



Maximizer Connect for Outlook 365

Getting Started Guide

for Maximizer CRM Live

Published By |

 **MAXIMIZER**CRM

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Applicability

This document applies to Maximizer Connect for Outlook 365 1.0.

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CHAPTER **1**

Maximizer Connect for Outlook 365

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About Maximizer Connect for Outlook 365

Maximizer Connect for Outlook 365 is an Outlook add-in that connects your Maximizer and Outlook accounts, giving you access to your Maximizer Address Book from within Outlook.

Some of the key features of Maximizer Connect for Outlook 365 are listed below:


- Create individual, company, and contact entries in Maximizer from Outlook email messages.
- Save Outlook email messages to Maximizer entries.
- Create Hotlist tasks in Maximizer from Outlook email messages.
- Create opportunities in Maximizer from Outlook email messages.
- Search for and add Maximizer entries as recipients of outgoing emails in Outlook.

System Requirements

In order to use Maximizer Connect for Outlook 365, you must have the following:

- Outlook 365 Account
- Maximizer CRM Live Account

You can use Maximizer Connect for Outlook 365 in the standard version of Outlook Web App, or in the desktop version of Outlook 2013 or Outlook 2016 when connected to your Outlook 365 account.

 Maximizer Connect for Outlook 365 does not work with the light version of Outlook Web App or the Office 365 plan that does not include email.

Setting Up Maximizer Connect for Outlook 365

There are two parts to installing Maximizer Connect for Outlook 365:

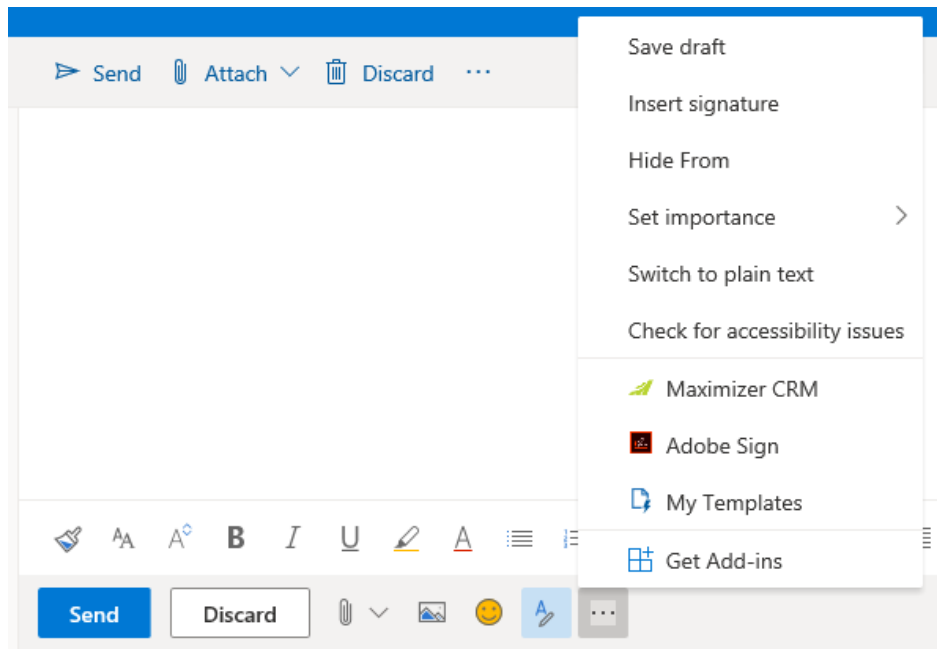
- First, install Maximizer Connect for Outlook 365 in your Outlook account.
- Second, connect Maximizer Connect for Outlook 365 with your Maximizer CRM account.

Install Maximizer Connect from a URL

The first step in setting up Maximizer Connect for Outlook 365 is to add the Maximizer Connect add-in to your Outlook 365 account. You must use the Outlook 365 Web App to install the Maximizer Connect add-in.

1 Compose a new message, or reply a message.

2 Click the "..." button to open the menu and click **Get Add-ins**.

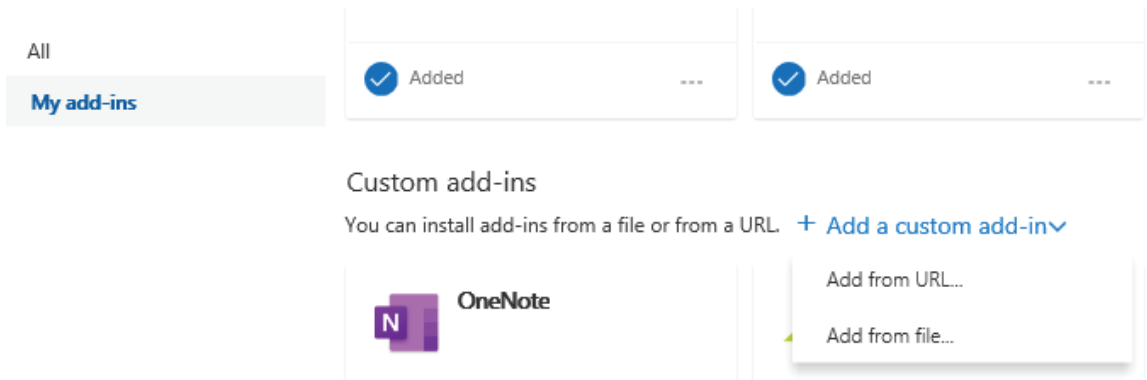


3 Select **My add-ins** tab, and click **+ Add a custom add-in**.

4 From the drop-down, select **Add from URL**.

ADD-INS FOR OUTLOOK

Add-ins may access personal information. By turning an add-in on, you agree to its License Terms and Privacy Policy.



Enter the following URL and click **Next**.

<http://download.maximizer.com/Office365/Outlook365Addin/MaximizerConnectforOutlook365.xml>

If you are in United Kingdom, please use the URL below:

http://download.maximizer.com/Office365/Outlook365Addin/MaximizerConnectforOutlook365_UK.xml

Click **Install** at the confirmation prompt.

The add-in is installed.

Click OK to complete the installation.

Maximizer Connect for Outlook 365 appears in the list of installed add-ins.

Connect Your Maximizer CRM Account

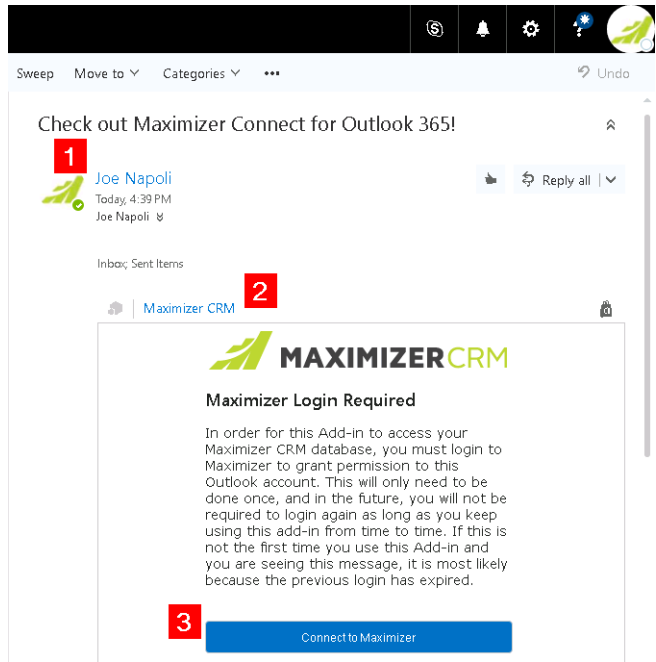
To complete this procedure, Maximizer Connect for Outlook 365 must be installed.

After installing Maximizer Connect for Outlook 365 in your Outlook account, you must connect the add-in to your Maximizer CRM account.

Open an email message in Outlook.

Click **Maximizer CRM** in the gray add-in bar at the top of the message.

Click **Connect to Maximizer**.



4 Enter your Maximizer CRM database alias and click **Submit**.

The database alias of your Maximizer CRM account is the account name you chose when you registered for your account.

Your alias appears in your Maximizer CRM login URL after "https://caw.maximizerscrmlive.com/".

For example, if your Maximizer CRM account URL were:

https://caw.maximizerscrmlive.com/MyAccount

Then your database alias would be:

MyAccount

If you are unsure how to locate the database alias for your account, consult your Maximizer administrator.

5 Enter your **User ID** and **Password** and click **Log In**.



Maximizer Connect for Outlook 365 is requesting authorization to access your Maximizer Address Book. Please log in below.

Log In to:

Escona Tutorial

User ID:

Password:

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Log In

Maximizer Connect for Outlook 365 is connected to your Maximizer CRM account.

Working With Email Messages

Maximizer Connect for Outlook 365 lets you work with your Maximizer Address Book data from any email message in Outlook.

Once you have installed Maximizer Connect for Outlook 365 a **Maximizer CRM** link appears above the contents of any open email message

View Maximizer Entries Associated With an Email

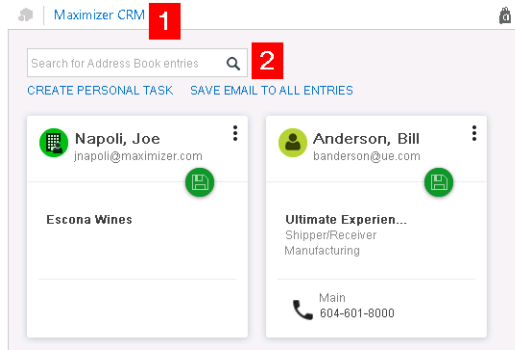
To complete this procedure, Maximizer Connect for Outlook 365 must be installed.

You can view the Maximizer Address Book entries associated with an email message in Outlook.

Maximizer Connect for Outlook 365 automatically displays contact cards for all Maximizer Address Book entries whose email address matches the sender or recipients of the email message.

Each Maximizer contact card displays basic contact information about the entry in Maximizer, and allows you to perform additional tasks with the entry, such as saving the email or creating tasks and opportunities from the email.

- 1** In Outlook, open an email message.
- 2** Select the **Maximizer CRM** link above the message content.
The add-in frame is displayed, along with contact cards for the sender and recipients of the email.
- 3** If the contact card of the entry you are looking for is not automatically displayed in the list, you can search for additional entries.
 - Enter the name or email address of the Address Book entry in the **Search for Address Book entries** field and press Enter or click the search icon.
 - Select the checkbox next to one or more entries in the search results list and click **DONE**.



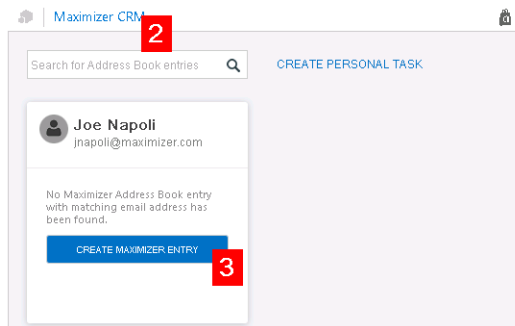
Contact cards for the selected entries are added to the list.

Create a Maximizer Address Book Entry

To complete this procedure, Maximizer Connect for Outlook 365 must be installed.

You can create Address Book entries in Maximizer directly from the sender or recipients of email messages in Outlook.

- 1** In Outlook, open an email message.
- 2** Select the **Maximizer CRM** link above the message content.
The add-in frame is displayed, along with contact cards for the sender and recipients of the email.
- 3** Click the **CREATE MAXIMIZER ENTRY** button on the contact card for a contact that does not already exist in Maximizer.



The Create Maximizer Address Book Entry frame opens.

- 4** Select the type of entry you want to create:

- Select **Create a company and a contact** to create a new company and contact entry.
- Select **Create a contact from an existing company or individual** to create a contact for an existing company or individual entry. You will have an opportunity to search for the company or individual entry in the next step.
- Select **Create an individual** to create a new individual entry.

5 If you selected the Create a contact from an existing company or individual option, search for the company or individual entry:

- Click **SEARCH FOR A COMPANY OR AN INDIVIDUAL**.
- Enter the name of the company or individual and press Enter or click the search icon.
- Select the company or individual from the search results and click **DONE**.

6 Enter the contact information in the fields below.

Maximizer CRM

Create Maximizer Address Book Entry

OPTIONS

- Create a company and a contact **4**
- Create a contact from an existing company or individual
- Create an individual

COMPANY

* Name:

5 [SEARCH FOR A COMPANY OR AN INDIVIDUAL](#)

CONTACT

Details	Phone
Mr/Ms: <input type="text"/>	Main <input type="text"/>
First Name: Joe	Fax <input type="text"/>
Middle Name: <input type="text"/>	Mobile <input type="text"/>
* Last Name: Napoli	Home <input type="text"/>

7 Click **SAVE**.

The new entry is created in Maximizer.

Save an Email Message to a Maximizer Entry

To complete this procedure, Maximizer Connect for Outlook 365 must be installed.

You can save email messages in Outlook to your Maximizer Address Book entries. Emails are saved as notes to the selected Maximizer entries.

- 1** In Outlook, open an email message.
- 2** Select the **Maximizer CRM** link above the message content.
The add-in frame is displayed, along with contact cards for the sender and recipients of the email.
- 3** If the contact card for the entry to which you want to save the email is not displayed, you can search for it:
 - Enter the name or email address of the Address Book entry in the **Search for Address Book entries** field and press Enter or click the search icon.
 - Select the checkbox next to one or more entries in the search results list and click **DONE**.
- 4** Click the save icon on a contact card to save the email directly to that entry.
– or –
Click **SAVE EMAIL TO ALL ENTRIES** to save the email to all of the entries whose contact cards are displayed.
The email is saved to the notes of the Maximizer entries.

Create a Hotlist Task From an Email

To complete this procedure, Maximizer Connect for Outlook 365 must be installed.

You can create Hotlist tasks in Maximizer from email messages in Outlook.

- 1** In Outlook, open an email message.
- 2** Select the **Maximizer CRM** link above the message content.
The add-in frame is displayed, along with contact cards for the sender and recipients of the email.
- 3** If the contact card of the entry for which you want to create the task is not displayed you can search for it:

- Enter the name or email address of the Address Book entry in the **Search for Address Book entries** field and press Enter or click the search icon.
- Select the checkbox next to one or more entries in the search results list and click **DONE**.

4 Click **CREATE PERSONAL TASK** to create a personal Hotlist task.

– or –

To create a Hotlist task with a Maximizer entry, hover your mouse over the three-dot menu in the upper-right of the entry's contact card and select **Create Task**.

The Create Task page opens.

5 Enter the task details and click **SAVE**.

The screenshot shows the 'Create Task' form in the Maximizer CRM interface. The form is titled 'Create Task' and has a breadcrumb 'Maximizer CRM'. It contains the following fields and options:

- Date:** 10/04/2016 (with a calendar icon)
- Time:** - (with a dropdown arrow)
- Set alarm:** A checkbox that is unchecked, followed by a text input field and a 'Minute(s)' dropdown menu.
- Activity:** Check out Maximizer Connect for Outlook 365
- Priority:** A dropdown menu with a blue arrow.
- Assigned to:** Joe Napoli (with a dropdown arrow)
- Task type:** Two radio buttons: 'Task with Napoli, Joe - Escona Wines' (which is selected) and 'Personal task'.
- Buttons:** 'SAVE' and 'CANCEL' buttons at the bottom right.

The task is created in Maximizer.

Create an Opportunity From an Email

To complete this procedure, Maximizer Connect for Outlook 365 must be installed.

You can create opportunities in Maximizer from email messages in Outlook.

1 In Outlook, open an email message.

2 Select the **Maximizer CRM** link above the message content.

The add-in frame is displayed, along with contact cards for the sender and recipients of the email.

3 If the contact card of the entry for which you want to create the opportunity is not displayed you can search for it:

- Enter the name or email address of the Address Book entry in the **Search for Address Book entries** field and press Enter or click the search icon.
- Select the checkbox next to one or more entries in the search results list and click **DONE**.

4 Hover your mouse over the three-dot menu in the upper-right of a contact card and select **Create Opportunity**.

The Create Opportunity frame opens.

5 Enter the details for the opportunity.

- Click **EDIT** or **REMOVE** next to the Contact field to change the Maximizer contact associated with the opportunity.
- Click **EDIT** next to the Product/Services field to open the Select Products/Services dialog.
- Click **EDIT** next to the Categories field to open the Select Categories dialog.

6 Click **SAVE**.

Maximizer CRM

Create Opportunity

Company: Ultimate Experience.

Contact: Anderson, Bill - Ultimate Experience. [REMOVE](#) | [EDIT](#)

Product/Services: Accessories, Products [EDIT](#)

Categories: [EDIT](#)

Objective: Promote fall product line

Description:

Start Date: 10/04/2016

Close Date: 10/31/2016

Revenue: 5000

Cost: 1000

Sales Team: *Single User

Leader: Joe Napoli

[SAVE](#) [CANCEL](#)

The opportunity is created in Maximizer.

Working With Outgoing Messages

With Maximizer Connect for Outlook 365 you can send email messages to your Maximizer contacts from Outlook.

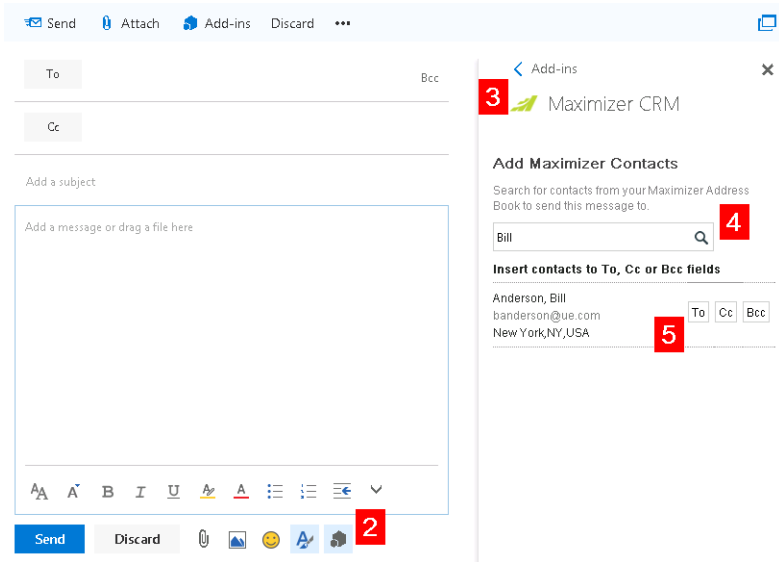
Send an Email to a Maximizer Entry

To complete this procedure, Maximizer Connect for Outlook 365 must be installed.

You can send email to your Maximizer Address Book entries from Outlook.

- 1** In Outlook, open a new email message.
- 2** Click the Add-ins icon to display the installed Add-ins.
The list of Add-ins appears.
- 3** Select the Maximizer CRM Add-in.
– or –
If you are using the desktop version of Outlook, select the Maximizer CRM Add-in and click **Start**.
The Maximizer CRM side panel appears.
- 4** Enter the name or email address of the Maximizer entry in the Search Address Book entries and press Enter or click the search icon.
The search results are displayed below.
- 5** Click the **To**, **Cc**, or **Bcc** button next to the contact to whom you want to send the email.

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The contact is added as a recipient to the email in the corresponding field.