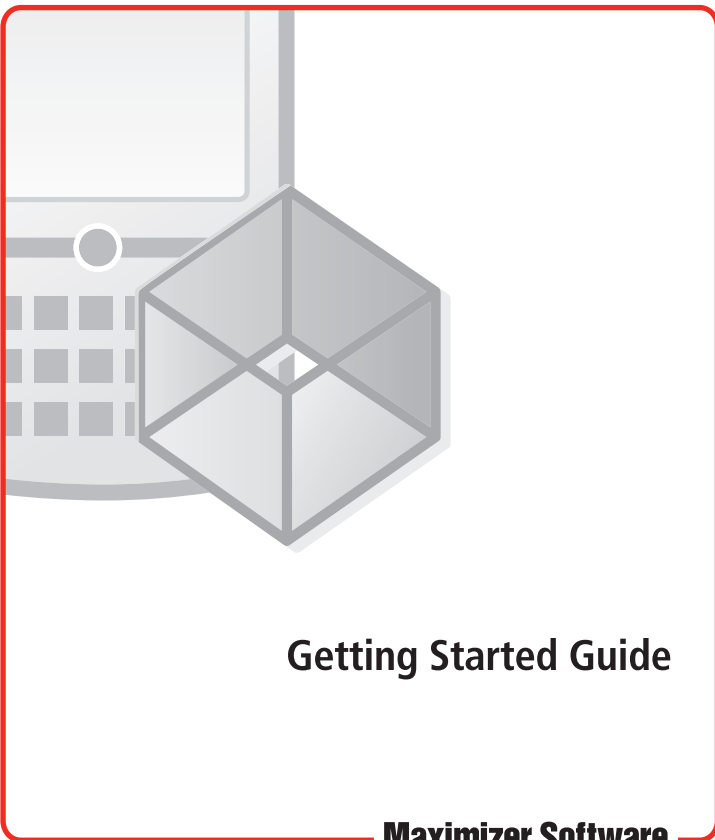




# **Maximizer<sup>®</sup> CRM 12**

MaxMobile *for BlackBerry<sup>®</sup>*



## **Getting Started Guide**

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

# Welcome to MaxMobile

## Introduction

MaxMobile for BlackBerry provides you with a way to take your customer information on the road. You can take notes and track sales opportunities, as well as check your schedule and make follow-up tasks for yourself. MaxMobile for BlackBerry is also integrated with the BlackBerry native applications and its Address Book so you can easily create contacts from calls and emails you receive on your BlackBerry. You can even quickly draw maps to client locations.

## System Requirements

BlackBerry devices running BlackBerry operating systems 4.2.1 to 7.0 are currently supported. Also required is 2 MB of free space on the device for MaxMobile components. Visit the Maximizer website at [www.maximizer.com](http://www.maximizer.com) for an up-to-date list of supported operating systems and devices.

## Installing MaxMobile

Depending on how your system administrator has configured the MaxMobile installation, you can install MaxMobile in one of two ways—through a link in an email or by browsing to the MaxMobile Wireless Server on the web. **If you have a previous version of MaxMobile installed, you should uninstall it before installing this version.**

Note that when specifying the server name in the following steps, you can alternatively use a local computer name (if you are using BES or Wi-Fi in an internal domain), a qualified domain name, or an IP address (e.g., an external static IP). Contact your Internet Service Provider for more information.

The **port number** is necessary in the following steps only if you are using a port other than the default ports of **80 for http** or **443 for https**. You can also use the **IP address** in place of the **server name**.

## Installing MaxMobile from a Link in an Email

If your system administrator has set up MaxMobile deployment by email, you will receive an email with a link to the MaxMobile installation.

### ➤ To install MaxMobile from a link in an email

1. When you receive the MaxMobile installation email, click on the **link** to the download page.
2. Select **Download** and click the **trackball**.
3. Grant the necessary permissions for MaxMobile as described in the **Granting Permissions for MaxMobile** section.

## Installing MaxMobile from the Web

If you are not using email deployment for MaxMobile, you can download MaxMobile from a URL.

### ➤ To install MaxMobile from the web

1. On the device web browser, browse to one of the following URLs depending on if you are using a secure connection (https) or not:

**http://[server\_name]:[port\_number]/  
MaxMobileService/bb.aspx**

**https://[server\_name]:[port\_number]/  
MaxMobileService/bb.aspx**

2. Select **Download** and click the **trackball**.
3. Launch MaxMobile.

You are prompted for the URL of the MaxMobile Wireless Server.

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

**http://[server\_name]:[port\_number]/maxmobileservice**

**https://[server\_name]:[port\_number]/maxmobileservice**

5. Grant the necessary permissions for MaxMobile as described in the **Granting Permissions for MaxMobile** section.

## Granting Permissions for MaxMobile

After downloading and installing MaxMobile, you must grant the necessary permissions for MaxMobile as follows:

- If users are prompted with a Yes/No message when granting permissions, they should choose **Yes**. If they receive a message asking them to view the permission details, they should click the **View** button, select the **Menu** key, and click **Save**.

If you experience an issue with MaxMobile going into a continuous process of rebooting after you have granted the necessary permissions on the device components, go to **Options > Advanced Options > Applications**, select **MaxMobile for BlackBerry**, click the **Menu** key, select **Edit Permissions**, and set **Connections and Interactions** to **Allow**.

## Uninstalling MaxMobile

There are two ways to uninstall MaxMobile from your device.

### ➤ To uninstall MaxMobile from your device

1. From the **BlackBerry Home** screen, select **Options** or **Tools** depending on your device.
2. Go to **Advanced Options > Applications** or **Applications**.
3. Select **MaxMobile for BlackBerry**.
4. Click the **Menu** key, select **Delete**, and click the **trackball**.  
– or –
  1. Connect your device to your desktop computer.
  2. Open **BlackBerry Desktop Manager** and double-click the **Application Loader** icon.

3. Click the **Next** button in the **Application Loader** wizard until you reach the **Device Application Selection** screen.
4. In the **Application Name** list, clear the selection for **MaxMobile for BlackBerry** and ensure **Remove** is selected as the **Action**.
5. Continue through the wizard screens by clicking **Next** and click **Finish** to finish uninstalling MaxMobile.

## MaxMobile Interface Customizations

Interface customizations can be made to an Address Book accessed by MaxMobile through a utility in the Maximizer CRM Customization Suite. Once customizations have been made to the software, the changes are downloaded to your device automatically. After the customizations are downloaded, MaxMobile must be restarted in order for the interface customizations to appear in MaxMobile.

For more information on interface customizations for MaxMobile, see your system administrator or consult your Maximizer CRM Customization Suite documentation. You can also visit the Maximizer website at [www.maximizer.com](http://www.maximizer.com) to learn more about the Maximizer CRM Customization Suite.

## Using MaxMobile

### Starting MaxMobile

#### ➤ To start MaxMobile on your device

1. In the BlackBerry Home screen, press the **Applications** or **Downloads** key.
2. Navigate to the **MaxMobile** icon and click the **trackball**. On some devices, the MaxMobile icon is located in the **Downloads** folder.

## Logging in to MaxMobile

If you are using MaxMobile with Maximizer CRM Entrepreneur edition, you may receive the following message when attempting to open an Address Book:

“This Address Book cannot be accessed through MaxMobile due to security reasons. To access this Address Book, security must be enabled by your system administrator on the System Options tab in Administrator preferences.”

You or your system administrator must enable security on the System Options tab in Administrator.

### ➤ To log in to MaxMobile

- Select an **Address Book**, enter your Maximizer **User ID** and **Password**, and click the **trackball**. This is the same user ID and password you use for Maximizer.

If you don't see a list of Address Books in the **Login to** field, click the **Menu** key, select **Connect**, and click the **trackball**. This establishes a connection with the MaxMobile server.

If you need to select a different server to access an Address Book, click the **Menu** key and select **Server**. Then, enter the **server name** — including the **port number** if required — and click **OK**. The server URL should be as follows:

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

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

You can also enter a connection timeout. By default, this is 120 seconds.

Depending on the connection methods enabled on the device, MaxMobile uses Wi-Fi or the Mobile Network to connect to the MaxMobile Wireless Server. If both connection methods are enabled and available, MaxMobile uses Wi-Fi.

You can also specify the order of the connection type used for the Mobile Network. By default, MaxMobile first attempts to connect to BES (BlackBerry Enterprise Server), followed by BIS-B (BlackBerry Internet Service Browsing), then Direct TCP, and lastly, WAP2. To select the **Connection type**, choose **Custom** from the drop-down list in the **Server** dialog box while you are in the Login or Home screen and select the options that correspond with the connection types to use. MaxMobile users may need to specify additional settings on their devices for Direct TCP. These settings are specified in Options > Advanced Options > TCP (or TCP/IP).

Note that you can switch Address Books or log in with a different User ID from any of the main MaxMobile windows such as the Opportunities window by clicking the **Menu** key and selecting the **Open Address Book** item.

You can set up your MaxMobile preferences so you do not have to log in to an Address Book. See the Startup Preferences section of Setting MaxMobile Preferences for more information.

Shortcut icons are created for each of the MaxMobile modules where you installed the application. Note that you can move or hide these icons, just as you can with any other native BlackBerry application. Having this access allows you to go directly to a MaxMobile module without having to launch it from the MaxMobile Home screen.

## Logging Out of MaxMobile

### ➤ To log out of MaxMobile

- From the Home page in MaxMobile, click the **Menu** key, select **Close**, and click the **trackball**. Clicking the Back/Escape key on the device allows MaxMobile to run in the background without closing the application.

## Using MaxMobile

Select an icon in the Home screen and click the trackball to open one of the windows. When you have a main window open, you can go directly to another MaxMobile window by clicking the **Menu** key, selecting **Switch Window**, and clicking the **trackball**. You can also switch to another application by choosing **Switch Application**.

## Setting MaxMobile Preferences

From the MaxMobile Home page, select the **Preferences** icon and click the **trackball** to open the Preferences window.

### General Preferences - Calendar/Hotlist Settings

**Working hours start/Working hours end** determines the display hours of the Daily and Weekly views in the Calendar.

**Default view** determines which calendar view opens automatically when you open the Calendar window.

**Email notification** allows you to send an email notification to users and Address Book entries when an appointment is created, modified, or deleted. Choosing **Ask** prompts you asking if you would like to send an email notification. Choosing the **Always** or **Never** options results in always or never sending an email notification. Based on the email setting preferences listed below, a note may also be logged to the Address Book entries in the appointment.

**Ignore all alarms and notifications** turns the Hotlist task, appointment alarm, and notification functionality on or off.

### General Preferences - Phone dialing settings

**Country code** appends phone numbers with a default country code for phone calls made from MaxMobile.

**Area Code** appends phone numbers with a default area code for phone calls made from MaxMobile.

**Show phone dialing settings when making a call** opens a pop-up window where your default country code and area code



are displayed. These settings can be modified in this window. You must have this option enabled to be able to edit these settings.

## General Preferences - Mapping

**Default mapping** specifies to use the BlackBerry Map or Online Mapping (e.g., Google Maps and Ask Maps). BlackBerry Map is selected by default.

Note that in order to map locations for multiple addresses or use the Get Directions functionality in MaxMobile, BlackBerry Map must be selected as your default mapping tool. Also note that this functionality is available only in operating systems 4.7 or higher.

**Preset location** sets the location of your default “from address” for getting directions.

**Automatically log into the last accessed Address Book** goes directly to the Home page rather than prompting for login credentials after starting MaxMobile.

## Logging Preferences - Email Settings

**Save email to entry's note** saves a note to the entry logging that an email was sent.

**Include message body in notes** allows you to save the message body of the email as part of the logged note.

**Prompt for entering extra logging notes** allows you to enter additional information as part of the logged note.

## Logging Preferences - Phone Log Settings

**Prompt for logging outgoing MaxMobile calls** logs a note to the related Address Book entry after an outgoing call is made from MaxMobile.

**Prompt for entering extra logging notes** allows you to enter additional information as part of the logged note for outgoing calls from MaxMobile.

**Prompt for logging incoming and outgoing BlackBerry calls** initiates a prompt to log a note to the related Address

Book entry after an incoming or outgoing call is made to/from the BlackBerry Call Log or Address Book (Contacts).

**Prompt for entering extra logging notes** allows you to enter additional information as part of the logged note for incoming and outgoing calls from the BlackBerry Call Log or Address Book (Contacts).

**Ignore List** allows you to view a list of phone numbers for entries that have been flagged to not log notes for. You can modify phone numbers in the list and also remove phone numbers from the list.

## Logging Preferences - SMS Settings

**Save SMS to entry's note** saves a phone note for an entry when a text message is sent.

**Include SMS message body in notes** includes the message text in the note when a text message is sent.

## Using the Menus

A menu is available for each of the MaxMobile windows.

### ➤ To use the menu bar

1. Click the **Menu** key.
2. Using the trackball, select a menu item, and then click the **trackball**.

## Changing the Font Settings for MaxMobile

You can adjust your font settings for MaxMobile, just as you can for any other native BlackBerry application.

### ➤ To adjust your font settings

- Go to **Options > Screen/Keyboard** and set the **Font Family**, **Font Size**, and/or **Font Style**.

## Address Book Entries

You can search for, view, add, edit, and delete Address Book entries using the Address Book window. You can also schedule an appointment or Hotlist task, write a note, create an opportunity, and email or phone the entry directly from the Address Book list or from the open Address Book entry.

### Viewing a List of Address Book Entries

When you open the Address Book window, there are no Address Book entries displayed in the list. You must perform a search to retrieve Address Book entries by clicking the trackball.

The icons beside each Address Book entry identify whether it is a Company, Individual, or Contact.



Company



Individual



Contact

You can sort entries by selecting one of the options after selecting the Sort menu item. If the list is sorted by Company, Company entries are grouped together with the Contacts associated with the Companies. If the list is sorted by name, you can jump to a place in the list by typing the first letters of an entry's name. If no match is found, MaxMobile automatically performs a search.

### Saving Photos, Sound, or Video to Entries

MaxMobile is integrated with BlackBerry multimedia. This allows you to capture a photo, voice recording, or video and save to an Address Book entry or opportunity. The files are saved in the entry's Documents window.

Like text messaging, in order to use the multimedia integration with MaxMobile, you must set your Interactions security option to Allow. See [Sending Text Messages](#) for more information.

## Drawing Maps and Getting Directions

You can draw a map for an Address Book entry's location in the Address Book or Opportunities window.

If you are using an operating system of 4.7 or higher, you can also use BlackBerry Map to map locations for multiple addresses in MaxMobile and get directions to a location. You must also be using BlackBerry Map as your default mapping preference in MaxMobile.

If you are using Online Mapping (not BlackBerry Map) and support for JavaScript is not enabled in the device browser, the Address Book entry's address does not appear in the online map site selection page. JavaScript can be enabled in your browser configuration options.

## Opportunities

You can view, add, edit, and delete opportunities using the Opportunities window. You can also view the Address Book entry associated with an opportunity by clicking the Menu key, selecting View in Address Book, and clicking the trackball.

You can also perform other associated actions like making a call or sending an email to the related Address Book entry using the Menu key.

## Working with User-Defined Fields

You can view user-defined fields through the User-Defined Fields screen in the Address Book or opportunity entry.

You can edit any user-defined field values that you have access to. If you do not have permission to edit a user-defined field in Maximizer, you also cannot edit that user-defined field in MaxMobile.

By default, blank and hidden user-defined fields are hidden. To show these fields, click the Menu key, select Filters, and select the Show blank fields and Show hidden fields options.

You must be in edit mode to modify user-defined fields. Following is a explanation of each type of user-defined field:

- **Date user-defined fields** – Select the user-defined field and click the **trackball** or click the **Menu** key, and select **Insert Date** to add a value. Use the **trackball** to toggle from month, day, and year. Then, click the **trackball** again to edit the values. Enter the appropriate values with the number keys. To clear a value, click the **Menu** key, select **Clear Date**, and click the **trackball**.
- **Single-value table user-defined fields** – Use the **trackball** to navigate to the field and then click the **trackball** to display a list of available field values. Click the **trackball** again while a value is highlighted to select a value. To clear a value, select the blank item (the first item) in the list of available field values and click the **trackball**.
- **Multiple-value table user-defined fields** – Use the **trackball** to navigate to the field and then click the **trackball** to display a list of available field values. Click the **trackball** again while a value is highlighted to select a value. Then, click the **Back** key, select **Save**, and click the **trackball**. Click the **trackball** to clear a value.
- **Numeric and alphanumeric user-defined fields** – Click the **trackball** and then use the number/alphabetic keys to manipulate values. To clear a value, select a field value and press the **Backspace/Delete** key. Or click the **Menu** key, select **Clear Field**, and click the **trackball**.

## Working with Notes

View notes through the Notes screen for Address Book or opportunity entries.

In the Notes screen, you can use the Filter menu item to display only certain types of notes by clicking the Menu key, selecting Filter, and selecting the note type. For Address Book entries, you also have the ability to display all notes. You can also filter notes

by time period by clicking the Menu key, selecting View, and choosing a view option.

Notes are always associated with an Address Book or opportunity entry, so you must open or select an entry before you can add a note.

## Working with Documents

You can view documents through the Documents screen in the Address Book or opportunity entry. Image files, text, HTML, and file types proprietary to the BlackBerry operating system can be opened directly in MaxMobile. You can save other types of files to your device to access the files with the associated applications using the Save As command.

In the Documents screen, you can use the Filter menu (Menu > Filter) to display only certain types of documents. For Address Book entries, you also have the ability to display all documents. You can also filter documents by time period by clicking on the Menu key, selecting View, and choosing a view option.

Documents are always associated with Address Book or opportunity entries. So you must open or select an entry before you can add a document. Documents can be modified in other BlackBerry applications, but must be re-inserted into MaxMobile to reflect any updates.

## Hotlist Tasks

You can view, add, edit, and delete Hotlist tasks using the Hotlist window.

### Viewing Hotlist Tasks

When you open the Hotlist window, it displays a list of current Hotlist tasks, including information such as due dates, activity descriptions, the Address Book entries related to tasks/appointments, and checkboxes to mark the tasks as complete.

In the Hotlist window, you can use the View menu item to display tasks based on a specific time frame and then use the Filters menu item to filter the list of displayed tasks as follows:

- **Show Carry Forward Unfinished Activities** displays unfinished tasks and appointments scheduled before the specified date range.
- **Show Completed Activities** displays all tasks and appointments in the specified date range, including completed tasks and appointments.
- **Show Appointments** displays appointments from the calendar along with the Hotlist tasks.

## Hotlist Task and Appointment Alarms

If you set an alarm for a task or appointment, an alarm window appears at the scheduled alarm time. It displays the details of the task or appointment and enables you to open the task or appointment, turn the alarm off, complete the task or appointment, snooze the alarm for a specified period of time, or make a call to the related Address Book entry. The alarm appears even if MaxMobile is closed. You set your alarm notification options in Profiles on your device.

You can disable alarms by clearing the “Ignore all alarms and notifications” option in MaxMobile Preferences.

## Calendar Appointments

You can view the calendar in daily, weekly, or monthly view mode. You can also jump directly to a specific date by selecting Go to Calendar Date from the menu.

You can add personal appointments or group appointments associated with an Address Book entry or opportunity. When you add an appointment, it fills in the Date, From, and Until fields automatically, but you can change them if necessary. The Subject field is mandatory and cannot be left blank.

When you add an appointment, you can specify to set an alarm for the appointment. You can also choose to notify other users of the appointment. Users then have the ability to accept/tentatively accept or decline the appointment.

You cannot add recurring appointments in MaxMobile. When a change is made to a recurring appointment, only the specific instance of the appointment is changed.

You can also link a personal appointment to a selected entry when you create or modify an appointment in the Calendar window by clicking the Menu key, selecting Link with current entry, and clicking the trackball. Similarly, when you are creating an appointment, you can unlink the appointment from an entry by clicking the Menu key, selecting Remove link, and clicking the trackball.

When you open an appointment, you are automatically in edit mode and can change the appointment details as necessary.

When you open an appointment associated with an opportunity from the Hotlist or Calendar window, the entry information at the top of the Appointment screen becomes a link. You can click the link to retrieve and open the entry. Each Address Book entry in the Attendees list is also a link you can click on to open the entry. Make sure you save any changes to the appointment before linking to the Address Book entry.

## **BlackBerry Contact Integration**

MaxMobile is integrated with the BlackBerry Address Book. This integration allows you to align your BlackBerry Address Book contacts with MaxMobile. For example, you can create a Contact in MaxMobile directly from your BlackBerry Address Book. You can also perform certain tasks such as creating an appointment in MaxMobile for a BlackBerry contact.

### **Creating a Contact from the BlackBerry Address Book**

MaxMobile checks for matching Address Book entries before creating a new entry from the BlackBerry Address Book.



Matching is based on the following Address Book entry information in the following lists:

**List 1**

Full Name/Company Name

Company Name for Individual

All Email Addresses

**List 2**

Full Name/Company Name

Company Name for Individual

All Phone Numbers

Note that MaxMobile checks for matching entries using partial matching. This identifies any entry as a possible match even if all fields considered are not the same in both the new entry and the existing entry. See the Preventing Duplicate Address Book Entries topic in the *Maximizer CRM Administrator's Guide* for more information.

## BlackBerry Phone Integration

MaxMobile is integrated with the BlackBerry Call Log and phone functionality. This integration allows you to log your phone call history in MaxMobile. For example, for each incoming or outgoing call that you receive or make from your BlackBerry, you can log a note in MaxMobile. You can also perform certain tasks from the BlackBerry Call Log such as creating an appointment in MaxMobile for an Address Book entry each time you have an incoming call or make an outgoing call.

## BlackBerry Messages Integration

MaxMobile is integrated with BlackBerry email, SMS, and phone messages. This integration allows you to perform tasks in MaxMobile directly from BlackBerry messages. Before performing any MaxMobile actions, you need to select the message for which you want to perform the task.

## **Creating a Contact from a BlackBerry Message**

Similar to the functionality in the BlackBerry Call Log, you can create a Contact in MaxMobile from a BlackBerry email, SMS, or phone message. The email address or phone number associated with the message is mapped directly to the new entry. See [Creating a Contact from the BlackBerry Call Log](#) for more information.

## **Viewing a Contact from a BlackBerry Message**

Similar to the functionality in the BlackBerry Address Book, you can view a Contact associated with an email address or a phone number in MaxMobile from a BlackBerry email, SMS, or phone message. See [Viewing a BlackBerry Contact in MaxMobile](#) for more information.

## **Performing Actions from a BlackBerry Message**

Similar to the functionality in the BlackBerry Address Book, you can perform actions such as adding an appointment, a Hotlist task, an opportunity, or a note from a BlackBerry email, SMS, or phone message. See [Performing Actions from the BlackBerry Address Book](#) for more information.

## **Saving a Message to a MaxMobile Contact**

You can save an email or a text message as a note for the associated Address Book entry in MaxMobile.

For sent email messages, a note is created for all recipients of the email. For received email and text messages, a note is created in the sender's Address Book entry. For sent text messages, a note is created for only the first recipient in the list.

Note that for email, the note creation date is the date the email was sent. For text messages, the note uses the date the message was saved in MaxMobile as a note. When an email is replied to or forwarded from the BlackBerry, the original message is not included in the note. The type of note that is created is Email for both email messages and text messages.

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## **Applicability**

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