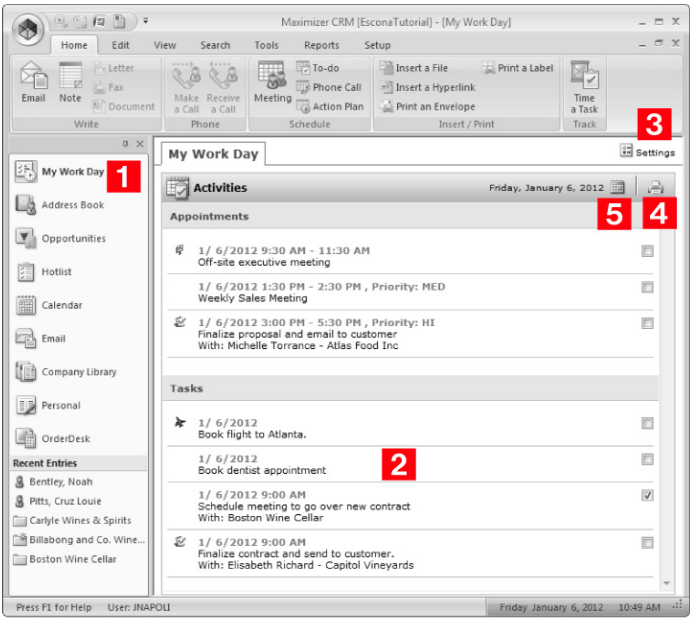
1 Select the **My Work Day** icon to open the My Work Day window.

2 Click on an **appointment** or a **Hotlist task** to view details of the activity.

3 Click **Settings** to specify to open the My Work Day window when starting Maximizer.

4 Select the **Print** icons to print activities for the day.

5 Select the **Calendar** icon and select a date to display tasks and appointments for a different day.



Getting Help

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

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

- **F1 Help –** Context-sensitive help for all windows and dialog boxes.
- **Online Help –** Online step-by-step instructions with a table of contents, an index, and search.
- **Online manuals –** Printable version of the online help that you can read using Adobe Acrobat Reader.

The following sections contain additional information on getting Help in Maximizer:

- "F1 Help" on page 23
- "Online Help" on page 24
- "Open the Online Help from Maximizer" on page 25
- "Online Manuals" on page 26
- "Open an Online Manual" on page 26
- "Sample Address Books" on page 26

F1 Help

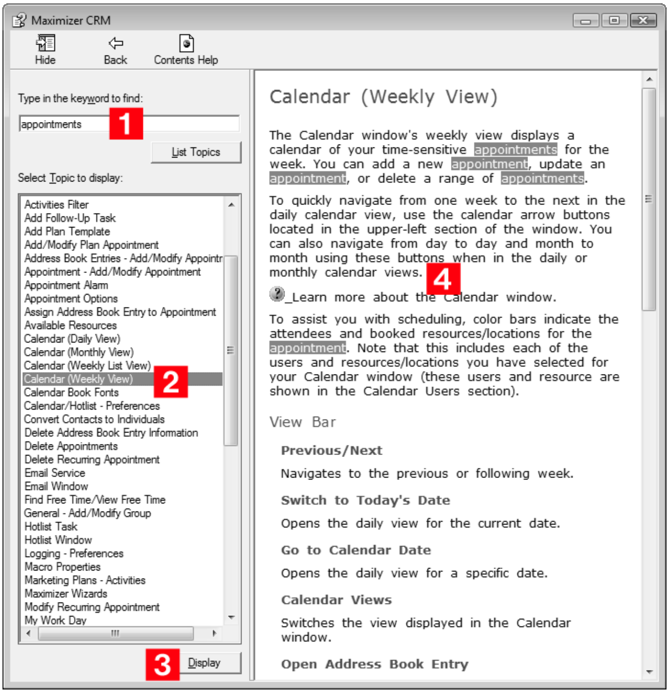
If you come across a window or dialog box you don't know how to use, press the F1 key to see brief descriptions of the window or dialog box options. Frequently, F1 Help topics have convenient links to related step-by-step instructions.

From the F1 Help window you can search the module's F1 Help for information on other windows, dialog boxes, or features—simply enter a keyword.

Keep the following points in mind when using the F1 help:

1. Enter a keyword and click **List Topics** to search for topics containing the keyword.
2. Topics containing your search keyword are displayed in the list.
3. Click **Display** to open the selected topic. You can also open a topic by double-clicking it.

4 Shortcuts link you directly to more information about what you are doing in the Contents Help.



Online Help

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

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

The local online help opens as a separate application in its own window. The Internet online help opens in a browser window.

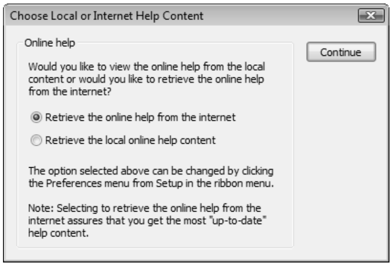
Open the Online Help from Maximizer

1. In the top-left corner of the window, click the **Maximizer** button, and select **Help > Online Help**.

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

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

   - To view the most up-to-date content over the Internet, select **Retrieve online help over the internet**.
   - To view content stored on your local computer, select **Retrieve the local online help content**.



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

Online Manuals

In addition to the online help, you can access manuals in .PDF format that you can read online using Adobe Acrobat or Acrobat Reader. The Maximizer CRM User's Guide contains similar information to the online help in a printable format. Like the online help, you can search the guide, and access hyperlinks from the table of contents, index, and cross-references to other places in the guide.

Open an Online Manual

- In Maximizer, click the **Maximizer** button, and select **Help**. Then, under **Documents**, select the guide that you want to open.
- In another module, select **Help**, and select the guide that you want to open.
- From the **Start** menu, select **Programs > Maximizer CRM > Documentation and Help**, and select the guide that you want to open.

Sample Address Books

In a typical server installation of Maximizer, the Maximizer setup program creates several complete sample Address Books, one of which is named "Escona Tutorial". This Address Book is designed to be used as an environment in which you can learn how to use Maximizer.

Using the example of Escona Estate Wines, a fictitious vintner in California's Sonoma Valley, the Escona Address Book provides realistic examples of how Maximizer might be used to improve your customer relationship management.

The Escona Address Book includes detailed data related to all areas of Maximizer including the following:

- List of Address Book entries (Companies, Individuals, and Contacts)
- Sample sales opportunities
- Appointments and Hotlist tasks
- Sample Company Library files

CHAPTER 3

Address Book Entries

Keep Track of Companies and Contacts

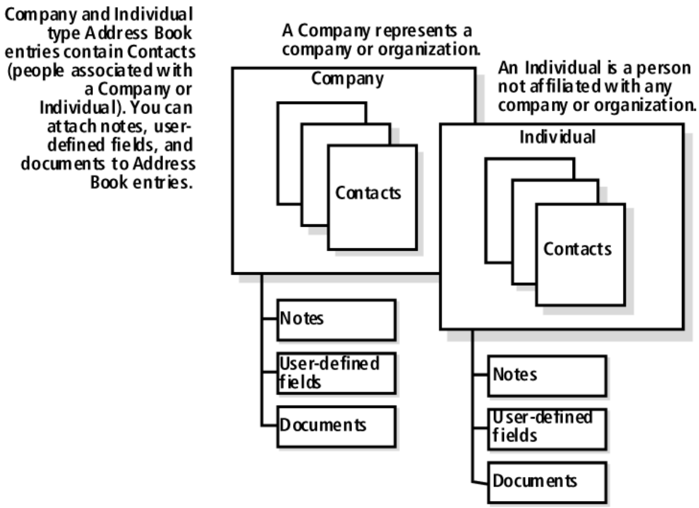
In this chapter...

About Address Book Entries

Maximizer's focus is on Address Book entries—Companies, Individuals, and Contacts.

The Address Book window gives you the ability to manage your daily activities with companies, and the people who work for them. In addition to the basic Address Book information, including addresses, phone numbers, and email addresses, you can record other important information, such as relationships between companies or extra details, like the business type.

As you work with the Address Book entries in your Maximizer Address Book, you can keep notes on your activities, so you can always have a history of your activities with your customers.



The following sections contain information on working with Address Book entries:

- "Types of Address Book Entries" on page 29
- "Address Book Window" on page 29
- "Choosing an Address Book List" on page 30
- "View an Address Book Entry" on page 31
- "Retrieve Contacts Associated with Address Book Entries" on page 31

Types of Address Book Entries

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

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

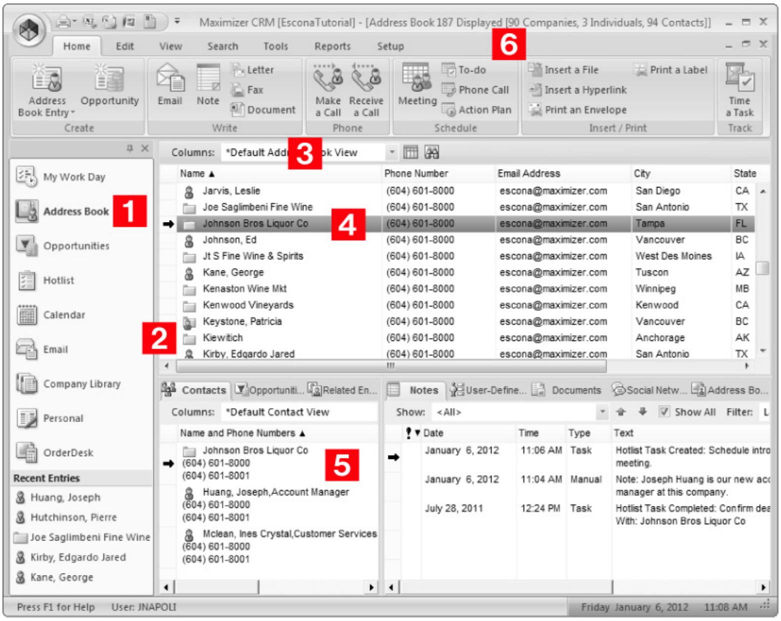
Companies and Individuals can exist on their own in an Address Book. Contacts are always attached to other Company or Individual entries.

Address Book Window

Typically, most of the activities on your Address Book entries are completed in the Address Book window. Keep the following points in mind when working in the Address Book window.

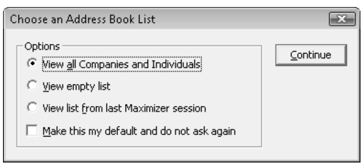
1. Select the **Address Book** icon to open the Address Book window.
2. Differentiate the **types** of entries with the icons representing Companies, Individuals, Contacts.
3. Use the **Columns** drop-down list to select a column setup and change the fields displayed in the window.
4. Double-click on an Address Book entry to open it.
5. Use the tabbed **following windows** to view more information and attached entries for the current entry in the main window.

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



Choosing an Address Book List

When you first open the Address Book window, you are prompted to choose an Address Book list to view.



The following options are available for viewing an Address Book:

- All Companies and Individuals in the Address Book
- An empty list (no Address book entries displayed)
- The list from your last Maximizer session

If you want the list you select to be displayed every time you open the Address Book window, select the "Make this my default and do not ask again" option. If you later decide that you don't want the list to display by default, select the "Ask at Address Book startup which list to view" option in your preferences. (On the Setup tab, select Preferences.)

View an Address Book Entry

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

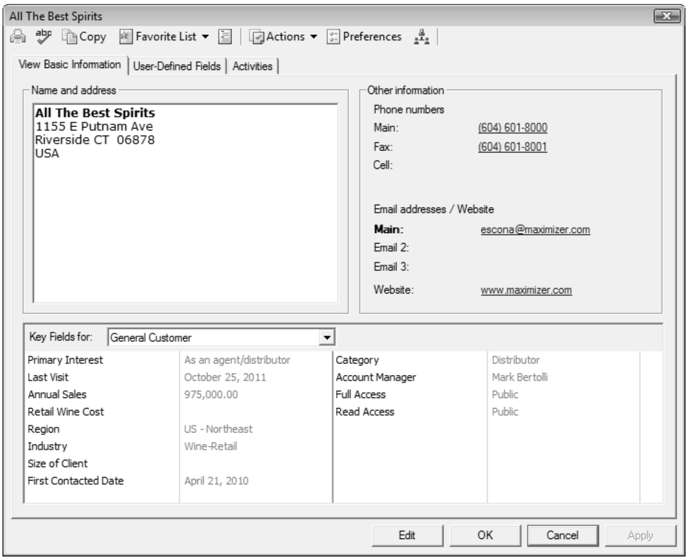
You can view and edit details of Address Book entries at any time.

1. In the Address Book window, double-click on the entry to open it.

   The Address Book entry opens showing the information in the entry.

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

3. If necessary, click **OK** to save changes made to the Address Book entry.



Retrieve Contacts Associated with Address Book Entries

You can retrieve the Contacts associated with Companies and Individuals to add the entries to the current list in the Address Book window.

You can select specific Companies and Individuals in a list to retrieve only the Contacts associated with the selected entries. If no entries are selected, the Contacts associated with all Companies and Individuals in the current list are retrieved.

1. Create a list of Companies and Individuals.

   – or –

   From the current list, select the specific Companies and Individuals.

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

2. On the **Search** tab, select **Contacts** from the **Retrieve** group.

Adding Address Book Entries

You can add Companies, Individuals, and Contacts to your Address Book. Typically, “Company” entries represent a corporate entity you would like included in your Address Book. “Individuals” represent a person who is not affiliated with a company or organization. “Contacts” are entries that are always associated with Companies or Individuals. “Address Book entries” refers to all Companies, Individuals, and Contacts in your Address Book.

If you need to add people to your Address Book, add them as Individuals or as Contacts of an Individual or Company. If you need to delete a Contact, its associated notes and documents are automatically transferred to the “parent” Company or Individual, which ensures you maintain a record of all interactions with a company, even during changes.

The following sections contain information on adding Address Book entries.

- “Add a Company or an Individual” on page 33
- “Add a Contact” on page 34
- “Add an Address Book Entry from an Email Message” on page 36
- “Access Rights for Address Book Entries” on page 37

Add a Company or an Individual

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

When you add entries for Companies and Individuals, you must specify all of the details on the entry.

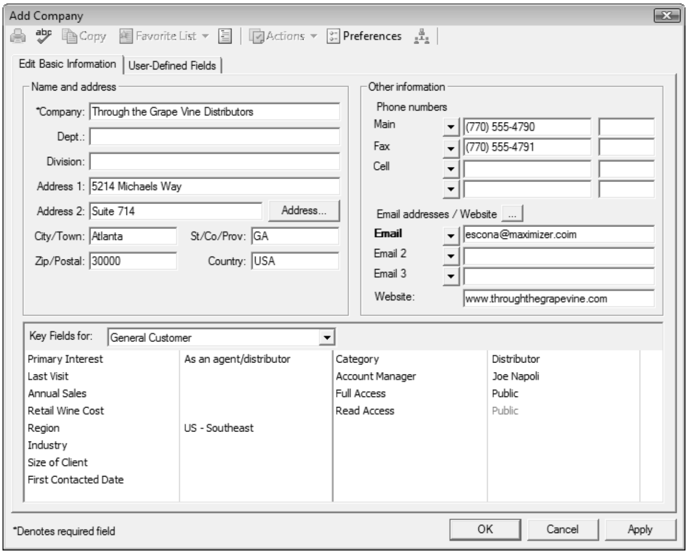
1. Select the **Address Book** icon to open the Address Book window.
2. On the **Home** tab, select **Address Book Entry > Company/ Individual** from the **Create** group.

   – or –

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

   The Add Company or Add Individual dialog box opens.
3. Enter the basic information for the Company or Individual including **name**, **address**, **phone numbers**, and **email addresses**.
4. From the **Key Fields for** drop-down list, select a Key Fields list, and enter values for the fields in the list.

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



5 Select the **User-Defined Fields** tab and specify values for any additional user-defined fields. Make sure you select the field and then click inside the field on the right to access the possible values for the field.

If necessary, select the **Show blank fields** option to display all fields in the Address Book, not only the fields with values defined in the entry.

6 Click **OK** to save the entry to the Address Book.

Add a Contact

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

You can add Contact entries attached to existing Companies and Individuals. When you add a new Contact to the Address Book, you need to specify only fields that are different than the Company or Individual entry.

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

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

2 On the **Home** tab, select **Address Book Entry > Contact** from the **Create** group.

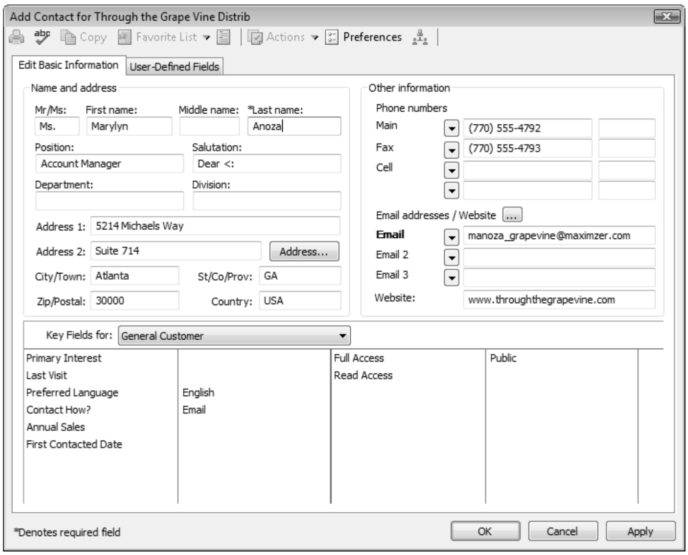
– or –

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

The dialog box for the new Contact opens. Some fields are populated with values from the Company or Individual entry.

3 Enter the basic information about the Contact, including the **name**, **position**, and **department**. And specify any additional information that differs from the Company or Individual entry.

4 Click **OK** to save the entry.



If you made changes to any of the address fields, you are prompted to update the current mailing address or create a new mailing address for this Contact.

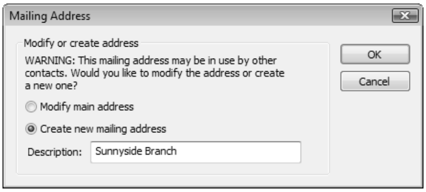
5 If necessary, select how to update the address, and click **OK**.

- To modify the current address, select **Modify the selected mailing address**.

  The address is modified for the Company entry and for any Contacts using the current address.

- To create a new address, select **Create a new mailing address**, and specify a name for the address.

You can later apply this address to other Contacts associated with the Company.



Add an Address Book Entry from an Email Message

You can create Address Book entries from email messages in the Email window. Email messages are automatically saved as documents for the new Address Book entries. You can create Companies, Individuals, or Contacts with Companies from email messages.

1. In the Email window, select the email message.
2. On the **Home** tab, select **Address Book Entry** from the **Create** group.

   – or –

   Right-click, and select **Create a New > Address Book Entry**.
3. Select the type of Address Book entry, and click **OK**.
4. Enter the details for the new entry, and click **OK** to save the entry.

   The Save Document dialog box opens.
5. Enter properties of the document including the name, owner, category, and description.
6. Click **OK** to save the email message with the Address Book entry.

The document name cannot contain the following characters: \ / : * ? < > |

Access Rights for Address Book Entries

For each Address Book entry, you can specify full access and read access rights for any Maximizer users or groups, or you can specify public access to grant access to all Maximizer users. Access rights to specific entries are shown in the Key Fields area of the Basic Information tab in the entry. You may need to select a different Key Fields list to view the Full Access and Read Access fields. By default, these fields are included in the <Default Key Fields> list.

You can specify access rights while adding or modifying an entry. You can select a user, a group, or public from the Full Access and Read Access drop-down lists.

Mailing Addresses

The main address of a Company or Individual is specified in the Basic Information tab. You can set up multiple addresses for companies and assign different addresses to specific Contacts in the company.

The following sections contain more information on mailing addresses:

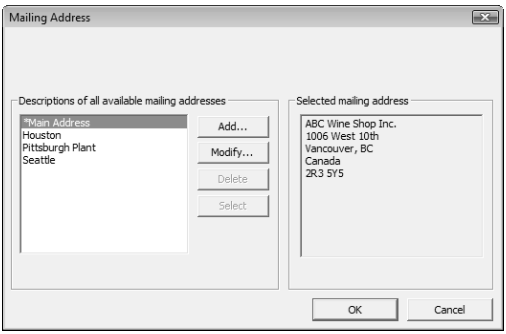
- "Add an Alternate Address for an Address Book Entry" on page 38

Add an Alternate Address for an Address Book Entry

Add alternate addresses for entries from the Basic Information tab.

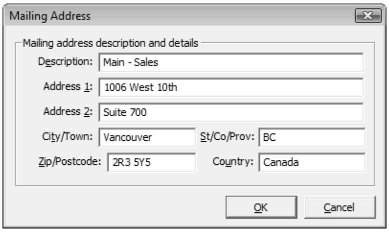
1. Open the Address Book entry.
2. If necessary, click **Edit**.
3. Click the **Address** button next to the **Address 2** field.

   The Mailing Address dialog box opens.



4. Click **Add** to enter a new address.

   You can also click **Modify** to change an existing alternate address.
5. Specify the new address, and click **OK**.



6 To set the address as the default (or main) address, select the address and click **Select.**

7 Click **OK** to return to the Address Book entry.

Modifying Address Book Entries

You can open existing Address Book entries at any time to modify their details. You can perform a number of other tasks to change the properties of Address Book entries, including adding alternate addresses to entries, converting Individuals to Companies and Contacts to Individuals, and recording relationships between Address Book entries.

The following sections contain information on modifying Address Book entries:

- "Combining Entries" on page 40
- "Combine Information from Multiple Entries" on page 41
- "Combine Multiple Entries into a Single Entry" on page 42
- "Move Contacts to Another Company or Individual" on page 43
- "Convert Individuals to Companies and Contacts to Individuals" on page 44

Combining Entries

You can combine information from multiple Address Book entries into a single entry. To combine entries, you must select at least two entries of the same type. The last entry selected is the target entry. The other entries selected are the source entries. You can combine a single source entry or multiple source entries into the target entry. When you combine the entries, information from the source entries is copied into the target entry. Information in the target entry is always preserved after combining the entries.

Information is copied in the following ways:

- If a field has a value in the source entry but not the target entry, the value in the source entry is copied to the target entry.
- If a multiple-value table field has a value in both source and target entries, the combined entry contains all values for the field.
- If a single-value field has values in both source and target entries, the combined entry contains the original value from the target entry.
- If a single-value field has different values in multiple source entries (but not in the target entry), the combined entry contains the value from the last source entry selected.
- If a source entry is a Company with Contacts, the Contacts are copied to the target entry (if a Contact does not already exist

with the same name) or combined with existing Contacts in the target entry (if a Contact already exists with the same name).

- If a source entry has notes, documents,or opportunities, duplicate notes, documents, and opportunities are created for the target entry.

If a source entry has an address specified, you have the option to create an alternate mailing address in the target entry with the address information from the source entry. You can apply this address to any Contacts associated with the target entry.

You can combine entries in a number of ways. You can combine the information into the target entry while keeping the original source entries. Or you can combine the source entries into the target entry and automatically delete the original source entries. You cannot preserve the original target entry. However, information in the target entry is never overwritten by information in the source entries.

Combine Information from Multiple Entries

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

Use this procedure to combine the information from a source entry or multiple source entries into a target entry without deleting the original source entries. All information is copied to the target entry without over-writing any of the original information in the entry. The source and target entries must be the same type of entries.

1. In the Address Book window, click on the source entry to make it the current entry.

   – or –

   In the Address Book window, select multiple source entries.

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

2. Select the target entry.

   Then, on the **Edit** tab, select **Combine Entries** from the **Relate & Convert** group.

   – or –

   Drag and drop the selected source entries to the target entry.

Select **Combine the source entries and the target entry into a single entry**, and click **OK**.

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

   If a source entry has an address specified, the Combine Address Book Entries dialog box opens asking how you want to use the mailing address of the source entry.

4. For each source entry, click **Yes** to create an alternate mailing address or click **No** to ignore the mailing address.

Combine Multiple Entries into a Single Entry

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

Use this procedure to combine the information from a source entry or multiple source entries into a target entry and automatically delete the source entries. All information is copied to the target entry without over-writing any of the original information in the entry. The source and target entries must be the same type of entries.

1. In the Address Book window, click on the source entry to make it the current entry.

   – or –

   In the Address Book window, select multiple source entries.

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

2. Drag and drop the selected source entries to the target entry.

   The Drag and Drop in Address Book dialog box opens.

3. Select **Move the source entries to the target entry**, and click **OK**.

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

   If a source entry has an address specified, the Combine Address Book Entries dialog box opens asking how you want to use the mailing address of the source entry.

5. For each source entry, click **Yes** to create an alternate mailing address or click **No** to ignore the mailing address.

A message is displayed confirming the number of entries that will be deleted.

6. Click **OK** in the message, and click **OK** again to confirm the deletion.

Move Contacts to Another Company or Individual

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

You can move a Contact from one Company or Individual to another Company or Individual. The Contact's notes, documents, and user-defined fields move with the Contact. Appointments and Hotlist tasks are updated to reflect the new location.

You can move a single Contact to a Company or Individual, or you can select multiple Contacts to move all of the Contacts to the Company or Individual at the same time.

1. In the Address Book window, click on the Contact entry to make it the current entry.

   – or –

   In the Address Book window, select multiple Contact entries.

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

2. Drag and drop the Contact entries to the Company or Individual entry.

   The Drag and Drop in Address Book dialog box opens.

3. Select **Move the source entries to the target entry**, and click **OK**.

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

   If a source entry has an address specified, the Combine Address Book Entries dialog box opens asking how you want to use the mailing address of the source entry.

5. For each source entry, click **Yes** to create an alternate mailing address or click **No** to ignore the mailing address.

A message is displayed confirming the number of entries that will be deleted.

6. Click **OK** in the message, and click **OK** again to confirm the deletion.

Convert Individuals to Companies and Contacts to Individuals

If you originally created an entry as an Individual and now decide the entry is more appropriate as a Company with Contacts, you can convert the entry.

In the conversion, Maximizer copies the entire contents of the Individual to a new Company entry with the Individual converted to a Contact for the Company. All data is converted, including the Individual's Contacts. The original Individual is automatically deleted in the process.

Additionally, you can convert Contacts to Individuals. You are asked to confirm if you want the new Individual to inherit the Contact's address. All data is transferred to the new Individual entry and the original Contact is automatically deleted.

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

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

   – or –

   Select multiple Individual or Contact entries.

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

2. On the **Edit** tab, select **Convert Individuals to Companies** or **Convert Contacts to Individuals** from the **Relate & Convert** group.

   – or –

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

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

Using Maximizer with LinkedIn

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

You can access the LinkedIn integration from the Social Networking following window.

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

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

The following sections contain additional information on integrating Maximizer with LinkedIn:

- "Associate an Address Book Entry with a LinkedIn Profile" on page 45
- "Social Networking Following Window" on page 46
- "Remove the Maximizer Integration with LinkedIn" on page 47

Associate an Address Book Entry with a LinkedIn Profile

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

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

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

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

Social Networking Following Window

You can view information from LinkedIn profiles in the Social Networking following window.

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

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

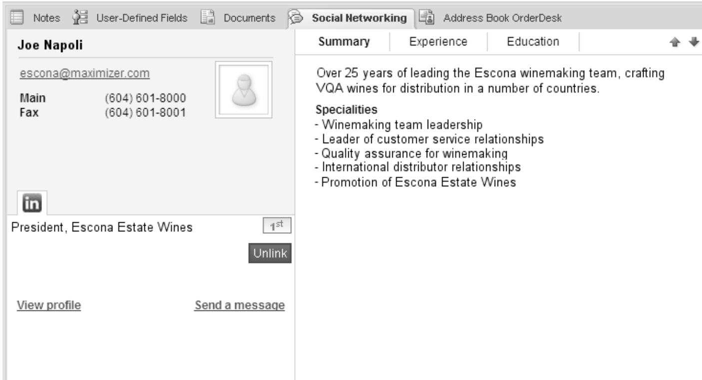
  If the name of the entry in LinkedIn is different from the name in Maximizer, the LinkedIn name is displayed in parentheses.
- The bottom-left part of the following window displays summary information from the LinkedIn profile.

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

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

links their own LinkedIn profile to the current Maximizer entry.

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



Remove the Maximizer Integration with LinkedIn

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

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

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

Recording Relationships with Related Entries

In the course of business, it's common to have people and companies who are somehow related or connected to each other. For example, one of your contacts might be another's accountant. Maximizer allows you to view these types of relationships in the Related Entries window.

Any Address Book entry can be related to another. All notes, user-defined fields, and documents associated with a related entry are then linked to the relationship. If an Address Book entry has entries related to it, these are displayed in the Related Entries following window.

The following sections contain additional information on related entries:

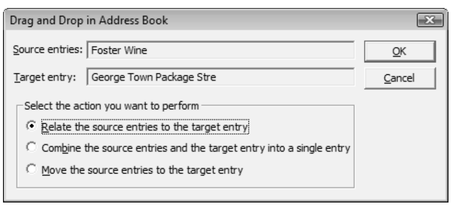
- "Relate Two Address Book Entries" on page 48
- "Unlink Address Book Entries" on page 49

Relate Two Address Book Entries

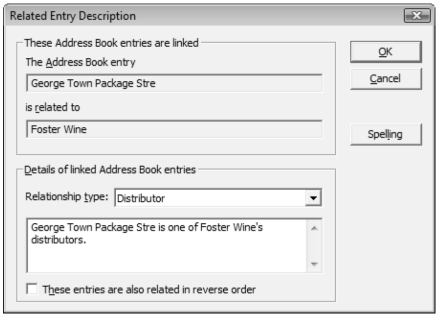
1. Select the two Address Book entries you wish to relate to each other. Then, on the **Edit** tab, select **Relate Entries** from the **Relate & Convert** group.

   – or –

   Drag an entry and drop it on to another entry. Then, select **Relate the source entry to the target entry**, and click **OK**.



2 Specify the details of the relationship between the two entries, and click **OK**.



Unlink Address Book Entries

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

1 In the **Related Entries** following window, select the entry to unlink.

2 On the **Edit** tab, select **Unlink Selected Entry** from the **Relate & Convert** group.

Draw a Map of an Address Book Entry

You can quickly draw a map showing the location of an Address Book entry or of the Address Book entry associated with an opportunity. You can choose to view only the location of the entry, or you can view directions to or from the Address Book entry and your current address.

1. Click on the Address Book entry or opportunity to make it the current entry.
2. On the **View** tab, select **Map** from the **Show** group.

   The Draw a Map dialog box opens displaying the address of the current Address Book entry.
3. Under **Draw this type of map**, select the type of map that you want to view.

   You can choose the following types of maps:

   - Map of selected entry only.
   - Map of travel route from current address to selected entry.
   - Map of travel route from selected entry to current address.
4. If necessary, enter your address in the **Current address** fields.
5. Click **OK**.

   A new browser window opens to a page displaying the address for the map.
6. Choose an online map site and click **OK**.

Phoning Address Book Entries

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

Users can transfer incoming calls to other phone extension in the phone company's system. If a note is logged for the phone call, the note includes the transfer information.

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

If you are using TAPI, you can phone entries directly from Maximizer. Otherwise, you can still use Maximizer to log phone calls with Address Book entries.

The following sections contain additional information on phoning Address Book entries:

- "Phone an Address Book Entry" on page 51
- "Receive a Phone Call" on page 53
- "Transfer a Phone Call" on page 54
- "Enable Logging for Phone Calls" on page 55
- "View the Phone Log" on page 55
- "Set Up Automatic Dialing from Maximizer" on page 56

Phone an Address Book Entry

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

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

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

If you are using TAPI, follow this procedure to phone Address Book entries directly from Maximizer.

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

2. On the **Home** tab, select **Make a Call** from the **Phone** group.

   – or –

   Right-click and select **Phone > Make a Call**.

   – or –

   In an open entry, select **Actions > Make a Call**.

   – or –

   In an open entry, click on the phone number you want to dial. Then in the Phone dialog box, click **Dial**.

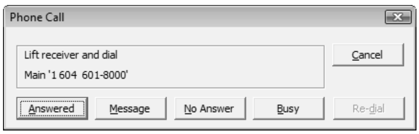
   If you log a phone call using one of the other methods, the first phone number associated with the Address Book entry is automatically selected as the number to dial.

3. Click one of buttons at the bottom of the dialog box to select a response.

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

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

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



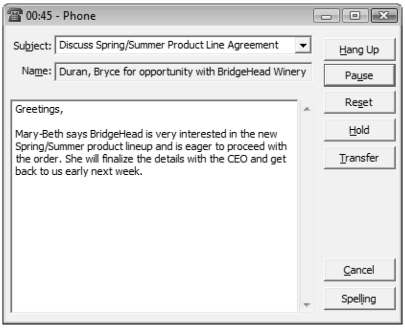
4. In the **Subject** field, enter a subject for the phone call, and record notes on your call as you talk.

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

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

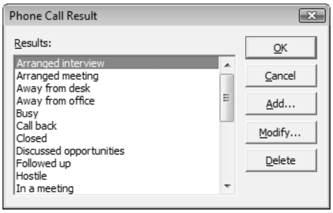
   The timer stops.

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



6 Edit the note, and click **Save**.

If your phone call logging preferences are set to show results on hang-up, you are prompted to select a result of the phone call. Select a value for the result.



You can also select a result of the phone call from the Phone dialog box. Click the Result button before saving the note.

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

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

Receive a Phone Call

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

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

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

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

2 On the **Home** tab, select **Receive a Call** from the **Phone** group.

– or –

Right-click and select **Phone > Receive a Call**.

– or –

In an open entry, select **Actions > Receive a Call**.

– or –

In an open entry, click on the phone number that is calling. Then, in the Phone dialog box, click **Incoming**.

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

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

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

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

5 Edit the note, and click **Save**.

If your phone call logging preferences are set to show results on hang-up, you are prompted to select a result of the phone call. Select a value for the result.

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

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

Transfer a Phone Call

You can transfer incoming or outgoing calls to other Maximizer users. If you are using TAPI, the phone call is transferred to the Maximizer user. Otherwise, the transfer is logged to the phone note.

1 In the Phone dialog box, click the **Transfer** button.

2 In the **Display name** list, select a user, or enter a valid extension for your company's phone system.

The phone extension does not have to be associated with a user in the current Address Book.

3 Click **OK** to complete the transfer.

Enable Logging for Phone Calls

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

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

   The Personal Preferences dialog box opens.

2. On the **Setup** tab, select **Preferences**.

   The Preferences dialog box opens.

3. Select the **Logging** tab.

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

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

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

6. Click **OK**.

View the Phone Log

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

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

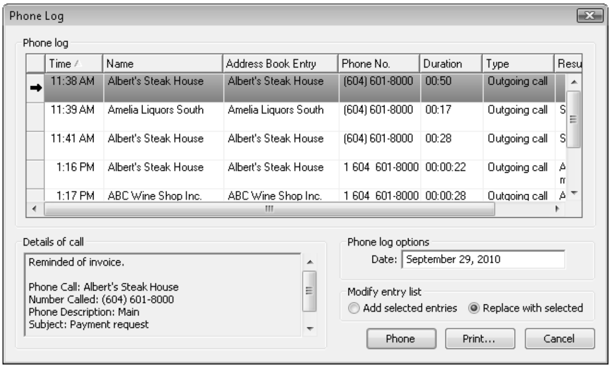
- On the **View** tab, select **Phone Log** from the **Logging** group.

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

  - In the **Date** field, select a date to change the day for which phone calls are displayed.

- Select entries in the list and click **Phone** to display the entries associated with the phone calls in the Address Book or Opportunitieswindow and record additional phone calls with the entries.

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



Set Up Automatic Dialing from Maximizer

If you have a modem installed in your computer, you can configure Maximizer to dial the phone for you when you make a phone call using the Phone feature in Maximizer. Before Maximizer can use your modem, you must first make sure that your modem functions correctly with your computer system, then configure your modem in your dialing preferences in Maximizer.

Your modem preferences tell Maximizer where your computer's modem is connected and how it performs. Some of these settings are more critical than others. For example, if you set up your port incorrectly, your modem will not work at all. But if you set up your baud rate incorrectly, the modem will operate but perhaps at a slower speed.

TAPI lets you use your Telephony Application Programming Interface modem to identify and direct signals received by your communications port to the appropriate application.

For more information on setting up dialing preferences, including documentation on using TAPI, refer to the *Maximizer CRM Administrator's Guide*.

1. On the **Setup** tab, select **Preferences**.
2. In the **Dialing** tab, select **Modem** or **TAPI**.

3. If you selected TAPI, click **Properties** to configure the dialing properties for the modem, and click **Device** to configure the Device properties for the modem.

   – or –

   If you selected Modem, fill in the remaining fields.

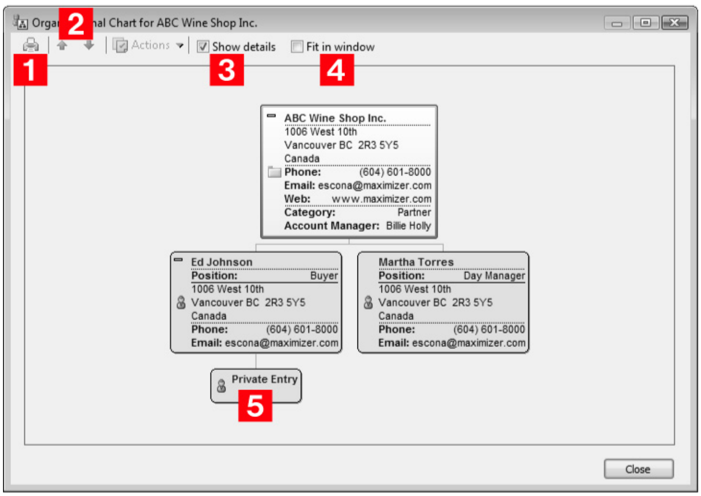
4. Click **OK**.

Organizational Charts

Organizational charts display the hierarchical structure of a Company or an Individual entry. The chart shows the entry's associated Contacts in a hierarchical format. The Company's organization is based on values in the Reports to field for each Contact.

Keep the following points in mind when working with an organizational chart:

1. Select the **Print** icon to print the organizational chart.
2. Use the **Previous entry** and **Next entry** buttons to view the organizational chart for the previous or next entry in the Address Book list.
3. Select or clear the **Show details** option to show or hide details or the Contacts.
4. Select the **Fit in window** option to fit the entire organizational chart into the dialog box.
5. **Private Entry** displays in place of the entry details if users do not have rights to view a particular Address Book entry.



The following sections contain information on organizational charts:

- "View an Organizational Chart for an Address Book Entry" on page 59
- "Modifying Organizational Charts" on page 59
- "View an Organizational Chart of Maximizer Users" on page 59

View an Organizational Chart for an Address Book Entry

1. Select the Address Book entry.
2. On the **View** tab, select **Organization Chart** from the **Show** group.

Modifying Organizational Charts

You can modify the structure of organizational charts in two ways:

- Change the value in the Reports to field in the Contact details section of the Edit Basic Information tab in an open Contact or in the user's general properties.
- Drag and drop an entry to the another entry the Contact or user reports to.

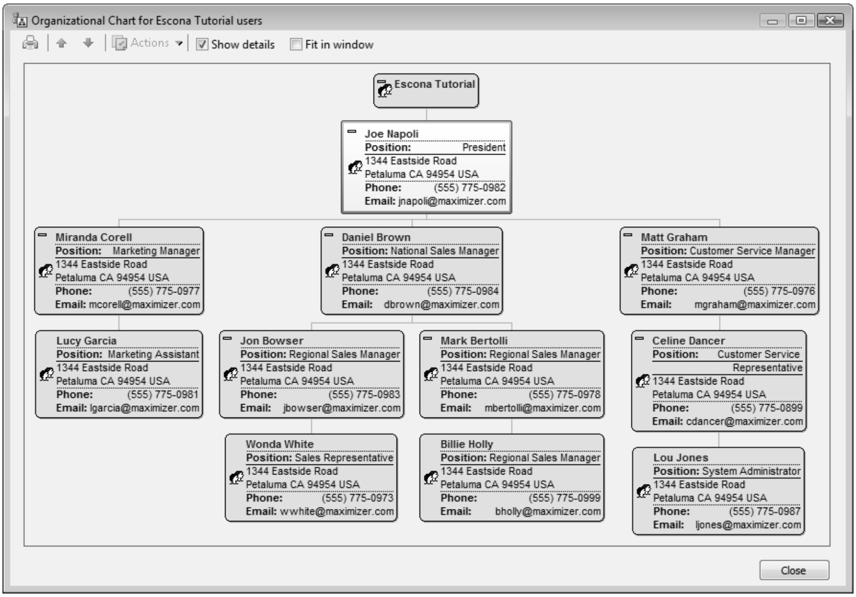
  The Reports to field automatically updates showing the new value.

View an Organizational Chart of Maximizer Users

You can view Maximizer users within an organizational chart. As with organizational charts for Address Book entries, the hierarchy of the organizational chart shows users based on values in the Reports to field in the user properties. Organizational charts include disabled users along with all fully enabled Maximizer users.

1. On the **Setup** tab, select **Manage Users** from the **User Management** group.
2. Click **Org Chart**.

The Organizational Chart dialog box opens displaying the chart for all Maximizer users.



CHAPTER 4

Maximizer Entries

Manage All Types of Information

In this chapter...

User-Defined Fields

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

- **Address Book –** Classifies Address Book entries. You can view these fields in the Address Book window or in an open Address Book entry.
- **Opportunities –** Classifies opportunities. You can view these fields in the Opportunities window or in an open opportunity.
- **Users –** Classifies Maximizer users. You can view these fields in the User Properties dialog box.

The following sections contain information on using user-defined fields:

- "Types of User-Defined Fields" on page 62
- "User-Defined Fields Following Window" on page 63
- "User-Defined Fields Tab" on page 64
- "Working with User-Defined Fields" on page 64
- "Mandatory, System, and Key Fields" on page 65

Types of User-Defined Fields

You can create different types of user-defined fields depending on the types of values required for the field. Maximizer defines the following types of user-defined fields:

- **Alphanumeric user-defined fields –** These fields record any alphanumeric text (letters and numbers) up to a specified maximum number of characters. You can encrypt alphanumeric fields for security protection. Note that you cannot disable or enable encryption once you have created the field.

Encrypted user-defined fields cannot be transferred, imported, or exported. They are also not searchable.

- **Date user-defined fields –** These fields store a specific date or an annually recurring date.
- **Numeric user-defined fields –** These fields record numeric values. You can specify a number of decimal places. For example, specify two decimal places to use this type of field for monetary values.
- **Table user-defined fields –** These fields enable you to select a value or values from a list. This type of field is very useful for multiple choice or multiple value fields. If you create a table

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

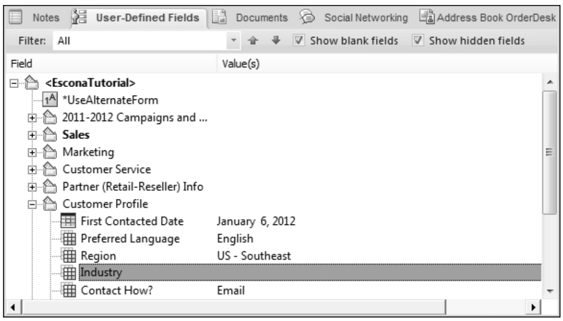
- **Yes/no user-defined fields –** These fields record either yes or no values. Since the fields must contain one of these values, these user-defined fields are always mandatory.

User-Defined Fields Following Window

User-defined fields for the current Address Book entry or opportunity are displayed in the User-Defined Fields following windowpane underneath the main list of entries.

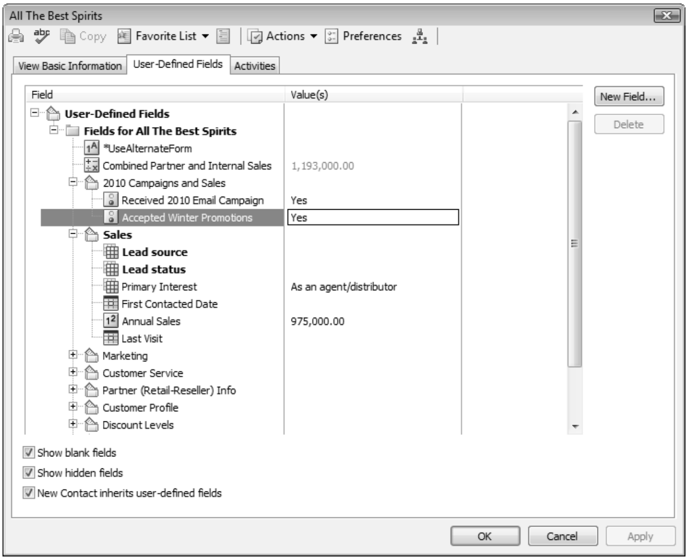
The following window displays only the user-defined fields defined for the type of entry, with values for the current entry. For example, when viewing Address Book entries, the User-Defined Fields following window contains only the user-defined fields defined for Address Book entries. The values of the fields are for the current Address Book entry in the controlling window.

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



User-Defined Fields Tab

You can access user-defined fields for open Address Book entries and opportunities from the User-Defined Fields tab of the dialog box for the entry. The folders and field names appear in a list on the left, and the field values appear on the right.



Working with User-Defined Fields

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

1. User-defined fields are displayed in a tree view, where fields are nested within folders, or in an alphabetical list, without their folder structure.

   You can set your default user-defined field view in your preferences. On the **Setup** tab, select **Preferences**, and select the **View User-defined fields in tree view** option in the System Defaults tab.

2. Click in the **Value(s)** column next to a field to add or modify a user-defined field value.

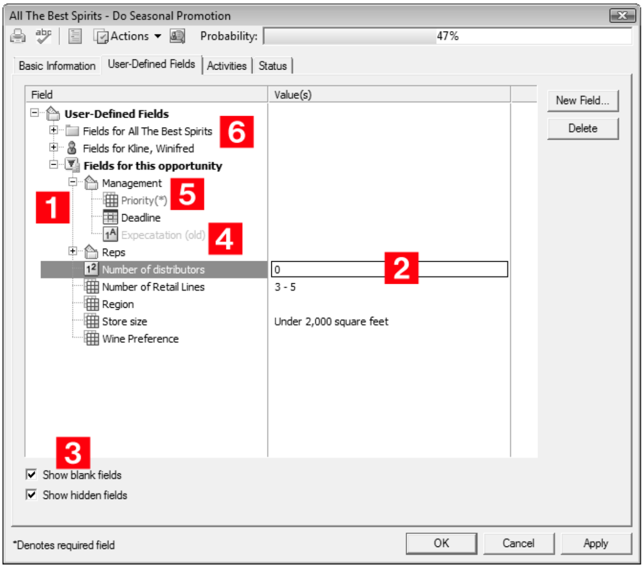
3. When you select the **Show blank fields** option, all user-defined fields in the Address Book for the type of entry are displayed. When you clear this option, only the fields with existing values are displayed.

4 When you select the **Show hidden fields** option, fields and folders that are set to hidden appear shaded. When you clear this option, the fields and folders are completely hidden.

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

6 Opportunities display the user-defined fields for the associated Address Book entries, as well as the user-defined fields for opportunities.

Contacts display the user-defined fields for the associated Companies or Individuals, as well as the user-defined fields for Contacts.



Mandatory, System, and Key Fields

There are a number of types of fields in Maximizer. These fields display differently depending on some of their characteristics.

- **Mandatory Fields –** These fields must have values. System fields are set as mandatory in Administrator. User-defined fields are set as mandatory when creating the user-defined fields in the Set Up User-Defined Fields dialog box. Mandatory fields are denoted with an asterisk displayed after the field type.
- **System Fields –** These fields are created by default and are not user-defined. They cannot be deleted or modified, though the values of some of these fields can be modified in Administrator. Some of the fields in Key Fields lists are system fields. As well,

some fields in the User-Defined Fields tab are system fields. They are shown in bold, black text.

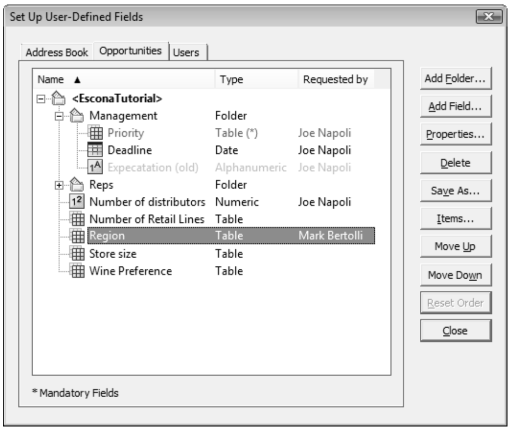
- **Key Fields –** These fields are displayed in an entry's Basic Information tab. Key Fields lists contain system fields and user-defined fields. They are defined by your system administrator in the Key Fields preferences in Administrator.

Setting Up User-Defined Fields

User-defined fields are usually set up by your system administrator using Administrator. However, any user may be assigned permission to create, change, or delete user-defined fields in Maximizer.

User-defined fields are created and modified in the Set Up User-Defined Fields dialog box. You can access this dialog box from the Setup tab.

The dialog box contains tabs for each category of user-defined field. The user-defined field structure can be multi-tiered with multiple levels of user-defined field folders, each of which may contain other folders or user-defined fields. The folder structure may contain a maximum of three folder levels.



The following sections contain information on setting up user-defined fields:

- “Sorting User-Defined Fields” on page 68
- “Create a Folder for User-Defined Fields” on page 68
- “Create a User-Defined Field” on page 69
- “Modify a User-Defined Field” on page 70
- “Add Items to a Table User-Defined Field” on page 71
- “Modify an Item in a User-Defined Field” on page 72
- “Modify an Item in a Table User-Defined Field from the User-Defined Fields Following Window” on page 73

Sorting User-Defined Fields

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

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

You can also use the mouse to drag and drop a field or a folder to a different position in the list. Dragging it onto a field places it immediately below that field. Dragging it 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.

Create a Folder for User-Defined Fields

You can group similar user-defined fields into folders and subfolders to a maximum folder depth of three levels. Grouping user-defined fields into folders is particularly useful if you have a large number of user-defined fields. Grouping them makes them easier to find and reduces the amount of scrolling needed to find the one you are looking for.

1. On the **Setup** tab, select **User-Defined Fields**.

   – or –

   In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

   The Set Up User-Defined Fields dialog box opens.

2. Select the tab for the category of user-defined fields you want to work with.

3. To create a top-level folder, select the Address Book name at the top of the list.

   – or –

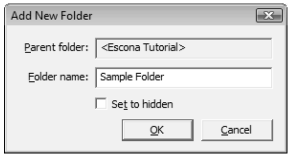
   To create a folder within an existing folder, select the existing folder.

4. Click **Add Folder**.

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

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.



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

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

Create a User-Defined Field

You can create user-defined fields for Address Book entries, opportunities, and user accounts in the Set Up User-Defined Fields dialog box. This dialog box is available from the Setup tab in Maximizer or the File menu in Administrator. Users can create user-defined fields only if they have insert permission for User-defined field setup.

1. On the **Setup** tab, select **User-Defined Fields**.

   – or –

   In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

   The Set Up User-Defined Fields dialog box opens.
2. Select the tab for the category of user-defined fields you want to work with.
3. Select an existing folder, inside which you want to create a new field.

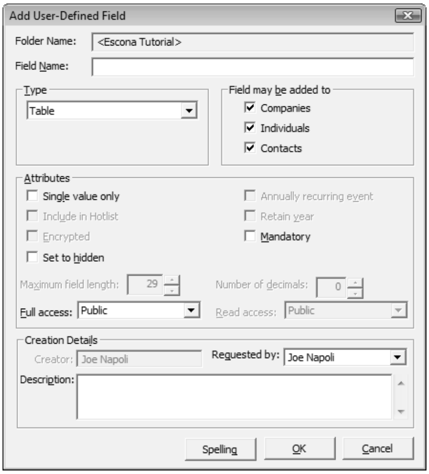
   – or –

   Select a user-defined field to create the new field at the same level as the selected field.
4. Click **Add Field**.
5. In the **Field Name** field, type a name for the user-defined field.

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

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**.

The user-defined field is added to the list.



Modify a User-Defined Field

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

1. On the **Setup** tab, select **User-Defined Fields**.

   – or –

   In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

   The Set Up User-Defined Fields dialog box opens.

2. Select the user-defined field and click **Properties**.

   – or –

   Double-click the alphanumeric, date, or numeric user-defined field.

3. Change the properties as required.

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

Add Items to a Table User-Defined Field

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

1. On the **Setup** tab, select **User-Defined Fields**.

   – or –

   In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

   The Set Up User-Defined Fields dialog box opens.

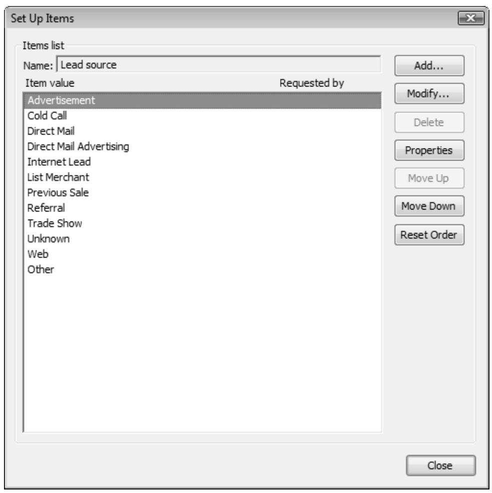
2. Select the table user-defined field, and click **Items**.

   – or –

   Double-click the table user-defined field.

   The Set Up Items dialog box opens.

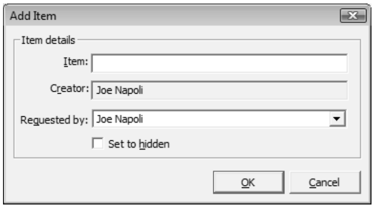
3. Click **Add**.



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

5. Click **OK**.

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



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

Modify an Item in a User-Defined Field

You can change the properties of existing items in table or yes/no user-defined fields. For yes/no user-defined fields, you can specify one of the items as the default value that is automatically set for the field in all new entries.

1. On the **Setup** tab, select **User-Defined Fields**.

   – or –

   In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

   The Set Up User-Defined Fields dialog box opens.

2. Select the table or yes/no user-defined field, and click **Items**.

   – or –

   Double-click the table or yes/no user-defined field.

   The Set Up Items dialog box opens.

3. Double-click the item you want to modify.

   – or –

   Select the item and click **Modify**.

4. Modify the properties of the item.

   For yes/no user-defined fields, you can select **Default value** to set this item as the default value for the field.

5. Click **OK**.

Modify an Item in a Table User-Defined Field from the User-Defined Fields Following Window

1. Select the **User-Defined Fields** following window.
2. Double-click the table user-defined field that contains the item you want to modify.

   The Table Values dialog box opens.
3. Select the item you want to modify and click **Modify**.
4. Modify the properties of the item and click **OK**.

Default Entries

You can set up default entries in the Address Book and Opportunities windows. When you create new entries, fields specified in the default entry are already filled in for you. For example, if you know all your Address Book entries will have the same city and state, you can specify these fields in the default Address Book entry.

Default entries are user-specific, so each user in the Address Book can have a different set of default entries.

The following section contains additional information on default entries:

- "Modify a Default Entry" on page 74

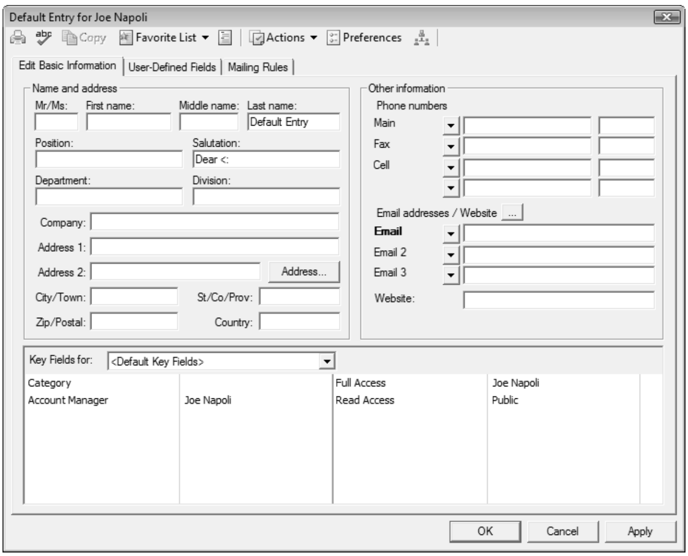
Modify a Default Entry

1. On the **Setup** tab, select **Default Entry** from the **Default Entry** group.

   The Default Entry dialog box opens.

2. Specify default values for fields in the **Basic Information** and **User-Defined Fields** tabs.

3. Click **OK** to save the changes to the default entry.



Searching

Many of the actions you can perform with Address Book entries and opportunities apply to the entire list of entries in the active window. For instance, when you print a report from the Address Book window, you are generally given a choice between printing the selected entry (or entries) or printing the entire list. When you perform a mail merge, for instance, you generally use the entire current list.

Maximizer's search features let you search any field for the data you specify and modify your current list with the matching entries. If you wanted to create a list of Address Book entries in Washington State, for example, you would search the State/Province field for entries with "WA" in that field.

A search retrieves any entries that match the search criteria and that you have the rights to view.

The following sections contain additional information on searching in Maximizer:

- "Search for Entries by a Field" on page 75
- "Search by All Fields" on page 76
- "Undo the Most Recent Search" on page 78

Search for Entries by a Field

Maximizer makes it easy to search for entries by basic field, such as Last Name, Company, City/Town, or Email for Address Book entries or Status or Revenue for opportunities. The items in the Search tab vary depending on what window is selected. You can search for entries matching a single field or multiple fields.

1. On the **Search** tab, select the field you are searching for from the **Search by** group.

   Select **Other** to see additional fields to search for.

   The Search By [field] dialog box opens.

2. Specify the search criteria.

3. Select how you want to update the current list with your search results.

   - **Add search results to list** displays the entries that match your search criteria, without removing any currently displayed entries from the list.

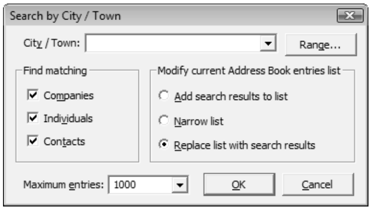
- **Narrow list** searches only selected entries (or all currently displayed entries if none are selected), and removes any entries that do not match your search criteria.
- **Replace list with search results** removes all entries currently displayed in the list and replaces them with entries that match your search criteria.

4 If applicable, specify the **Range** of the items to search.

5 Specify the **Maximum entries** to be returned in your search. This number is important to note because it affects what is displayed in your list after your search.

If you change the maximum entries field to a value less than the system default value, the value will remain as your default value for subsequent searches. If you change this field to a value more than the system default value, it will return to the system default value for subsequent searches. The default values for the number of entries returned in a search is set in Administrator.

6 Click **OK** to run the search.



Search by All Fields

Maximizer's Search by All Fields feature is useful when you need to search by fields that are not listed in the Search tab or when you want to search by more than one field. In the Search by All Fields dialog box, you can build complex search arguments and even save your search in the catalog for later use.

Use the Search by All Fields feature to find user-defined fields or a combination of user-defined fields and basic fields to produce a custom list of Address Book entries and opportunities.

In the Opportunities window, you can search by Address Book entry fields, as well as opportunity fields. The search returns opportunities associated with the Address Book entries matching the field values.

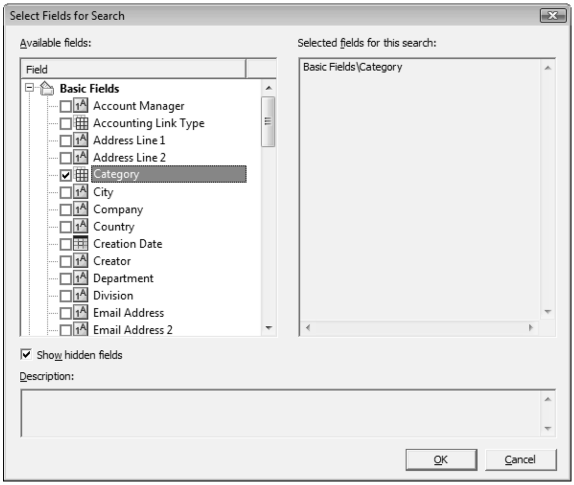
1 On the **Search** tab, select **All Fields** from the **Search By** group.

The Search by All Fields dialog box opens.

2 Click **Add.**

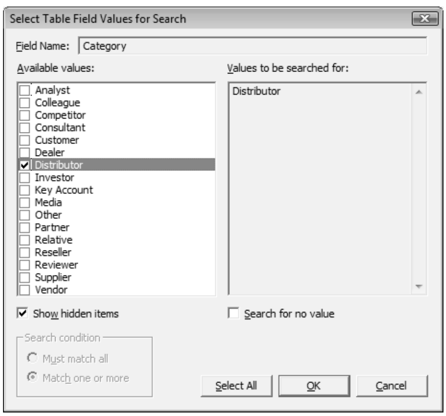
The Select Fields for Search dialog box opens.

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



4 For each field selected in the previous step, select or specify values in the dialog box that is provided.

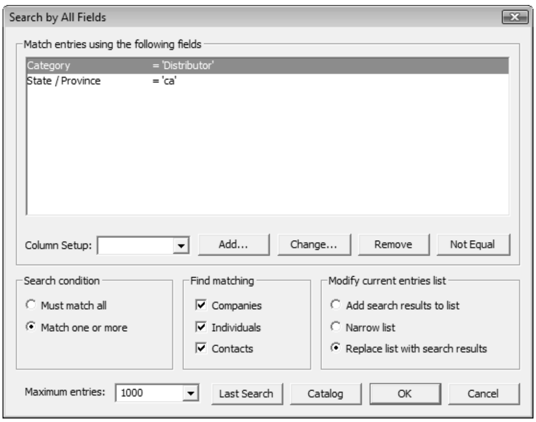
- For date fields, select **Rolling date range** to specify date values relative to the current date or select **Specified date range** to specify the exact values of the date.
- For alphanumeric, date, and numeric fields, specify values in the **From** and **To** fields to return any values within the range.
- If applicable, indicate under **Search conditions** whether to return entries that match all values, or that match one or more values.
- Select the **Search for no value** checkbox to search for entries where no value is assigned to the selected field.



5 Specify the remaining search criteria in the Search by All Fields dialog box.

To build a list of entries that excludes a certain group, as in a list of all Address Book entries except those in a certain state or province, use the Not Equal button.

6. In the **Modify current entries list** area, select one of the options.
   - **Add search results to list** displays the entries that match your search criteria, without removing any currently displayed entries from the list.
   - **Narrow list** searches only selected entries (or all currently displayed entries if none are selected), and removes any entries that do not match your search criteria.
   - **Replace list with search results** removes all entries currently displayed in the list and replaces them with entries that match your search criteria.
7. Specify the **Maximum entries** you would like to be returned.
8. Click **OK** to start the search.



Undo the Most Recent Search

You can quickly undo the most recent search in the Address Book and Opportunities windows.

- On the **Search** tab, select **Undo Search** from the **Options** group.

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

Search Catalog

The search catalog stores all fields searches so that you can retrieve the searches at a later time. Each saved search stores all of the information set up in the Search by All Fields dialog box. While saving the search, you can select a column setup to display automatically whenever the search is retrieved.

While setting up the search criteria, you can specify generic values in your searches to make them reusable for different users and at different times. For fields that take Maximizer users as values, you can specify the current user as the value of the field. For date fields, you can specify values in relation to the current date, such as today, next month, and current fiscal quarter. Each time the search is run, values for the current user and values relative to the current date are retrieved.

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

- Retrieve entries from a saved search automatically when you first open the Address Book window.
- Create a custom action that retrieves a saved searches when you select an icon.

The following sections contain additional information on the search catalog:

- “Save a Search in the Search Catalog” on page 79
- “Retrieve a Search from the Search Catalog” on page 80
- “Retrieve a Recent Search from the Search Catalog” on page 81

Save a Search in the Search Catalog

You can save values in the Search by All Fields dialog box to the search catalog to retrieve at a later time. While saving the search, you can select a column setup to display automatically whenever the search is retrieved.

While setting up the search criteria, you can specify generic values in your searches to make them reusable for different users and at different times. For fields that take Maximizer users as values, you can specify the current user as the value of the field. For date fields, you can specify values in relation to the current date, such as today, next month, and current fiscal quarter. Each time the search is run, values for the current user and values relative to the current date are retrieved.

1. On the **Search** tab, select **All Fields** from the **Search By** group.

   The Search by All Fields dialog box opens.

2. Enter your search criteria.

3. Click **Catalog** and click **Add**.

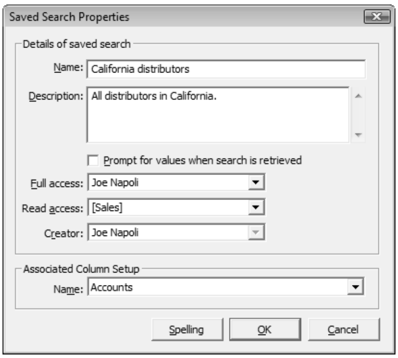
4. Specify the properties of the search.

   - In the **Full Access** and **Read Access** fields, select a Maximizer user or group with access to the saved search.
   - In the **Associated Column Setup** area, select an existing column setup to display when the search is retrieved.

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

5. Click **OK**.

   The search is added to the search catalog.



Retrieve a Search from the Search Catalog

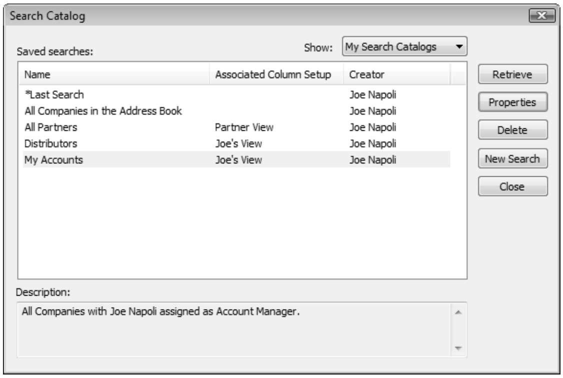
You can access saved searches from the Search Catalog dialog box. If the saved search has a column setup associated with it, the column setup is automatically displayed when the search is retrieved.

1. On the **Search** tab, select **Search Catalog** from the **Catalog** group.

   The Search Catalog dialog box opens.

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

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



Retrieve a Recent Search from the Search Catalog

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

- On the **Search** tab, select **Recent Catalog Searches** from the **Catalog** group, and select the name of the saved search.

Global Edits

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

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

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

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

The following sections contain additional information on working with the Global Edit command:

- "Modify Multiple Entries" on page 82
- "Add Values to a Field in Multiple Entries" on page 85
- "Remove Values from a Field in Multiple Entries" on page 86
- "Add a Note to Multiple Entries" on page 87

Modify Multiple Entries

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

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

1. Create a list of entries to modify.

   – or –

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

   - Click in the gutter to the left of entries.

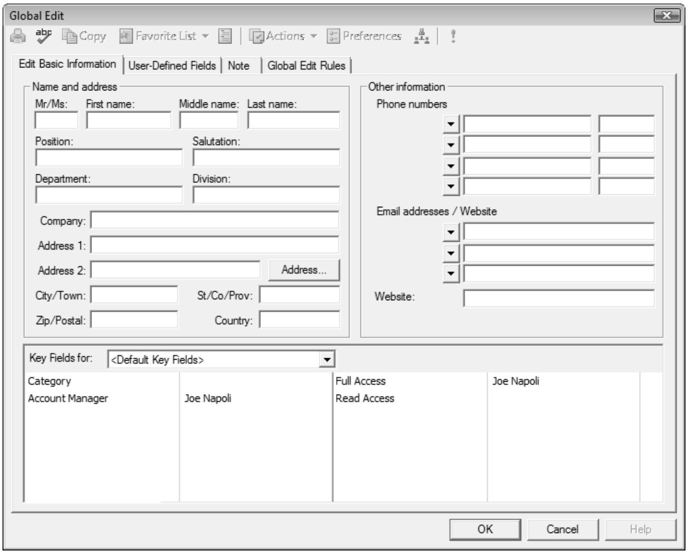
- Click on the entries one at a time while holding down the **Control** key.
- To select all entries between two entries, select an entry and, while holding down the **Shift** key, select another entry.

2 On the **Edit** tab, select **Global Edit** from the **Replace** group.

The Global Edit dialog box opens.

3 Apply your edits in the **Basic Information** and **User-Defined Fields** tabs.

For many basic fields, you can select **Remove** to remove existing values for a field without specifying alternative values. For user-defined fields, use the **Remove** column to remove all values or specific values from a field.



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

5 If you are working with Address Book entries, set the mailing address options under **Mailing rules**.

You can specify **Do not change**, **Yes**, or **No** for each of the options.

- In the **Receives mail sent to Company or Individual** drop-down list, specify if you want to send mailings to the associated Contacts when sending mail to the Company or Individual.

  This option applies only to Contacts.
- In the **Use Address Book entry's name in mailing address** drop-down list, specify if you want to list the

Address Book entry name as well as the Contact name (if applicable) in the mailing address.

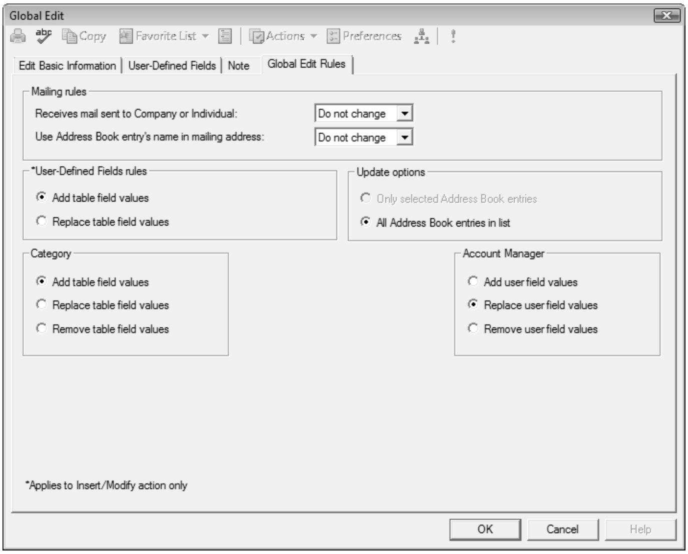
6 Under **Update options**, specify how you want to use the current list.

7 In the other sections of the Global Edit Rules tab, specify how you want the edits applied to specific basic fields and table user-defined fields.

- To add the selected values to the existing values, select **Add table field values** or **Add user field values**.
- To replace the existing values with the selected values, select **Replace table field values** or **Replace user field values**.
- To remove the selected values from the existing values, select **Remove table field values** or **Remove user field values**.

  This option is available only for specific basic fields. You can specify to remove table field values from user-defined fields in the **Remove** column of the User-Defined Fields tab.

If the table user-defined field is "single-value only", the Add Table Field values option does not apply. The new value always replaces the existing one.



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

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

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

Add Values to a Field in Multiple Entries

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

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

1. Create a list of entries to modify.

   – or –

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

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

2. On the **Edit** tab, select **Global Edit** from the **Replace** group.

   The Global Edit dialog box opens.

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

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

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

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

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

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

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

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

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

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

Remove Values from a Field in Multiple Entries

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

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

1. Create a list of entries to modify.

   – or –

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

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

2. On the **Edit** tab, select **Global Edit** from the **Replace** group.

   The Global Edit dialog box opens.

3. Locate the field.

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

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

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

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

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

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

   This step is required if you are updating the "Products/Services" or "Categories" fields in opportunities and the "Category", or "Account Manager" fields in Address Book entries.

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

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

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

Add a Note to Multiple Entries

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

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

1. Create a list of entries to modify.

   – or –

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

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

2. On the **Edit** tab, select **Global Edit** from the **Replace** group.

   The Global Edit dialog box opens.

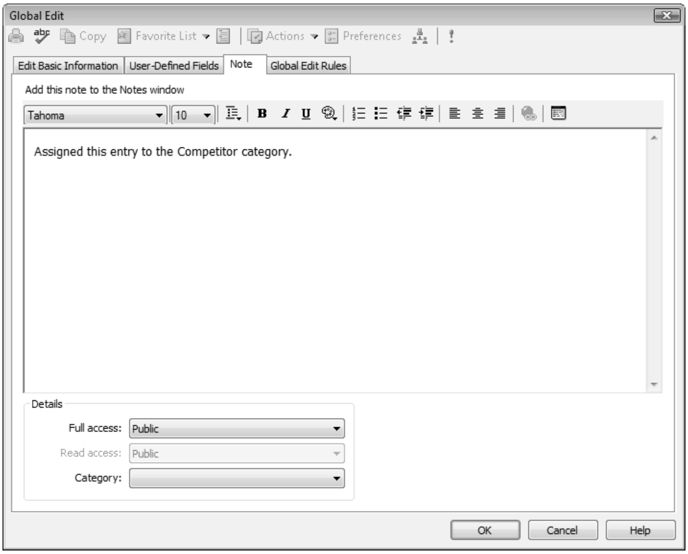
3. Select the **Note** tab.

4. Enter the content of the note.

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

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

6. If necessary, select the **Important** icon to mark the note as important, and adjust the **Full access**, **Read access**, and **Category** fields in the note.



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

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

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

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

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

Favorite Lists

Favorite Lists keep track of lists of Address Book entries and opportunities. You can easily create new Favorite Lists and retrieve the lists at any time. You can also add and remove entries from existing Favorite Lists to keep track of changes to the list.

The following sections contain additional information on Favorite Lists:

- "Create a Favorite List" on page 89
- "Retrieve a Favorite List" on page 90
- "Retrieve a Favorite List Automatically" on page 91
- "Add or Remove Entries in a Favorite List" on page 92
- "View a List of Favorite Lists for an Entry" on page 93

Create a Favorite List

You can quickly create a new Favorite List from a list of entries in the Address Book or Opportunities window. While creating the Favorite List, you can select a column setup to display automatically when the Favorite List is retrieved.

1. Create a list of the entries you want saved in the Favorite List.

   – or –

   From the current list, select the entries to save in the Favorite List.

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

2. On the **View** tab, select **All Lists** from the **Favorite Lists** group.

   The View Favorite Lists dialog box opens displaying all existing Favorite Lists.

3. Click **Add**.

   The Favorite List dialog box opens.

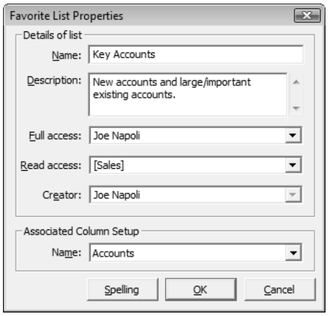
4. Specify the properties of the Favorite List.

   - In the **Full Access** and **Read Access** fields, select a Maximizer user or security group with access to the Favorite List.

If you select Public, all users can modify or retrieve the Favorite List. If you select a group or user, only members of that group or that particular user can perform these actions.

- In the **Associated Column Setup** area, select an existing column setup to display when the Favorite List is retrieved.

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



5 Click **OK**.

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

Retrieve a Favorite List

You can quickly retrieve an existing Favorite List and replace the current list of entries with the entries in the Favorite List. If the Favorite List has a column setup associated with it, the column setup is automatically displayed when the Favorite List is retrieved.

You can retrieve Favorite Lists from the Address Book and Opportunities windows.

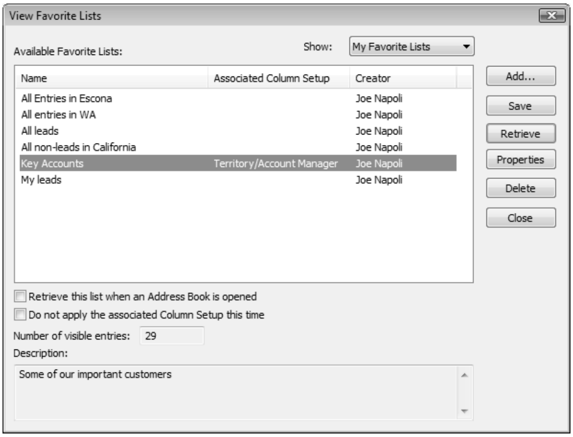
1 On the **View** tab, select **All Lists**, from the **Favorite Lists** group.

– or –

On the **View** tab, select **Recent Lists** from the **Favorite Lists** group, and select a Favorite List that you have recently accessed.

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

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



Retrieve a Favorite List Automatically

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

When you set a default Favorite List in the Address Book window, the “Ask at Address Book startup which list to view” option is cleared in the preferences, so you are not prompted to select an Address Book list when you first log in.

1 On the **View** tab, select **All Lists** from the **Favorite Lists** group.

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

3 Select the Favorite List.

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

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

Add or Remove Entries in a Favorite List

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

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

   – or –

   Open the entry.

   – or –

   Select the entries.

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

2. On the **View** tab, select **Add to List** or **Remove from List** from the **Favorite Lists** group.

   – or –

   Right-click and select **Add to Favorite List** or **Remove from Favorite List**.

   – or –

   In an open entry, select **Favorite List > Add to Favorite List** or **Remove from Favorite List**.

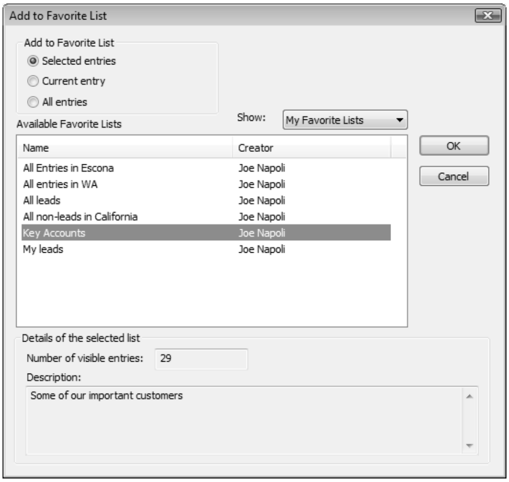
   The Add to Favorite List or Remove from Favorite List dialog box opens.

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

4. Select the Favorite List and specify the details as to what entries you are adding or removing.

   For example, to add or remove only the selected entries in the current Address Book list, select Selected Entries.

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



View a List of Favorite Lists for an Entry

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

1 Open the entry.

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

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

Column Setups

Maximizer provides a selection of column setups you can use for the Address Book and Opportunities windows. You can also create your own column setups to display different fields in various combinations.

Column setups contain basic and user-defined fields specific for the type of entry displayed in the window. You can specify the fields displayed in each column of the window, as well as the width and heading of the columns.

In the Opportunities window, column setups can contain fields for Address Book entries, as well as for opportunities. Columns with Address Book entry fields display values for the Company or Individual associated with the entry.

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

The following sections contain additional information on column setups:

- "Create a Column Setup" on page 94
- "Retrieve a Column Setup" on page 96

Create a Column Setup

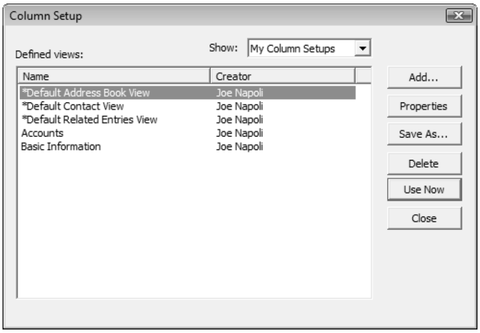
You can create custom column setups displaying any of the basic or user-defined fields in your list of entries. You can create column setups for the Address Book and Opportunities windows.

1. On the **Setup** tab, select **Column Setup** from the **Display** group.

   – or –

   On the **View** bar, click the **Column Setup** icon.

   The Column Setup dialog box opens.



2 Click **Add**.

The Defined View Properties dialog box opens.

3 In the **Details of View** area, specify the basic properties of the column setup.

- Enter a **Name** for the column setup.
- Specify the access rights in the **Full Access** and **Read Access** drop-down lists.

  If you leave Public selected, all users can modify or retrieve the column setup. If you select a group or user, only members of that group or that particular user can perform these actions.

4 In the **Columns in View** area, click a column header.

5 In the **Available fields** list, click the plus symbol to expand a folder, select a field, and click **Add** to add the field to the selected column.

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

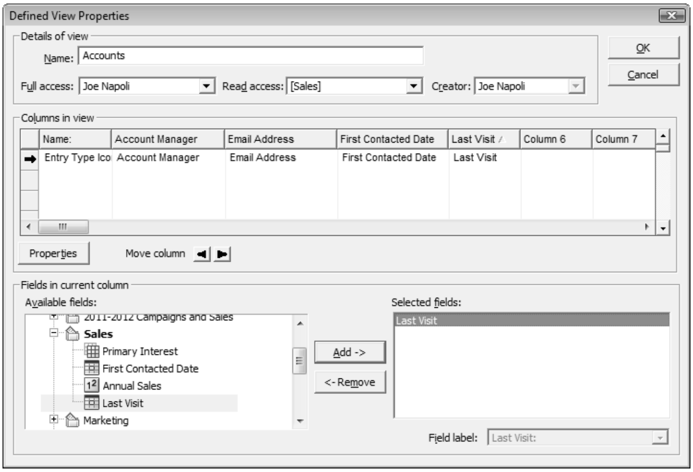
Fields in the current column appear in display order in the Selected Fields list.

6 If you add multiple fields to the column, specify the field label for each field, or select field separator characters from the **Field Label** drop-down list to place multiple fields on the same line.

7 If necessary, click **Properties** and modify the heading and width of the column.

8 Repeat steps 4–7 for each column in the column setup.

9 Click **OK** to save the column setup.

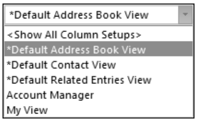


Retrieve a Column Setup

You can retrieve existing column setups to change the fields displayed in the current window. In some windows, you can retrieve a column setup directly from the View bar. Otherwise, you can retrieve a column setup from the Column Setup dialog box.

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

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



- On the **Setup** tab, select **Column Setups** from the **Display** group. Then, select the column setup, and click **Use Now**.

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

Coloring Rules

Coloring rules shade entries with different colors depending on the values of specific fields. You can set up coloring rules in the Address Book, Opportunities, and Hotlist windows. Each coloring rule includes a set of values for a specific field. You can choose a background color and a text color for each value in the rule. When you apply a coloring rule, the entries that have the same value for the field are colored even if the value is hidden in the current column setup.

The colors of current and selected entries override the colors in coloring rules. You can also customize these colors.

The following sections contain additional information on coloring rules:

- "Create a Coloring Rule" on page 97
- "Apply a Coloring Rule" on page 98

Create a Coloring Rule

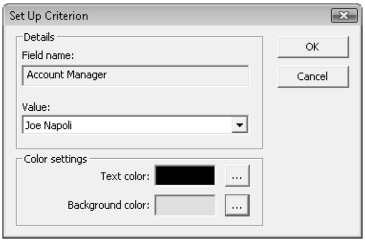
You can create coloring rules from the Address Book, Opportunities, and Hotlist windows.

1. On the **Setup** tab, select **Coloring Rule** from the **Display** group.
2. Click **Add**.

   The Rule Properties dialog box opens.
3. Enter a **name** for the coloring rule.

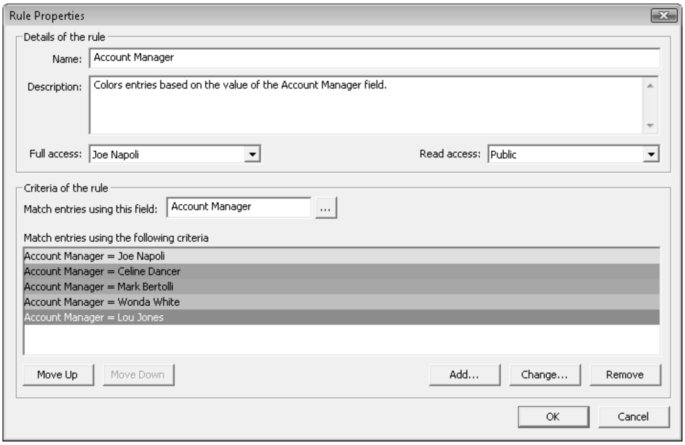
   You can also enter a **description** and specify values in the **Full access** and **Read access** fields.
4. Next to **Match entries using this field**, click the ellipsis button.
5. From the **Basic Fields** or **User Defined Fields** list, select the field for the rule, and click **OK**.
6. Click **Add**.

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



8 Repeat steps 6–7 for other values of the field.

9 Click **OK** to save the coloring rule.



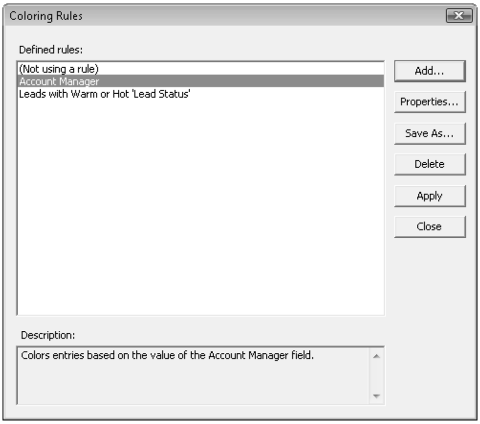
Apply a Coloring Rule

You can apply any existing coloring rule to the current list in the Address Book, Opportunities, or Hotlist window.

1 On the **Setup** tab, select **Coloring Rule** from the **Display** group.

The Coloring Rules dialog box opens.

2 Select an existing coloring rule, and click **Apply**.



CHAPTER 5

Notes and Documents

Store Notes and Documents in your Address Book

In this chapter...

Notes

Notes are used to record activities associated with Address Book entries and opportunities. Use notes to jot down "manual" notes—your ideas and impressions about a customer or an opportunity. You can enter manual notes for short company profiles or summaries of contracts and business agreements.

You can search for entries by notes. (On the Search tab, select Other Fields > Notes from the Search By group.) And you can view notes reports. (On the Reports tab, select Notes from the Associated Entries group.) Simply select the types of notes you want in your search or report.

The following sections contain additional information on working with notes in Maximizer:

- "Types of Notes" on page 102
- "Notes Following Window" on page 103
- "Add a Note to an Entry" on page 104
- "Set Up a Default Note" on page 105

Types of Notes

Maximizer automatically creates different types of notes, providing a history of all your activities. Maximizer creates the following types of notes:

By default, notes are logged for all of the main activities you can perform in Maximizer. You can adjust logging in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

- **Accounting –** Created in previous versions of Maximizer when you create or modify accounting transactions using external accounting applications.
- **Email –** Created when you send an email message to one or more Address Book entries.
- **History –** Created when opportunities are added or changed.
- **Incoming call –** Created when you receive a phone call.
- **Mail-outs –** Created when you print documents, labels, envelopes, or letters using the Maximizer Word Processor's merge feature.
- **Manual –** Added manually to entries.
- **Opportunity –** Created for Address Book entries when opportunities are added or changed. Opportunity notes can be printed or searched only from Address Book entries.
- **Outgoing call –** Created when you phone an Address Book entry.
- **Task –** Created when appointments or Hotlist tasks are scheduled, modified, deleted, or completed. For Hotlist task

notes, the current owner of the Hotlist task is included in the note, even when a task is reassigned. For appointment notes, details of the appointment are included when the appointment is scheduled. And when an attendee list is modified, an additional note is logged.

- **Timed –** Created when you use the Timer
- **Transfer log –** Created when you transfer entries between Address Books.

Notes Following Window

The Notes following window displays notes for the current entry in the Address Book, Opportunities, or Hotlist window.

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

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

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

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

2. Use the **Show** drop-down list to narrow the entries to a specific note type (for example, “Manual” or “Email”). Choosing **<Custom...>** enables you to search for notes that contain certain text, notes that were created by a particular user or accessible by a particular user or group, notes in a specific date range, and/or a combination of note types.

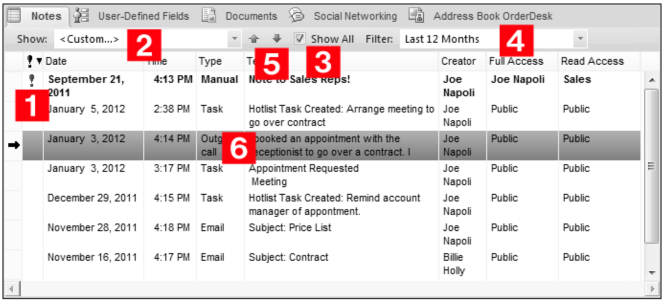
3. Select **Show All** to display all notes for the current Address Book entry, including notes belonging to the Company/Individual and all associated Contacts. If this checkbox is not enabled, only notes belonging to the selected entry are displayed.

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

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

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

6 Double-click on an entry to open and modify a note.



Add a Note to an Entry

You can add notes to Address Book entries and opportunities. When you add or edit a note, you can add formatting and hyperlinks in the note. You can also view and edit the HTML source of the note.

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

Notes for the entry are displayed in the Notes following window.

2 Drag the entry to the **Notes** following window.

– or –

On the **Home** tab, select **Note** from the **Write** group.

– or –

In Notes following window, right-click and select **Add Note**.

– or –

In the Notes following window, double-click a blank note cell.

You can also add a note by copying text from the Windows Clipboard. In the Notes window, right-click and select Paste Link.

The Add Note dialog box opens.

3 Enter the content of the note.

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

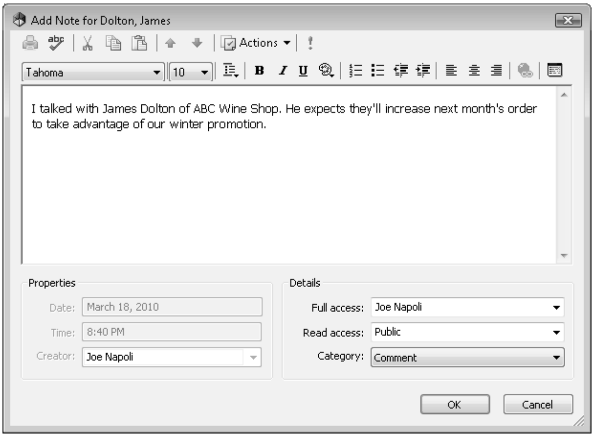
To view the HTML source of the note, select the **View Source/ HTML** icon.

You can use the icons in the Menu bar to perform other tasks in the note. For example, you can click the Spelling icon to check the spelling in the note.

You can choose to always check spelling when saving changes in a dialog box in your preferences. (On the Setup tab, select Preferences.)

5 If necessary, select the **Important** icon to mark the note as important, and adjust the **Full access**, **Read access**, and **Category** fields in the note.

6 Click **OK**.



Set Up a Default Note

You can create default notes for different types of entries. Default notes are specific to the current user. The content of the default note automatically appears when you create a new note. The Full access, Read access, and Category fields can also have default values.

You can add default notes in the Address Book, Opportunities, and Journal windows.

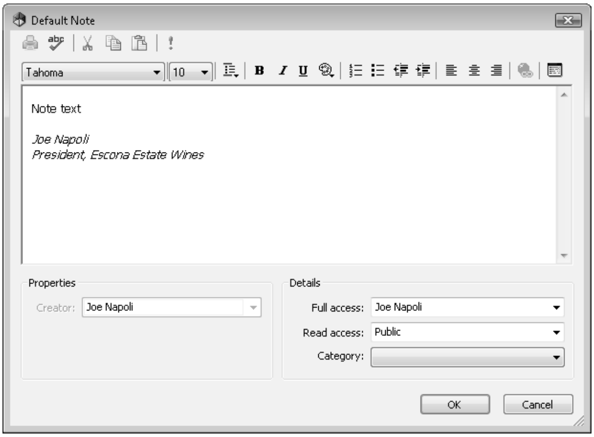
1 On the **Setup** tab, select **Default Note** from the **Default Entry** group.

The Default Note dialog box opens.

2 Enter the content of the note.

3 If necessary select a user or group for the **Full access** and **Read access** fields, as well as a note category.

4 Click **OK** to save the default note.



Journal

The journal provides you with a location to keep personal records. Journal entries can be business activities, reference notes, and personal ideas. These entries are similar to notes, except they are not attached to Address Book entries.

You can add journal entries up to 9,216 characters in length. By default, journal entries are stamped with today's date. You can change the date stamp if you want to add an entry for a past or future time period.

You can automatically log your Address Book activities as journal entries and search most Maximizer note types from the Journal window if you choose the Journal or Both options in your logging preferences.

The following sections contain additional information on journal entries.

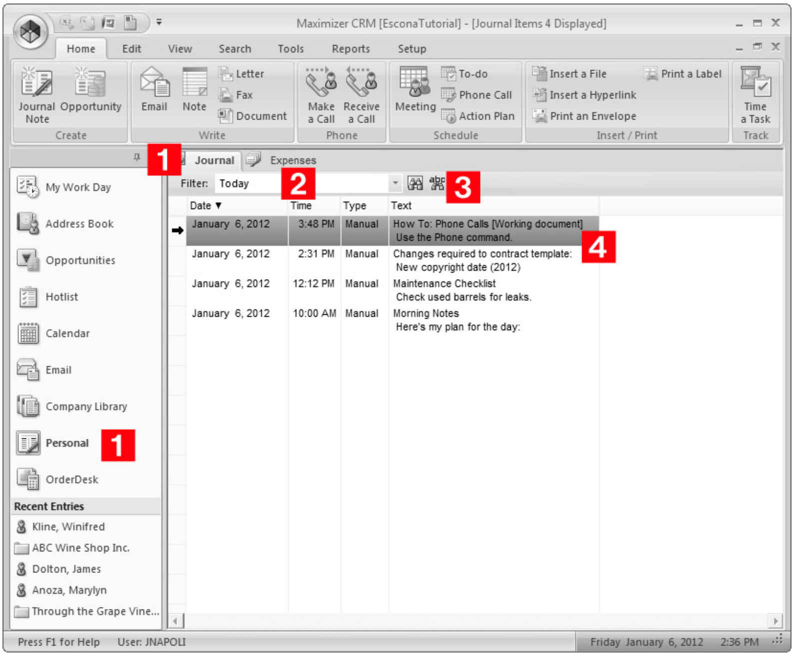
- "Journal Window" on page 107
- "Add a Journal Note" on page 108

Journal Window

You can access the Journal window by selecting the Personal icon and clicking the Journal tab. You can also access the Expenses window from the Journal window. Keep the following points in mind while working in the Journal window:

1. Select the **Personal** icon, and select the **Journal** tab to open the Journal window.
2. Use the **Filter** drop down list and filter your journal entries displaying only entries in a specific date range—**List All**, **Today**, **Yesterday**, **This Week**, or **This Month**.
3. Select one of the search icons to search for a note by date or text.

4 Double-click on a journal note to open it and view its details.



Add a Journal Note

You can add manual journal notes to the Journal window at any time. These notes are not attached to any entries and are accessible only to you.

1 Select the **Personal** icon, and select the **Journal** tab to open the Journal window.

2 On the **Home** tab, select **Journal Note** from the **Create** group.

– or –

Right-click and select **Add Journal Note**.

3 Enter the text of the note, and click **OK**.

Documents

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

The following sections contain additional information on working with documents in Maximizer:

- "Documents Following Window" on page 109
- "View a Document Attached to an Entry" on page 110
- "Add a Document to an Entry" on page 110
- "Add a Hyperlink to an Entry" on page 112

Documents Following Window

The Documents following window displays documents attached to the current entry in the Address Book, Opportunities, or Hotlist window.

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

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

1. Use the **Show** drop-down list to narrow the entries to a specific type of document.
    - **Maximizer Documents –** Displays documents created in Maximizer.
    - **Emails –** Displays email messages sent from Maximizer.
    - **Other –** Displays any other type of file attached to the entry.

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

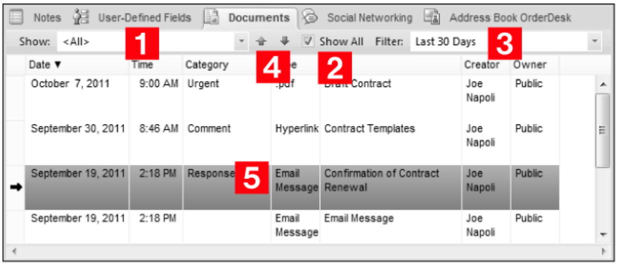
    This option is available only in the Address Book and Hotlist widows.

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

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

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

5 Double-click on an entry to open the document in its native application.



View a Document Attached to an Entry

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

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

2 Select the **Documents** following window.

Documents attached to the entry are displayed.

3 If necessary, select options from the **Show** and **Filter** drop-down lists to change the types of documents and the date range of documents displayed.

4 Double-click the document that you want to open.

Add a Document to an Entry

You can attach any type of files as documents to Address Book entries and opportunities.

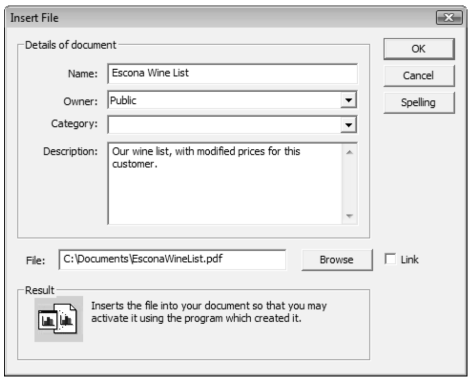
By default, files are embedded into the database when you add them to entries. You can also link a file to a location on a hard drive, and only a link to the source file is stored in the Address Book.

1. Click on the entry to make it the current entry.
2. Select the **Documents** following window.
3. On the **Home** tab, select **Insert File** from the **Insert/Print** group.

   – or –

   Right-click and select **Insert File**.
4. Specify properties for the document, such as **Name**, **Category**, **Description**, and **Owner**.
5. Click **Browse** and browse to the location of the file, and click **Open**.
6. To link the file to a location on a hard drive, select **Link**.
7. Click **OK** to save the file with the entry.

For the file to be accessible from other computers, specify the full UNC file path to the file (for example, \\[server name]\Documents folder\maximizer.doc), and ensure it resides in a shared location.



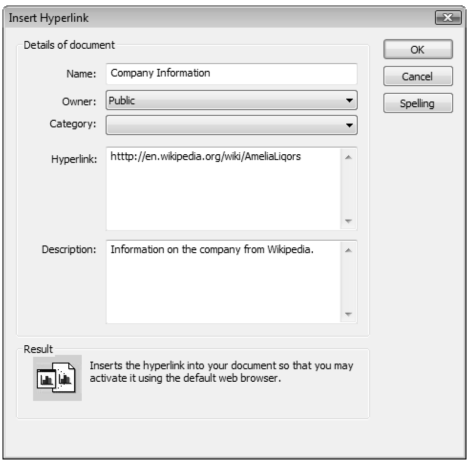
Add a Hyperlink to an Entry

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

1. Click on the entry to make it the current entry.
2. On the **Home** tab, select **Insert a Hyperlink** from the **Insert/ Print** group.

   – or –

   In the Documents following window, right-click and select **Insert Hyperlink**.
3. In the **Name** field, enter the name of the document.
4. In the **Hyperlink** field, enter the URL of the document.
5. Specify other properties of the document, such as **Category**, **Description**, and **Owner**.
6. Click **OK** to save the hyperlink as a document with the entry.



Maximizer Word Processor

To create documents and templates, you can use the Maximizer Word Processor, which is always installed as part of Maximizer. You also have the option of using Microsoft Word or Corel WordPerfect as your word processor.

The Maximizer Word Processor is a separate application with a toolbar and menus that are similar to other commonly used word processors.

The word processor includes fax, invoice, letter, and memo templates. You can customize these templates or create your own custom templates.

The following sections contain information on the Maximizer Word Processor:

- "Open the Maximizer Word Processor" on page 113
- "Maximizer Word Processor Window" on page 114
- "Documents and Templates" on page 114
- "Create a Document in the Maximizer Word Processor" on page 115

Open the Maximizer Word Processor

- Drag an Address Book entry to the **Documents** following window.
- On the **Home** tab, select **Letter**, **Fax**, or **Document** from the **Write** group.

  The Maximizer Word Processor opens the template for the type of document selected.
- On the **Tools** tab, select **Maximizer Editor** from the **Other** group.
- Press F8.

Maximizer Word Processor Window

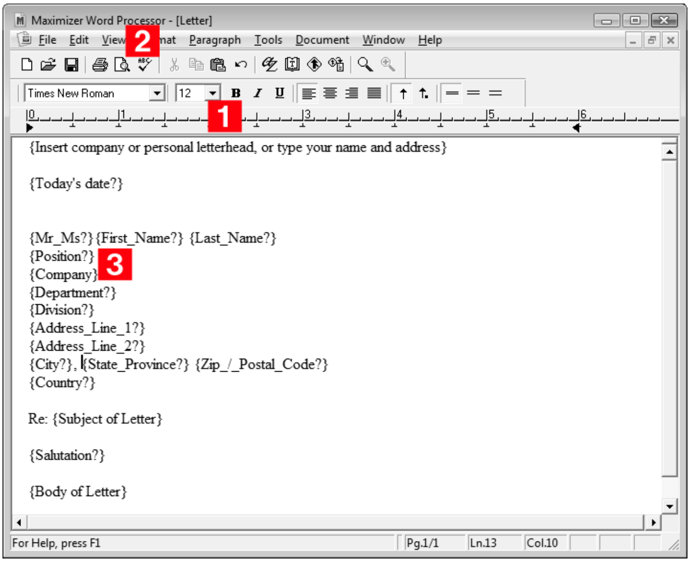
When you open the Maximizer Word Processor, it opens a separate window where you can create and edit documents and templates. Keep the following points in mind when working in the Maximizer Word Processor window:

1 Use the toolbars for common tasks and formatting text and paragraphs.

2 To run a spell check, place your cursor at the top of the document, and click the **Spell Check** button on the toolbar.

You can choose to always check spelling when saving changes in your preferences. (On the Setup tab, select Preferences.)

3 If your template has merge fields, the information for the selected Address Book entry—like the address—is inserted in place of the merge fields.



Documents and Templates

Understanding how templates and documents are used and how they communicate with each other is the key to working efficiently with this correspondence system.

Templates

A template is a standard design meant to be used repeatedly to create new documents. Templates are generally designed to be used with a company's stationery, including default page margins, standard fonts, and merge fields.

For example, a template might be used for the following:

- Create form letters for bulk mailings to clients and prospects.
- Provide a default structure for letters and faxes.
- Provide a consistent company image.

You can create a template in the Maximizer Word Processor by designing a document then selecting "Template" when you save your work. When you next create a new document, you can use your saved template as the basis for the document. You can also customize existing templates to suit your needs.

Documents

A Maximizer Word Processor document is always specific to an Address Book entry or opportunity. Typically, documents are created from one of the templates created with the word processor. A document can be a letter, a fax, a flyer, or anything you write with the word processor and send by mail, fax, or email.

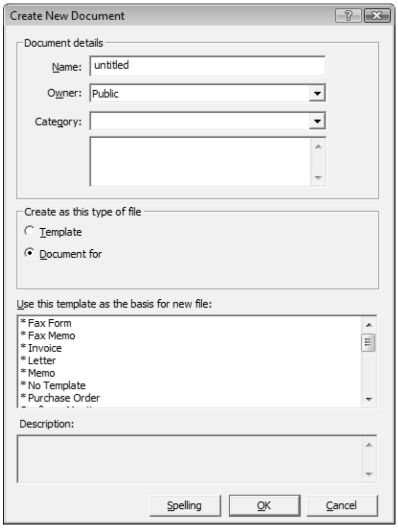
Location of Templates and Documents

When you use the Maximizer Word Processor to save your templates and documents, they are automatically stored in the database, not the Address Book folder. Therefore, they can be viewed only through the Maximizer Word Processor and not Windows Explorer or another file management tool.

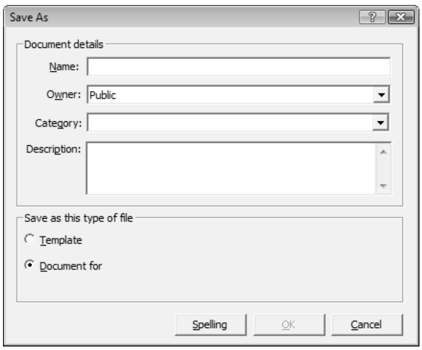
Create a Document in the Maximizer Word Processor

You can open the Maximizer Word Processor and create documents at any time while working with Maximizer. You can base the documents on existing templates, or you can start from a blank document. The document is attached to the currently selected Address Book entry.

1. In Maximizer, select the entry that the document is associated with.
2. On the **Home** tab, select **Document** from the **Write** group.
3. Select the template to base the document on and click **OK**.



4. In the Maximizer Word Processor, modify the document as required.
5. Select **File > Save**.
6. Specify the properties of the document and click **OK**.



Merge Fields

Ensure the start and end of the merge field reside on a single line. The start of a merge field is denoted by the left brace ({) character and the end of a merge field is denoted by the right brace (}) character.

Merge fields are simply place-holders in your document that can be replaced by basic Address Book entry or user-defined field information when you perform a merge. For example, in the body of a letter, you can insert a merge field for a Contact's name:

{First_Name?}

When you perform the merge, the name of each recipient is displayed in place of the merge field. If the entry does not have an assigned value for the chosen merge field, the field does not display.

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

You can insert merge fields in email templates, email messages, Maximizer Word Processor templates, and Microsoft Word documents.

The following sections contain additional information on working with merge fields in Maximizer:

- "Insert a Merge Field in the Maximizer Word Processor" on page 117
- "About Mail Merge" on page 118
- "Send a Mail Merge" on page 118

Insert a Merge Field in the Maximizer Word Processor

You can insert merge fields into documents and templates in the Maximizer Word Processor, letting you add information for specific entries to generic documents and templates.

1. In the Maximizer Word Processor, place your cursor where you want to insert a merge field.
2. Select **Tools > Merge Field**.

   – or –

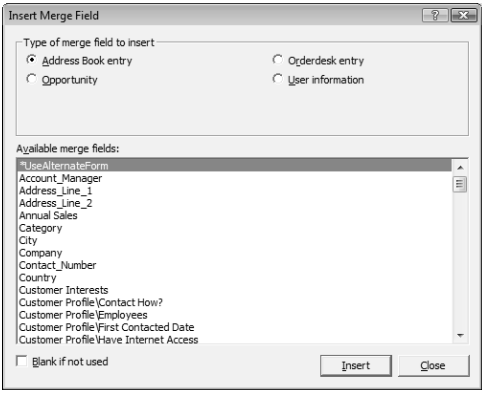
   On the toolbar, click the **Merge Field** icon.

   The Insert Merge Field dialog box opens.
3. Select the type of merge field you would like to insert.
4. Select a merge field from the list and click **Insert**.
5. Select the **Blank if Not Used** checkbox if you prefer.

   During a mail-merge, this option leaves a blank space if there is no information available for a field. (By default, if there is no information in the field, the Maximizer Word Processor simply omits the field and leaves no space; it also adjusts the position of the other merge fields accordingly.)

6 Click **Insert**.

The selected merge field is inserted in the template.



About Mail Merge

Use mail merge in the Maximizer Word Processor to send a letter, an email message, or a fax to many recipients. The merge feature allows you to send a single document to multiple Address Book entries by fax, email, or regular mail. This type of merge is called a "broadcast" merge.

Because the word processor has merge fields for your Address Book information, you can create a document with a merge field in place of a specific name. These merge fields are replaced with the recipient's information when you perform the merge and send the document.

Send a Mail Merge

1 In Maximizer, create a list of Address Book entries that should receive your merged document.

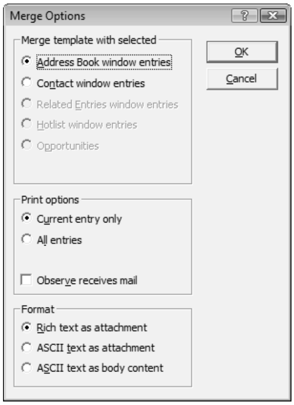
You can create a list by searching for the appropriate entries or simply selecting entries in your current list.

2 In the Maximizer Word Processor, select **File > Merge > to Printer**, **to Email**, or **to Microsoft Fax**.

You can also send a mail merge from Microsoft Word or WordPerfect using the Maximizer toolbar embedded in the word processor to insert the merge fields.

3 Specify your merge options, and click OK to continue with the merge.

Depending on what window you have active, the available merge entries vary



4 Select **Print** or **Send** to merge the document with the first entry in the list of entries, or select **Send All** or **Print All** to merge the document with all of your selected entries.

Click **Skip** to go on to the next entry.

Microsoft Word Integration

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

Maximizer also integrates with Corel Word Perfect.

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

Word templates created in previous versions of Maximizer do not work in Maximizer CRM 12. You must recreate the templates using the latest version of Word Integration. If you copy content from the old templates, any merge fields in the templates will no longer merge with Maximizer fields and will trigger warning messages. You must delete and reinsert the merge fields in the new template.

The following sections contain additional information on working with Word Integration:

- "Open Microsoft Word from Maximizer" on page 121
- "Insert a Merge Field in a Microsoft Word Document" on page 121
- "Insert a Basic Merge Field in a Microsoft Word Document" on page 122
- "Preview a Microsoft Word Document" on page 122
- "Send a Microsoft Word Document to the Printer" on page 123
- "Link a Microsoft Word Document to a Maximizer Entry" on page 124

Open Microsoft Word from Maximizer

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

- On the **Tools** tab, select **Open Microsoft Word** from the **Office** group.

Insert a Merge Field in a Microsoft Word Document

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

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

If you created templates with merge fields using a previous version of Maximizer, you must delete and reinsert the merge fields in the template.

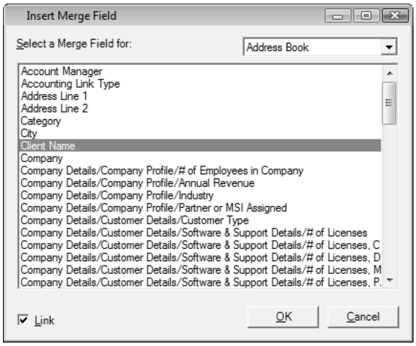
When you add a merge field to a Word document, you have the option of adding the merge field as a link. When the merge field is added as a link, a field is added to the document. When you merge the document, the field is replaced with the value from the current entry. If you add a merge field without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

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

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

   The Insert Merge Field dialog box opens.
3. From the **Select a Merge Field for** drop-down list, select the type of merge field to insert.
4. Select a merge field from the list.
5. To add the merge field as a link, select the **Link** checkbox.

6 Click **OK** to finish adding the merge field to the document.



Insert a Basic Merge Field in a Microsoft Word Document

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

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

ⓘ If you created templates with merge fields using a previous version of Maximizer, you must delete and reinsert the merge fields in the template.

1 With a document open in Word, place your cursor where you want to insert the merge field.

2 In the **Add-Ins** tab, click the bottom of the **Insert Merge Field** icon in the **Maximizer CRM** group, and select the merge field.

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

Preview a Microsoft Word Document

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

ⓘ Word templates created in previous versions of Maximizer do not work in Maximizer CRM 12. You must recreate the templates using the latest version of Word Integration.

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

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

1 Open the document in Word.

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

3. In the **Add-Ins** tab in Word, select **Preview** from the **Maximizer CRM** group.

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

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

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

Send a Microsoft Word Document to the Printer

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

Word templates created in previous versions of Maximizer do not work in Maximizer CRM 12. You must recreate the templates using the latest version of Word Integration.

When you use Microsoft Word with Maximizer, you can send a Word document to the printer, automatically merging the document with entries in Maximizer. When you send the document, you can choose to merge the document with the current entry or with all selected entries in Maximizer. You can also log a note to all entries included in the merge.

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

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

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

1. Open the document in Word.

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

   – or –

   In Maximizer, select multiple entries.

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

3. In the **Add-Ins** tab in Word, select **Send Document** from the **Maximizer CRM** group.

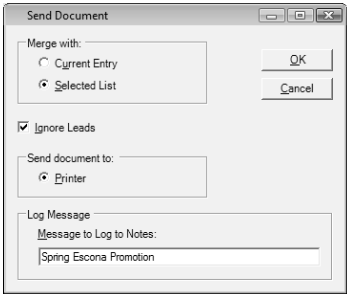
   The Send Document dialog box opens.

4. Under **Merge with**, select how you want to use the current list.

   - Select **Current Entry** to merge the document with only the current entry.

- Select **Selected List** to merge the document with all selected entries in the current list.

5. Under **Log Message**, enter a note to log with each of the selected entries.
6. Click **OK** to send the document to the current printer.



Link a Microsoft Word Document to a Maximizer Entry

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

Word templates created in previous versions of Maximizer do not work in Maximizer CRM 12. You must recreate the templates using the latest version of Word Integration.

You can link a Microsoft Word document with the current entry in Maximizer. The Word document is added to the entry as a linked document. If the document has not previously been saved, you are prompted to save the document while linking it. The path to the document is saved with the entry.

In order to access the document from other computers running Maximizer, you should save the document in a shared network location.

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

1. In the **Add-Ins** tab in Word, select **Link Document** from the **Maximizer CRM** group.
2. Click **OK** to confirm the action.
3. In necessary, browse to the location to save the document, and click **Save**.

Company Library

You know the value of keeping an organized database of your marketing materials and other company collateral. Brochures, price lists, photos, magazine reviews—all of these materials should be easy to find when you need them. The Company Library provides shared access to a central library of these materials with the security offered by the Maximizer environment.

If you use another word processor—such as Microsoft Word or Corel WordPerfect—for your correspondence, you can even open a document from the Company Library, merge it with one or more Address Book entries, and print or send it as an email message.

Most file types are supported in the Company Library if you have the associated application installed on your computer. These include the following file types:

- .DOC and .RTF files – Microsoft Word
- .XLS files – Microsoft Excel
- .PPT files – Microsoft PowerPoint
- .HTM and .HTML
- .BMP files – bitmaps
- .TXT files – text and Company Library notes
- .JPG, .GIF, and .TIF files – graphic files
- .PDF files – Adobe Portable Document Format files
- .MXD files – Maximizer Documents
- .MSG files – Outlook Email Messages

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

The following sections contain additional information on working with the Company Library:

- “Company Library Window” on page 126
- “Organizing the Company Library” on page 127
- “Add a Folder to the Company Library” on page 128
- “Add a Document to the Company Library” on page 128
- “Add a Note to the Company Library” on page 129
- “Add a Hyperlink to the Company Library” on page 129
- “Send Items by Email from the Company Library” on page 130

Company Library Window

The Company Library window is divided into two areas. The left side lists the folders and files from the library in a tree view. The right side is a preview area where you can view a preview of some of the items in the library.

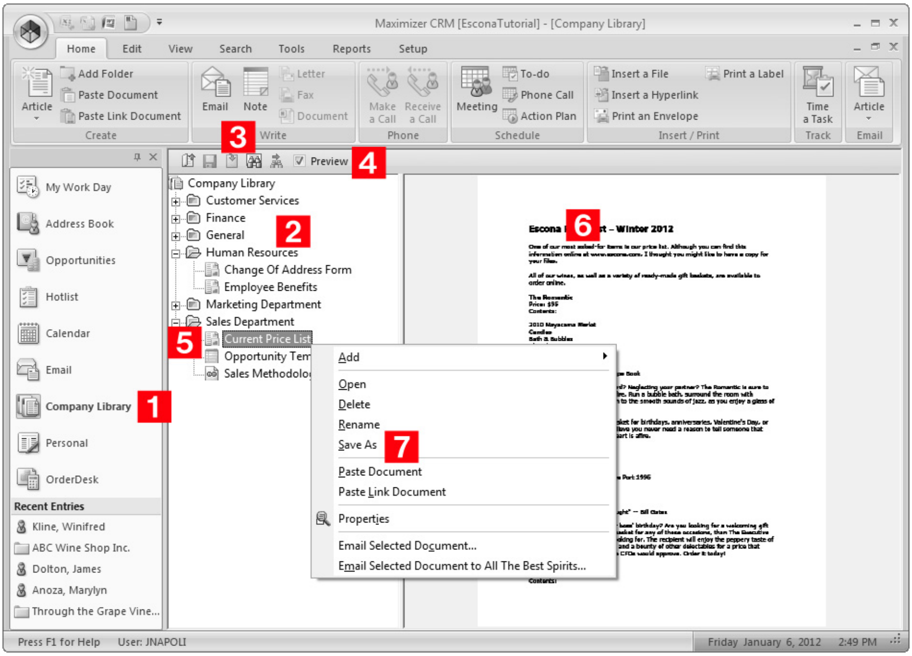
Keep the following points in mind when working in the Company Library window.

1. Select the **Company Library** icon to open the Company Library window.
2. In the area on the left side of the window, view your folders and files in a tree view.

   To view the contents of a folder, click the plus sign on the left side of the folder.
3. Use the toolbar for common tasks.
4. Select the **Preview** checkbox to display a preview of notes, hyperlinks, and most file types in the right part of the window.
5. Double-click on a document, hyperlink, or note to open it.
6. Write new notes and edit existing notes in the pane on the right-side of the window.

7 Use the shortcut menu to perform common tasks in the window such as adding, deleting, or renaming files.

- Save files on your computer or a network location by right-clicking on the file and choosing **Save As**.
- Print notes, by right-clicking and choosing **Print**.



Organizing the Company Library

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

You can drag documents, hyperlinks, and notes to other folders to move them. You can also drag folders to other folders to move the folder and all of its contents.

Add a Folder to the Company Library

1. In the Company Library window, click on the parent folder that you want to add the new folder to.

   – or –

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

2. On the **Home** tab, select **Add Folder** from the **Create** group.

   – or –

   Right-click and select **Add > Folder**.

3. Enter the name for the new folder.

Add a Document to the Company Library

The Company Library can store many different file types. Provided that your system administrator has given you access to the Company Library, you can add documents as either private or public entries. While adding the document, you browse to an existing file on your hard drive or network.

By default, files are embedded into the database when you add them to the Company Library. You can also link a file to a location on a hard drive, and only a link to the source file is stored in the Address Book.

1. In the Company Library window, click on the folder to which you want to add the document.

2. On the **Home** tab, select **Article > Document** from the **Create** group.

   – or –

   Right-click, and select **Add > Document**.

   The Insert File dialog box opens.

3. Click **Browse** to select a file.

4. Locate the file, and click **Open**.

5. Specify a **Name**, **Category** (optional), and **Owner** for the document.

6. To link the file to a location on a hard drive, select **Link**.

For the file to be accessible from other computers, specify the full UNC file path to the file (for example, \\[server name]\Documents folder\maximizer.doc), and ensure it resides in a shared location.

7. Click **OK**.

Add a Note to the Company Library

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

1. In the Company Library window, click on the folder to which you want to add the note.
2. On the **Home** tab, select **Article > Note** from the **Create** group.

   – or –

   Right-click, and select **Add > Note**.
3. Enter a name for the note.
4. Click in the right pane of the window, and type the content of the note.
5. In the toolbar, click the **Save Note** icon.
6. To specify properties of the note, right-click and select **Properties**.
7. Specify a **Category** (optional), and **Owner** for the note.
8. Click **OK**.

Add a Hyperlink to the Company Library

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

1. In the Company Library window, click on the folder to which you want to add the hyperlink.
2. On the **Home** tab, select **Article > Hyperlink** from the **Create** group.

   – or –

   Right-click, and select **Add > Hyperlink**.

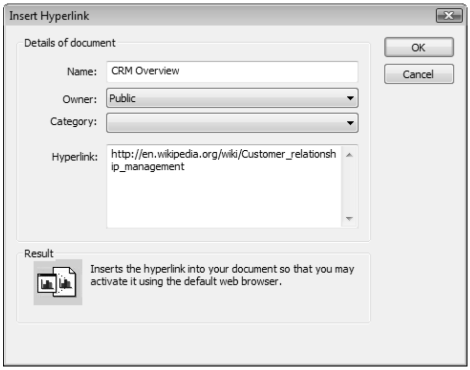
The Insert Hyperlink dialog box opens.

3 In the **Name** field, enter a name to refer to the document.

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

5 Specify the category and owner for the hyperlink, as desired.

6 Click **OK**.



Send Items by Email from the Company Library

You can send items by email directly from the Company Library window. You can select one or multiple documents, hyperlinks, and notes. Documents and notes are attached to the email message, while hyperlinks are inserted directly into the content of the email message.

You can send the items to the currently selected Address Book entry, or you can select Address Book entries while sending the documents.

1 If you want to send the items to an Address Book entry, in the Address Book window, select the Address Book entry to send the documents to.

2 In the Company Library window, select any documents, hyperlinks, and notes you want to send.

You can hold down the Control key to select multiple items.

3 In the **Home** tab, select **Article** from the **Email** group, and select the name of the document.

Depending on your email preferences, the Send Email dialog box may open with options for logging the email message with Address Book entries.

If necessary, adjust the email options, and click **OK**.

4. Enter the details of your email message.
5. Click **Send**.

CHAPTER 6

Calendar and Hotlist

Track Your Appointments and Tasks

In this chapter...

Hotlist Tasks

The Hotlist is a timeless "to-do" list of tasks and reminders. Tasks include calling and writing to customers. Use the Hotlist window to record actions and follow up on personal activities, such as producing expense reports, or those related to your interactions with Address Book entries. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

The following sections contain information on working with Hotlist tasks:

- "Hotlist Window" on page 134
- "Viewing Hotlist Tasks" on page 135
- "Add a Hotlist Task" on page 136
- "Reassign Hotlist Tasks" on page 137

Hotlist Window

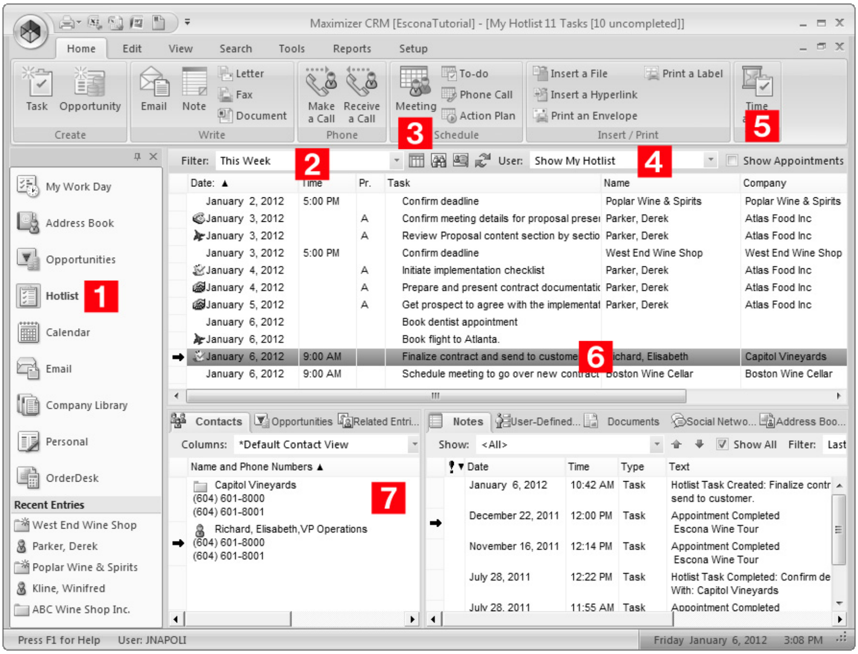
You can view all of your Hotlist tasks in the Hotlist window. Because the Hotlist is a controlling window, the following windows update with information on the Address Book entry associated with the task. Keep the following points in mind when working in the Hotlist window.

1. Select the **Hotlist** icon to open the Hotlist window.
2. Use the **Filter** drop-down list or click the **Build Hotlist** icon to select the date range you want to show.
3. Click the **Column Setup** icon to add or modify a column setup in the Hotlist window.

   On the View tab, select Carry Forward Unfinished Activities from the Filter group to view old tasks that are not yet complete in your current Hotlist.
4. From the **User** drop-down list, select a Maximizer user to view another user's Hotlist.

   You must have access to other users' Hotlist to view their Hotlist tasks. You can give other users access to your Hotlist in your Calendar/Hotlist preferences.
5. Select **Show Appointments** to view your appointments in the list with your tasks.
6. Double-click on a task to view its details.

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



Viewing Hotlist Tasks

You can click on a Hotlist task in the Hotlist window to open the Hotlist Task dialog box where you can view and edit details of the task. Keep the following points in mind when working in the Hotlist Task dialog box.

1 Specify a **date** and, optionally, a **time** for the task.

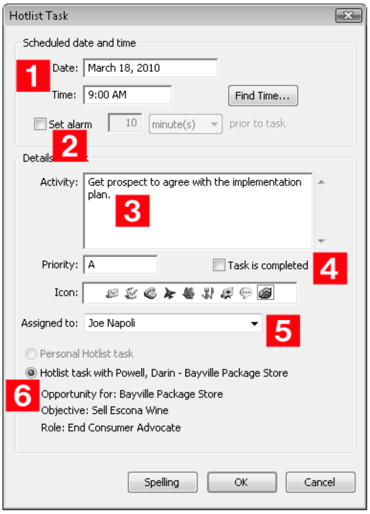
2 Select **Set alarm** to remind yourself of the task before the scheduled time.

3 Enter the **activity** or select a predefined activity from the drop-down list.

4 Mark the task as completed when you are finished with the task.

5 From the **Assigned to** drop-down list, select a user to assign the Hotlist task to another user.

6 Select **Personal Hotlist task** if you want to make the task personal and remove the Address Book entry associated with the task.



Add a Hotlist Task

You can create Hotlist tasks for Address Book entries opportunities. You can also create personal Hotlist tasks. Personal Hotlist tasks are not associated with other entries.

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

– or –

Open the entry.

– or –

To add a personal task, select the **Hotlist** icon to open the Hotlist window.

2 In an open entry, select **Actions > Schedule a To-do**.

– or –

On the **Home** tab, select **To-do** from the **Schedule** group.

– or –

In the Hotlist window, on the **Home** tab, select **Task** from the **Create** group.

– or –

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

The Add Hotlist Task dialog box opens.

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

Reassign Hotlist Tasks

You can reassign Hotlist tasks to different Maximizer users directly in the Hotlist window. You can reassign one Hotlist task, or you can select multiple tasks to assign all of them to the same user.

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

   – or –

   Select multiple Hotlist tasks.

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

2. On the **Edit** tab, select **Reassign** from the **Manage Activity** group.

   – or –

   Right-click, and select **Reassign**.

   The Reassign Hotlist Tasks dialog box opens.

3. Select a user.

4. Click **OK**.

Calendar Appointments

The Calendar lets you schedule meetings and appointments with other Maximizer users and Address Book entries. Calendar appointments can be associated with Address Book entries and opportunities, or they can be personal.

The following sections contain information on working with Calendar appointments:

- "Calendar Window" on page 138
- "Add Items to the Calendar Legend" on page 140
- "Viewing Appointments" on page 141
- "Add an Appointment" on page 143
- "Add Users to an Appointment" on page 145
- "View the Availability of Users, Locations, and Resources" on page 146

Calendar Window

You can view, add, and modify your appointments in the Calendar window. Appointments and Hotlist tasks are displayed in a daily, weekly, weekly list, or monthly view. All views allow you to see your appointments at a glance.

In the View bar at the top of the page, you can view the dates for which appointments are currently displayed in the page. By default, appointments are displayed for the current day, week, or month. You can select any other day/week/month to view appointments in the Calendar for that time period. You can display the appointments for other users if they have given you access to their calendars. Calendar access is set in your Calendar/Hotlist preferences.

Here are some tips for working with the Calendar window.

1. Select the **Calendar** icon to open the Calendar window.
2. In the top-left corner of the window, select the **arrow** buttons to navigate from day to day, week to week, or month to month.
3. Select the **Daily**, **Weekly**, **Weekly List**, or **Monthly** icon to change the calendar view.
4. View details of appointments directly in the Calendar window.

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

   - Monthly view – To view details of a day's appointments in a pop-up window, hold your mouse pointer over the day. To display appointment details, hold your mouse over the appointment. To open an appointment from the pop-up window, click on the appointment.

- Weekly, weekly list, and daily views – To display appointment details, hold your mouse over the appointment. To open an appointment, double-click on the appointment.

5 Select the **Open Address Book entry** icon to view the Address Book entry associated with the selected appointment. You can also right-click and choose this command from the context menu.

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

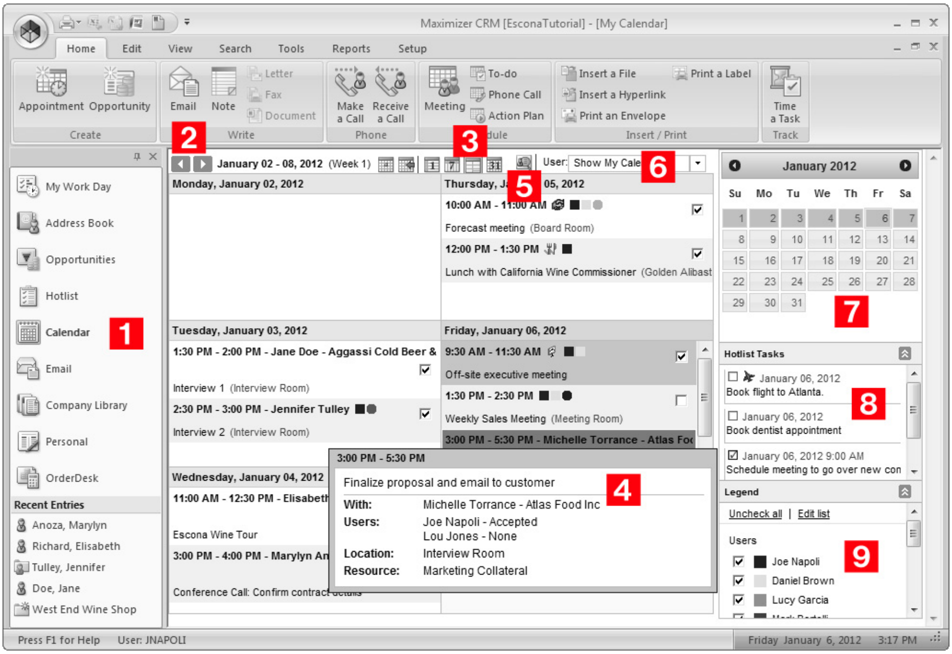
7 Select a date in the miniature calendar view to navigate to a different day, or month in the calendar. Use the arrow buttons to move between months or years.

8 In the **Hotlist Tasks** section, view the day's Hotlist tasks.

You can click on a Hotlist task to open it and view its details.

9 In the **Legend** section, select the checkbox beside other users and locations/resources to view the availability of users and locations/resources.

You can use the **Check All** or **Uncheck All** icon to quickly select or clear all users and resources in the list. Use the **Edit List** icon to add users and resources to the calendar and to set icon colors for these users and resources.

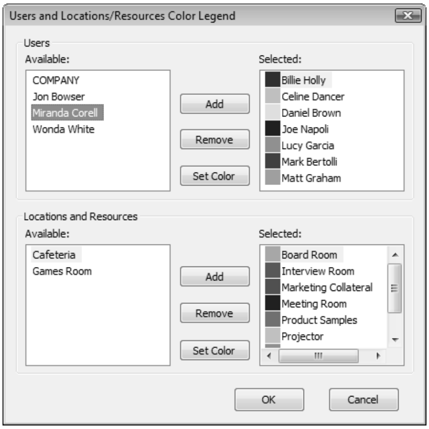


Add Items to the Calendar Legend

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

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

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



3. Select an item in the **Available** list, and click **Add**.
   - To select multiple items, press **Control** while selecting the items.
   - To select a series of items, select the first item in the series, then press **Shift** and select the last item in the series.
   - Type the first letter in the item's name to jump to that item in the list.
4. Select the color to assign to the item, and click **OK**.
5. Click **OK** to save the changes to the legend.

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

Viewing Appointments

Appointments for a day, week, or month, are displayed in the Calendar window. You can hold your mouse pointer directly over an appointment to see more information. You can also click on an appointment to open it and view its details.

When you open an appointment, its details are displayed in the Modify Appointment dialog box. Here are some tips for working in the Modify Appointment dialog box.

1. Click **Options** to set lead times for alarms and to sign yourself out of the Peg Board.

   Default settings for alarms are specified in your Calendar/Hotlist preferences.
2. Click **Recurring** to view details of recurring appointments.
3. Select **Completed** to mark the appointment as completed.

4 View information on the **entry** associated with the appointment in the information bar.

If the appointment is linked to an opportunity, the entry is displayed as a link in the appointment. You can click the link to retrieve the entry in the associated controlling window.

If the appointment is personal, you can link it with the current entry.

5 Specify the **date** and **time** of the appointment.

If the end time of the appointment is earlier than the start time, the appointment spans into the next day.

After clicking in one of the time fields, you can click the ellipsis button next to the field to view the availability of selected users, locations, and resources.

6 Select **Private** to keep the appointment details private.

When this option is selected, even users with access to your calendar cannot see the appointment details. The appointment appears in the calendar with the subject displayed as "Private appointment".

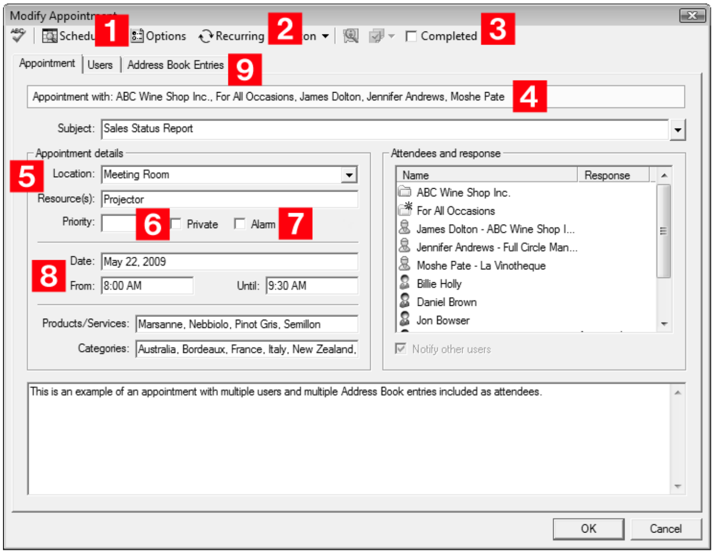
7 Select **Alarm** to set an alarm.

8 Select a **location** for the appointment and specify the needed **resources**.

These values are set in Administrator, but you can specify any value as a location.

9 Select the **Users** and **Address Book Entries** tabs to assign Maximizer users and Address Book entries to the appointment.

You can view the current users and Address Book entries assigned to the appointment in the **Attendees and response** list.



Add an Appointment

You can easily schedule an appointment with Address Book entries, other users, or yourself. The Add Appointment dialog box gathers all the information for the appointment—the date and time, the description, and who will be in attendance.

When scheduling appointments, you can set an alarm in advance of the appointment, mark yourself out of the Peg Board, set the priority, and send notifications to the selected users.

You can schedule appointments from the Address Book, Opportunities, or Calendar window. If you add an appointment from one of the main windows, the appointment is linked by default to the current entry. If you add an appointment from the Calendar window, it is by default created as a personal appointment.

When you schedule an appointment for an opportunity, the Contact associated with the opportunity is automatically added to the appointment.

1. In the Calendar window, select a day, and on the **Home** tab, select **Appointment** from the **Create** group.

   – or –

   In a main window, select an entry, and on the **Home** tab, select **Meeting** from the **Schedule** group.

   – or –

   In a main window, open an entry, and select **Actions > Schedule a Meeting.**

   – or –

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

   – or –

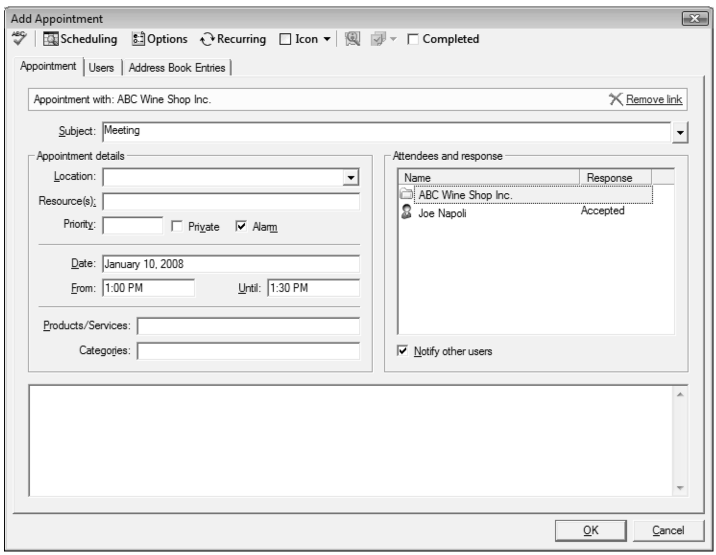
   In the Address Book window, select an entry, right-click, and select **Schedule > Meeting**.

   The Add Appointment dialog box opens.

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

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

3. Specify the details of the appointment.



4. If necessary, select the **Users** and **Address Book Entries** tabs and add other Maximizer users or Address Book entries to the appointment.

In the Appointment tab, you can select **Notify other users** to notify other attendees of the appointment and prompt them to select a response when they next open Maximizer.

5. Click **OK** to save the appointment.

   Depending on your Calendar/Hotlist preferences and the details of the appointment, you may be prompted to send an email message to the other users added to the appointment.

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

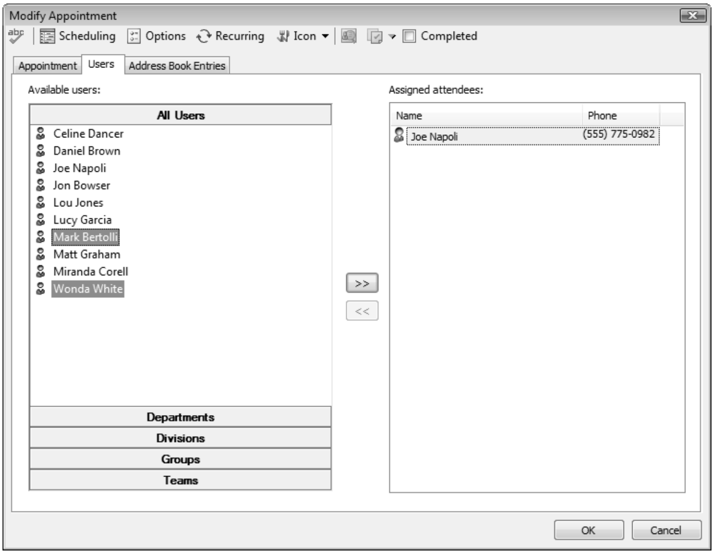
Add Users to an Appointment

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

1. Open the appointment.
2. Select the **Users** tab.
3. In the **Available users** list, select the users to add to the appointment, and click the right arrow button to add the users to the **Assigned attendees** list.
   - To select multiple users, press **Control** while selecting the users.
   - To select a series of users, select the first user in the series, then press **Shift** and select the last user in the series.
   - Type the first letter in the item's name to jump to that item in the list.
   - Select a security group, department, or division to add all members of the group to the list.

   Users are grouped by the departments, divisions, and security groups to which they belong if you have the "Display users by groups" option enabled in your preferences. (On the Setup tab, select Preferences.)

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



View the Availability of Users, Locations, and Resources

You can quickly view the availability of users, locations, and resources. You can access the View Free Time dialog box from any Maximizer window, or you can access the Find Free Time dialog box while creating or viewing an appointment. In an open appointment, you can select a new date and time for the appointment directly from the Find Free Time dialog box.

1 On the **View** tab, select **Free Time** from the **Availability** group.

The View Free Time dialog box opens.

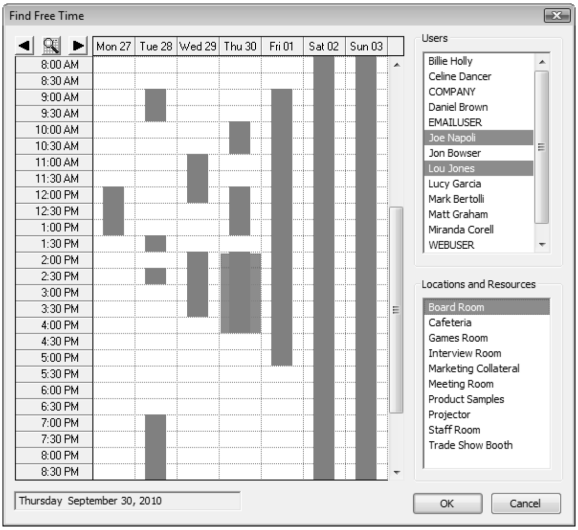
– or –

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

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

2 On the right side of the dialog box, select and clear items to view or hide the availability of different users, locations, and resources.

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



Calendar and Hotlist Preferences

Use the Calendar/Hotlist preferences to change your Hotlist task and calendar preferences. Most of the options on this tab apply to the calendar.

Hotlist and calendar preferences can also be controlled in Administrator using the user preferences

You can control which users can view or modify your tasks and appointments using the Full Access and Read Access options. For example, if you want a user or group to be able to view your tasks and appointments, select the name from the Read Access drop-down list. The selected user or members of the group can then view your tasks and appointments by selecting your user name from their Hotlist window View bar. If you want them to be able to add or modify your existing tasks and appointments, use the Full Access option.

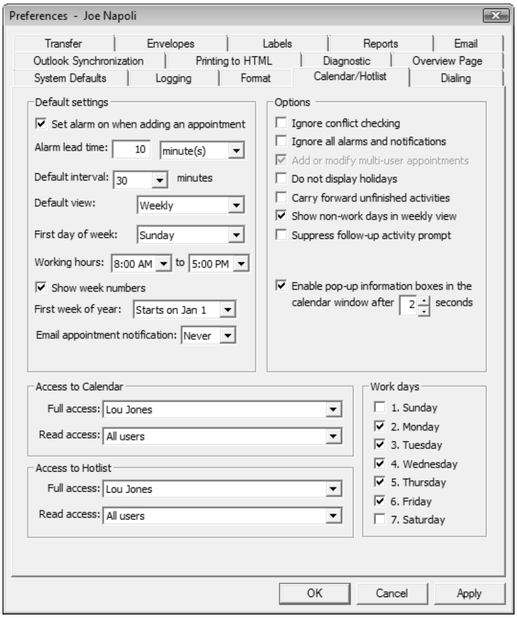
The Full Access option also controls your ability to reassign tasks and appointments to other users, as you can only assign tasks and appointments to other users if they have given you permission.

The following section contains information on the calendar and Hotlist preferences:

- "Set Calendar and Hotlist Task Preferences" on page 149

Set Calendar and Hotlist Task Preferences

1. On the **Setup** tab, select **Preferences**, and select the **Calendar/Hotlist** tab.
2. Set your calendar and Hotlist default options, and click **OK** when you are finished.



Viewing Activities for Entries

You can access all appointments and Hotlist tasks scheduled for specific entries directly in open entries. Appointments and tasks are displayed in the Activities tab for Address Book entries. You can also add and modify activities directly in entries.

The following sections contain information on viewing activities associated with entries:

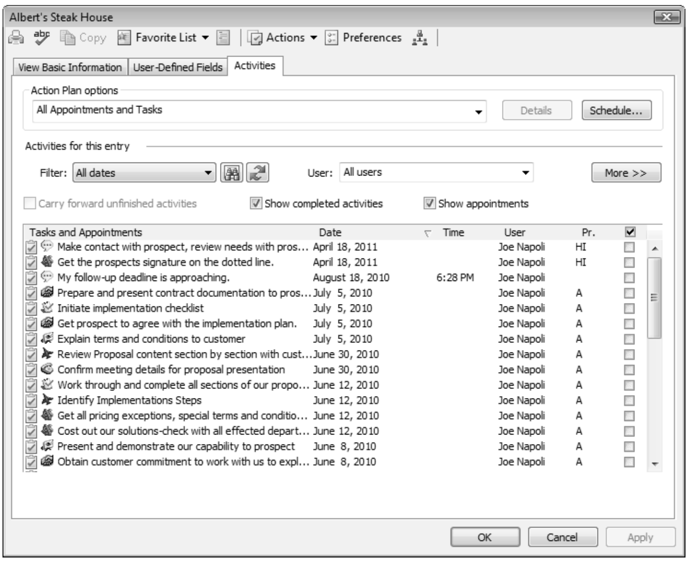
- "View Appointments and Tasks Scheduled for an Entry" on page 150

View Appointments and Tasks Scheduled for an Entry

1. Open the entry.
2. Select the **Activities** tab.
3. Optionally, select **Show appointments** or **Show completed activities** to view more activities scheduled for the entry.

   You can also filter the activities displayed for the entry. You can choose to view only Action Plan activities. And you can filter activities by date and user.

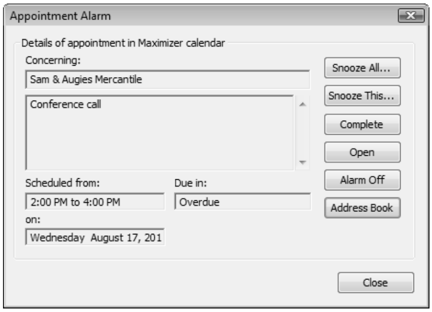
   To add, modify, or delete activities for the entry, click **More**.



Alarms

You can schedule alarms to remind you of upcoming appointments and Hotlist tasks.

At the scheduled time, the alarm pops up in Maximizer reminding you of the activity. In the alarm, you can view a summary of the activity, open and modify the activity, complete the activity, and reschedule the alarm to appear later in the day.



The following sections contain additional information on working with alarms:

- "Set an Alarm for a Hotlist Task" on page 151
- "Set an Alarm for an Appointment" on page 152
- "Set Default Values for Alarms" on page 152
- "Reschedule an Alarm" on page 153

Set an Alarm for a Hotlist Task

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

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

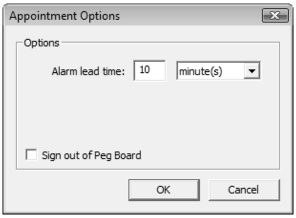
   From the drop-down list, you can select a different unit for the time.
4. Click **OK** to save the changes to the Hotlist task.

Set an Alarm for an Appointment

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

1. Open the appointment.
2. Select the **Alarm** checkbox.
3. Click **Options**.
4. Specify the lead times for the alarm.
   - In the **Alarm lead time** field, specify the amount of time before the appointment to set the alarm.

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



5. Click **OK** to save the changes in the Options dialog box, and click **OK** again to save the changes to the appointment.

Set Default Values for Alarms

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

1. On the **Setup** tab, select **Preferences**.
2. Select the **Calendar/Hotlist** tab.
3. Specify default values for the alarm preferences.
   - To turn alarms on by default in new appointments, select the **Set the alarm on when adding an appointment** checkbox.
   - In the **Alarm lead time** field, specify the amount of time before the activity to set the alarm.

This setting affects appointments and Hotlist tasks.

4. Click **OK** to save the changes to the Preferences dialog box.

Reschedule an Alarm

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

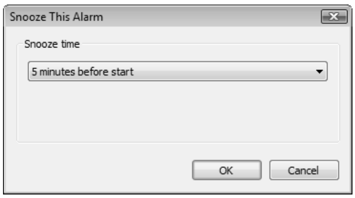
1. In the alarm, click **Snooze This**.

   – or –

   To reschedule all current alarms, click **Snooze All**

2. From the **Snooze time** drop-down list, select an amount of time by which to delay the alarm.

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



3. Click **OK**.

Action Plans

Action Plans are lists of pre-determined appointments and Hotlist tasks that can be scheduled all at once. Each appointment or task is scheduled to occur a specified number of days before or after the Action Plan start date. Action Plans can be scheduled as personal appointments and tasks for Maximizer users or scheduled for Address Book entries or opportunities.

The following topics contain information on working with Action Plans:

- "Action Plan Library" on page 154
- "Create an Action Plan Template" on page 154
- "Schedule an Action Plan" on page 156
- "View Activities Scheduled from an Action Plan" on page 158

Action Plan Library

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

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

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

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

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

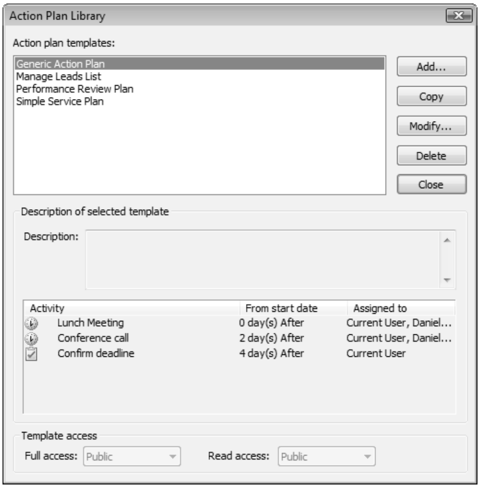
Create an Action Plan Template

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

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

1 On the **Setup** tab, select **Template Library > Action Plan Library** from the **File Management** group.

The Action Plan Library dialog box opens.



2 Click **Add**.

The Add Plan Template dialog box opens.

3 Enter the template **name** and **description**.

4 Click **Add** and select **Appointment** or **Task** to add an activity in the template.

5 Enter the appointment or Hotlist task details.

- In the **Schedule activity** fields, specify when to schedule the activity in relation to the start date of the Action Plan.
- In the **Assigned to** field or the **Users** tab, select a Maximizer user (or multiple users in appointments) to assign to the activity.

  By default, the activity is assigned to the user who schedules the Action Plan.
- Select the **Personal** or **Personal Hotlist task** option to mark the activity as personal, not associated with an Address Book entry.

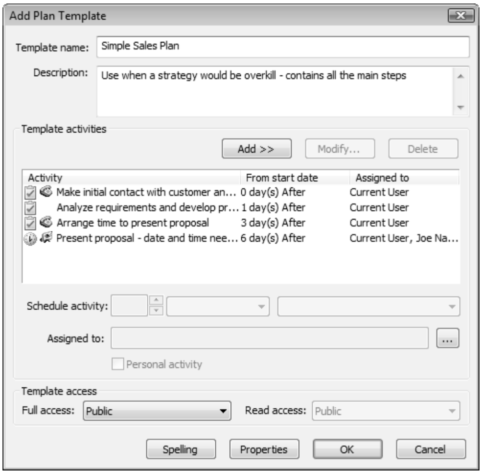
6 Click **OK.**

The activity is listed as part of the template.

7 Repeat steps 4–6 for each activity in the template.

8. In the **Full Access** and **Read Access** fields, select a user or group to make this Action Plan template accessible to only a particular user or group.

9. Click **OK** to save the Action Plan template.



Schedule an Action Plan

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

You can schedule Action Plans from the Address Book, Opportunities, or Hotlist window. When you schedule an Action Plan from the Hotlist window, the Action Plan is scheduled with the Address Book entry associated with the selected task or appointment. If you select a personal task or appointment, you can schedule a personal Action Plan not associated with any entries.

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

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

   – or –

   Open the entry.

   – or –

   Select the entries.

   - Click in the gutter to the left of entries.

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

2 In an open entry, select **Actions > Schedule an Action Plan**.

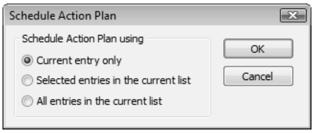
– or –

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

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

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

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



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

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

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

You can click inside the field and then click the arrow button to choose a date from a pop-up calendar.

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

7 In the **Replace current user with** drop-down list, select the user to schedule the main Action Plan activities for.

All template activities assigned to the current user are scheduled for the selected user. Template activities assigned for specific users continue to be scheduled for the users specified in the template.

You can also assign specific appointments and tasks to other users by editing the details of the appointment or task.

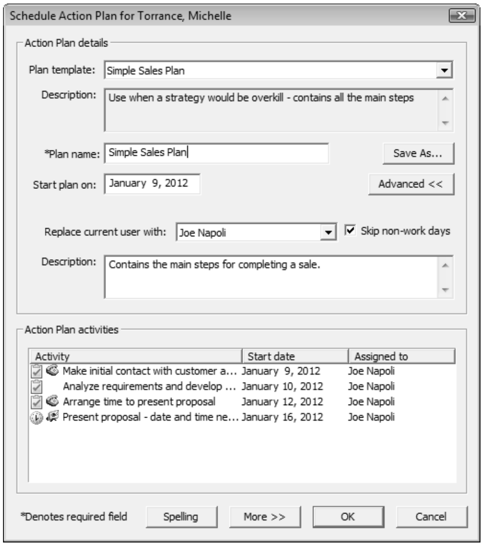
8 Select **Skip non-work days** to schedule activities only on work days.

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

9 If necessary, click **More** to modify or add activities to the Action Plan.

You can click **Save As** to save a modified Action Plan as a new template.

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



View Activities Scheduled from an Action Plan

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

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

2 Select the **Activities** tab.

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

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

4 Select the name of the Action Plan.

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

- From the **View** drop-down list, select **All dates**.
- From the **User** drop-down list, select **All Users**.

- Select **Show appointments**.
- On the right, click the arrow to expand the view options, and select **Show completed activities**.

Peg Board

In a medium to large office, it's not always obvious when people are in, out, or busy with an appointment. The Peg Board works with Maximizer's calendar to show you each user's current status.

When users create appointment, they can automatically sign out of the Peg Board during the appointment. The Peg Board displays users that are currently available. You can also override the calendar status, and change your status directly in the Peg Board.

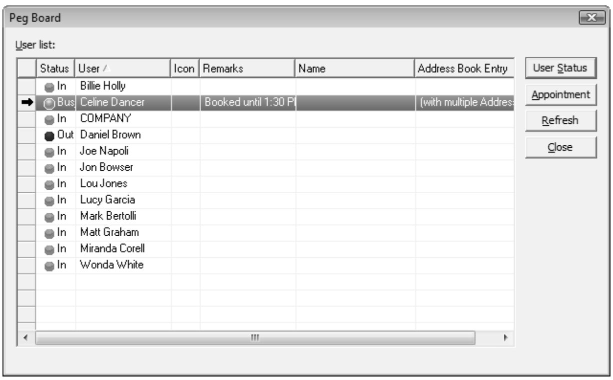
You can see other users' busy periods in the Peg Board if they have allowed you to view their calendars in the Calendar/Hotlist preferences. If you have permission to view users' calendar appointments, you can also click the Appointment button to view appointment details.

The following section contains information on the Peg Board:

- "View the Peg Board" on page 160

View the Peg Board

- On the **View** tab, select **Pegboard** from the **Availability** group.



World Clock

The World Clock is a utility that allows you to view the time in various locations around the world. You determine which locations are displayed. It's great if you have international dealings of any kind—from the occasional phone call to regular contact with your international clients.

You can set the time for up to six remote locations around the world by adjusting the dials shown in the Clock frame in the World Clock window.

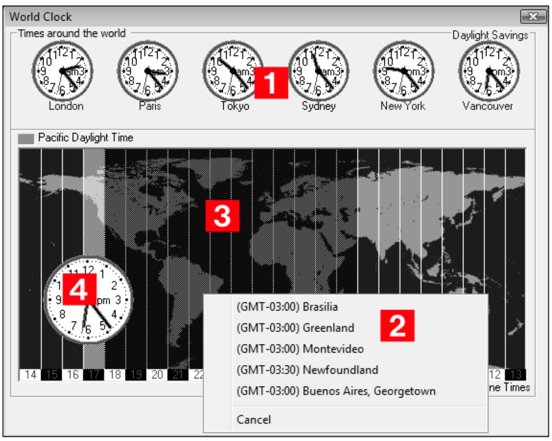
Keep the following points in mind when using the World Clock:

1 To select a time zone, right-click on one of clocks.

2 To view time zone information, click in the corresponding area of the world map.

3 To shade the area of the clock where it's night time, right-click and select **Show night**.

4 To change the time zone displayed in the large clock, click on any time zone in the world map and select the time zone.



The following section contains information on the World Clock:

- "View the World Clock" on page 161

View the World Clock

- On the **Tools** tab, select **World Clock** from the **Other** group.

CHAPTER 7

Email

Send Email to Address Book Entries

In this chapter...

Email

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

You can use the Email window to send and receive email using your existing email system.

The following sections contain additional information on using email in Maximizer:

- "Email Window" on page 164
- "Save an Email Message to an Entry" on page 165
- "Save Multiple Email Messages to Address Book Entries" on page 166
- "Send an Email Message" on page 166
- "Send an Email Message to Address Book Entries" on page 167
- "Send Email Options" on page 169
- "Create an Appointment or Task from an Email Message" on page 170
- "Create a Personal Appointment or Task from an Email Message" on page 171

Email Window

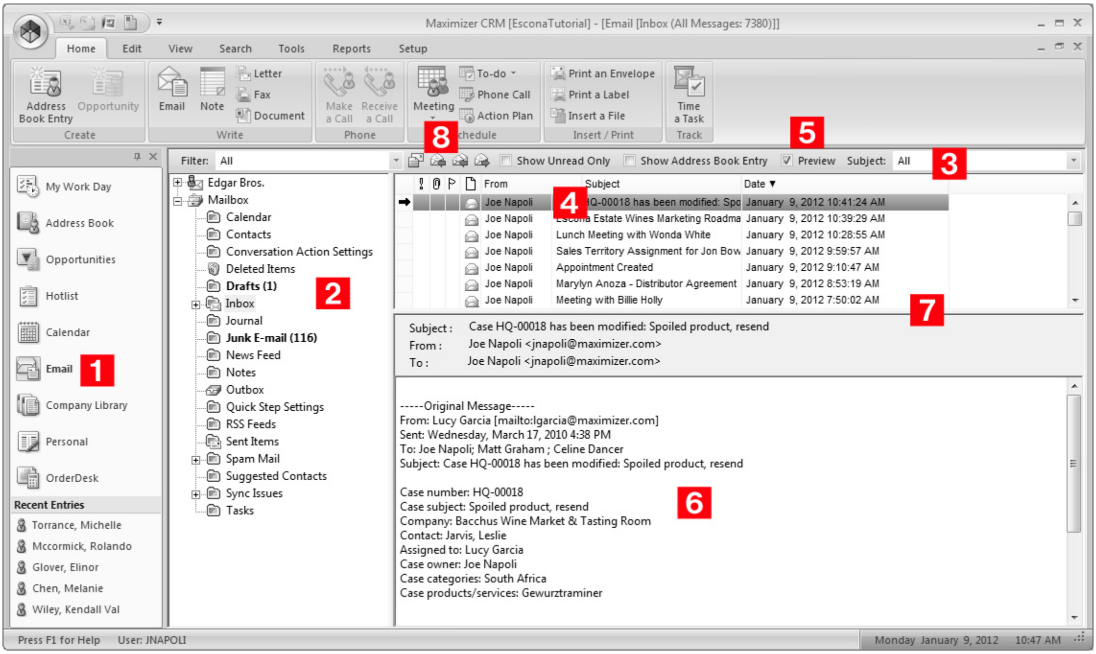
Use the Email window to perform your email tasks. You can send email messages, reply to messages, move messages, and perform other common email tasks. You can also save messages to associated Address Book entries.

Keep the following points in mind when working with the Email window.

1. Select the **Email** icon to open the Email window.
2. Select email **folders** on the left side of the Email window.
3. To search for email messages by subject, select **Custom** from the **Subject** drop-down list, and enter the text to search for.
4. Select **email messages** in the top-right area of the window.
5. Toggle the preview pane on and off with the **Preview** checkbox in the top-right corner of the window.
6. View the currently selected email message in the **preview** pane.

7 Move the upper preview border up and down to adjust the size of the preview pane.

8 Use the icons to perform common tasks—such as **reply** and **forward**—on the selected email message.



Save an Email Message to an Entry

You can save an email message to any existing Address Book entry or opportunity. Email messages are saved as documents with the entries.

1 In the Address Book or Opportunities window, select the entry to save the email message with.

2 Open the Email window, and select the email message.

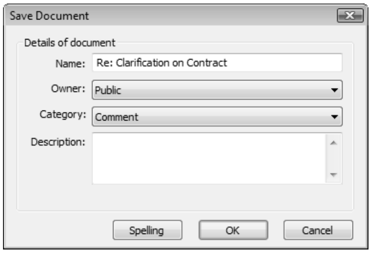
3 On the **Edit** tab, select **Save Email Message > Save to <entry>** from the **Manage Email** group.

– or –

Right-click, and select **Save to <entry>**.

4 Enter properties of the document including the **name**, **owner**, **category**, and **description**.

5 Click **OK** to save the email as a document.



Save Multiple Email Messages to Address Book Entries

You can save multiple email messages to the Address Book entries associated with the email addresses in the messages.

1 In the Email window, select the email messages to save.

To save all email messages in the current list with their associated Address Book entries, skip this step.

2 On the **Edit** tab, select **Save Email Message > Save All/ Selected Email Messages** from the **Manage Email** group.

– or –

Right-click, and select **Save All/Selected Email Messages**.

3 Click **OK**.

Send an Email Message

You can compose email messages in HTML or plain text format depending on your email preferences. You can attach files to your message. If you are using the HTML format, you can also insert hyperlinks. To check the spelling in your message, click the Spell Checker button.

1 In the Email window, select the **Compose** icon.

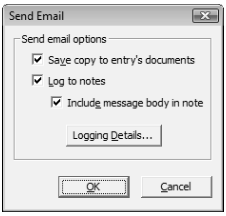
– or –

In the Email window, right-click, and select **Compose New Email**.

Depending on your email preferences, the Send Email dialog box may open with options for logging the email message with Address Book entries.

To display the Send Email dialog box, select the "Always display the Send Email options before composing an email" option in your email preferences. (On the Setup tab, select Preferences, and select the Email tab.)

If necessary, adjust the email options, and click **OK**.



The Compose Email Message dialog box opens.

2. Enter email addresses in the **To**, **Cc**, or **Bcc** fields, separating email addresses with semicolons.

   – or –

   Click the **To**, **Cc**, or **Bcc** buttons and select the type of entry you want to add.

   You can select a contact from your email service provider or from your Maximizer Address Book.

3. Enter a subject and your email text.
4. If the email recipient is associated with an Address Book entry, set the logging options.
5. Click **Send**.

Send an Email Message to Address Book Entries

You can send email to Address Book entries directly from the Address Book, Opportunities, and Hotlist windows. If you send the email message from the Address Book window, the message is sent to the selected Address Book entries. If you send the email message from another window, the email message is sent to the Address Book entries associated with the selected entries.

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

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

   – or –

   Open the entry.

   – or –

   Make a list of entries.

   – or –

   Select multiple entries.

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

2 On the **Home** tab, select **Email** from the **Write** group.

– or –

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

Depending on your email preferences, the Send Email dialog box may open. For information on the options in the Send Email dialog box, see "Send Email Options" on page 169.

3 To add more email recipients, click the **To**, **Cc**, or **Bcc** buttons.

You can search the current Address Book or your global address list. You can search by last name or by company. For entries with multiple email addresses, select the desired address from the drop-down list in the row for the entry.

These options are available only if the One email option is selected in the Send Email dialog box.

4 Enter a **subject** and the text of the email message.

Use the toolbar icons and font drop-down lists in the **Format Text** group to format your message.

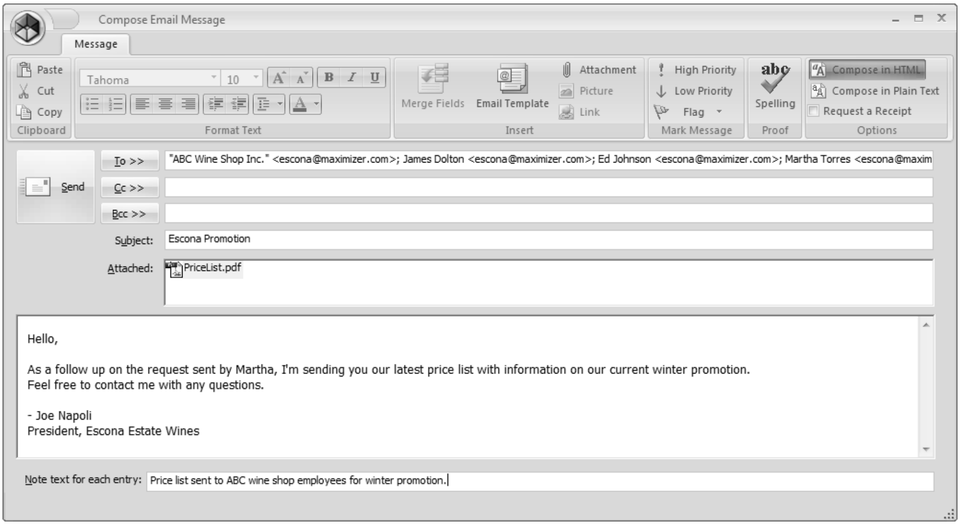
If you are sending email to a single Address Book entry or to multiple Address Book entries using the Separately option, you can insert merge fields into the message text.

To add a merge field, select **Merge Fields** from the **Insert** group, select the field and click **Insert**. When the message is sent, the field value corresponding to the Address Book entry or opportunity is merged into the message.

5 Select **Attachment** from the **Insert** group to select file attachments to send with the email message.

6 In the **Note text for each entry** field, enter any additional text you would like to log as part of the note created by the email message.

7 Click **Send**.



Send Email Options

In the Send Email dialog box, you can specify how the email will be sent and set logging options. Here are some points to keep in mind:

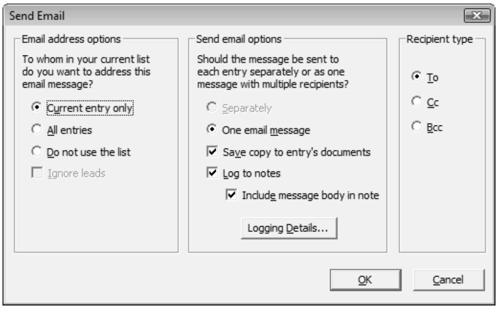
- Select **Separately** to send a separate email message to each Address Book entry.

  If you want to send the email message to more than 1,000 entries at a time, you must either select the **Separately** option or select the entries in groups of 999 or less.

- Select **One email** to send one email message to all the selected entries at once.
- Select the **Save copy to entry's documents** option to save the message as a document for the entry.
- Select the **Log to notes** and **Include message body** options to save the message to the note created.

  These options are unavailable if logging is disabled for email in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

- Click the **Logging Details** button and then the **Assign More** button to log the email details to additional Address Book entries.



Create an Appointment or Task from an Email Message

You can create appointments and tasks directly from the Email window. You can create the appointment or task for the Address Book entry associated with the email message or for the currently selected Address Book entry or opportunity.

The subject of the email message becomes the subject of the appointment or the activity of the task. The body of the email message becomes the body note of the appointment.

1. In the Email window, select the email message you want to create an appointment or a task for.
2. On the **Home** tab, select **Meeting > Appointment for <entry>** or **To-do > Task for <entry>** from the **Schedule** group.

   – or –

   Right-click and select **Create a New > Appointment/Task for <entry>**.

   Depending on the email message, you can select either the Address Book entry associated with the message or the currently selected Address Book entry or opportunity.
3. Enter the appointment/task details and click **OK**.
4. To save the email message as a document with the entry, specify the properties of the document and click **OK**.

Create a Personal Appointment or Task from an Email Message

1. In the Email window, select the email message you want to create an appointment or a task for.
2. On the Home tab, select **Meeting > Personal Appointment** or **To-do > Personal Task**.

   – or –

   Right-click and select **Create a New > Personal Appointment/ Task**.
3. Enter the appointment or task details and click **OK**.

Email Templates

You can create email templates that you can reuse to send to many Address Book entries at different times. An email template can include merge fields that are populated with information from the selected Address Book entries, or from the Address Book entries associated with the selected opportunities, when email messages are sent using the template.

The following sections contain information on email templates:

- "Create an Email Template" on page 172

Create an Email Template

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

1. From the Address Book or Opportunities window, on the **Home** tab, select **Email** from the **Write** group.

   Depending on your email preferences, the Send Email dialog box may open. For information on the options in the Send Email dialog box, see "Send Email Options" on page 169.

2. Compose the text of the email message.

   You can compose the email message in HTML or in plain text. You can use the formatting toolbar to apply additional formatting to the email text.

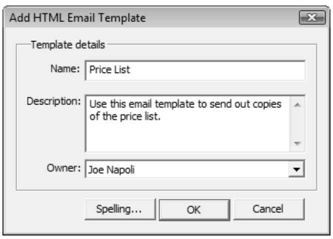
3. Select **Merge Fields** from the **Insert** group to insert merge fields in your template.

4. Select **Email Template** from the **Insert** group.

   The HTML Email Templates or Text Email Templates dialog box opens.

5. Click **Add** to add a new email template.

6. Enter a name, description, and owner for the template and click **OK**.



To reuse this template in the future, select the template in the Available email templates list, and click **Retrieve**.

To save changes made to the template, select the template in the Available email templates list, and click **Save**.

To retrieve this template automatically each time you compose an email message, select **Retrieve this template when the Compose Email Message dialog is opened**.

7 Click **Close** to return to the email message.

Setting Up Email

The Email window in Maximizer provides you with the ability to send and receive email within Maximizer. The Email window works with your existing email system so that you can take advantage of some of the benefits of sending and receiving email. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily.

Maximizer's Email window works much the same as any email application, but has additional functionality that enables you to easily integrate your Address Book entries with your email.

The following sections contain information on setting up Maximizer for email:

- "Supported Email Clients" on page 174
- "Set Up Novell GroupWise and Lotus cc:Mail/Mail" on page 175
- "Set Up Microsoft Outlook" on page 175

Supported Email Clients

To use these features, you must already have a Messaging Application Programming Interface (MAPI) or Vendor Independent Messaging (VIM) email client. Email clients that should work with Maximizer when properly configured include the following:

- Lotus cc:Mail
- Lotus Mail
- Lotus Notes
- Microsoft Outlook
- Novell GroupWise

For the latest version information of compatible email programs, see the Maximizer website at

www.maximizer.com.

Set Up Novell GroupWise and Lotus cc:Mail/Mail

If you are using Novell GroupWise, Lotus cc:Mail (MAPI), or Lotus Mail (MAPI), select the corresponding option in the advanced email preferences in Maximizer. (On the Setup tab, select Preferences, and select the Email tab. Then, click Advanced.) If you do not select the correct option, a program fault error will occur when you use the Email window. For Lotus cc:Mail and Lotus Mail, you also must have the "Override Extended MAPI" option selected in your email preferences.

Set Up Microsoft Outlook

Maximizer cannot use Extended MAPI with the Internet Mail Only installation type. Ensure the installation type is Corporate or Workgroup.

Outlook 2007, Outlook 2003, and Outlook 2002 are Extended MAPI programs. This means the Maximizer Email window will show the same folders as Outlook.

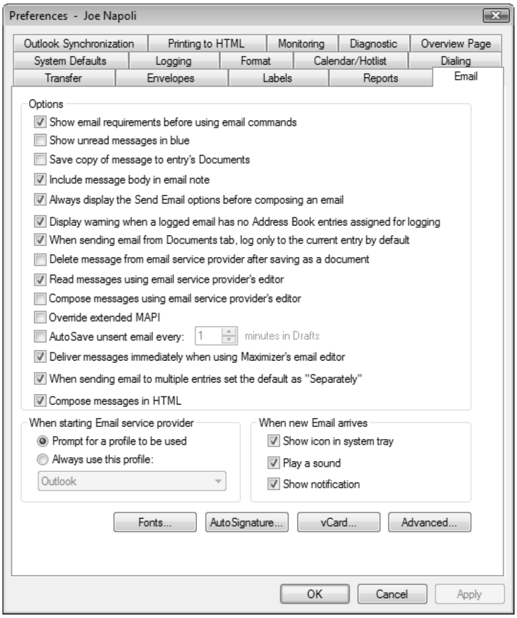
When you open the Email window, folders such as Inbox, Outbox, Sent Items, Deleted Items, and your personal folders are displayed.

For more information on configuring Maximizer for Outlook Synchronization, refer to the *Maximizer CRM Administrator's Guide* and to Maximizer Help.

1. On the **Setup** tab, select **Preferences**.
2. Select the **Email** tab.
3. Find the **Override Extended MAPI** option and verify this setting is disabled (the checkbox should be cleared).
4. Click **OK**.
5. Exit Maximizer.
6. Restart Maximizer.

Setting Email Preferences

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



The following sections contain information on setting email preferences:

- "Set Up an Email AutoSignature" on page 176
- "Set Default Fonts for Email Messages" on page 177

Set Up an Email AutoSignature

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

1. On the **Setup** tab, select **Preferences**.

   The Preferences dialog box opens.

2. Select the **Email** tab.

3 Click **AutoSignature**.

4 Enter the content of the email signature.

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

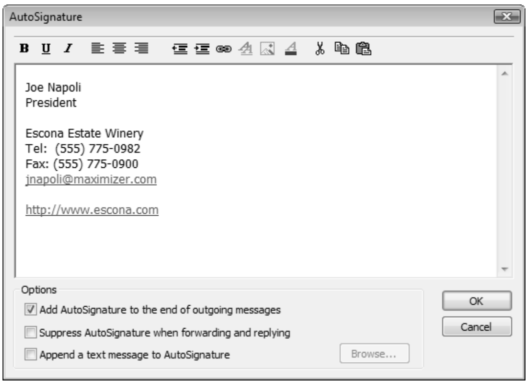
5 Under **Options**, select **Add AutoSignature to the end of outgoing messages**.

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

7 To add content from a text file to the AutoSignature, select **Append a text message to AutoSignature**, click **Browse**, and browse to the text file.

The AutoSignature updates automatically when you modify the text file.

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



Set Default Fonts for Email Messages

In the email preferences you can set default fonts for email messages in Maximizer. You can set up different fonts for new messages and for messages that you are forwarding or replying to. You can also set up a font for composing and viewing plain-text email messages. When you send a plain-text email message, the font information is not included in the email message.

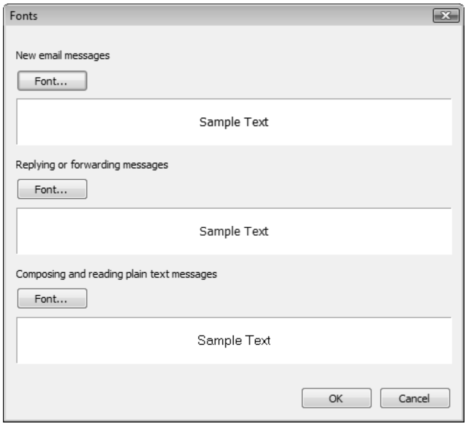
1 On the **Setup** tab, select **Preferences**.

The Preferences dialog box opens.

2 Select the **Email** tab.

3 Click **Fonts**.

The Fonts dialog box opens displaying the current default fonts.



4 Under **New email messages**, **Replying or forwarding email messages**, or **Composing or reading plain text messages**, click **Font**.

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

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

Microsoft Outlook Integration

Microsoft Outlook integration for Maximizer installs toolbars in the Mail, Contacts, and Contact information windows in Outlook.

Outlook integration works with Outlook XP, 2003, or higher.

In Outlook, select View > Toolbars to view and modify the toolbars that are currently enabled.

Outlook integration is not the same as Outlook synchronization, which synchronizes information in Outlook and Maximizer.

To access Maximizer commands, the Maximizer Add-In toolbar must be enabled. From the toolbar, you can complete the following tasks in Maximizer:

- Create Address Book entries.
- Save email messages to Address Book entries.
- View Address Book entries.

Before you can use Outlook integration, you must specify which Address Book to save the contacts and email messages to.

The following sections contain additional information on using Outlook integration:

- "Set Up Microsoft Outlook Integration" on page 179
- "Select a Microsoft Outlook Address List for Integration" on page 181
- "Add an Address Book Entry from Microsoft Outlook" on page 182
- "Send an Email Message to Address Book Entries from Microsoft Outlook" on page 183
- "Save an Email Message to an Address Book Entry from Microsoft Outlook" on page 185
- "View an Address Book Entry from Microsoft Outlook" on page 186

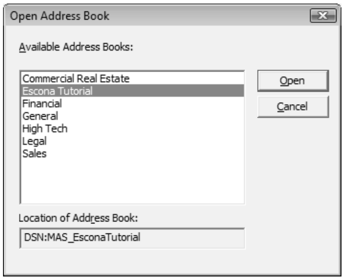
Set Up Microsoft Outlook Integration

Before using Microsoft Outlook Integration, you must configure Outlook to communicate with Maximizer. You must specify the Address Book and the Maximizer user ID and password. You can also set default preferences for creating new Address Book entries.

Each Windows user can integrate Outlook with only one Maximizer Address Book on a single machine. If you use Maximizer on more than one machine, you must specify the Address Book for integration on each machine. If you want, you can specify a different Address Book for integration on each machine.

If multiple users log in to the same machine using different Windows login accounts, each user must specify the Address Book for integration in Maximizer on that machine.

1. In Maximizer, on the **Home** tab, select **Preferences**. Then, click **Other Options** on the **System Defaults** tab.
2. Click **Address Book**.
3. Select the Address Book to integrate with Outlook, and click **Open**.

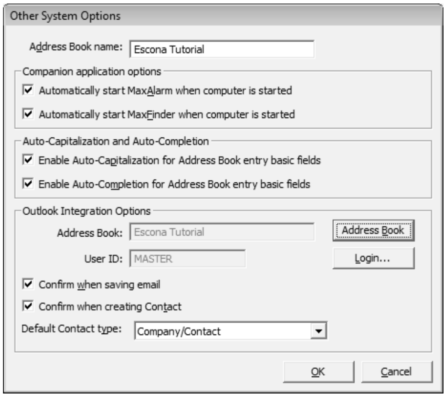


4. Enter your **User ID** and **Password**.

   If your Maximizer password changes, or if you ever need to change the User ID you use for Outlook integration with Maximizer, open the Other System Options dialog box, click the Login button, and change your login credentials.
5. Click **OK**.
6. Select the options for creating Address Book entries and saving email messages:
   - Select the **Confirm when saving email** and the **Confirm when creating Contact** options to specify details before saving email or contact information to Maximizer.
   - In the **Default Contact type** drop-down list, select the type of Address Book entry that is created when you add contacts from Outlook.

   If the "Confirm when creating Contact" option is selected, you can select a different type of Address Book entry while creating the entry.

7 Click **OK** to close the Other System Options dialog box, and click **OK** again to close the Preferences dialog box.



Select a Microsoft Outlook Address List for Integration

Outlook integration with Maximizer only works with address lists in the Outlook Address Book (such as Contacts), and only with one address list at a time. It does not work with the global address list or other address lists.

If Outlook is set to use the global address list or another address list, which might be the case if your organization uses Microsoft Exchange, you will see an error message when you try to save an Outlook contact to Maximizer. If you see such an error message, use the procedure below to select an Outlook address list.

This procedure is written for Microsoft Outlook 2010. The steps may differ slightly in earlier versions of Outlook.

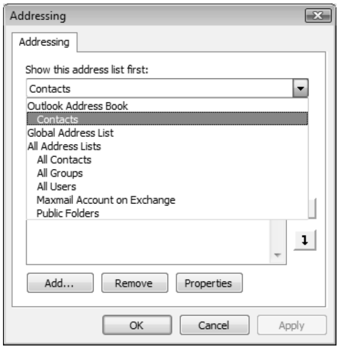
1 In Outlook, on the **Home** tab, select **Address Book** from the **Find** group.

The Address Book dialog box opens.

2 Select **Tools > Options**.

3 Open the **Show this address list first** drop-down list, and select one of the items under Outlook Address Book.

Typically, there is only one item in this list, called Contacts. In that case, select Contacts.



4. Click **OK**, and then close the dialog box in Outlook.

Add an Address Book Entry from Microsoft Outlook

You can create Address Book entries in Maximizer directly from Microsoft Outlook. You can create Address Book entries from Outlook contacts or from email messages in Outlook. If you create the entry from an email message, the entry is created from the email sender (From address).

You can access the command from the Save Contact to Maximizer icon in a contacts window or from the Save Sender As Contact to Maximizer icon in a mail window in Outlook.

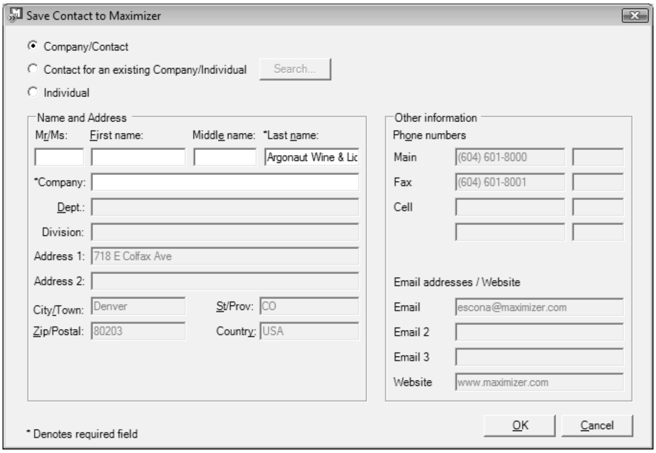
If you cleared the "Confirm when creating Contact" option when setting up Outlook integration, Maximizer automatically creates entries as follows:

- If Individual is selected as the default contact type, Maximizer creates an Individual Address Book entry.
- If Company/Contact is selected as the default contact type, Maximizer creates a Company/Contact Address Book entry. If the Outlook contact information does not include a company name, you are prompted to provide one when saving the Contact to Maximizer.

1. In Outlook, select the contact or the email message.
2. Select the **Save Contact to Maximizer** or the **Save Sender As Contact to Maximizer** icon.

   If the "Confirm when creating Contact" option is disabled, the Company or Individual Address Book entry is created automatically in Maximizer.

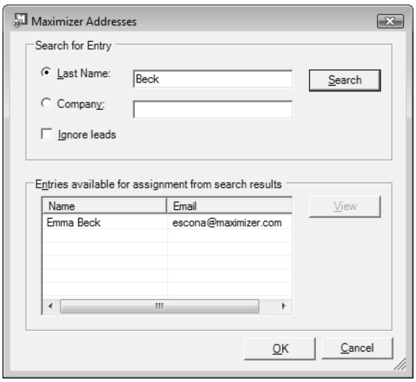
   If the "Confirm when creating Contact" option is selected, the Save Contact to Maximizer dialog box opens.



To enable or disable the "Confirm when creating Contact" option, click Other Options in the system defaults preferences. (On the Setup tab, select Preferences.)

3 If necessary, change the Address Book entry type.

4 If you are creating a Contact for an existing Company/Individual, click **Search** to find and select the Address Book entry for which you want to create a Contact.



5 Edit the information in the available fields as required.

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

Send an Email Message to Address Book Entries from Microsoft Outlook

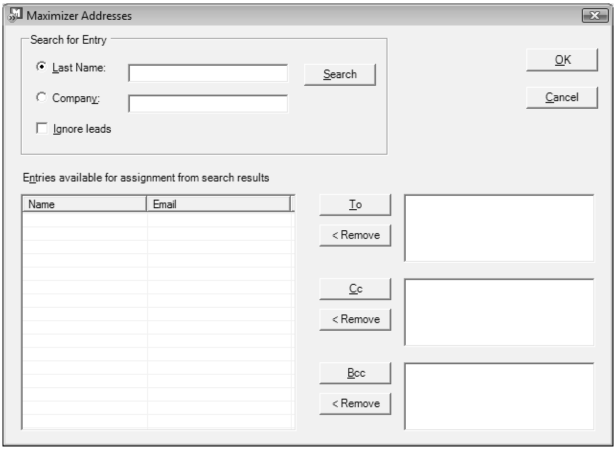
You can use Microsoft Outlook to send email messages to Maximizer Address Book entries, even if the Address Book entries do not have related contact records in Outlook.

This method may not be available if you are using Word as your email editor. To determine if Word is your email editor, select Tools >

Options from the menu in Outlook, and click the Mail Format tab. If the "Use Microsoft Office Word to edit e-mail messages" checkbox is selected, the Maximizer Addresses button may not be available in the new email message dialog box.

1. In Outlook, open a new email message.
2. Click the **Maximizer Addresses** button.

   The Maximizer Addresses dialog box opens.



3. Select **Last Name** or **Company** and enter the full or partial last name or company name to search for.
4. Click Search.

   The names and primary email addresses of the matching Address Book entries appear in the "Entries available for assignment from search results" list.
5. Select the Address Book entry from the list, and click the To, Cc, or Bcc button.

   You can select multiple entries by holding down the Ctrl key or Shift key.
6. Click **OK**.

Save an Email Message to an Address Book Entry from Microsoft Outlook

You can save email messages in Microsoft Outlook directly to Address Book entries in Maximizer. Email messages are saved in the documents tab of the Address Book entries. You can save and send a new email message to an Address Book entry, or you can save an existing email message to an Address Book entry.

If there are no Address Book entries associated with the email message, you either create an entry yourself or let Maximizer create it for you, depending on your preference settings. The email message is then saved to this entry's documents. If the email address does not have a record in Outlook contacts, Maximizer creates a corresponding Outlook contact.

If you are using Outlook Synchronization for Address Book entries, Outlook integration also adds the newly created Address Book entries to the synchronized Favorite List in Maximizer and category in Outlook, so they will get synchronized in the future.

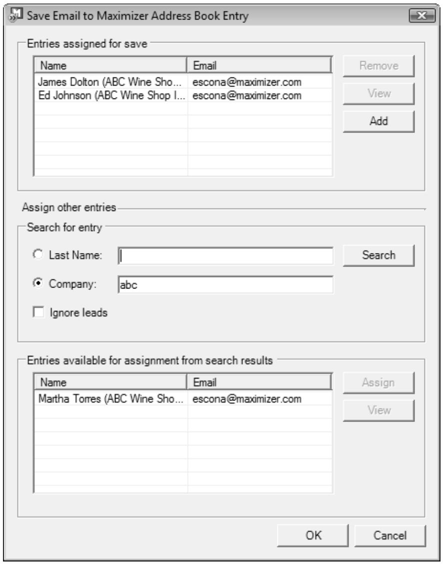
1. In Outlook, select the email message, and select the **Save Email to Contact in Maximizer** icon.

   – or –

   In Outlook, compose a new email message, and select the **Send email and save to Contact in Maximizer** icon.

   If the "Confirm when saving email" option is disabled, the email message is saved as a document to the Address Book entry that contains the email address of the sender or recipient.

   If the "Confirm when saving email" option is selected, the Save Email to Maximizer Address Book Entry dialog box opens. The Entries assigned for save list displays Address Book entries that contain the email address of the sender or recipient. If no such entries exist, this list is empty.



To enable or disable the "Confirm when saving email" option, click Other Options in the system defaults preferences. (On the Setup tab, select Preferences.)

2 If necessary, click **Add** to create an Address Book entry to save the email message to. Then, enter and edit information as required and click **OK**.

3 To remove an entry from the Entries assigned for Email Save list, select the entry and click **Remove**.

4 If necessary, select other Address Book entries to save the email message to:

- Search for the entries by **Company** or **Last Name** and click **Search**.
- Select the entries from the **Entries available for assignment from search results** list and click **Assign**.

5 Click **OK**.

View an Address Book Entry from Microsoft Outlook

You can automatically open Maximizer to view Address Book entries from Microsoft Outlook. You can view Address Book entries associated with Outlook contacts or with email messages.

Which Maximizer Address Book entry is associated with the Outlook contact depends on how the association was created:

- If you are using Outlook Synchronization, and the Outlook contact is synchronized with Maximizer, the View Contact in

Maximizer button takes you to the synchronized Address Book entry.

- If the Maximizer Address Book entry was created from Outlook using the Save Sender as Contact in Maximizer button, the View Contact in Maximizer button takes you to the Maximizer Address Book entry that was created previously.
- Otherwise, Outlook Integration uses email addresses to associate Outlook contacts with Maximizer Address Book entries, so if more than one Maximizer Address Book entry has the same email address as the selected contact, all matching Address Book entries are highlighted in Maximizer. It matches based on Email 1, 2, or 3 in the Maximizer Address Book entry.

When you view Address Book entries from Outlook, Maximizer opens displaying the Address Book window. The window lists all matching entries.

1. In a mail or contacts window in Outlook, select an email message or contact.
2. Select the **View Contact in Maximizer** icon.

Microsoft Outlook Synchronization

Microsoft 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. Outlook Synchronization preferences enable you to specify the following settings:

- The frequency of synchronization. This setting determines how often entries are synchronized including the option only to synchronize manually.
- The date range within which appointments and tasks are synchronized. All appointments and tasks scheduled within the specified date range are synchronized. These settings apply to appointments and tasks in both Maximizer and Outlook.
- The Maximizer Favorite List to synchronize with Outlook. The entries on the Favorite List are assigned to a specified Outlook category.
- The Outlook category. Only Outlook contacts assigned to the specified category are synchronized with Maximizer. Those entries are assigned to the selected Favorite List in Maximizer.

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

The "Sync Issues" folder in Outlook contains log files and items that Outlook has been unable to synchronize with Microsoft Exchange. This folder does not apply to Outlook Synchronization with Maximizer.

The following sections contain additional information on Outlook Synchronization:

- "Synchronizing Appointments and Tasks with Microsoft Outlook" on page 189
- "Configure Microsoft Outlook Synchronization" on page 190
- "How Phone Numbers are Synchronized with Microsoft Outlook" on page 192
- "Manually Synchronize with Microsoft Outlook" on page 193

Synchronizing Appointments and Tasks with Microsoft Outlook

When Outlook Synchronization is configured, it can synchronize select appointments and tasks between the Maximizer Address Book and Microsoft Outlook. Appointments and tasks scheduled within the specified date ranges are synchronized. As well, the following activities are synchronized:

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

You can also specify whether to include private appointments and/or tasks in the synchronization.

The Products/Services, Categories attendees, resources, and any notes you add to appointments in Maximizer are synchronized to Outlook. These items appear as part of the appointment dialog box in Outlook.

Recurring Appointments

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

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

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.

Set Up Microsoft Outlook for Synchronization

Microsoft Outlook contacts are synchronized with Maximizer based on their assigned categories. Each Outlook contact that you want to synchronize, must be assigned to a category.

The following procedures describes how to assign a new category named Maximizer to selected Outlook contacts.

1. In Outlook, open the Address Book list to synchronize with Maximizer.

   For example, open the Contacts Address Book list.
2. Select **Edit > Select All to** select all entries in the list.

   – or –

   Or select specific entries in the list to assign for synchronization.
3. Select **Edit** > **Categories.**
4. Click **Master Category List** and add a new category called **Maximizer**.
5. In the **Available categories** list, select the checkbox beside the Maximizer category and click **OK**.

Configure Microsoft Outlook Synchronization

Maximizer Address Book entries are synchronized with Microsoft Outlook based on Favorite Lists. Before configuring Outlook synchronization in Maximizer, you must create a Maximizer Favorite List that specifies which Address Book entries are to be synchronized with Outlook.

1. On the **Setup** tab, select **Preferences**, and select the **Outlook Synchronization** tab.
2. Under **Synchronization frequency**, specify how often Maximizer should synchronize with Outlook.

If you select Never (manual synchronization), you must initiate synchronization manually.

3 Under **Conflict resolution**, specify how to handle entries that have changed in both Maximizer and Outlook since the last synchronization.

4 Under **Options**, specify the remaining settings.

- 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.

Do not select Ignore computer name if you use multiple computers and synchronize to a different Outlook profile on each computer.

- 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.

- 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.

- To synchronize Maximizer Address Book entries and Outlook contacts, select the **Synchronize Address Book entries** checkbox.

- To specify the mapping between Outlook and Maximizer phone number fields, click **Phone Mapping**, and select the Maximizer phone number field to map to each Outlook phone number field.

  If necessary, use the Move Up and Move Down buttons to prioritize the fields in the phone mapping list.

  Maximizer supports only four phone numbers for an Address Book entry, so when you synchronize from Outlook to Maximizer, only four Outlook phone numbers are synchronized.

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

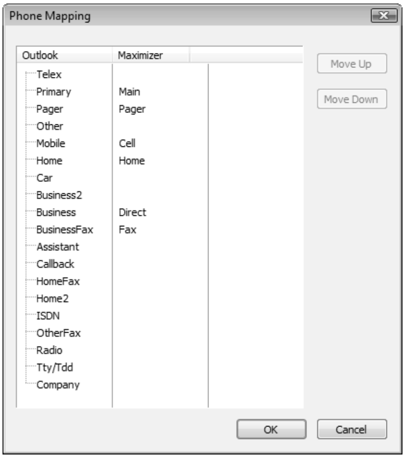
- In the **Synchronize Contacts from Outlook Category** drop-down list, select the Outlook category to synchronize.

5 Click **OK**.

How Phone Numbers are Synchronized with Microsoft Outlook

In an Outlook to Maximizer synchronization, Maximizer first tries to synchronize mapped phone numbers whose descriptions exist in the default Address Book entry. Maximizer then tries to synchronize mapped phone numbers that appear highest in the phone mapping list. Only mapped phone numbers are synchronized to Maximizer.

In the following examples, the phone number descriptions in the default entry are Main, Fax, and Cell, and the mapped phone numbers are as follows:



Maximizer Field	Outlook Field
Main	Primary
Pager	Pager
Cell	Mobile
Home	Home
Direct	Business
Fax	BusinessFax

Example: Outlook values exist for all mapped phone numbers

If Outlook values exist for all mapped phone numbers, the following phone numbers would be included in the synchronized entry.

Main, Fax, Phone, Pager

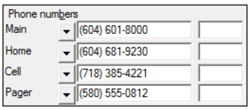
Because the fourth phone number description is empty in the default entry, Maximizer fills it with the Pager phone number description. Main is higher in the phone mapping list, but it has already been synchronized.

Example: Outlook values exist for three mapped phone numbers

If Outlook values exist for all mapped phone numbers except Fax, the following phone numbers would be included in the synchronized entry.

Main, Home, Cell, Pager

As in the previous example, Maximizer uses Pager for the fourth phone number description. In a later pass, Maximizer determines that there is not an Outlook value for Fax, so it replaces the Fax phone number description with Home, the highest phone number that is not synchronized in the phone mapping list.



Manually Synchronize with Microsoft Outlook

You can manually synchronize entries between your Maximizer Address Book and Microsoft Outlook at any time. After synchronizing, you can retrieve the Favorite List used for synchronization to view the changes.

- On the **Tools** tab, select **Synchronize with Outlook** from the **Office** group.

  Depending on how many Outlook contacts you are synchronizing, the processing time will vary. A message box appears when the synchronization is complete.

CHAPTER 8

Opportunities

Organize Your Sales with Opportunity Management

In this chapter...

About Opportunities

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

You can use opportunities to formalize your sales processes.

- Effectively schedule and coordinate the selling process among all members of your sales team.
- Ensure that all the right people in your organization have up-to-date information about the status of your opportunities.
- Forecast the probability of successfully closing your opportunities.

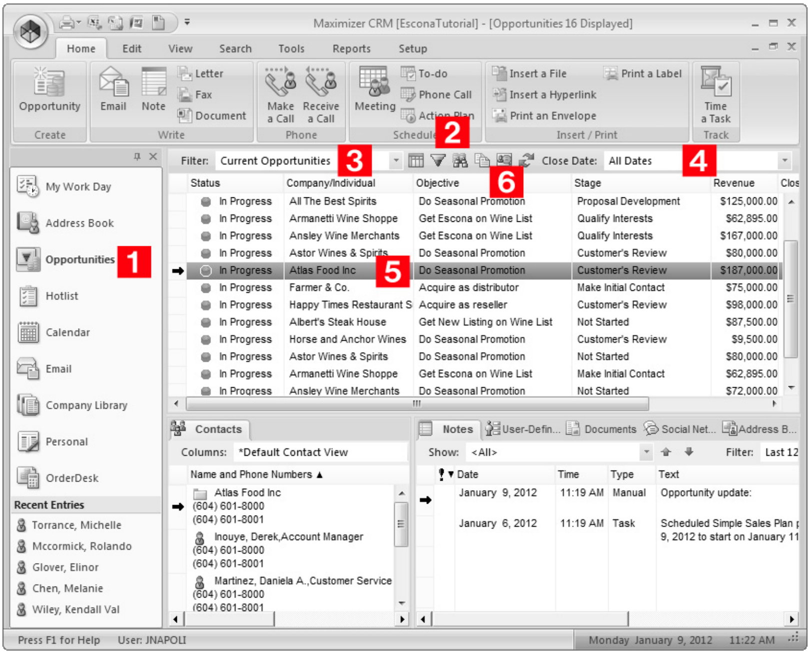
The following sections contain basic information on opportunities:

- "Opportunities Window" on page 196
- "View an Opportunity from the Opportunities Window" on page 197
- "View an Opportunity from an Address Book Entry" on page 198
- "Add an Opportunity" on page 199

Opportunities Window

Keep the following points in mind when working with the Opportunities window:

1. Select the **Opportunities** icon to open the Opportunities window.
2. Use the **view bar** buttons for common opportunity tasks.
3. Use the **Filter** drop-down list to show all opportunities or current opportunities.
4. Use the **Close Date** drop-down list to filter the displayed opportunities according to their expected close dates.
5. Double-click an **opportunity** to view or modify it.
6. Click the **View in Address Book** button in the View bar or choose the option from the shortcut menu to view the Address Book entry associated with the current opportunity.



View an Opportunity from the Opportunities Window

1. Select the **Opportunities** icon to open the Opportunities window.

   The Opportunities window opens.

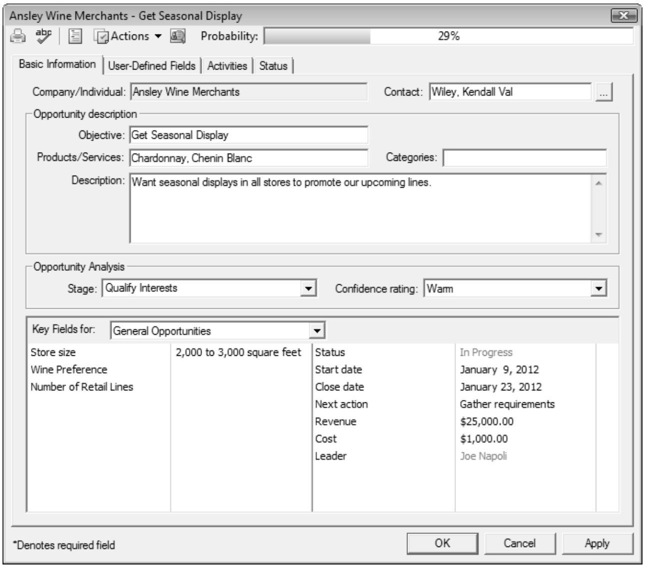
2. If necessary, select an option from the **Filter** drop-down list.

   - **All Opportunities** displays all opportunities that you have the rights to view.
   - **Current Opportunities** displays the opportunities that are in progress.

3. To further filter the current list by the opportunity close date, select an option from the **Close Date** drop-down list.

4. Double-click on an opportunity to open it.

   The opportunity dialog box opens displaying the details of the opportunity.



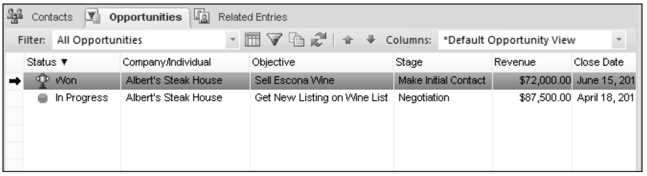
5 Select the other tabs to view more information on the opportunity.

View an Opportunity from an Address Book Entry

1 Select the Address Book entry.

2 Select the **Opportunities** following window.

All opportunities for the current Address Book entry are displayed in the list.



3 Click on an opportunity to open it.

Add an Opportunity

All opportunities are associated with Address Book entries. To create an opportunity, you must select or open an Address Book entry or an existing opportunity, , task, or appointment associated with the Address Book entry.

1. Click on the Address Book entry or on an opportunity associated with the Address Book entry to make it the current entry.

   – or –

   Open the Address Book entry associated with the Address Book entry.

> You can select a different Address Book entry in the Opportunity Entry dialog box by clicking the ellipsis button beside the Company/Individual field.

2. On the **Home** tab, select Opportunity from the **Create** group.

   – or –

   Drag and drop the entry to the **Opportunities** following window.

   – or –

   In the Address Book window, right-click and select **Create an Opportunity**.

   A new opportunity dialog box opens.

3. Specify the basic fields for the opportunity.
   - Enter the opportunity **Objective**. The objective should describe the goal of this opportunity.
   - Select the applicable **Products/Services** and **Categories**.
   - Enter the **Description** of the opportunity.
   - Select a **Stage** and **Confidence Rating** for the opportunity.

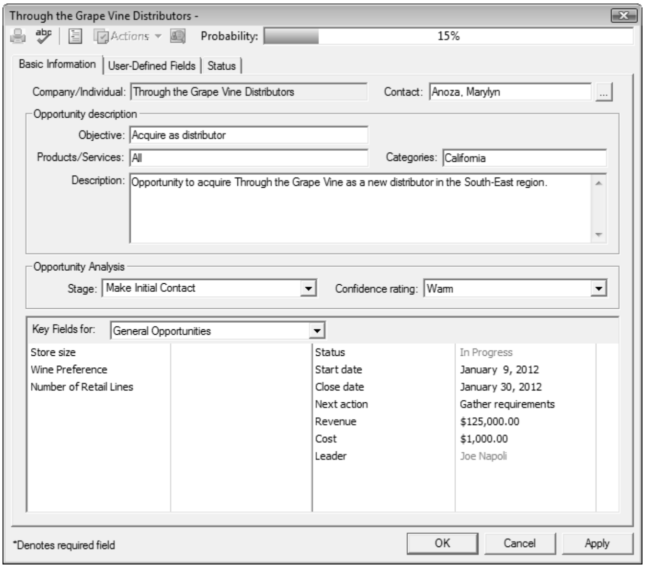
> Mandatory opportunity fields are denoted by an asterisk.

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

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

5. Work through the remaining tabs, entering the opportunity's details including the user-defined fields and status.

6 Click **OK** to save the opportunity.



Opportunity Status

When you add a new opportunity, its status is set to “In progress”. By default, when you open the Opportunities window, your current, or “In progress”, opportunities are displayed. You can change the status of an opportunity to indicate that the opportunity is won, lost, abandoned, or suspended.

The following sections contain information on opportunity status:

- “Complete an Opportunity” on page 201
- “Suspend an Opportunity” on page 202

Complete an Opportunity

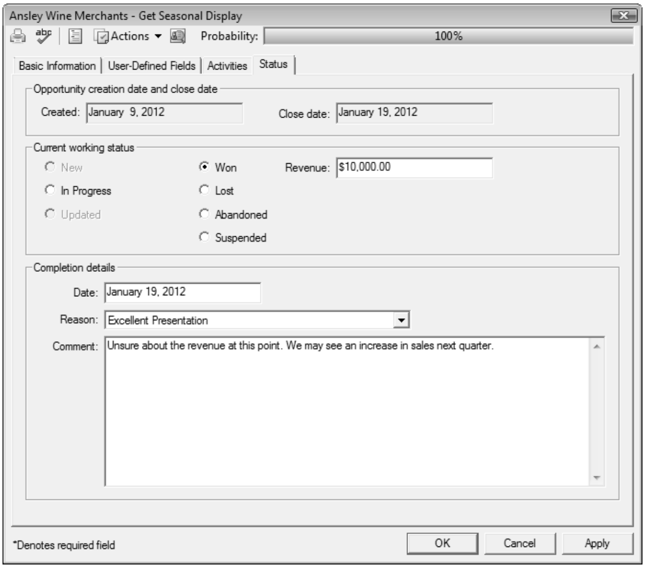
To complete this procedure, you must have Modify rights for opportunities.

You can complete an opportunity to indicate that the opportunity is won, lost, or abandoned. While completing the opportunity, you can select a reason and enter comments on the opportunity. The completion reasons are set in Administrator. The list differs depending on the status of the opportunity.

1. Open the opportunity.
2. Select the **Status** tab.
3. Under **Current working status**, select the status of the opportunity: **Won**, **Lost to**, or **Abandoned**.
4. If the opportunity is won, enter the revenue for the opportunity.

   By default, the projected revenue is displayed.
5. Under **Completion reasons**, select a reason for completing the opportunity and enter a comment, as desired.

6 Click **OK**.



Suspend an Opportunity

To complete this procedure, you must have Modify rights for opportunities.

When you suspend an opportunity, it is no longer displayed in the list of current opportunities. When the opportunity is suspended, you can continue to modify the opportunity.

1 Open the opportunity.

2 Select the **Status** tab.

3 Under **Current working status**, select **Suspended**.

4 Under **Completion reasons**, select a reason for suspending the opportunity and enter a comment, as desired.

5 Click **OK**.

Opportunity Pipeline Report

With a single click, you can view the current opportunities in the pipeline. The report graphically displays all opportunities that you select to include grouped by opportunity stage. The Opportunity Pipeline report can also be modified using Crystal Reports.

The following section contain information on the Opportunity Pipeline Report:

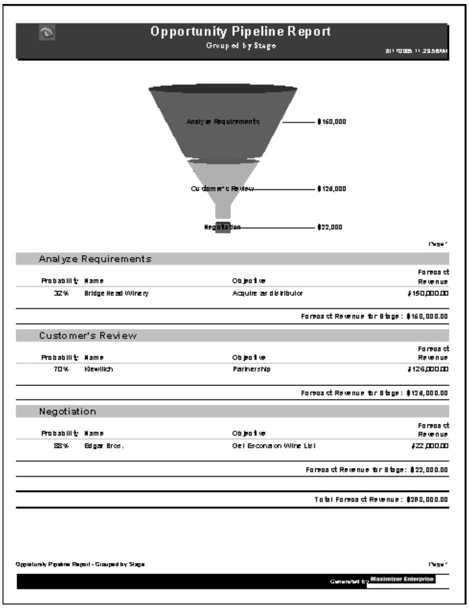
- "View the Opportunity Pipeline Report" on page 203

View the Opportunity Pipeline Report

1. In the Opportunities window, click the **Display Opportunity Pipeline Report** button in the **View** bar.

   You are prompted for which entries to include in the report.

2. Select the entries to include, and click **OK**.



CHAPTER 9

Customizing Maximizer

Customize Maximizer to suit your needs

In this chapter...

Preferences

You can personalize how Maximizer works for you. Maximizer provides you with various settings that give a great deal of flexibility in how you work—in other words, Maximizer adapts to the way you want to work.

The following sections contain information on setting preferences:

- "Set your Maximizer Preferences" on page 206
- "Working with Lists of Users" on page 207

Set your Maximizer Preferences

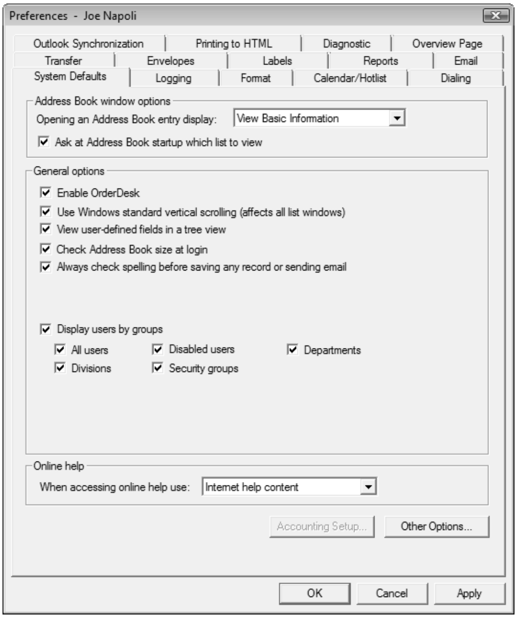
You can set your Address Book preferences directly in Maximizer. Your system administrator can also set these preferences in Administrator.

1. On the **Setup** tab, select **Preferences**.

   The Preferences dialog box opens.

2. Select the tab for the settings you want to edit.
   - Select **System Defaults** to specify default settings and Microsoft Outlook integration options.
   - Select **Logging** to specify how notes are logged for various actions.
   - Select **Format** to specify date and address formats.
   - Select **Calendar/Hotlist** to specify the default settings and access rights for the calendar and Hotlist.
   - Select **Dialing** to specify settings for dialing phone calls from Maximizer.
   - Select **Outlook Synchronization** to specify settings for synchronizing Address Book information with Microsoft Outlook.
   - Select **Printing to HTML** to specify settings for creating HTML files from Maximizer information.
   - Select **Diagnostic** to specify settings for logging error messages.
   - Select **Overview Page** to specify options for the My Work Day page.
   - Select **Transfer** to specify settings for transferring information between Address Books.
   - Select **Envelopes**, **Labels**, or **Reports** to specify settings for printing envelopes, labels, and reports from Maximizer.

- Select **Email** to specify the default settings for viewing and sending email.



3 Edit the settings and click **OK** to save the changes.

Working with Lists of Users

The “Display Users by Groups” setting in the System Defaults preferences affects how users are listed in a number of dialog boxes in Maximizer, including the Appointment and Select Users for Full or Read Access dialog boxes. If you enable the setting, you can select which groupings to include in the user lists. The grouping are determined by various user properties.

- **All Users –** Lists all enabled users in a single list in alphabetical order, without any other groupings.
- **Departments –** Groups users by department. A user’s department is set in the “Dept” field of the user’s properties. Users without values specified in this field are not displayed in this list. In the user properties, security must be set to “Public” for users to display in this list.
- **Disabled Users –** Lists all disabled users in alphabetical order. Disabled users cannot log in to Maximizer and are not displayed in any of the other lists. However, you can add disabled users to appointments.

- **Divisions –** Groups users by division. A user's division is set in the "Division" field of the user's properties. Users without values specified in this field are not displayed in this list. In the user properties, security must be set to "Public" for users to display in this list.
- **Security Groups –** Groups users by security group. If you are selecting values in the Full Access and Read Access fields, you can select a security group to add to the field. In other user-selection dialog boxes, you can select the users in the security groups.

Customizing the Interface

You can customize the basic Maximizer interface in a number of ways. You can select the layout of the main window. You can adjust the properties of the icon bar containing the icons linking to the main Maximizer windows.

The following sections contain information on customizing the Maximizer interface:

- "Window Layout" on page 209
- "Adjust the Icon Bar" on page 210
- "Customize the Quick Access Toolbar" on page 211
- "Add a Command to the Quick Access Toolbar" on page 211

Window Layout

You can control what windows are displayed and how they are laid out. On the Setup tab, you can select Window > Window Settings from the Workspace group to select one of the Maximizer window views—Classic, Outlook Style, and Custom.

- **Classic** displays the following windows below the controlling (main) windows. This setting is Maximizer's default window layout.
- **Outlook Style** is somewhat similar to Microsoft Outlook's display. The controlling windows form the left pane while the following windows occupy the top-right and bottom-right panes.
- **Custom** allows you to control what windows are displayed. For example, use this option if you want only the Address Book and Calendar windows open, without their following windows open. Open the windows you want using the icons on the icon bar or the Switch Windows commands. (On the View tab, select Switch Window from the Window group.) Then, tile the windows. (On the Setup tab, select Window > Window Management from the Workspace group, and select an option.) Of course, you can manually size any window.

You can also control such things as the colors, fonts, and grid lines in your windows. (On the Setup tab, select Window > Window Settings from the Workspace group, and choose Set Color or Set Font.)

Adjust the Icon Bar

You can adjust the icon bar properties and also choose the state of the icon bar's visibility.

1. On the **Setup** tab, select **Icon Bar** from the **Workspace** group.

   The Icon Bar Properties dialog box opens.

2. In the **General** area, set the default properties of the icon bar:
   - Select the **Visible** option to display the icon bar in the Maximizer window.
   - Select the **Display tooltips** option to show information about each icon when you pass the mouse pointer over it.

3. Set the icon size to **Small** or **Large**.

4. Set the location of the icon bar.
   - The **Floating** option allows you to place the icon bar anywhere inside the Maximizer window.
   - The **Docked at left** and **Docked at right** options place the icon bar on the left or right side of the Maximizer window.

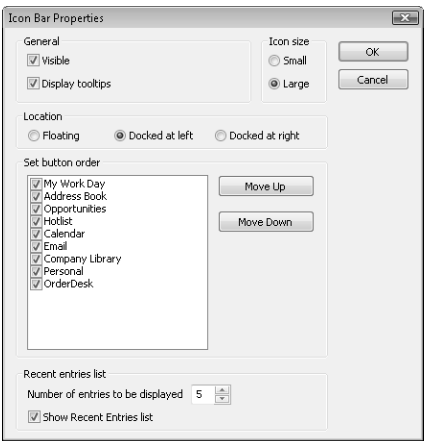
5. In the **Set button order** area, select the icons you want to be displayed.

   Use the **Move Up** and **Move Down** buttons to position the icons.

6. In the **Recent entries list** area, set the number of entries to be displayed.

   To hide the section, clear the **Show Recent Entries list** option.

7. Click **OK**.



Customize the Quick Access Toolbar

The Quick Access toolbar is located directly above or below the ribbon. You can click the arrow button next to the toolbar to add or remove the default commands on the toolbar. You can also add any other command from the ribbon, from sub-menus, or from the icon bar to the Quick Access toolbar.

1. Right-click anywhere in the ribbon, and select **Customize Quick Access Toolbar**.

   The Customize Quick Access Toolbar dialog box opens.

2. From the **Choose commands from** drop-down list, select the location of a command to add to the toolbar.

   You can select a tab, the icon bar, or the Maximizer menu that displays when you click the Maximizer button.

3. Select a command, and click **Add**.

   You can also select <Separator> to add a separator between commands.

4. Repeat steps 2 and 3 to add more commands to the toolbar.

5. To move a command on the toolbar, select the command on the right, and click the arrow buttons to move the command up or down in the list.

6. When you are finished, click **OK** to save the changes to the Quick Access toolbar.

Add a Command to the Quick Access Toolbar

- Right-click on the command, and select **Add to Quick Access Toolbar**.

Custom Actions

Custom actions are commands that you can set up and personalize and then access from the Custom Actions tab. You can create the following types of custom actions:

- **Browse a website –** Open a specific website or HTML document.
- **Open a document or run an application –** Open a document or file, or run an external application such as a word processor, spreadsheet, or graphics program.
- **Start a user-defined field for an Address Book entry –** Treat the value of an alphanumeric user-defined field as the fully qualified name of a document or an application to open or start.

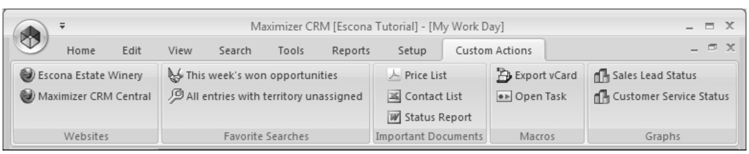
  For example, you could use an alphanumeric user-defined field to record a secondary web site for an Address Book entry. When you access the command, you can open the current Address Book entry's secondary website in your browser.
- **Run a Maximizer macro –** Run an existing Maximizer macro.
- **Draw a graph from a defined graph catalog –** View an existing graph in the graph catalog.
- **Retrieve a search catalog –** Retrieve an existing saved search from the search catalog in the Address Book or Opportunities window.

The following sections contain information on custom actions in Maximizer:

- "Custom Actions Tab" on page 212
- "Create a Group in the Custom Actions tab" on page 213

Custom Actions Tab

You can access your custom actions from the Custom Actions tab. The custom actions are arranged into groups. When you set up your custom actions, you create the groups and add each action to an existing group. Custom toolbars created in previous versions of Maximizer are converted into groups on the Custom Actions tab. The Custom Actions tab is visible only after you create a custom actions group.

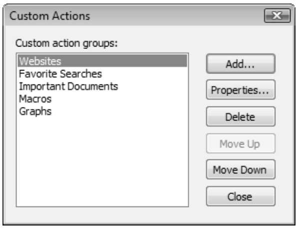


Create a Group in the Custom Actions tab

You can create groups in the Custom Actions tab to perform personalized actions such as launching another application or performing a specific search that was saved in your search catalog.

1. On the **Setup** tab, select **Custom Actions** from the **Workspace** group.

   The Custom Actions dialog box opens.

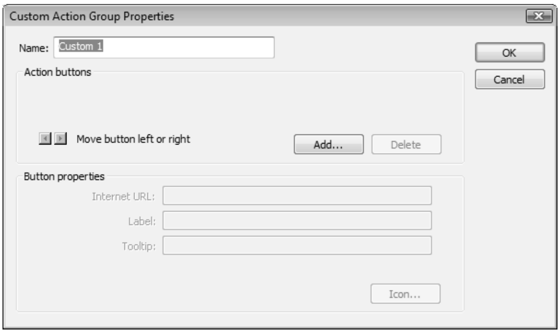


2. To create a new custom actions group, click **Add**.

   – or –

   To add a button to an existing custom actions group, select the existing group, and click **Properties**.

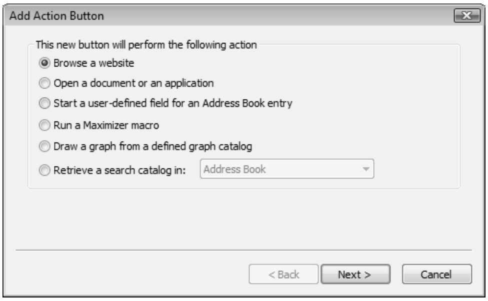
   The Customize Action Group Properties dialog box opens.



3. Enter a name for the group, and click **Add** to add a command to the group.

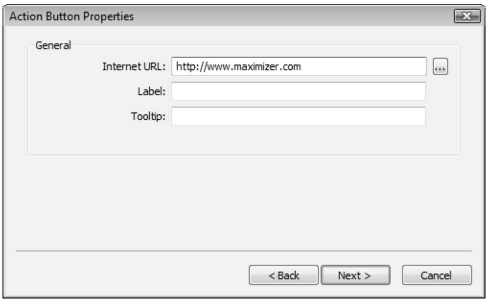
   The Add Action Button dialog box opens.

4. Under **This new button will perform the following action**, select the main action, and click **Next**.



5 Specify the details of the custom action.

- If you chose **Browse a website** or **Open a document or an application**, click **Browse** to locate the document/ application to run, or enter the URL or the path to the document/application.



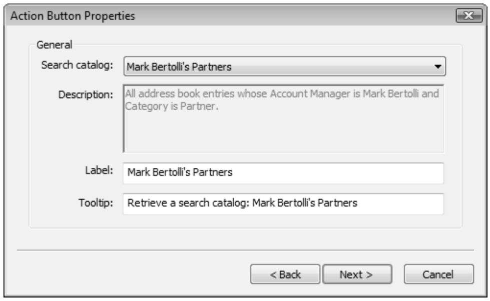
  If you select a document, it opens in the default application for the type of document. To open the document with another application, specify the path to the application enclosed in double quotes, enter a space, then specify path to the file.

  For example, to launch WordPad and open the file Notes.txt, in the Document/Application text box type the following:

  "C:\ProgramFiles\Accessories\WordPad.exe" C:\Notes.txt

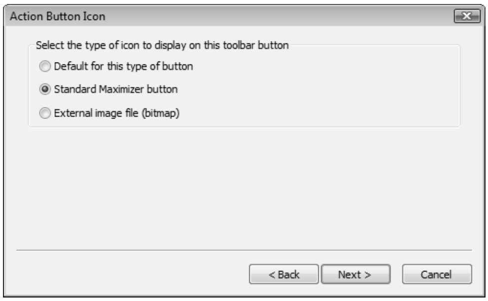
  To load a new instance of an already running program, select the **Load new instance** checkbox.

- If you chose any other item, select the specific user-defined field, macro, graph, or search from the drop-down list.



6 Enter the **Label** and **Tooltip**, and click **Next**.

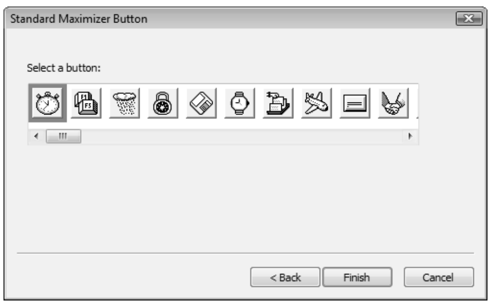
7 Select the type of button you would like to display for the command, and click **Finish** or **Next** depending on the option you choose.



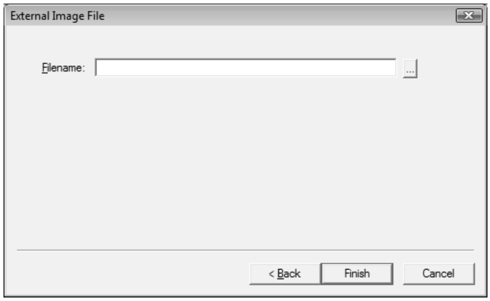
If you chose to display the default button, Maximizer selects the button automatically, and you can skip to step 9.

8 Select the image to use for the custom action, and click **Finish**.

- If you chose to use a standard Maximizer button, select one of the available buttons.

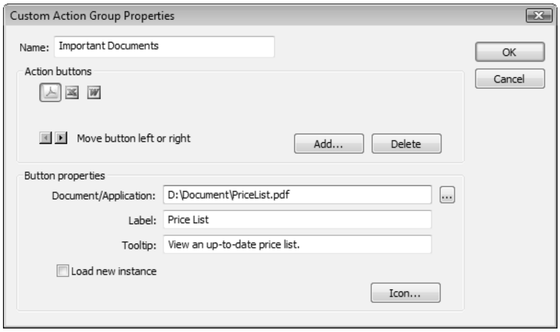


- If you chose to use an external image file (bitmap), locate the image using the ellipsis button.



9 To add another custom action to the group, return to step 3 and repeat the steps for the next custom action.

10 If desired, change the position of the new command in the group using the arrows, and click **OK** to save the group.



Web Inquiry Forms for Websites

Maximizer can help you create an inquiry form to collect pertinent information from your website visitors. The collected information is sent to the specified email addresses as an .MTI or .XML file and then imported directly into Maximizer as Address Book entries by double-clicking on the file. You can also use a direct import (direct insert) of information.

You can create web inquiry forms with the Web Inquiry Form wizard. You can use the wizard for the following tasks:

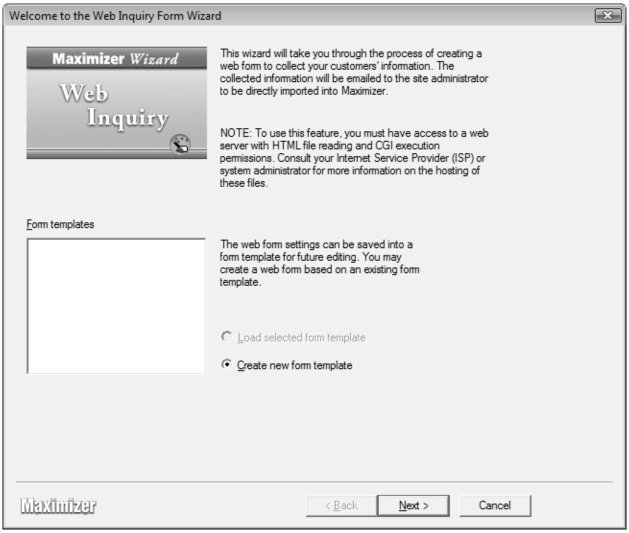
- Save the web form settings as a template for future editing, so you can customize the form as the need arises.
- Select the Maximizer fields, including user-defined fields, you want to appear on the form. Information entered in the form's Last Name field, for example, is inserted into the Last Name field when importing information into Maximizer. If you have chosen a table user-defined field, a drop-down list is automatically created so customers can select available choices.
- Change displayed field names. For example, if you want to include in the form an existing Maximizer user-defined field called "GIC Heard About", you can choose to display a helpful label such as "How did you hear about our GIC program?".
- Designate mandatory fields, in addition to the last name and email address fields. If information is not entered in these mandatory fields, the customer will be notified via a Failure page.
- Create rules to manage when collected information is sent to the website administrator (or whatever other email addresses you specify).
- Use HTML to customize the look of the areas above and below the web form; the look of the form itself cannot be customized.
- Use HTML to customize the Success page and the areas above and below the Failure page.
- Preview the web form and return to the respective wizard screens to make the required adjustments.

The following sections contain information on web inquiry forms:

- "Open the Web Inquiry Form Wizard" on page 218
- "Requirements for Web Inquiry Forms" on page 218
- "Create a Direct Insert Web Form" on page 219

Open the Web Inquiry Form Wizard

- On the **Tools** tab, select **Web Form** from the **Internet** group.



Requirements for Web Inquiry Forms

If you are creating forms using the Web Inquiry Form wizard in Maximizer, you must consider some mandatory circumstances regarding your Internet Service Provider (ISP). First, your ISP must support HTML file readings and CGI execute permissions. Second, if your ISP is running a UNIX server, you must ensure the ISP installs the following Perl modules:

- CGI
- Net::SMTP
- MIME::Base64

Third, you may have to ask your ISP to install the "winqcgi.pl" file into a folder that has execute permissions.

You may also have to modify the generated web form HTML page to target the winqcgi.pl file installed by the ISP. To do so, modify the following line:

<FORM action="winqcgi.pl" method="post" name="mtiform">

to

<FORM action="/cgi-bin/winqcgi.pl" method="post" name="mtiform">

Create a Direct Insert Web Form

You can set up your web forms so that they insert new entries directly into a Maximizer Address Book. In order to create direct insert forms, Maximizer must be installed on the web server that is hosting your web form. Before creating the direct insert web form, you must first set up a virtual directory. If your web server runs Windows Server 2003, you also need to add a web service extension for the web form.

1. Create a folder for the web form.
2. On the **Tools** tab, select **Web Form** from the **Internet** group.

   The Web Inquiry Form Wizard opens.
3. Follow the instructions in the Web Inquiry Form Wizard.
   - On the **Server and File Options** screen, select the **Direct Insert** option.
4. Copy the form’s .html files and the winqcgi.exe (for Windows servers) or winqcgi.pl (for Unix servers) file to the folder.
5. Launch IIS and create a virtual directory pointing to the folder.

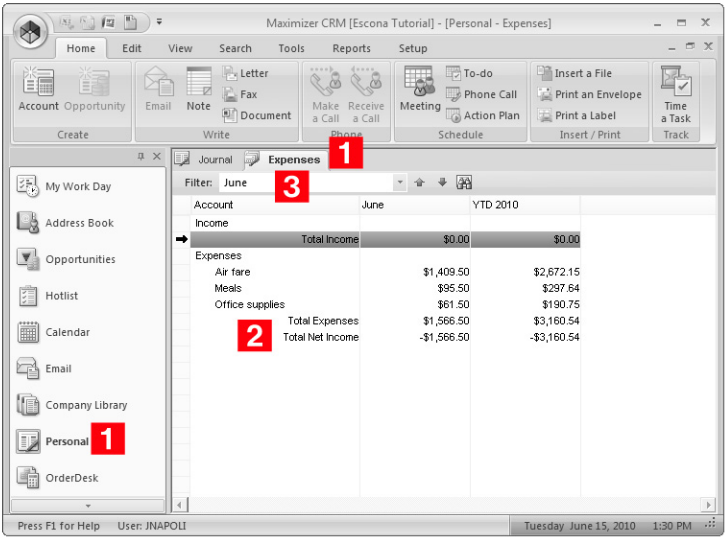
Income and Expenses

Use the Expenses window to record your income and expense items in separate accounts. Keep the following points in mind when working in the Expenses window.

1. Select the **Personal** icon, and select the **Expenses** tab to open the Expenses window.

2. Income and expenses are split up into accounts. The account totals are displayed for the current month and the current year.

3. Use the **Filter** drop-down list and the **Previous Month** and **Next Month** buttons to change the month for which income and expenses are displayed.



The following sections contain information on keeping track of income and expenses in Maximizer:

- “Add an Income or Expense Account” on page 221
- “Record an Income or Expense Amount” on page 221

Add an Income or Expense Account

Income and expenses are stored in accounts. Before recording income or expense items, you must set up the accounts. You can share accounts with other Maximizer users or keep them private.

1. Select the **Personal** icon, and select the **Expenses** tab to open the Expenses window.
2. On the **Home** tab, select **Account** from the **Create** group.

   – or –

   Right-click and select **Add Account**.

   The New Income/Expense Account dialog box opens.

3. In the **Account** area, enter a name and a description for the account.

   The description is the text that identifies the account in the Expenses window. The name is required but not displayed in the Expenses window.
4. In the **Type** area, select the type of account—**Expense** or **Income**.
5. In the **Security** area, select **Public** to share the account with other Maximizer users or **Private** to keep the account private.
6. Click **OK** to finish adding the account.

Record an Income or Expense Amount

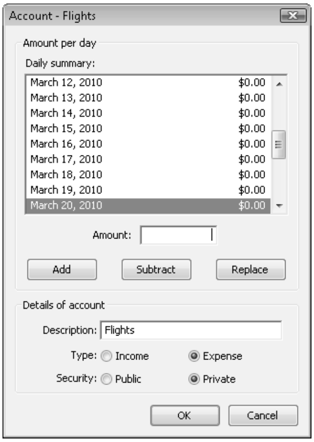
Once you have set up your income and expense accounts, you can record income and expenses for specific days.

1. Select the **Personal** icon, and select the **Expenses** tab to open the Expenses window.
2. If necessary, select a month for the expense/income.

- From the **Filter** drop-down list, select a month in the current year.
- Click the **Select Month and Year** icon and specify any year and month.

3. Double-click on the account to open it.

   The Account dialog box opens displaying details of the account.



4. In the **Daily summary** list, select the day for the income/expense amount.

5. In the **Amount** field, enter the amount for the income/expense, and click **Add**.

   You can enter multiple amounts to add them all to the selected day.

6. Click **OK** to save the change to the account.

OrderDesk

When you receive orders or inquiries from your website, you can manage them using the OrderDesk window. You can use the same OrderDesk window to enter, process, and manage orders that come to you by telephone, mail, or other methods.

The following sections contain basic information on OrderDesk:

- "Enable OrderDesk" on page 223
- "Open the OrderDesk Window" on page 223

Enable OrderDesk

OrderDesk is unavailable only if OrderDesk is enabled in your preferences. After enabling or disabling OrderDesk, you must restart Maximizer for the change to take affect.

1. On the **Setup** tab, select **Preferences**.
2. Select **Enable OrderDesk** and click **OK**.

Open the OrderDesk Window

The OrderDesk window displays all OrderDesk information in the Address Book. You can use the Address Book OrderDesk following window to view orders and inquiries associated with the selected entry in the Address Book or Opportunities window.

- In the icon bar, select the **OrderDesk** icon.

CHAPTER 10

Reporting

Report on the Progress of Your Business

In this chapter...

Crystal Reports

The Crystal Reports viewer is installed automatically with Maximizer and is accessible from the Reports tab. To create or modify reports, you must have the full Crystal Reports program installed.

Crystal Reports supports up to 256 linked views when using Microsoft SQL.

Maximizer installs a set of standard Sales reports, but you can also create your own custom, shared reports and save them in the MaximizerReports folder (in My Documents) where they can be accessed from the Reports tab in Maximizer.

The following sections contain information on using Crystal Reports with Maximizer:

- "Launch Crystal Reports" on page 226
- "Shared and Personal Reports" on page 226
- "Default Crystal Reports" on page 227
- "Create a Shared Crystal Report" on page 227
- "Create a Personal Crystal Report" on page 228

Launch Crystal Reports

To complete this procedure, you must be a member of the Crystal Report Users security group.

You can launch Crystal Reports from Maximizer. You can also open Crystal Reports outside of Maximizer from the Start menu.

- On the **Reports** tab, select **Crystal Reports > Personal > Custom Report**.

Shared and Personal Reports

The Maximizer installation creates a folder on the database host for shared reports. Shared reports are accessible to all Maximizer users. The shared folder is in the following location: **...\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name>**. All folders and reports within this folder are accessible from the Crystal Report commands on the Reports tab from all Maximizer workstations.

As well, all Maximizer installations create a folder on each computer for personal reports. Personal reports are accessible only on the computer hosting the report. The local folder is in the following location: **...\My Documents\MaximizerReports**. You can create new report templates, edit existing report templates, and view reports using existing report templates directly from Maximizer.

Default Crystal Reports

The Maximizer installation provides a standard report set. These shared reports provide out-of-the-box reporting.

Administration Reports

The following reports are included from the Crystal Report > Administration menu on the Reports tab:

- **Column Setups –** Lists the column setups that the current user has access to.
- **Favorite Lists –** Lists the Favorite Lists that the current user has access to.

Sales Reports

The following reports are included from the Crystal Report > Sales menu on the Reports tab:

- **Opportunity Report - Basic/Probability of Closing/Rating –** Lists opportunities, grouped by status, stage, or confidence rating.

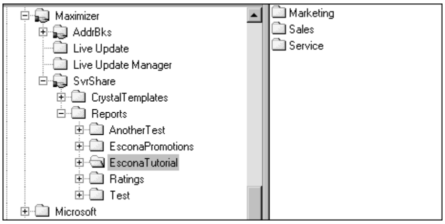
Create a Shared Crystal Report

Before accessing custom reports in Maximizer you must create the reports using Crystal Reports.

1. Save your Crystal Report in one of the following folders that are created by the Maximizer installation:
   - Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name>\Administration\
   - Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name>\Sales\

   – or –

   To create your own reports folder, create a folder on the Maximizer server and copy the report to the folder in the following location: Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name>\



2. On the **Reports** tab, select **Crystal Report > Refresh**.

   If you created a folder, it is displayed as one of the available report types and your report is available in the folder where you saved the report.

3. To access the report, on the **Reports** tab, select **Crystal Report**, and select the report from the folder.

   For example, select Sales, and then select the report name.

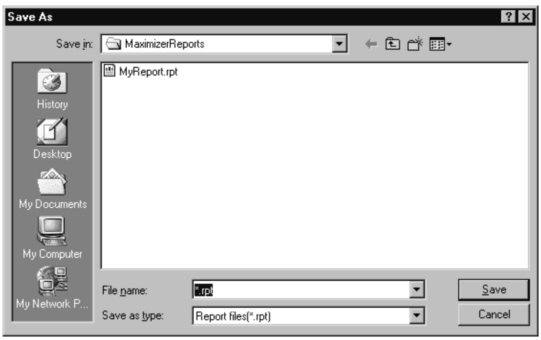
Create a Personal Crystal Report

To complete this procedure, you must be a member of the Crustal Report Users security group and you must have Crystal Reports installed on your computer.

1. On the Reports tab, select **Crystal Report > Personal > Custom Report** to launch Crystal Reports and create the report.

2. When you are prompted, enter a report name.

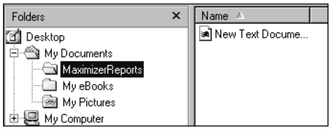
   By default, the report is saved in ...\My Documents\MaximizerReports.



3. Create the report in Crystal Reports and save the report file in the MaximizerReports folder on your local drive.

If you are prompted with a login screen, enter your Maximizer user name and password.

4 In Maximizer, on the **Reports** tab, select **Crystal Report > Refresh**.

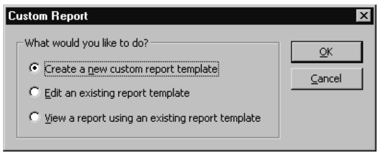


5 To access the report, on the **Reports** tab, select **Crystal Report > Personal**, and select the name of the report.

– or –

On the Reports tab, select **Crystal Report > Personal > Custom Report**, and select the **View a report using an existing report template**.

If you would like to edit the report template, choose **Edit an existing report template**.



Printing Reports from Maximizer

Maximizer contains a number of reports that let you view and print detailed information on your entries and activity. For example, column reports display any information from Maximizer as it appears in the current list, while detailed reports let you print more detailed information on specific entries. Other reports, such as the notes, and user-defined fields reports, let you print specific information about your Address Book entries and opportunities.

You can print your calendar appointments as a Calendar Book or Appointment Calendar. You can print a Personal Organizer from the Address Book, Contacts, Related Entries or Hotlist window.

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

While all Maximizer reports can be sent to a printer, you can additionally generate .RTF (Rich Text Format), .PDF files (Portable Document Format) for most reports in Maximizer. You can also preview most Maximizer reports.

The Reports tab allows you to print reports on the following Maximizer information:

- Address Book entries
- Opportunities
- Hotlist tasks and calendar appointments
- OrderDesk
- Journal entries
- Expenses
- Phone calls

The following sections contain additional information on printing reports:

- "Types of Reports" on page 231

Types of Reports

You can create the following types of reports in Maximizer:

- **Activities –** Lists the notes, Hotlist tasks, and appointments created or completed by Maximizer users in a specific date range.
- **Analysis Reports-Detail –** Lists the opportunities by status with a revenue total.
- **Analysis Reports-Summary –** Reports the number of opportunities by status with total revenue.
- **Appointments –** Prints the appointments currently visible in the Calendar window.
- **Column Report –** Displays the same information you see displayed in a controlling window, such as names and addresses or opportunity information.
- **Detailed Report –** Includes basic information, appointments, Hotlist tasks, user-defined fields, Contacts, document summaries, and notes for an Address Book entry or an opportunity.
- **Forecast Analysis –** Provides a summary of the probability of a successful close, the potential sales revenue, and the weighted amount associated with each active opportunity in the opportunity file.
- **Monthly** Calendar **–** Displays the contents of the Calendar window in a printable report. This report is available only in the monthly view.
- **Notes Report –** Prints notes attached to an Address Book entry or an opportunity.
- **Phone Log –** Lists phone calls recorded in Maximizer for the current user on a specific day.
- **User-Defined Field Report –** Lists the user-defined fields attached to an Address Book entry or an opportunity.

Exporting Entries to Microsoft Excel

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

If the column setup includes multiple fields in a single column, each field is displayed in a separate column in Excel, with each column named after the Maximizer field name. For example, if the column setup includes a column named “Details”, which contains the fields “Contact Name”, “Next Action”, and “Last Modified Date”, the Excel spreadsheet would contain three columns named “Contact Name”, “Next Action”, and “Last Modified Date”.

If the column setup includes a table user-defined field, multiple table items are combined into a single cell in Excel. For example, if the column setup includes a column for the “Partner Interests” table user-defined field, and the “General Information”, “Press Releases”, and “Technical Bulletins” table items are selected, the Excel spreadsheet would include a column named “Partner Interests” containing “General Information, Press Releases, Technical Bulletins” in a single cell.

If you use Excel 2007 or later, you have the option of performing an advanced export to Excel. This option lets you apply conditional formatting to numeric user-defined fields. You can choose the same data bars, color scales, and icon sets that are available in Excel. See the Excel documentation for more information on conditional formatting.

Note that reports exported to Excel are not dynamic, meaning they do not automatically update when changes to the exported entries are made. To update an exported report, repeat the export process.

Export a List of Entries to Microsoft Excel

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

1. Create a list of entries to export.

   – or –

   Select the specific entries to export.

   - Click in the gutter to the left of entries.
   - Click on the entries one at a time while holding down the **Control** key.

- To select all entries between two entries, select an entry and, while holding down the **Shift** key, select another entry.

2. Select a column setup and apply a coloring rule to use for the export.
3. On the **Tools** tab, select **Export to Excel** or **Advanced Export to Excel** from the **Office** group.

   – or –

   Right-click and select **Export to Excel** or **Advanced Export to Excel**.
4. If you are performing an Advanced Export to Excel, select the conditional formatting to apply to each column, and click **OK**.

   Only columns that display numeric user-defined fields are listed.

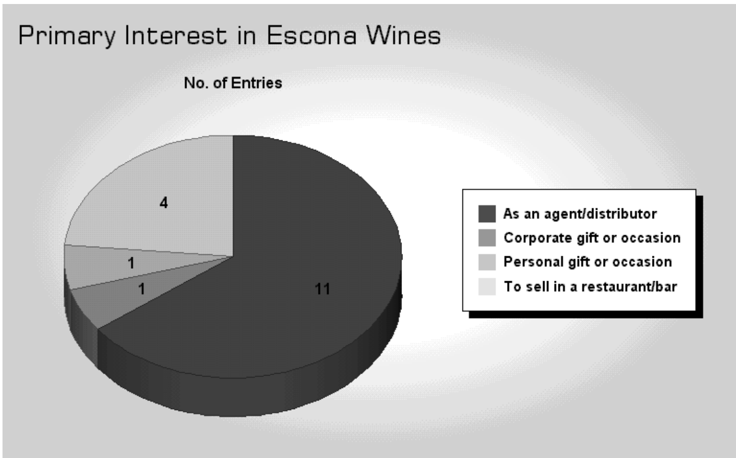
   To apply the conditional formatting to total cell, as well as the summed cells in the column, select **Include Totals**.

   Excel opens and displays the selected entries.
5. To keep the report, save it to your computer with a unique file name.

Graphing and Charting

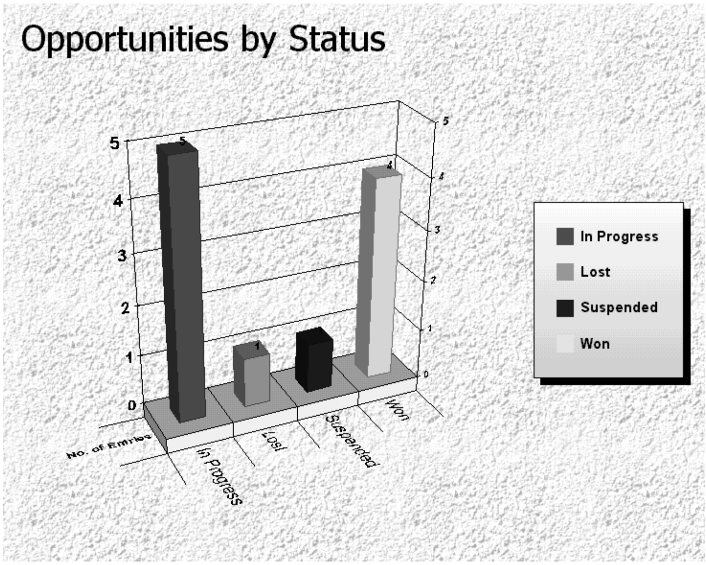
Creating a good presentation is about having good information and presenting it well. When you need to create attractive and meaningful graphs or charts for your presentation, and you need them quickly, Maximizer can do the job.

Maximizer gives you the ability to track your customers and find out who they are. Gathering relevant customer information is a key component of successful marketing and e-commerce initiatives. With the creation of meaningful graphs and charts on your Address Book data, you benefit from complete, detailed intelligence to evaluate the performance of your business.



When you graph your entries, you generate the graph using the entries listed in the Address Book or Opportunities window. For example, if your Address Book window currently lists all Address Book entries between A and M, only those entries will be graphed.

Once your list contains the entries you are trying to graph, choose the Graphing command from the Tools tab to begin the process of constructing your graph. You can graph any table or date field in your Address Book, such as City/Town, State/County/Province, Opportunity Status, to name only a few, and any table or date user-defined field.



Maximizer creates graphs and charts for all kinds of purposes. You can print your completed graph from Maximizer or save it as a high-quality image file that you can use in documents and presentations.

If you often create the same type of graph, you can save a graph template to a catalog, which you can retrieve at any time. You can even add a custom button to your Maximizer toolbar that instantly creates a graph from one of your saved templates.

The Chart wizard walks you through the steps of creating a graph or chart. You can then edit the final product to make it look attractive.

The following sections contain additional information on graphing and charting in Maximizer:

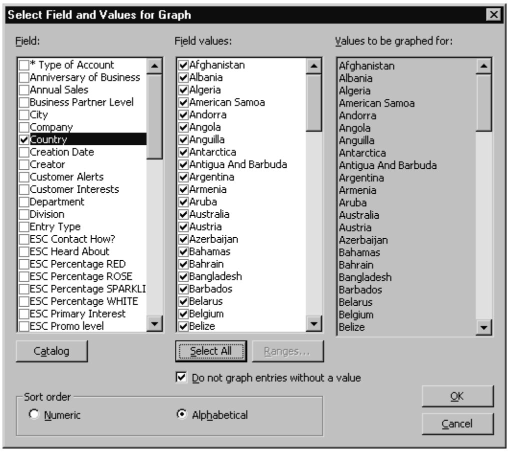
- "Create a Graph" on page 236
- "Selecting Fields and Values for Your Graphs" on page 237
- "Defining the Appearance of Graphs" on page 239
- "Title and Footnote Merge Fields" on page 240
- "Insert a Title or Footnote Merge Field" on page 240
- "Customizing your Graphs" on page 241
- "Using Graphs in Other Applications" on page 242
- "Saving Graph Settings" on page 243
- "Add Graph Settings to the Graph Catalog" on page 243

Create a Graph

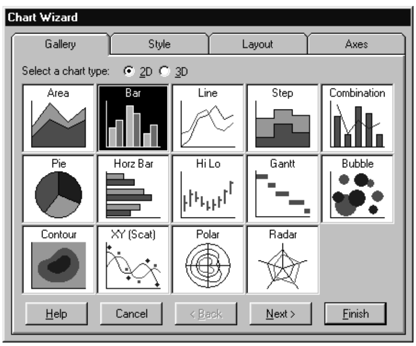
You can create graphs using information from your Address Book entries and opportunities.

1. In the Address Book or Opportunities window, create a entries to graph.
2. On the **Tools** tab, select **Graphing** from the **Other** group.
3. Choose the fields and values you are graphing.

   For example, you could graph Address Book entries by the City/Town or State/County/Province field. Defining the values lets you narrow the range or selection of values to graph.

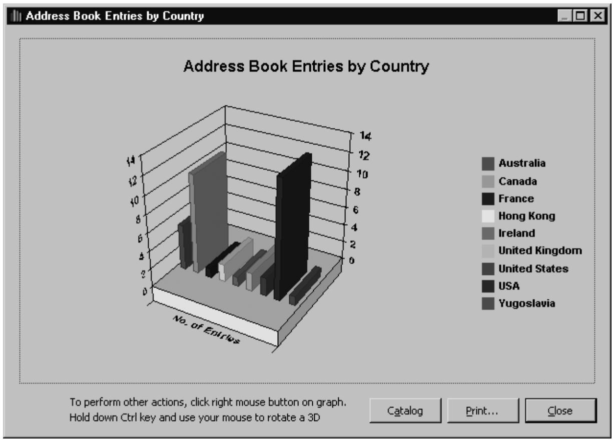


4. Use the Chart wizard to choose the graph type, style, and layout.



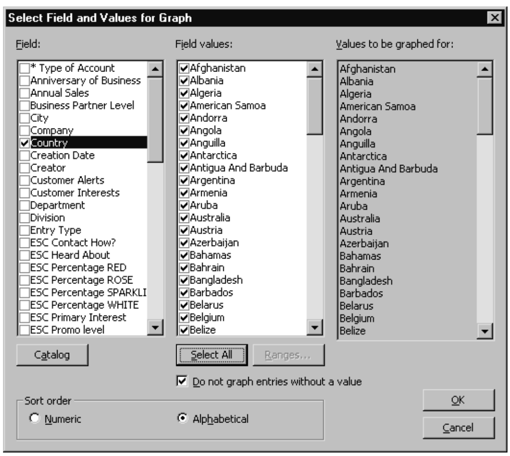
5. Edit your graph in the Graphing window.

You can change the appearance of your graph and edit the data. From this window, you can also save your graph as an image file.



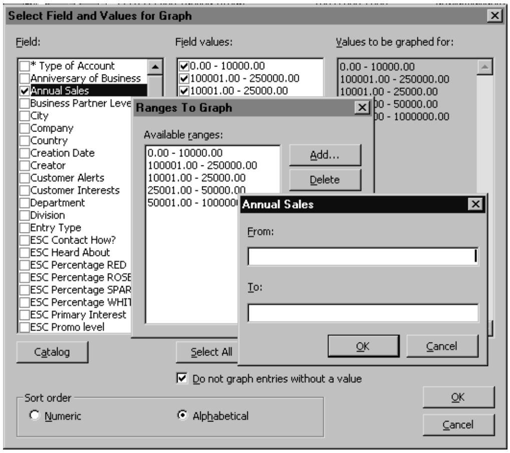
Selecting Fields and Values for Your Graphs

When you select the Graphing command, Maximizer prompts you to choose a field to graph. Your choice of fields depends on the type of entries you are graphing. If the Address Book window is active when you begin graphing, you choose from Address Book entry and user-defined fields, such as Company, City, or State. If the Opportunities window is the active window, you choose from opportunity fields and user-defined fields, as in the Status, or Objective. You can graph any Address Book entry or opportunity field. Some field types require that you specify a range to graph, as in a range of amounts for “Annual Sales”.



Maximizer lets you choose a range of values to graph for the field you select. For a table field, such as City/Town, you simply select the table items you want to include in the graph. Other field types—alphanumeric, numeric, or date fields—require you to enter a range.

For example, if you select "Anniversary of Business", you would have to provide the date ranges to include in the graph. This allows you to include only the area of interest.



Each range you provide becomes an item on the X-axis of your graph. If you defined your ranges for the "Anniversary of Business" user-defined field as January-June and July-December, you would have two columns in a bar graph (or two wedges in a pie graph).

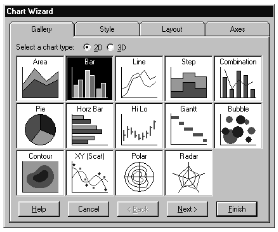
Finally, choose numeric or alphabetical as the sort order:

- **Numeric –** Displays charted values in numeric order, from lowest to highest. For example, if you choose a bar chart to graph the values of the City/Town field, the city/town (value) assigned to the least number of Address Book entries is shown on the left of the chart while the city/town assigned to the most number of entries is shown on the right. The legend will list the cities/towns in numeric order.
- **Alphabetical –** Displays charted values in alphabetical order, from A to Z. For example, if you choose a bar chart to graph the values of the City/Town field, any city (value) that starts with A is shown on the left of the chart while any city/town starting with Z is shown on the right of the chart. The legend will list the cities in alphabetical order.

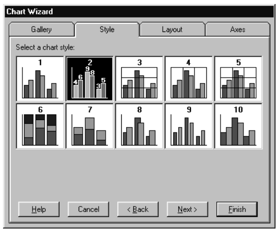
Defining the Appearance of Graphs

After you choose the field and values for your graph, the Chart wizard opens so you can define the characteristics of your graph. The Chart wizard has four tabs for defining your graph appearance:

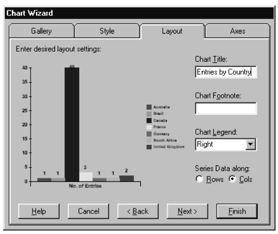
- **Gallery –** Choose flat (2D) or perspective (3D), and the chart type (Area, Bar, Pie, etc.).



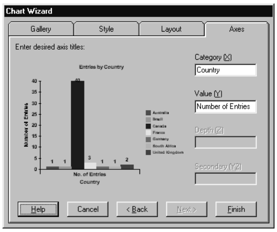
- **Style –** Choose the style based on the chart type you chose in the Gallery tab.



- **Layout –** Specify the title, footnote, and legend settings.



- **Axes –** Label your graph's axes.



These are only the basic characteristics of your graph—after the graph is generated, you can make additional changes to its appearance and even edit the graph data.

Title and Footnote Merge Fields

When you save a graph to the Graph Catalog, you can insert title (header) and footnote (footer) merge fields that display information such as the current date and time, the total number of entries, and other information.

For example, inserting "date" in the title of the graph and then saving the graph to the catalog as a template tells Maximizer to display the current day's date the next time you generate the graph.

The following fields are available for footers and headers:

- **[count] –** The total number of entries graphed.
- **[date] –** The date the graph is generated.
- **[login] –** The user ID of the logged-in user.
- **[time] –** The time the graph is generated.
- **[user] –** The name of the user specified in the Users dialog box in Maximizer.

Insert a Title or Footnote Merge Field

1. Start a new graph.
2. In the Chart wizard, select the **Layout** tab.
3. In the **Chart Title** and **Chart Footnote** fields, enter any fields you want to appear in the title and footnote of the graph.

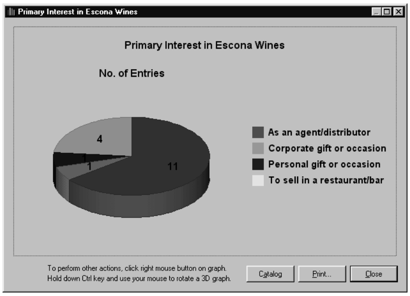
   Remember to surround the field with square brackets, [like this].

4 Finish creating your graph and save it to the Graph Catalog.

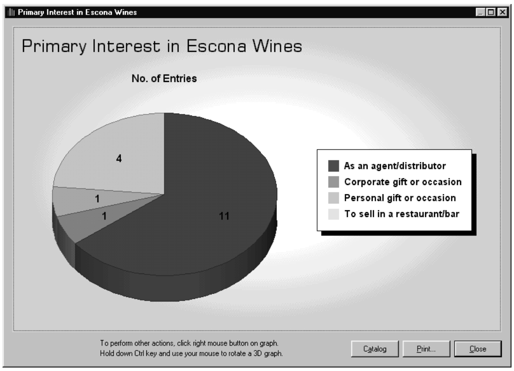
The first time you create the graph, the field name will display, not the value (i.e., [user] instead of “Bob Smith”). The next time you generate the graph, the value will display correctly.

Customizing your Graphs

At first, your completed graph may not look like much—by default, it has a plain gray background and the graph’s colors are chosen for you.

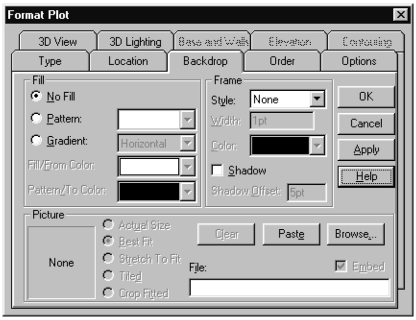


You can easily add your own touches to your graph by editing it in the Graphing window.



You can select and edit each element in the graph, such as the title, legend, or even the bars in a graph. The background, for example, can be a solid color of your choice, a gradient, or a “wallpaper” image. Simply select and double-click the element that you want to edit to display a setting dialog box. You can also right-click inside the graph to display a pop-up menu.

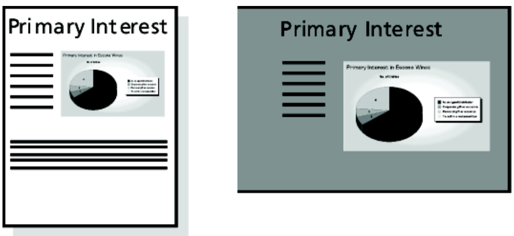
A background color can make a plain graph look attractive. To change the background properties, double-click within the area of the graph (but not on the graph itself) so that "selection handles" appear around the graph. The Format Plot dialog box lets you make many changes to your graph.



You can use this same procedure to change many of the graph elements. Try single-clicking different elements to see which ones show the selection handles. If selection handles appear, you can double-click it to edit the element.

Using Graphs in Other Applications

If you are making a presentation, you will probably want to use your graph in handouts or in an on-screen presentation. You can save your graph as an image file that you can use in other applications, such as word processors, spreadsheets, presentation software, and more.



When you save your graph, you have a choice of two image file types: Windows Metafile or Windows Bitmap. If you think you will have to resize the image when you insert it into your document or presentation, you might want to use the Windows Metafile format, as it is "scalable"—you can resize it without getting any jagged edges.

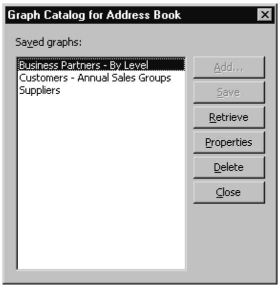
Saving Graph Settings

If you find yourself often creating the same type of graph, you can save yourself some time by saving the graph settings as a graph template in the Graph Catalog. After you generate the graph, use the Catalog button to save your graph template. Once your graph template is saved to the Graph Catalog, you can use the template when you next create a graph.

Graphs for Address Book entries and opportunities are stored in separate catalog. The available catalog depends on whether the Address Book or Opportunities window is selected.

Add Graph Settings to the Graph Catalog

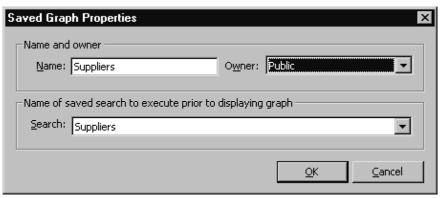
1. In the Graphing window, click the **Catalog** button to open the Graph Catalog.
2. Click **Add** to add your graph to the catalog.



3. Type a descriptive name and specify a Maximizer user or group as the owner of the graph.

   To make the template available to all users, choose Public as the Owner.
4. If you have a search saved in the search catalog, select it in the search list to have Maximizer perform the search before generating the graph.
5. Click **OK** to save the graph settings to the Graph Catalog.

Ensure that access rights to the saved search are adequate. If users do not have read access to the search, they will not be able to generate the graph.



CHAPTER 11

Administration for Maximizer

Manage your Address Book

In this chapter...

Backing Up Address Book Data

You can back up and restore Maximizer Address Book data. If your Address Book uses a custom dictionary or holidays you must back up this data separately from the Address Book. After creating backup copies of your Address Book, you can restore the Address Book using Administrator.

The following backup procedures are available in Maximizer:

- **Regular Backup –** This backup procedure requires the Address Book to be closed and must be done in Administrator. See the *Maximizer CRM Administrator's Guide* and Administrator Help for assistance
- **Quick Backup –** This backup procedure is performed on an open Address Book. You can perform a Quick Backup from either Administrator or Maximizer. If security is enabled, you will need access to the MASTER user password.

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

- "Perform a Quick Backup" on page 246
- "Backing Up the Dictionary and Holiday Files" on page 248

Perform a Quick Backup

You can use the Quick Backup command in Maximizer. The advantage of using Quick Backup over a regular backup is that you can perform frequent backups of any open Address Book.

By default, the backup is saved to the current Address Book folder. If you don't want to save the backup to this location, you can browse to another one.

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, 2010. (The backup was saved to the following default location).

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial_20100815_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:

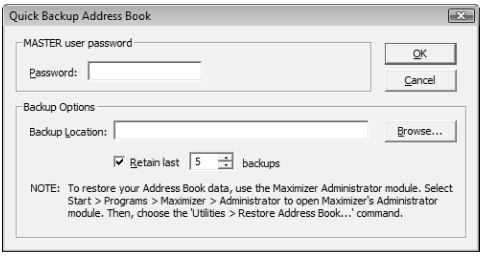
C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial_20070815_02.BAK

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.

1. Open the Address Book to back up.

2. In the top-left corner of the window, click the **Maximizer** button, and select **Quick Backup**.

   The Quick Backup Address Book dialog box opens.



3. Enter the MASTER user password.

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

4. Select the backup folder:

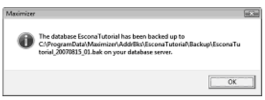
   - To save the backup file to the default location (Address Book folder), leave the **Backup Location field** blank.
   - To save the backup file to a different location, click **Browse**. Select a folder and click **OK**.

     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**.

Backing Up the Dictionary and Holiday Files

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

Holiday files are created in Holiday Editor in Administrator. The holidays listed in the Holiday Editor appear in the Calendar in Maximizer. You can use Administrator to modify or delete existing holidays, or add new holidays.

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:

C:\Program Files\Maximizer\MaData6\Userdict.lexHoliday File Location:

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

C:\Program Files\Maximizer\MaData6\Mxzhol.nam

Exporting Address Book Data

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

Encrypted user-defined fields cannot be exported.

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 Address Book data from Maximizer:

- "Export Address Book Entries in XML Format" on page 249
- "Export Address Book Entries in CSV or Tab-Delimited Format" on page 251
- "Selecting Fields for Export" on page 253

Export Address Book Entries in XML Format

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 then easily import this file into another Maximizer Address Book.

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

You can optionally export the following additional information:

- **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.

1. In Maximizer, open the Address Book window, and select the Companies and Individuals to export.

   – or –

   Don't select any entries to export all entries currently displayed in the Address Book list.

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 **XML**.

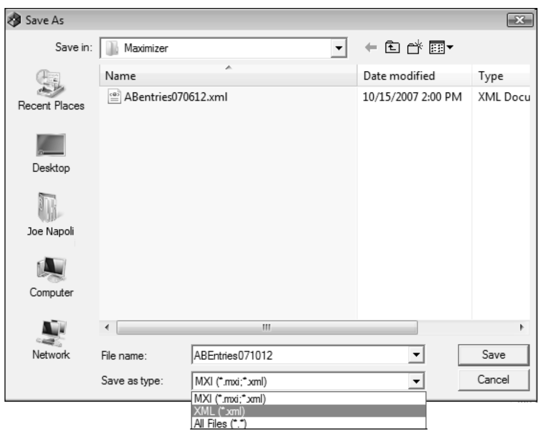
4. Click **Browse**.

   The Select Export File dialog box opens.

5. Specify the destination location and file name for the exported file.

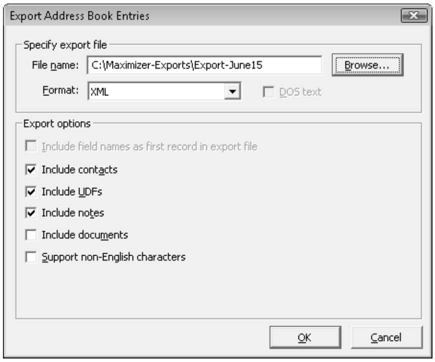
6. In the **Save as type** drop-down list, select either **MXI** or **XML**.

7. Click **Save**.



8. Select any of the Export options, as needed.

9 Click **OK**.



Export Address Book Entries in CSV or Tab-Delimited Format

You can export Address Book entries in the following text formats: comma-separated values (CSV) and tab-delimited. 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.

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.

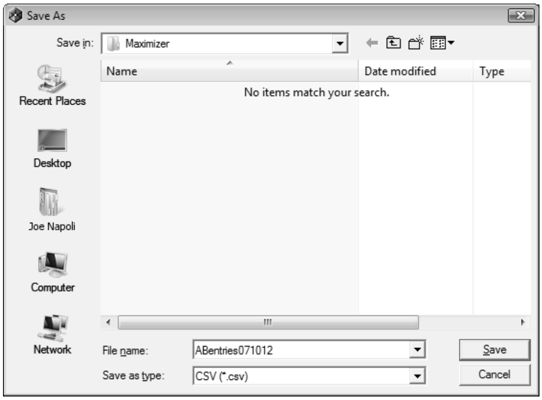
3 From the **Format** drop-down list, select **Comma Separated Value** or **tab-delimited**.

4 Click **Browse**.

The Select Export File dialog box opens.

5 Specify the destination location and file name for the exported file, and click **Save**.

You can verify that the format you selected previously appears in the **Save as type** field.

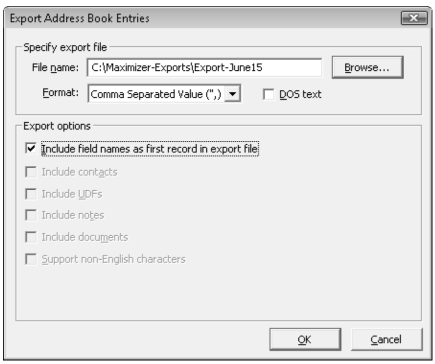


6 Specify the remaining export options.

- To export data that is in DOS standard ASCII, select the **DOS text** checkbox.

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

- To export the field names 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.



7 Click **OK**.

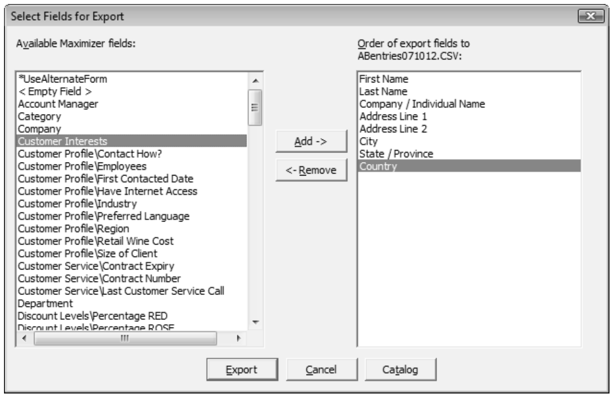
The Select Fields for Export dialog box opens.

8 From the **Available Maximizer fields** list, select each field and clicking **Add**.

– or –

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

For more information, see "Selecting Fields for Export" on page 253.



9 Click **Export** to begin the export process.

Selecting Fields for Export

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

Use Administrator or Maximizer to import Address Book information from other sources. Some import methods are available only through Administrator.

After importing Address Book entries into Maximizer, a list of imported Address Book entries is stored in a Favorite List named according to the file format and import date and time.

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

- **MXI or XML Files –** This method imports Address Book entries and other data from MXI (Maximizer XML Interface) or XML Files. These MXI and XML files may have been created by exporting from Maximizer or by exporting the information from another source and converting it to XML using the Maximizer XML schema. For more information about the Maximizer XML Schema, refer to the *Maximizer CRM Administrator's Guide*.
- **Address Book Entries –** This method imports entries from a text file that is created when you export from 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.
- **ACT! or GoldMine Database –** Importing an ACT! or GoldMine database is straightforward as Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. This import method is available through Administrator or Maximizer if you are logged in as the MASTER user. For information about importing from ACT! or GoldMine, refer to the *Maximizer CRM Administrator's Guide*.
- **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. or GoldMine database version and map the fields automatically. This import method is available through Administrator or Maximizer if you are logged in as the MASTER user. For information about importing from other contact manager databases, refer to the *Maximizer CRM Administrator's Guide*.

The following sections contain information on importing Address Book data into Maximizer:

- "Import Address Book Entries" on page 255
- "About Two-Tier Imports" on page 256
- "Field Mapping" on page 257
- "Import from an MXI or XML File" on page 257

Import Address Book Entries

Back up the Address Book before completing this procedure.

The Import Address Book Entries command 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.

If you import a Company record, and an existing Company record in the database has an identical value in the “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.

Note that 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.

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

   The Import Address Book Entries dialog box opens.

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

3. Under **Type of import**, select the type of Address Book entries you want to create from the import—**Companies / Individuals** or **Contacts**.

   If you are performing a two-tier import, first select the Companies / Individuals. Then, after completing this procedure, repeat it a second time to import the Contacts.

4. Click **OK**.

   The Select Fields for Import dialog box opens.

5. Map the Maximizer fields with the fields in the file.

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

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

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

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

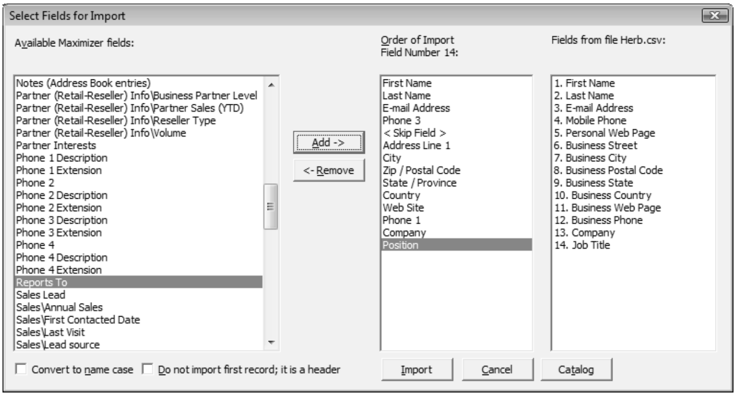
You can save the field mapping for reuse by clicking the Catalog button.

6 Specify the remaining settings for the import.

- To convert text that is in capital letters (uppercase) into mixed case, select the **Convert to name case** option.
- To exclude the first line from being imported, select the **Do not import first record; it is a header** option.

  Many comma-delimited data files use the first line as a column header.

7 Click **Import**.



About Two-Tier Imports

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)

In a two-tier import, you first import Company entries as Companies/ Individuals Address Book entries, and then you import the people as Contacts.

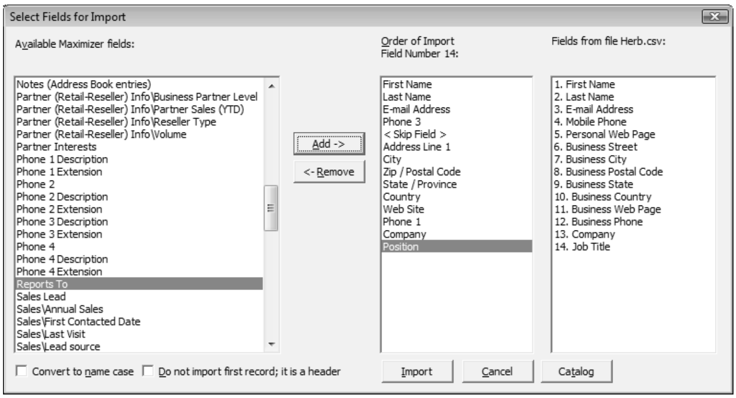
Two-tier importing is only applicable to comma-separated value (CSV) files, tab-delimited files, dBase III, III+, or IV, or XML files using the Import Address Book Entries command.

Field Mapping

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 Microsoft Outlook and “Company or Individual” in Maximizer.

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

When you are importing a file type that requires you to map fields, the 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.



Import from an MXI or XML File

Back up the Address Book before completing this procedure.

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.

1. In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Advanced Import**.
2. Next to the **File name** field, click **Browse** and locate the .XML or .MXI file to import.

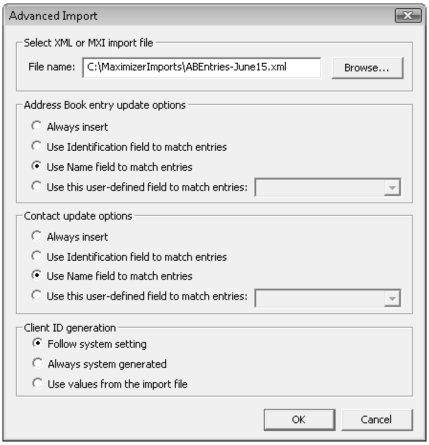
Once you have selected the file to import, Maximizer fills in the Log File field automatically to create a log file with the same name and location as the import file.

3 To change the default Log File, click **Browse** and provide an alternate log file location and/or name.

4 In the **Log Level** drop-down list, specify how much detail to include in the log file.

5 Specify any additional import options.

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



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

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

Transferring Entries Between Address Books

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.

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

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

You can transfer entries by direct access between Address Books or by email.

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

- "What happens During Transfers?" on page 259
- "Transfer Address Book Entries" on page 260
- "Transfer Summary Reports and Logging" on page 261

What happens During Transfers?

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.

Note that each Address Book entry has a unique ID.

- **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.

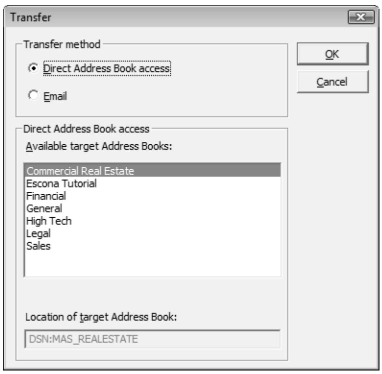
  If the Address Book entry names are the same, they are considered to be duplicate entries. In this case, Maximizer merges duplicate Address Book entries in the target Address Book.
- **Date and Time –** Maximizer also checks the date and time of the record. It will not overwrite data in the target Address Book that has been modified more recently than the data in the source Address Book.

Transfer Address Book Entries

By default, when you transfer Companies or Individuals, the following are included—all associated Contacts, user-defined fields, notes, files, appointments, Hotlist tasks, orders (not available for SQL), and opportunities. Encrypted user-defined fields cannot be transferred.

1. In the Address Book window, select the entries you want to transfer.
2. In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Address Book Entries**.
3. Select **Direct Address Book Access** or **Email** as the transfer method.

   If you are transferring your Address Book entries using direct Address Book access, select the target Address Book.

4. Click **OK**.

   The Login dialog box opens.
5. Type your user ID and password to log in to the target Address Book, and click **OK**.

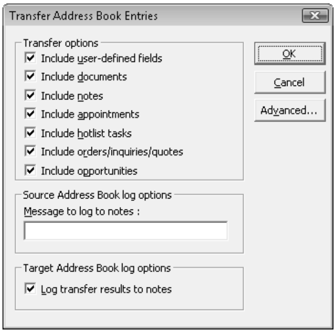
   The Transfer Address Book Entries dialog box opens.
6. Select the transfer options.

   For example, you can choose to include or not include user-defined fields, documents, notes, appointments, Hotlist tasks, orders, and opportunities.

   You can also click Advanced to set the advanced options, click the Advanced button.

7 Enter a note to be logged for each Address Book entry affected by the transfer if necessary.

8 Click **OK** to begin.



When Maximizer finishes, the Transfer Summary displays the results of the transfer.

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

9 Enter the email address where you would like the transfer sent, and send the 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.

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.

The following sections contain information on using TAPI with Maximizer:

- "Requirements for Caller ID" on page 262
- "Phone Number Matching with TAPI" on page 263
- "Configure Maximizer to Use TAPI" on page 265

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 MESG-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 MESG 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

Address Book entry phone number	Does the incoming four-digit phone number (2314) match?	Does the incoming seven-digit phone number (732-2314) match?
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.

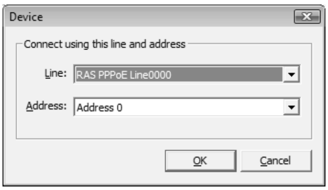
The following table illustrates Exact Phone Number Matching for four-digit and seven-digit incoming phone numbers.

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	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

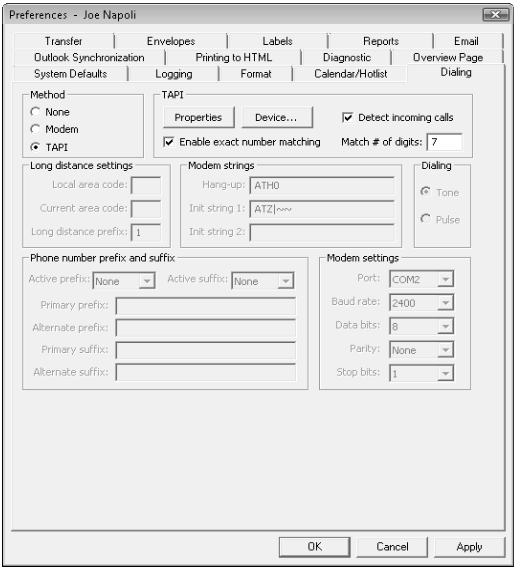
Configure Maximizer to Use TAPI

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.

1. On the **Setup** tab, select **Preferences**.
2. Select the **Dialing** tab.
3. Under **Method**, select **TAPI**.
4. Under **TAPI**, click **Properties**.
5. Fill in your location information, and click **OK** to return to the Dialing Preferences.
6. Click **Device**.



7. From the **Line** drop-down list, select the TAPI device name, and click **OK**.
8. Select the **Detect incoming calls** option.
9. If desired, select the **Enable exact number matching** option, and specify the number of phone number digits to match.



10 Click **OK** to close the Preferences dialog box.

Updating Maximizer with Live Update

The Live Update Wizard on Maximizer workstations connects to the Maximizer Live Update Server and downloads any available updates.

After downloading the software updates, the downloaded executable file should launch immediately to start the installation. If you need to locate the downloaded file, it is in the user's Application Data folder (typically C:\Documents and Settings\<CurrentUser>\Application Data\Maximizer\Live Update).

If the Enable automatic Maximizer Live Update notification option is selected in the Live Update options in Administrator, a message box you when new updates are available. You can also check for updates at any time from Maximizer or Administrator.

Live Update options are accessible through the Live Update button on the System Options preferences in Administrator. (Select File > Preferences.)

The following section contains additional information on Maximizer Live Update:

- "Download Software Updates from the Server" on page 267

Download Software Updates from the Server

1. If you are notified that new updates are available, click **OK** in the message box to start the Live Update Wizard.

   – or –

   In the top-left corner of the Maximizer window, click the **Maximizer** button, and select **Help**. Then, under **About Maximizer**, select **Maximizer Live Update**.

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.

Languages for the Maximizer Spell Checker

In many of the Maximizer dialog boxes, you can use the Maximizer Spell Checker to check the spelling of text. By default, the selected language is American English, but you can change this language to any other of the following languages:

- Brazilian Portuguese
- British English
- Canadian French
- Spanish

The following section contains information on languages in the Maximizer Spell Checker:

- "Change the Language for the Spell Checker" on page 269

Change the Language for the Spell Checker

1. Open the Maximizer Word Processor.
2. Select **Tools > Options**.
3. In the **Spelling** tab, choose a language from the **Currently installed languages** list.

APPENDIX A

Maximizer CRM 12 Ribbon Interface

Find the locations of commands in Maximizer CRM 12

In this chapter...

The Maximizer CRM Ribbon Interface

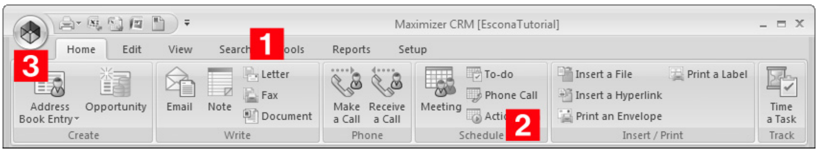
Maximizer CRM 12 has an improved interface where all commands are available on tabbed ribbons. In previous versions of Maximizer, the commands were available in menus and toolbars. This section lists the menu commands from the previous version of Maximizer CRM and the new locations of the commands in the Maximizer CRM 12 ribbon interface.

The following terms refer to elements in the Maximizer CRM 12 interface:

1 **Tabs –** The ribbons where commands are displayed. Tabs are displayed at the top of the Maximizer screen. The content of the tabs changes depending on the controlling or following window currently in focus.

2 **Groups –** The sections separating different commands within the tabs.

3 **Maximizer button –** The button in the top-left corner of the window. When you click the button, a menu containing additional commands is displayed.



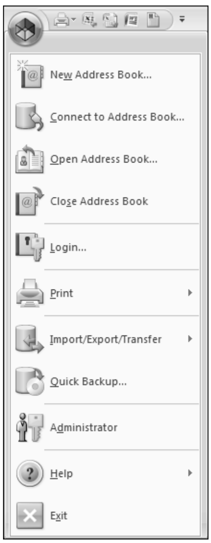
Finding Commands in Maximizer CRM 12

The following sections list the commands in Maximizer CRM 10 along with a description of how to find the commands in Maximizer CRM 12.

- “File Menu” on page 273
- “Edit Menu” on page 276
- “View Menu” on page 278
- “Search Menu” on page 279
- “Actions Menu” on page 281
- “Web Menu” on page 282
- “Tools Menu” on page 282
- “Reports Menu” on page 284
- “Window Menu” on page 284
- “Help Menu” on page 285

File Menu

You can access most commands from the File menu in Maximizer CRM 10 by clicking the Maximizer button in Maximizer CRM 12. You can also access commands on the Home and Setup tabs.



The following commands appear on the File menu in the Address Book window in Maximizer CRM 10.

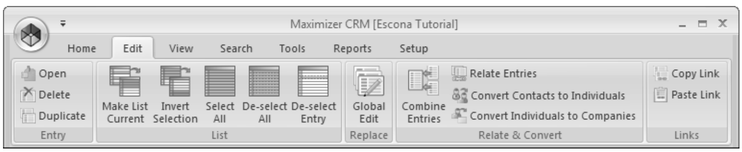
In Maximizer CRM 10, select File >	In Maximizer CRM 12
New Address Book	Click the **Maximizer** button, and select **New Address Book**.
Connect to Address Book	Click the **Maximizer** button, and select **Connect to Address Book**.
Open Address Book	Click the **Maximizer** button, and select **Open Address Book**.
Close Address Book	Click the **Maximizer** button, and select **Close Address Book**.
Login	Click the **Maximizer** button, and select **Login**.
Administrator	Click the **Maximizer** button, and select **Administrator**.
Page Setup	This command is unavailable in Maximizer CRM 12.
Print > Merge Documents	Click the **Maximizer** button, and select **Print > Merge Documents**.
Print > Envelopes	Click the **Maximizer** button, and select **Print > Envelopes**.
Print > Labels	Click the **Maximizer** button, and select **Print > Labels**.
Print > Column Report	Click the **Maximizer** button, and select **Print > Column Report**.
Print > Detailed Report	Click the **Maximizer** button, and select **Print > Detailed Report**.
Print > Name/Address/ Telephone Report	Click the **Maximizer** button, and select **Print > Name/Address/Telephone Report**.
Print > Note Report	Click the **Maximizer** button, and select **Print > Note Report**.
Print > Personal Organizer	Click the **Maximizer** button, and select **Print > Personal Organizer**.
Print > Custom Report	Click the **Maximizer** button, and select **Print > Custom Report**.
Send Email	On the **Home** tab, select **Email** from the **Write** group.
vCard > Import	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **vCard**, select **Import**.
vCard > Export	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **vCard**, select **Export**.

In Maximizer CRM 10, select File >	In Maximizer CRM 12
vCard > Send	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **vCard**, select **Send**.
Set Up User-Defined Fields	On the **Setup** tab, select **User-Defined Fields**.
Preferences	On the **Setup** tab, select **Preferences**.
Users	On the **Setup** tab, select **Manage Users** from the **User Management** group.
Security Groups	On the **Setup** tab, select **Security Groups** from the **User Management** group.
MaxMobile Administration	On the **Setup** tab, select **Administration** from the **MaxMobile** group.
Action Plan Library	On the **Setup** tab, select **Template Library > Action Plan Library** from the **File Management** group.
Import > Address Book Entries	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Address Book Entries**.
Import > Advanced Import	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Advanced Import**.
Import > Vertical Templates	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Vertical Templates**.
Export Address Book Entries	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Export**, select **Address Book Entries**.
Transfer > Address Book Entries	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Address Book Entries**.
Transfer > Column Setups	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Column Setups**.
Transfer > Document Templates	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Document Templates**.
Transfer > User-Defined Fields	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **User-Defined Fields**.
Transfer > Macros	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Macros**.

In Maximizer CRM 10, select File >	In Maximizer CRM 12
Transfer > Drop-Down Tables	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Drop-Down Tables**.
Document Administration > Convert Embedded Documents	On the **Setup** tab, select **Document Administration > Convert Embedded Documents** from the **File Management** group.
Document Administration > Move Linked Documents	On the **Setup** tab, select **Document Administration> Move Linked Documents** from the **File Management** group.
Quick Backup	Click the **Maximizer** button, and select **Quick Backup**.
Exit	Click the **Maximizer** button, and select **Exit**.

Edit Menu

You can access most commands from the Edit menu in Maximizer CRM 10 on the Edit tab in Maximizer CRM 12. You can also access commands on the Home and Setup tabs.



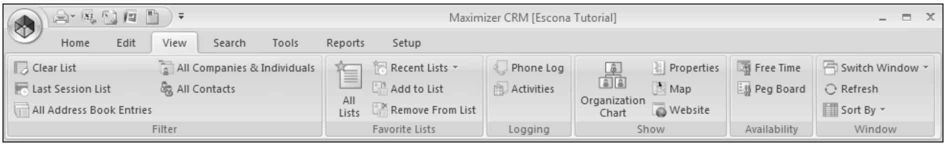
The following commands appear on the Edit menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Edit >	In Maximizer CRM 12
Add > Company	On the **Home** tab, select **Address Book Entry > Company** from the **Create** group.
Add > New Company and New Contact	On the **Home** tab, select **Address Book Entry > New Company and New Contact** from the **Create** group.
Add > Individual	On the **Home** tab, select **Address Book Entry > Individual** from the **Create** group.

In Maximizer CRM 10, select Edit >	In Maximizer CRM 12
Add > Contact	On the **Home** tab, select **Address Book Entry > Contact** from the **Create** group.
Open [Address Book Entry]	On the **Edit** tab, select **Open** from the **Entry** group.
Delete Selected Entries	On the **Edit** tab, select **Delete** from the **Entry** group.
Global Edit	On the **Edit** tab, select **Global Edit** from the **Replace** group.
Create Duplicate Entry	On the **Edit** tab, select **Duplicate** from the **Entry** group.
Default Entry	On the **Setup** tab, select **Default Entry** from the **Default Entry** group.
Default Note	On the **Setup** tab, select **Default Note** from the **Default Entry** group.
Select Entry	On the **Edit** tab, select **Select Entry** from the **List** group
Select All	On the **Edit** tab, select **Select All** from the **List** group.
De-select All	On the **Edit** tab, select **De-select All** from the **List** group.
Invert Selection	On the **Edit** tab, select **Invert Selection** from the **List** group.
Make Selected List Current	On the **Edit** tab, select **Make List Current** from the **List** group.
Combine Selected Entries	On the **Edit** tab, select **Combine Entries** from the **Relate & Convert** group.
Relate Entries	On the **Edit** tab, select **Relate Entries** from the **Relate & Convert** group.
Convert Contacts to Individuals	On the **Edit** tab, select **Convert Contacts to Individuals** from the **Relate & Convert** group.
Convert Individuals to Companies	On the **Edit** tab, select **Convert Individuals to Companies** from the **Relate & Convert** group.
Insert File	On the **Home** tab, select **Insert a File** from the **Insert/Print** group.
Links	This command is unavailable in Maximizer CRM 12.
Copy Link	On the **Edit** tab, select **Copy Link** from the **Links** group.

View Menu

You can access most commands from the View menu in Maximizer CRM 10 on the View tab in Maximizer CRM 12.



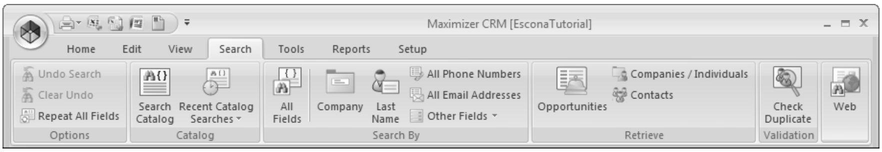
The following commands appear on the View menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select View >	**In Maximizer CRM 12**
Last Session List	On the **View** tab, select **Last Session List** from the **Filter** group.
Favorite Lists	On the **View** tab, select **All Lists** from the **Favorite Lists** group.
Recent Favorite Lists > Clear Recent Favorite Lists	On the **View** tab, select **Recent Lists > Clear Recent Favorite Lists** from the **Favorite Lists** group.
Recent Favorite Lists > [Favorite List]	On the **View** tab, select **Recent Lists** from the **Favorite Lists** group, and select a Favorite List.
Add to Favorite List	On the **View** tab, select **Add to List** from the **Favorite Lists** group.
Remove from Favorite List	On the **View** tab, select **Remove from List** from the **Favorite Lists** group.
Clear List	On the **View** tab, select **Clear List** from the **Filter** group.
Default Entries for All Users	On the **View** tab, select **Default Entries** from the **Filter** group.
Activities for [Address Book Entry]	On the **View** tab, select **Activities** from the **Logging** group.
Phone Log	On the **View** tab, select **Phone Log** from the **Logging** group.
Free Time	On the **View** tab, select **Free Time** from the **Availability** group.
Peg Board	On the **View** tab, select **Peg Board** from the **Availability** group.
Organizational Chart	On the **View** tab, select **Organization Chart** from the **Show** group.

In Maximizer CRM 10, select View >	In Maximizer CRM 12
Column Setup	On the **Setup** tab, select **Column Setup** from the **Display** group.
Toolbars	This command is unavailable in Maximizer CRM 12.
Sort by > [Column]	On the **View** tab, select **Sort By** from the **Window** group, and select a column.
Properties	On the **View** tab, select **Properties** from the **Show** group.
Refresh	On the **View** tab, select **Refresh** from the **Window** group.

Search Menu

You can access all commands from the Search menu in Maximizer CRM 10 on the Search tab in Maximizer CRM 12.



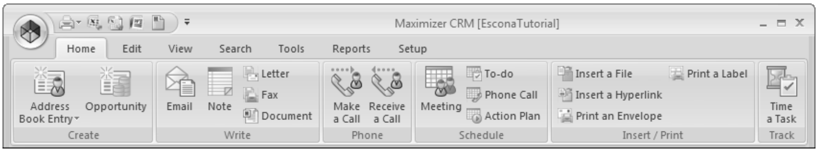
The following commands appear on the Search menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Search >	In Maximizer CRM 12
Undo Search	On the **Search** tab, select **Undo Search** from the **Options** group.
Clear Undo	On the **Search** tab, select **Clear Undo** from the **Options** group.
Repeat All Fields	On the **Search** tab, select **Repeat All Fields** from the **Options** group.
Last Catalog Searches > [Catalog Search]	On the **Search** tab, select **Recent Catalog Searches** from the **Catalog** group, and select a saved search.
Last Catalog Search > Reset Last Searches	On the **Search** tab, select **Recent Catalog Searches > Reset Last Searches** from the **Catalog** group.
All Fields	On the **Search** tab, select **All Fields** from the **Search By** group.

In Maximizer CRM 10, select Search >	In Maximizer CRM 12
Last Name	On the **Search** tab, select **Last Name** from the **Search By** group.
First Name	On the **Search** tab, select **Other Fields > First Name** from the **Search By** group.
Company	On the **Search** tab, select **Company** from the **Search By** group.
All Email Addresses	On the **Search** tab, select **All Email Addresses** from the **Search By** group.
City/Town	On the **Search** tab, select **Other Fields > City/Town** from the **Search By** group.
State/County/Province	On the **Search** tab, select **Other Fields > State/County/Province** from the **Search By** group.
Zip/Postcode	On the **Search** tab, select **Other Fields > Zip/Postcode** from the **Search By** group.
IDentification	On the **Search** tab, select **Other Fields > IDentification** from the **Search By** group.
All Phone Numbers	On the **Search** tab, select **All Phone Numbers** from the **Search By** group.
Notes	On the **Search** tab, select **Other Fields > Notes** from the **Search By** group.
Documents	On the **Search** tab, select **Other Fields > Documents** from the **Search By** group.
Other > [Field]	On the **Search** tab, select **Other Fields** from the **Search By** group.
Retrieve Contacts	On the **Search** tab, select **Contacts** from the **Retrieve** group.
Retrieve Companies/ Individuals	On the **Search** tab, select **Companies/ Individuals** from the **Retrieve** group.
Retrieve Opportunities	On the **Search** tab, select **Opportunities** from the **Retrieve** group.
Check [Column Name] Column for Duplicates	On the **Search** tab, select **Check Duplicate** from the **Validation** group.

Actions Menu

You can access all commands from the Actions menu in Maximizer CRM 10 on the Home tab in Maximizer CRM 12.



The following commands appear on the Actions menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Actions >	In Maximizer CRM 12
Create an Opportunity	On the **Home** tab, select **Opportunity** from the **Create** group.
Make a Call	On the **Home** tab, select **Make a Call** from the **Phone** group.
Receive a Call	On the **Home** tab, select **Receive a Call** from the **Phone** group.
Time a Task	On the **Home** tab, select **Time a Task** from the **Track** group.
Schedule a Meeting	On the **Home** tab, select **Meeting** from the **Schedule** group.
Schedule a To-do	On the **Home** tab, select **To-do** from the **Schedule** group.
Schedule a Call	On the **Home** tab, select **Phone Call** from the **Schedule** group.
Schedule an Action Plan	On the **Home** tab, select **Action Plan** from the **Schedule** group.
Write an Email	On the **Home** tab, select **Email** from the **Write** group.
Write a Note	On the **Home** tab, select **Note** from the **Write** group.
Write a Letter	On the **Home** tab, select **Letter** from the **Write** group.
Write a Fax	On the **Home** tab, select **Fax** from the **Write** group.
Write a Document	On the **Home** tab, select **Document** from the **Write** group.

In Maximizer CRM 10, select Actions >	In Maximizer CRM 12
Print an Envelope	On the **Home** tab, select **Print an Envelope** from the **Insert/Print** group.
Print a Label	On the **Home** tab, select **Print a Label** from the **Insert/Print** group.

Web Menu

You can access commands from the Web menu in Maximizer CRM 10 on the View, Search, and Tools tabs in Maximizer CRM 12.

The following commands appear on the Web menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Web >	In Maximizer CRM 12
Draw a Map for [Address Book Entry]	On the **View** tab, select **Map** from the **Show** group.
Search for [Address Book Entry]	On the **Search** tab, select **Web**.
View Website for [Address Book Entry]	On the **View** tab, select **Website** from the **Show** group.
Create Web Form	On the **Tools** tab, select **Web Form** from the **Internet** group.
Mailing Lists	On the **Tools** tab, select **Mailing Lists** from the **Internet** group.
Visit Maximizer	This command is unavailable in Maximizer CRM 12.

Tools Menu

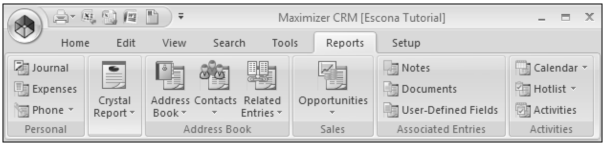
You can access most commands from the Tools menu in Maximizer CRM 10 on the Tools tab in Maximizer CRM 12.

The following commands appear on the Tools menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10.5, select Tools >	In Maximizer CRM 12
Phone	On the **Tools** tab, select **Phone** from the **Other** group.
Timer	On the **Tools** tab, select **Timer** from the **Other** group.
Graphing	On the **Tools** tab, select **Graphing** from the **Other** group.
Maximizer Word Processor	On the **Tools** tab, select **Maximizer Editor** from the **Other** group.
Maximizer Wizards	On the **Tools** tab, select **Maximizer Wizard** from the **Other** group.
World Clock	On the **Tools** tab, select **World Clock** from the **Other** group.
Record Macro	On the **Tools** tab, select **Record Macro** from the **Macro** group.
Run Last Macro	On the **Tools** tab, select **Run Last Macro** from the **Macro** group.
Macro List	On the **Tools** tab, select **Macro List** from the **Macro** group.
Synchronize with Outlook	On the **Tools** tab, select **Synchronize with Outlook** from the **Office** group.
Synchronize with MaxMobile	This command is unavailable in Maximizer CRM 12.
Reset MaxMobile	This command is unavailable in Maximizer CRM 12.
Export to Excel	On the **Tools** tab, select **Export to Excel** from the **Office** group.
Advanced Export to Excel	On the **Tools** tab, select **Advanced Export to Excel** from the **Office** group.
Open Microsoft Word	On the **Tools** tab, select **Open Microsoft Word** from the **Office** group.
Expert Advice	This command is unavailable in Maximizer CRM 12.

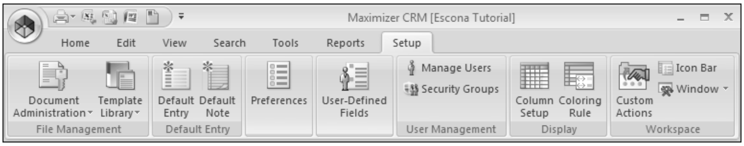
Reports Menu

You can access all commands from the Reports menu in Maximizer CRM 10 on the Reports tab in Maximizer CRM 12.



Window Menu

You can access the commands from the Window menu in Maximizer CRM 10 on the Setup and View tabs in Maximizer CRM 12.



The following commands appear on the Window menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Window >	In Maximizer CRM 12
Window Settings > Window Layout > [Layout]	On the **Setup** tab, select **Window > Window Settings** from the **Workspace** group, and select a layout.
Window Settings > Favorite Layouts	On the **Setup** tab, select **Window > Window Settings > Favorite Layouts** from the **Workspace** group.
Window Settings > Save Settings on Exit	On the **Setup** tab, select **Window > Window Settings > Save Settings on Exit** from the **Workspace** group.
Window Settings > Reset Default Layout	On the **Setup** tab, select **Window > Window Settings > Reset Default Layout** from the **Workspace** group.
Window Settings > Set Color > Current Window	On the **Setup** tab, select **Window > Window Settings > Set Color > Current Window** from the **Workspace** group.
Window Settings > Set Color > All Windows	On the **Setup** tab, select **Window > Window Settings > Set Color > All Windows** from the **Workspace** group.

In Maximizer CRM 10, select Window >	In Maximizer CRM 12
Window Settings > Set Font > Current Window	On the **Setup** tab, select **Window > Window Settings > Set Font > Current Window** from the **Workspace** group.
Window Settings > Set Font > All Windows	On the **Setup** tab, select **Window > Window Settings > Set Font > All Windows** from the **Workspace** group.
Window Management > [Option]	On the **Setup** tab, select **Window > Window Management** from the **Workspace** group, and select an option.
[Window]	On the **View** tab, select **Switch Window** from the **Window** group, and select a window.

Help Menu

You can access all commands from the Help menu in Maximizer CRM 10 by clicking the Maximizer button in Maximizer CRM 12.

The following commands appear on the Help menu in the Address Book window in Maximizer CRM 10.

In Maximizer CRM 10, select Help >	In Maximizer CRM 12
Contents	Click the **Maximizer** button, and select **Help > Online Help**.
Online Support	Click the **Maximizer** button, and select **Help > Online Support**.
Getting Started	Click the **Maximizer** button, and select **Help > Getting Started**.
MaxMobile User’s Guide	Click the **Maximizer** button, and select **Help > MaxMobile User’s Guide**.
Other Products > [Product]	Click the **Maximizer** button, and select **Help > Other Maximizer Products**.
Training	Click the **Maximizer** button, and select **Help > Training**.
About Maximizer CRM	Click the **Maximizer** button, and select **Help > About Maximizer CRM**.
Maximizer Live Update	Click the **Maximizer** button, and select **Help > Maximizer Live Update**.

Keyboard Shortcuts

Sometimes you will find it faster to use keyboard shortcuts instead of using your mouse. Keyboard shortcuts are available to change the focus of windows, to select commands from ribbons, to work with entries in lists, and to work in many other areas of the interface.

The following sections list the keyboard shortcuts available in Maximizer:

- "Keyboard Shortcuts: Windows" on page 286
- "Keyboard Shortcuts: Ribbons" on page 287
- "Keyboard Shortcuts: Dialog Boxes" on page 287
- "Keyboard Shortcuts: Entries" on page 288
- "Keyboard Shortcuts: Drop-Down Calendars" on page 288
- "Keyboard Shortcuts: Notes" on page 289
- "Keyboard Shortcuts: Phone Calls" on page 289
- "Keyboard Shortcuts: Macros" on page 289
- "Keyboard Shortcuts: Other Tasks" on page 290

Keyboard Shortcuts: Windows

The following keyboard shortcuts apply to Maximizer windows.

Press	**To**
Alt+spacebar, n	Minimize Maximizer.
Alt+spacebar, x	Maximize Maximizer.
Alt+-(hyphen),n	Minimize the current window.
Alt+-(hyphen), x	Maximize the current window.
Alt+-(hyphen), r	Restore the current window.
Ctrl+1	Open the Address Book window.
Ctrl+2	Open the Contacts window.
Ctrl+3	Open the User-Defined Fields following window.
Ctrl+4	Open the Notes following window.
Ctrl+5	Open the Documents following window.
Ctrl+6	Open the Hotlist window.
Ctrl+7	Open the Calendar window.
Ctrl+8	Open the Journal window.
Ctrl+9	Open the Expenses window.

Press	To
Ctrl+0	Open the Opportunities window.
Ctrl+A	Open the Opportunities following window.
Ctrl+D	Open the My Work Day window.
Ctrl+E	Open the Email window.
Ctrl+L	Open the Company Library window.
Ctrl+R	Open the Related Entries following window.
Ctrl+Q	Stop searching or list building.
Ctrl+F4	Close the current window.
Ctrl+F9	Open the Activities dialog box.
Ctrl+Tab	Move between open windows.
Ctrl+Shift+F	Move the focus to the View bar.
Shift+F4	Tile all windows vertically.
Shift+F5	Cascade all windows.
Shift+F6	Tile all windows horizontally.
Tab	Sort by next column.
Esc	Move the focus back to the window from a tab or drop-down list.

Keyboard Shortcuts: Ribbons

The following keyboard shortcuts apply to selecting tabs and commands in the ribbon interface.

Press	To
Alt+*highlighted letter*	Select a tab.
highlighted letter	Select a command from the current tab.
Esc	Select a different tab.
Shift+F10	Access the shortcut menu.

Keyboard Shortcuts: Dialog Boxes

The following keyboard shortcuts apply to working in dialog boxes.

Press	To
Tab	Move to the next field or button.
Shift+Tab	Move to the previous field or button.

Press	To
Enter	Close the dialog box and accept entries in the dialog box.
Shift+F10	Access the shortcut menu on edit fields.
Esc	Close the dialog box and optionally save changes.

Keyboard Shortcuts: Entries

The following entries apply to working with entries in a list.

Press	To
Home	Go to the first entry in the list.
End	Go to the last entry in the list.
Insert	Add an entry.
Enter	Open the current entry.
Delete	Delete the current entry.
Ctrl+spacebar	Select the current entry
Ctrl+/ (forward slash)	Select all entries.
Ctrl+\ (back slash)	Clear selection of all entries.
Ctrl+= (equal symbol)	Invert which entries are selected.
Shift+Down Arrow	Drag and select entries.
Alt+Enter	Show the properties of the selected entry.

Keyboard Shortcuts: Drop-Down Calendars

The following keyboard shortcuts apply to drop-down calendars that are available when you select a date.

Press	To
Down Arrow	Move ahead one week.
Up Arrow	Move back one week.
Page Down	Move ahead one month.
Page Up	Move back one month.
Ctrl+Page Down	Move ahead one year.
Ctrl+Page Up	Move back one year.

Keyboard Shortcuts: Notes

The following keyboard shortcuts apply to notes, including Journal notes.

Press	To
Right Arrow	Move right one character.
Left Arrow	Move left one character.
Up Arrow	Move up one line.
Down Arrow	Move down one line.
Home	Jump to the start of the line.
End	Jump to the end of the line.
Ctrl+Home	Jump to the top of the document.
Ctrl+End	Jump to the bottom of the document.
Page Up	Move up one screen.
Page Down	Move down one screen.

Keyboard Shortcuts: Phone Calls

The following keyboard shortcuts apply to using the phone call features.

Press	To
F7	Phone the current entry.
Shift+F7	Use the quick dial feature to phone the main phone number for the current entry.
Ctrl+F7	View the phone log.
Alt+F7	Receive a phone call.

Keyboard Shortcuts: Macros

The following keyboard shortcuts apply to working with macros.

Press	To
F11	Record a macro.
Shift+F11	Run the last macro.
Ctrl+F11	View the list of macros.

Keyboard Shortcuts: Other Tasks

The following keyboard shortcuts apply to any other tasks in Maximizer.

Press	To
F1	View help for the current window or dialog box.
F8	Open the Maximizer Word Processor.
Shift+F9	Use the Timer.
Ctrl+W	Use a Maximizer Wizard.
Ctrl+Z	Undo the last search.
Alt+F4	Exit Maximizer.

APPENDIX B

Crystal Reports Database Views/Tables Reference

Maximizer Database Views/Tables Reference

In this chapter...

Overview

This chapter is a technical reference for using Crystal Reports with Maximizer data.

Data Population for the Current Window

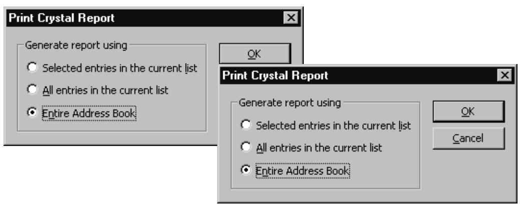
For more information on user access rights for creating Crystal Reports, see the *Maximizer CRM Administrator's Guide*.

When you create a new report template or edit an existing report template, the default table/view for the report is based on the current Maximizer window. You are connected to the **MAS_[Address Book name] for Microsoft SQL** data source by default. If you want to link to additional tables, you must do so in the **Database Expert** dialog box in Crystal Reports. See "Linking" on page 295 for more information.

Following is a list of each controlling window and its associated default table and file names used for Crystal Reports.

Controlling Window	Views for Microsoft SQL
Address Book	AMGR_Client
Opportunity	Opp_View
Hotlist	AMGR_Hotlist

If you are not in the controlling window that corresponds with the type of report you choose, you are limited to running the report on all entries in the Address Book rather than a selected or current entry list.



Database Views for User-Defined Fields

When you create a user-defined field, a database view for that user-defined field is also created. You can use these views to report on user-defined fields in Crystal Reports. For example, when a new

Address Book user-defined field called “Salary” is created, a new view named “A_Salary” is dynamically created. Based on the type of user-defined field, the view name is prefixed by a designated letter. The following table identifies the view name prefixes for each type of user-defined field.

Microsoft SQL View Prefixes

TheMicrosoft SQL driver creates database views for user-defined fields, using the following prefixes.

Prefix	Type of user-defined field
A_	Address Book
O_	Opportunity
U_	Users
S_	System

Database Driver Used to Create Crystal Reports

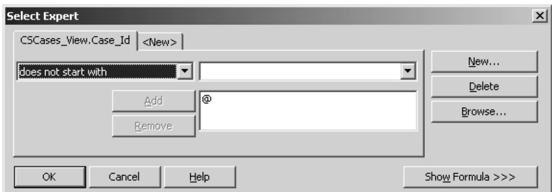
Maximizer uses the native SQL Server driver (MAS_ DSN) exclusively to create Crystal Reports. Use the SQL Server driver to create reports for use with Maximizer.

Filtering Data

In order to report on particular types of data, you need to use selections or filtering in Crystal Reports. Use the Select Expert (Report > Select Expert) to select or filter data for your report. In the case of the Address Book table/view, use the Record_Type field to select or filter Address Book entries. For example, to create a report that only shows Company records, use the Select Expert to return only those records where "Record_Type = 1".

You can also filter or select the data for the report using Maximizer. Once a report has been saved, populate the appropriate Maximizer windows with the desired information then run the personal report and select the all entries in the current list option.

Maximizer contains default records in many of the common modules. These are denoted by an "@" sign and can be filtered using the Select Expert by using the "does not start with" criteria as illustrated in the following graphic.



Address Book Entry Data Type	Record Type for Microsoft SQL
Company	Record_Type = 1
Individual	Record_Type = 2
Contact	Record_Type = 31
Individual Contact	Record_Type = 32
Default Entry	Record_Type = 5
Alternate Address for Contact	Record_Type = 41
Alternate Address for Individual	Record Type = 42

Linking

Linking determines how the report data elements are related. For example, to report all notes related to an Address Book Entry you would link the Client_Id and Contact_Number fields of the AMGR_Client view to the fields of the same name in Notes.

Crystal Reports enables you to specify the type of join and type of link you want to use when linking tables. Joins and links indicates how linked fields in two tables are compared when records are read. Join, enforce, and link options can be specified in the Links Options dialog box. Using the various join enforcement options can ensure that linked tables are included in the SQL query, even when none of the fields in the table are used in the report. The Crystal Reports help files contain more information on Linking options.

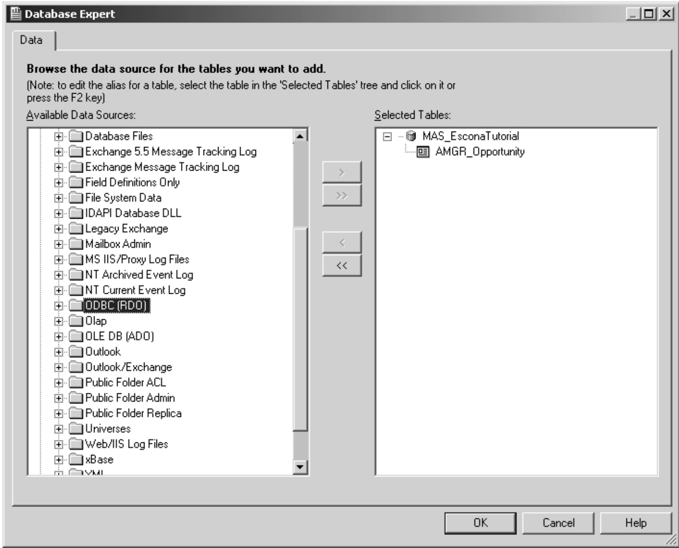
Controlling Windows

As mentioned previously, when you choose to create a new report template or edit an existing template, the default view for the report is based on the active controlling window. Following is an example of a controlling window in Maximizer outlining the associated view name, links, and common selections.

Including Additional Views in Your Reports

To include additional views in your reports, you must link them to the parent table of the controlling window. You do so through the

Database Expert (Database > Database Expert) by linking to the data source.

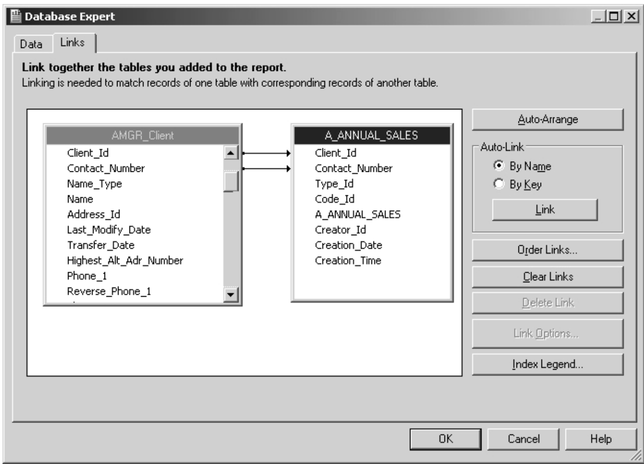


User-Defined Fields Example

When a new User-Defined Field is created, a new database table or view for that User-Defined Field is also created. User-Defined Fields can be associated with Address Book, Opportunity, and Users. Use the Database Expert (Database > Database Expert) to include a user-defined field and link it to the desired parent view/table.

The following example is using a user-defined field named “Annual Sales”.

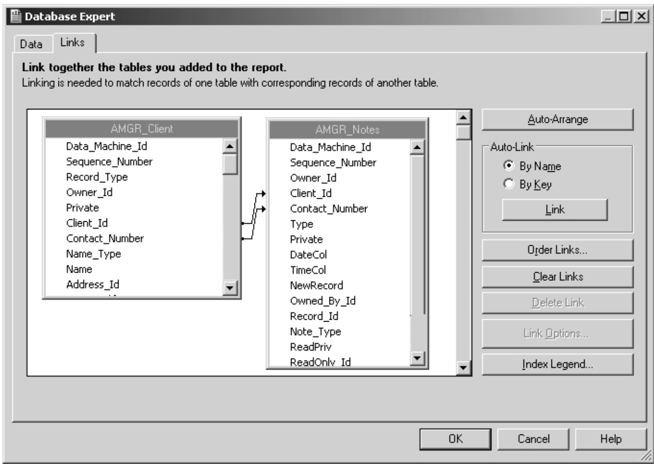
User-Defined Field	Microsoft SQL
User-defined field view name	A_<user-defined field name> example: A_ANNUAL_SALES
Links	Client_Id => Client_Id Contact_Number => Contact_Number



Notes Example

Each note created for an Address Book entry is a record in the view called Notes. To report on notes associated with Address Book entries, you must add the view and link it to the Address Book entry table according to the following table.

Note	Microsoft SQL
Notes view name	AMGR_Notes
Links	Client_Id => Client_Id Contact_Number => Contact_Number



SQL Views and Data Tables

Following is an appendix of the most common Maximizer SQL views and tables.

AMGR_Client View

The AMGR_Client View contains name, address, phone number, and email address information for Address Book entries, including Companies, Individuals, and Contacts, as well as alternate addresses and default entries. Many other tables in the database reference the Client_Id and Contact_Number fields of this table.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Type of Address Book entry: 1 = Company 2 = Individual 5 = Default entries 31 = Company Contact 32 = Individual Contact 41 = Company or Company Contact alternate address 42 = Individual or Individual Contact alternate address
Owner_Id	String	11		
Private	Integer	4		
Client_Id	String	23		Unique client identification string.
Contact_Number	Integer	4		Unique client identification number. 0 = Company or Individual record < 60,000 = Contact record > 59,999 = Alternate address
Name_Type	String	1		C = Company I = Individual, Contact, Default entry, or Alternate address

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Name	String	79		One of the following: • Company name • Individual last name • Contact last name • Alternate address description • Default Entry
Address_Id	Integer	4		0 = Use default address Value other than 0 = Contact_ Number of address to use for this Address Book entry.
Last_Modify_Date	DateTime	8		
Transfer_Date	DateTime	8		Date and time when the last transfer occurred.
Highest_Alt_Adr_ Number	Integer	4		Highest alternate address number in use.
Phone_1	String	21		
Reverse_Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_2	String	21		
Reverse_Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_3	String	21		
Reverse_Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_4	String	21		
Reverse_Phone_4	String	21		
Phone_4_Extension	String	21		
Highest_Contact_ No	Integer	4		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Receives_Letters	Integer	4		Indicates whether Contact (Record_Type = 31 or 32) receives mail sent to the Company/ Individual: 0 = Contact doesn't receive mail sent to Company/Individual 1 = Contact receives mail sent to Company/Individual **Note:** • For Individual records (Record_Type = 2), this value is always 1. • For Company records (Record_Type = 1) and alternate addresses (Record_Type = 41 or 42), this value is always 0.
Use_Client_Name	Integer	4		Applies to Contacts (Record_Type = 31 or 32) only. Indicates whether the Contact's Company/Individual name should be included in the address: 0 = Do not include Company/ Individual name in address 1 = Include Company/Individual name in address
First_Name	String	79		
Initial	String	79		Middle name or initials.
MrMs	String	79		
Title	String	79		
Salutation	String	79		
Department	String	79		
Firm	String	79		The Company Name of an Individual record. Applies to Individual (Record_Type = 2) records only.
Division	String	79		
Address_Line_1	String	79		
Address_Line_2	String	79		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		
Last_Client_Id	String	23		Last Client ID used for transfer.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Updated_By_Id	String	11	ADMN_User_ Details.User_Id	User_Id of user who most recently updated the Address Book entry.
Reports_To_ Contact_Number	Integer	4	AMGR_Client. Contact_Number	Contact_Number of Contact (Record_Type = 31 or 32) to whom this contact reports (e.g., contact's supervisor or manager). Applies only to Contact records (Record_ Type = 31 or 32).
Assigned_To	String	11	ADMN_User_ Details.User_Id	User_Id of user assigned to the Address Book entry as the Account Manager. Applies to Company (Record_Type = 1), Individual (Record_Type = 2), and Default Entry (Record_Type = 5) records only. <MULTI> = Multiple account managers are assigned to this entry. The users are set in the ADMN_RecordAccessRights table.
ReadPriv	Integer	2		
ReadOnly_Id	String	11		
Phone_1_Desc	String	21		
Phone_2_Desc	String	21		
Phone_3_Desc	String	21		
Phone_4_Desc	String	21		
Email_1_Desc	String	15		
Email_2_Desc	String	15		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Email_3_Desc	String	15		
Lead_Status	Integer	2		0 = Not a sales lead 1 = Sales lead Applies to Company (Record_Type = 1) and Individual (Record_Type = 2) records only.
Change_Bits	Binary	8		MaxMerge Change Field. Used by Maximizer.
Contact_Inherits_UDFs	Integer	2		"New contact inherits user-defined fields" checkbox in Company and Individual Address Book entries. 0 = Contact does not inherit UDFs 1 = Contact inherits UDFs
Territory_Status	Integer	2		Indicates how the territory was set. 0 = Unassigned 1 = Unaligned 101 = Set by user 102 = Set by rule 201 = Set by manager **Note:** Unaligned status is used when territory alignment moves an Address Book entry from a defined territory so that it no longer falls under any of the territory criteria. The old territory remains in the Territory_ID field.
Territory_ID	Numeric	10	AMGR_Territory.Territory_ID	Unique identification number.

Company View

The Company View includes fields from AMGR_Client for Company Address Book entries.

Note
This view is read-only.

Table 2 Company View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Record identifier.
Owner_Id	String	11		
Private	Integer	2		If modified, all contacts and addresses with the same Client_Id will also be modified.
Client_Id	String	23		Unique identification number. System generated if field is Null and "System to assign Address Book entries' Identification field values" option is selected in Administrator (File > Preferences > System Options). Must be unique. Non-modifiable.
Contact_Number	Integer	2		Always 0
Name_Type	String	1		Always C
Company_Name	String	79		Name of Company. Mandatory field.
Address_Id	Integer	2	AMGR_Client. (Client_Id, Address_Id)	Points to the address to use. 0 to use main address or must already exist in the Address table. >= 60000 means unsigned.
Department	String	79		
Firm	String	79		
Division	String	79		
Address_Line_1	String	79		

Table 2 Company View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Address_Line_2	String	79		
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		
Last_Modify_Date	DateTime	8		
Last_Modify_Time	DateTime	11		
Transfer_Date	DateTime	8		Date and time of transfer. If left empty, it defaults to the system clock.
Transfer_Time	DateTime	11		
Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_1_Desc	String	21		
Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_2_Desc	String	21		
Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_3_Desc	String	21		
Phone_4	String	21		
Phone_4_Extension	String	21		
Phone_4_Desc	String	21		
Change_Bits_Low	Binary	8		MaxMerge Change Field 1. Used by Maximizer. Do not use.
Change_Bits_High	Binary	8		MaxMerge Change Field 2. Used by Maximizer. Do not use.
Creator_Id	String	11		
Creation_Date	DateTime	8		Date and time when Company/ Individual record was created. Default value is current system date and time.
Creation_Time	DateTime	11		

People View

The People view includes fields from AMGR_Client for Individual and Contact entries.

Note
This view is read-only.

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Record type indicator.
Owner_Id	String	11		
Private	Integer	2		
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number)	Unique identification number. Valid values: 0–59999 • 0 = Individual • Value other than 0 = Contact Cannot modify. Pair (Client_Id, Contact_Number) must be unique.
Contact_Number	Integer	2		
Name_Type	String	1		
Last_Name	String	79		
Address_Id	Integer	2	AMGR_Client. (Client_Id, Address_Id)	Pointer to address record to use: • 0 = Use main address • >= 60,000 (unsigned) = Use alternate address
Department	String	79		
Firm	String	79		
Division	String	79		
Address_Line_1	String	79		
Address_Line_2	String	79		
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Last_Modify_Date	DateTime	8		
Last_Modify_Time	DateTime	11		
Transfer_Date	DateTime	8		Date and time of transfer.
Transfer_Time	DateTime	11		
Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_1_Desc	String	21		
Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_2_Desc	String	21		
Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_3_Desc	String	21		
Phone_4	String	21		
Phone_4_Extension	String	21		
Phone_4_Desc	String	21		
Receives_Letters	Integer	2		Applies to Contacts only. 0 = Contact does not receive mail 1 = Contact receives mail (default)
Use_Client_Name	Integer	2		Applies to Contacts only. 0 = Do not include Company/ Individual name in mailing address 1 = (Default) Include Company/ Individual name in mailing address
First_Name	String	79		
Initial	String	79		
Mr/Ms	String	79		
Title	String	79		
Salutation	String	79		Salutation (e.g., Dear:) to use in correspondence.

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Change_Bits_Low	Binary	8		MaxMerge Change Field 1. Used by Maximizer.
Change_Bits_High	Binary	8		MaxMerge Change Field 1. Used by Maximizer.
Creator_Id	String	11		
Creation_Date	DateTime	8		Date and time Individual or Contact was created. Default is current system date.
Creation_Time	DateTime	11		

AMGR_Appointments View

The AMGR_Appointments View includes both personal and Address Book-related appointments.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling. All times are stored in Coordinated Universal Time (UTC).

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11	AMGR_Resources. Resource_Id – or – ADMN_Users.User_Id	User, location, or resource that the appointment is scheduled with. (There is a separate record for each user, location, and resource participating in the same appointment.) If the Location field includes a location that is not in the AMGR_Resources Table (Owner_Type=101), the Owner_Id value is L@FREEFORM.
App_Date	DateTime	8		Start date and time of appointment. Mandatory field.
Lead_Date	DateTime	8		Date and time when the appointment notification should take place. Default is 10 minutes prior to App_Date.

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
End_Date	DateTime	8		End date and time of appointment. Default is 30 minutes after App_Date.
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number).	Client the appointment is associated with. If filled in, the entry must exist in the AMGR_ Client View. Cannot modify.
Contact_Number	Integer	4		
Private	Integer	4		
Type	Integer	2		Identifies all records of a single appointment, group appointment, recurring appointment, or recurring group appointment. The value is 0 for a single-user appointment and is another unique value for a group, recurring, or recurring group appointment. **Note:** Recurring, group, and recurring group appointments consist of multiple records in the AMGR_Appointments Table—one for each user and one for each recurrence.
Alert_Flag	Integer	2		0 = Alarm not set 1 = Alarm set
Priority	String	4		Defines the priority text (e.g., Hi, MED, LOW).
Completed	Integer	2		0 = Appointment incomplete 1 = Appointment complete

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Icon_Type	Integer	2		Icon associated with the appointment: 0 = None 1 = Mail 2 = ToDo 3 = Phone 4 = Travel 5 = Sale 6 = Meal 7 = Presentation 8 = Speech 9 = Meeting **Note:** Icons can be viewed when an appointment is being created.
Rsvp	Integer	2		User's response to appointment invitation: 0 = No response 1 = User accepts appointment 2 = Declined 3 = Tentative response Cannot modify.
Recurring_Id	Integer	2		Unique recurring ID: • 0 = Not recurring • Other unique value = Identifier for records belonging to a recurring appointment
Appt_Rec_Freq	Integer	2		Frequency of recurring appointment: 0 = Daily 1 = Weekly 2 = Day of month (e.g., first Monday) 3 = Monthly (e.g., 14th) 4 = Yearly

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Appt_Num_Occur	Integer	2		Identifies relative day of recurring appointment (e.g., second Tuesday). Applies to weekly, day of month, and monthly appointments only. **Weekly appointments:** 0 = Every ___ 1 = Every second ___ 2 = Every third ___ ... 25 = Every 26th ___ **Day of month appointments:** 0 = Every 1st ___ of the month 1 = Every 2nd ___ of the month ... 31 = Every Last ___ of the month **Monthly appointments:** 0 = First ___ of the month 1 = Second ___ of the month 2 = Third ___ of the month 3 = Fourth ___ of the month 4 = Last ___ of the month
Appt_Day_Of_ Week	Integer	2		Day of recurring appointment (e.g. , Friday). Applies to weekly, day of month, and monthly appointments only. **Weekly and Monthly appointments:** 0 = Sunday 1 = Monday 2 = Tuesday 3 = Wednesday 4 = Thursday 5 = Friday 6 = Saturday **Day of month appointments:** 0 = Day 1 = Weekday

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Skip_Weekend	Integer	2		Applies to daily appointments only. 0 = Default 1 = Daily appointments do not occur on weekends.
Move_To_Weekday	Integer	2		Applies to yearly appointments only. 0 = Default 1 = If appointment occurs on a weekend, move to nearest weekday
Rec_Start_Date	DateTime	8		Appointment start date.
Rec_End_Date	DateTime	8		Appointment end date. Mandatory if Rec_Start_Date is used.
PegBoardState	Integer	2		Peg board state during appointment: 0 = Unknown 1 = Busy 2 = Out (Default)
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Snooze_End_Date	DateTime	8		Date and time when a snoozed appointment will display a reminder.
Email_Date	DateTime	8		Date and time to send email appointment reminder. Applies only if Email_Flag is set to True (1).
Email_Flag	Integer	2		0 = Don't send email reminder 1 = Send email reminder
Owner_Type	Integer	2		0 = User 1 = Location 2 = Resource 101 = Custom Location

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Plan_Id	String	23	AMGR_ ActionPlanTemplate.(Plan_Id, Plan_ Number)	Unique identification value of the Action Plan template, as defined in AMGR_ActionPlanTemplate.
Plan_Number	Integer	4		Sequential number of the activity in the plan.
Master_Id	String	23	AMGR_CSCases.(Case_Id, Case_ Number) – or – AMGR_ Opportunity.(Opp_ Id, Opp_Number)	Identifies the customer service case or opportunity the appointment is associated with.
Master_Number	Integer	4		
Entity_Type	Integer	4		Type of record this template is applicable to. Entity_Type values correspond to the Client_Id/ Contact_Number pair references on the right: 0 = Not specified (default for old notes) 1 = Address Book entry 2 = Opportunity 3 = Campaign 4 = User 5 = Customer service case 6 = Knowledge base 7 = Order 8 = Order item 9 = Default entry 100 = Custom Independent table 101 = Custom Child table
TextCol	String	1024		Text description of appointment.
Appointment_Id	String	24		Appointment identification string.
Appointment_ Number	Integer	4		Appointment identification number.

AMGR_Hotlist View

The AMGR_Hotlist View includes both personal and Address Book related tasks.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling. All times are stored in Coordinated Universal Time (UTC).

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11		If originated from AMGR_Opportunity_Link, it is the Owner Id of the Team Member responsible for the opportunity.
Schedule_Date	DateTime	8		Date of task. Mandatory field.
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_Number)	Client who the task is associated with. Leave empty for a personal appointment. Otherwise it must already exist in the AMGR_Client table. Cannot modify. Contact_Number = 0–59999
Contact_Number	Integer	4		
Entry_Type	Integer	4		Flag for the source of the task. 0 = Manual task 1 = Task associated with follow-up deadline for customer service case 2 = Reserved system value. Do not use. 3 = Task created by a Date user-defined field that has the "Include in Hotlist" attribute 4 = Reserved system value. Do not use.
Original_Date	DateTime	8		Original date of the task. If left empty, it defaults to the system clock.
Type_Id	Integer	4		Pointer to date field in the Detail_List table. Cannot modify.

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Status_Id	Integer	4		Not in use.
Priority	String	4		Priority of task.
Completed	Integer	2		0 = Not complete 1 = Complete
Opp_Id	String	23	AMGR_ Opportunity_Link. (Opp_Id, Opp_ Number, Step_Id, Activity_Id)	Identifier of the associated opportunity related to the AMGR_ Opportunity_Link that the task originated from. Must already exist in the AMGR_Opportunity_Link table. Opp_Number = 0.
Opp_Number	Integer	4		
Step_Id	Numeric	9		Must already exist in the AMGR_ Opportunity_Link table, unless it's a follow-up activity.
Activity_Id	Numeric	9		Must already exist in the AMGR_ Opportunity_Link table.
Alarm	Integer	2		0 = No alarm set 1 = Alarm set
Icon_Type	Integer	2		Icon associated with the task: 0 = None 1 = Mail 2 = ToDo 3 = Phone 4 = Travel 5 = Sale 6 = Meal 7 = Presentation 8 = Speech 9 = Meeting Icons can be viewed when the Hotlist task is being created.
Lead_Date	DateTime	8		Date when alarm is to sound. If left empty, defaults to Schedule_Date.
End_Date	DateTime	8		Task end date.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Snooze_End_Date	DateTime	8		Date and time when the alarm deferral ends.
TextCol	String	255		Text of task. Mandatory field.
Related_To	Integer	4		Type of record this template is applicable to: 0 = Undefined. Defaults to Address Book. 1 = Address Book entry 2 = Opportunity 3 = Campaign 5 = Customer service
Plan_Id	String	23	AMGR_ActionPlan Template.(Plan_Id, Plan_Number)	Unique identification value of the Action Plan, as defined in AMGR_ ActionPlanTemplate.
Plan_Number	Integer	4		Sequential number of the activity in the plan.
TaskFlags	Integer	2		Determines if a Hotlist task is scheduled or timeless. 0 = Scheduled 1 = Timeless

AMGR_Resources Table

The AMGR_Resources table lists the users' display names (e.g,. Joe Napoli), locations (e.g., Staff Room), and resources (e.g., Projector) available in the Appointments dialog box.

Table 6 AMGR_Resources Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Id	Integer	4		
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	Integer	4		Resource_Id's type: 1 = User display name 2 = Location 3 = Resource

Table 6 AMGR_Resources Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Resource_Id	String	12	ADMN_User_ Details.User_Id	Depends on Record_Type: • If Record_Type = 1 (User), then Resouce_Id = User_Id. • If Record Type = 2 (Location) or 3 (Resource), then Resource_Id is the unique ID of the location or resource.
Creator_Id	String	11		
Create_Date	DateTime	8		
Name	String	80		Friendly name of the user or resource (e.g., Joe Napoli, Staff Room, Projector). Mandatory field. Unique Name.

AMGR_Notes View

The AMGR_Notes View includes history and notes for Address Book entries, opportunities, campaigns, etc.

> **Note**
> This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Table 7 AMGR_Notes View

<table>
<tr><th>Field Name</th><th>Data Type</th><th>Len.</th><th>Foreign Table Ref.</th><th>Description and Rules</th></tr>
<tr><td>Data_Machine_Id</td><td>Numeric</td><td>9</td><td></td><td></td></tr>
<tr><td>Sequence_Number</td><td>Numeric</td><td>9</td><td></td><td></td></tr>
<tr><td>Owner_Id</td><td>String</td><td>11</td><td></td><td>This field actually contains the Creator_Id, not the Owner_Id.</td></tr>
<tr><td>Client_Id</td><td>String</td><td>23</td><td rowspan="2">AMGR_Client. (Client_Id, Contact_ Number)
– or –
AMGR_ Opportunity (Opp_ Id, Opp_Number)</td><td rowspan="2">Client_Id/Contact_Number or Opp_ Id/Opp_Number of the record the Note is associated with. Associated record must already exist. Mandatory field. Must provide Client_Id/Contact_Number for insert. Cannot update.</td></tr>
<tr><td>Contact_Number</td><td>Integer</td><td>4</td></tr>
</table>

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Type[a]	Integer	4		Can insert. Can update. Valid values: 0–32,767 Standard Maximizer note types and Detail note types may be specified: 0 = Manual note 1 = Mail-out note 2 = Outgoing call note 3 = Timed note 4 = Transfer note 5 = Completed task or appointment 6 = Scheduled task or appointment 7 = Email sent note 8 = Opportunity created or opportunity status changes 9 = History note 10 = Reassign task note 11 = Reserved for future use 12 = Customer service 14 = Incoming call note
Private	Integer	4		
DateCol	DateTime	8		Date and time when note was created. Default is current system date and time. Can insert. Can update.
TimeCol	DateTime	8		
NewRecord	Integer	4		Maximizer system field. Do not use.
Owned_By_Id	String	11		
Record_Id	Integer	4		
Note_Type	String	20		Within Maximizer, this string is used only for display purposes to indicate a sub-type of note. If a standard type is defined in the Type field, this string is appended to the standard type name for display. In Maximizer, this field appears as Category on the Note dialog box for manual notes only. Can insert. Can update.

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
ReadPriv	Integer	2		
ReadOnly_Id	String	11		
SynchFlags	Integer	4		Do not use this field. It is reserved for use by MaxExchange.
Entity_Type	Integer	2		Specifies the type of parent record the note belongs to. Entity_Type values correspond to the Client_Id/ Contact_Number pair references on the right: 0 = Not specified (default for old notes) 1 = Address Book entry 2 = Opportunity 3 = Campaign 5 = Customer service case 10 = Appointment 100 = Custom Independent table 101 = Custom Child table This field must be specified upon note insert, and it cannot be updated later.
TextCol[b]	Text	9216		Text of Note, without HTML tags. Can insert. Can update.
RichText<Superscript><TableFootnote>b	Text	No limit		Text of Note, including HTML tags. Can insert. Can update.
NoteFlags	Integer	2		0 = Note is not flagged. 1 = Note is flagged as important.

a. Some Maximizer functions, such as purging, searching, and MaxExchange synchronization, do not support user-defined note types, which have a Type value greater than 17.

b. If both TextCol and RichText are populated, the value in the RichText field is used as the note. If the RichText field is not null and a note is inserted into the TextCol field or the TextCol field is updated, the information in the RichText field must be set to null.

ADMN_User_Details Table

The ADMN_User_Details table contains personal information on Maximizer users.

Table 8 ADMN_User_Details Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Type	Integer	4		
User_Id	String	11		
Old_Password	String	511		
User_MrMs	String	80		
User_FirstName	String	80		
User_Init	String	80		
User_Name	String	80		
User_Title	String	80		
User_Salutation	String	80		
User_Firm	String	80		
User_Route	String	80		
User_Div	String	80		
User_AddressLine1	String	80		
User_AddressLine2	String	80		
User_City	String	80		
User_State_Province	String	80		
User_Zip_Code	String	80		
User_Country	String	80		
User_Phone_1	String	22		
User_Phone_1_Extension	String	22		
User_Phone_2	String	22		
User_Phone_2_Extension	String	22		
User_Phone_3	String	22		
User_Phone_3_Extension	String	22		
User_Phone_4	String	22		

Table 8 ADMN_User_Details Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
User_Phone_4_Extension	String	22		
User_Email_Address	String	120		
User_WebSite	String	120		
User_CustomField1	String	120		
User_CustomField2	String	120		
User_CustomField3	String	120		
User_CustomField4	String	120		
Creator_Id	String	12		
Create_Date	DateTime	8		
LastUpdate_Date	DateTime	8		
User_ReadAccess	Integer	4		
WindowLogin	String	33		
Display_Name	String	80		Not in use. **Note:** The user's display name is stored in the AMGR_Resources Table.
Record_Id	Integer	4		
Reports_To	String	12		The user ID of the person the user reports to. This information is used in organizational charts generated by Maximizer.

Appendix C

Glossary of Terms

Glossary of Terms

Use this list of terms to help familiarize yourself with the terminology of Maximizer CRM.

Access Rights – security settings for users. Access rights control each user's permissions to read, insert, modify, or delete various types of Maximizer entries. They also control general Maximizer privileges, user roles, and allowed printing destinations. Access rights are determined by the user's access settings and the access settings of any security groups the user belongs to.

Access Settings – there are two types of access settings: user access settings and group access settings. Combined user and group access settings determine a user's access rights.

Address Book – a Maximizer database.

Address Book entry – a Company, Individual, or Contact in the Maximizer Address Book.

Administrator – a Maximizer module in which the Address Book administrator can perform system configuration and maintenance for the Maximizer system and Address Books.

Advanced Import – importing an MXI or XML file into an Address Book.

Calendar – a Maximizer window in which you can manage your appointments.

Company – an Address Book entry used to record information for a company or organization.

Company Library – a shared library of company literature.

Contact – an Address Book entry used to record information for an individual person associated with a Company or Individual type of Address Book entry.

Controlling window – a main Maximizer window, such as the Address Book window, that determines what tabbed following windows are displayed. The contents of the following window depend on which entry is selected in the main controlling window.

Crystal Reports – a tool for generating reports. Crystal reports are available for viewing and generation through the Reports tab in Maximizer.

default entry – an entry (such as an Address Book entry) containing default field values that are propagated to new entries by default.

Escona – the Escona Address Book is a sample Address Book included with a typical installation of Maximizer. Using the example of a fictitious vintner in the Sonoma Valley, this Address Book demonstrates many of Maximizer's possibilities.

Following window – a tabbed sub-window of a controlling window. The contents of the following window depend on which entry is selected in the main controlling window. For example, the Contacts window displays only those Contacts that belong to the selected entry in the Address Book window.

Global Edit – a Maximizer operation that enables you to apply the same change to multiple Maximizer entries simultaneously.

Holiday Editor – a tool in Administrator for adding holidays to the Maximizer Calendar window.

Hotlist – a window in Maximizer used to display tasks and appointments in a specific date range.

HTML – HyperText Markup Language. A document format used for displaying web pages in a browser.

intranet – an internal network—much like the Internet—that is self-contained with the local area network (LAN). Frequently, a web server is used to display pages that should be accessible only within the company.

IP address – a number used to uniquely identify a specific computer on a network. Every network-connected computer has an IP address.

list – a listing of entries in Maximizer. You can create a list using a search or by selecting specific entries and reducing the list to the selection. Most activities are performed for the current list or the current entry.

log in – the act of entering your user ID and password to gain access to a Maximizer Address Book. The Login dialog box prompts you for your user ID and password.

MASTER user – the Address Book administrator's user ID. This user ID permits access to Administrator.

merge field – text inserted into a document or template that is replaced by Address Book information during a mail merge. For example, a merge field can be a Contact's name, so you can customize a letter's salutation with the recipient's name.

note – a text document attached to Address Book entries, Contacts, and opportunities.

OLE – object linking and embedding (OLE) is a technology that allows you to insert files, portions of files, and links to files into a document or application. You can insert files in the Documents window and the Company Library. Double-clicking the file opens it in the associated (and installed) application.

online – information that is "online" is sometimes used to describe information on the Internet or on your computer screen. An "online" user guide or "online" Help is documentation displayed on your screen.

opportunity – an entry in Maximizer used to record an opportunity to make a sale.

OrderDesk – a window in Maximizer used to manage orders and inquiries from your online catalog.

Outlook Synchronization – a Maximizer feature for synchronizing some Maximizer entries, such as Address Book entries, between Maximizer and Microsoft Outlook.

preferences – a collection of program options that allow users to customize how Maximizer functions. Some preferences are set in Administrator; some are set in the modules.

prospect – a potential customer. ListsNOW.com lets you acquire and import lists of prospects. You can then use the data for your sales prospecting activities.

related entries – an entry that records a relationship between two Address Book entries. For example, one Address Book entry might be an accountant for another Address Book entry, which could be recorded as a related entry in Maximizer.

search engine – a website on the Internet that keeps a searchable index of websites. You can register your website with a search engine so customers can find your site by performing a search. Examples of search engines are Google and Yahoo!.

security group – a set of access settings for a subset of Maximizer users.

SMTP – an SMTP server is a server used for outgoing Internet email.

template – a file that outlines the design for a document, email message, or web page. Maximizer uses templates for word processor documents.

UNC – Universal Naming Convention. A kind of network path used to locate files and folders. An example of a UNC path is "\\Escona\MxServer\".

user-defined field – a custom field used to record additional "user-defined" information for Address Book entries, opportunities, and users.

user ID – a name that uniquely identifies a Maximizer user. Users must enter their user ID and password in order to gain access to a Maximizer Address Book.

wizard – a series of interactive screens that walk you through the steps necessary to perform an action or procedure in a program.