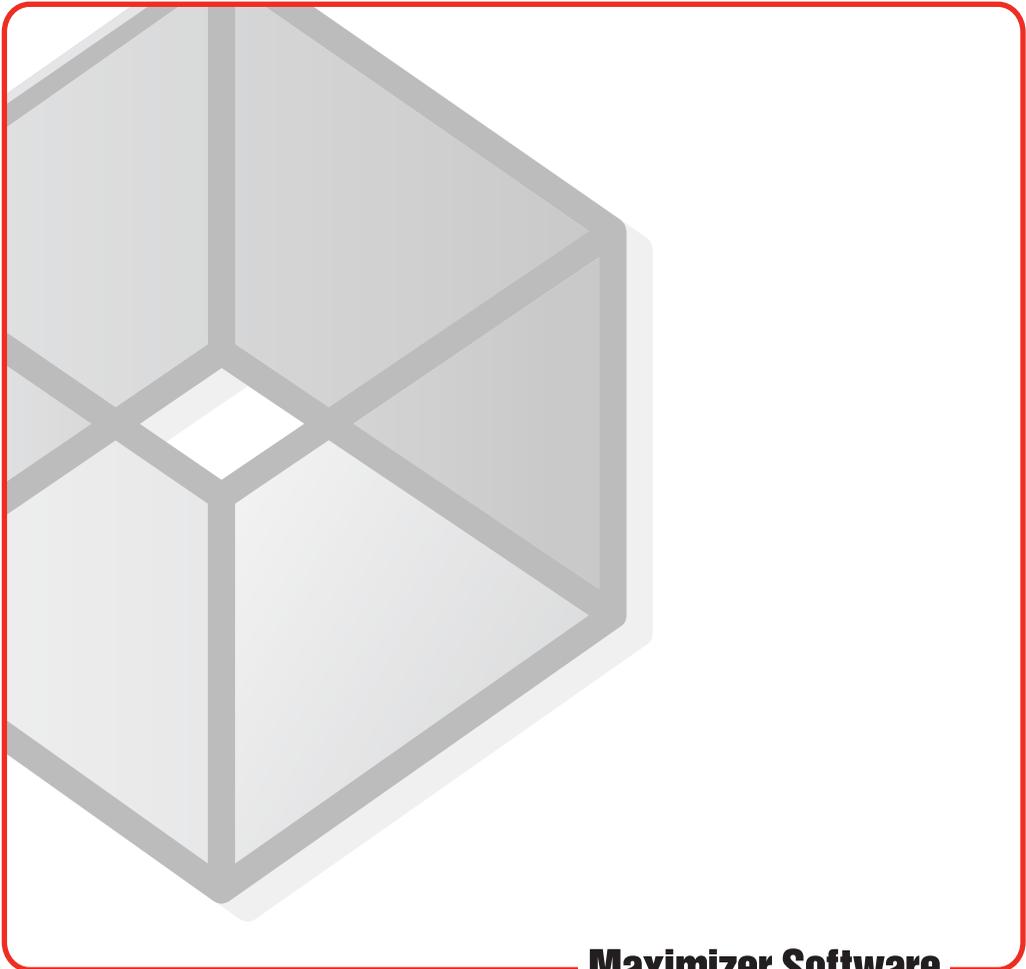


# Maximizer™

*Entrepreneur* **CRM**10

## User's Guide



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



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## Printing Information

First printing: January 2008

## Applicability

This document applies to Maximizer CRM 10 Entrepreneur Edition.

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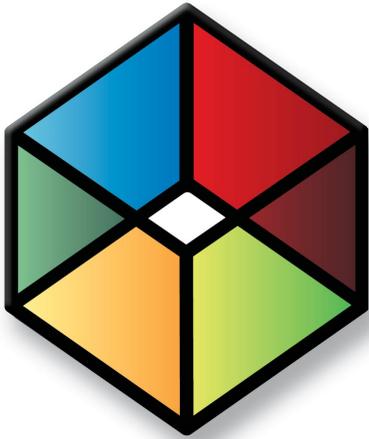
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CHAPTER **1**  
**Welcome to  
Maximizer**

*Introducing Maximizer*

In this chapter...

"Grow Your Business with Maximizer" on page 2

"Administrator" on page 5

"Maximizer Companion Applications" on page 6

"Maximizer System Requirements" on page 8

"Where to Go from Here..." on page 9

## 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, Palm® synchronization, Accounting Link Designed for use with QuickBooks®, a company library, and e-commerce.

### 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, emails, 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 use Microsoft Word or Corel WordPerfect
- Fax your customers
- Send email messages instantly using a VIM- or MAPI-compliant email client

## Marketing

- Share documents, collateral, 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

## eCommerce Integration

- Use a wizard-driven tool to help you build your website every step of the way—no programming, technical expertise, or design skills required
- Build a web store that supports real-time credit card transaction processing
- 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
- Generate website traffic with automatic search engine registration

## 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

## Palm, BlackBerry, and Windows Mobile Access

- Easily access and update your Maximizer CRM information using a Palm OS, BlackBerry, Pocket PC, or Smartphone device

# 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 from the File menu in Maximizer (File > Administrator).

## Maximizer Companion Applications

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

### ecBuilder

ecBuilder is an online store. Refer to the ecBuilder online manual and help installed with the application. You can access the online manual from the Start menu. ecBuilder is a separate installation available from the Maximizer CD.

### 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.

### MaxFinder

MaxFinder, also a Maximizer companion application, lets you browse or search for entries in a Maximizer Address Book. As with MaxAlarm, MaxFinder automatically starts when you start your computer, and its icon resides in your Windows System Tray.

MaxFinder provides a fast alternative for quick lookups and even allows you to record phone calls, time activities, or write notes for any entry in your Address Book without opening a Maximizer Address Book.

## Maximizer Form Designer

Maximizer Form Designer allows you to create custom dialog boxes (forms). When adding or modifying Address Book entries, you can then select the form you want to use. To access Maximizer Form Designer from Maximizer's Tools menu, you must choose the Maximizer Form Designer option during a custom installation.

For more information, refer to the online manual installed with Maximizer (Help menu > Maximizer Form Designer Guide). You can also refer to the Maximizer Form Designer's online help for assistance.

## MaxLink/MaxMobile

Combined with Maximizer, MaxLink for the Palm® OS, or MaxMobile for the Windows Mobile™ OS form a powerful suite of tools offering you all of the contact management features of Maximizer with the portability and convenience of a handheld 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 synchronize record additions, changes, and deletions between the two products. When data is synchronized regularly, performance speed is optimal because only records that have been modified are read during the process.

# Maximizer System Requirements

 Visit our website at [www.maximizer.com](http://www.maximizer.com) for the most up-to-date product compatibility information.

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

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

## System Requirements

Minimum Processor Speed	600 MHz (minimum); 800 MHz (minimum for Windows Vista) 1.6 GHz or faster processor (recommended)
Available RAM	512 MB (minimum); 1 GB (minimum for Windows Vista) 1 GB (recommended); 2 GB (recommended for Windows Vista)
Available hard disk space	1 GB (minimum) 2 GB or more (recommended)
Minimum video resolution	SVGA (800x600) or higher-resolution video adapter and monitor
Operating system	Microsoft Windows 2000, XP <sup>a</sup> , Vista <sup>b</sup> , or 2003 (updated to their latest service packs)
Email system	32-bit MAPI- or VIM-compliant
Internet browser	Microsoft Internet Explorer 6.0 or 7.0

- a. Windows XP Home is not supported in a networked environment.
- b. Windows Vista Home Basic/Premium are not supported in a networked environment. Also, please visit our website for incompatibility issues related to Windows Vista.

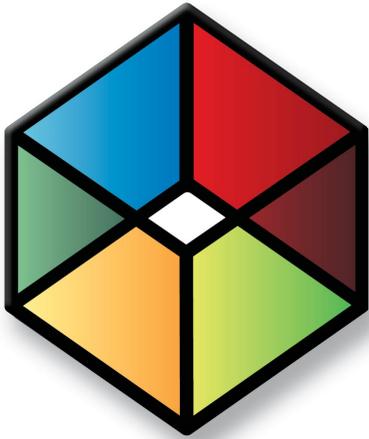
## Where to Go from Here...

### Explore Maximizer in a safe training ground

The Maximizer Training Guide is designed to introduce you to the fundamentals of using Maximizer. Using the example of Escona Estate Wines—a fictitious vintner in the Sonoma Valley—you can follow tutorials that take you through real-world examples of how to use the various components of Maximizer. Daily tasks in marketing, sales, and administration give you the springboard you need as a novice user to start you on your way to being a Maximizer expert.

To order the Maximizer Training Guide, contact your nearest Maximizer office. When you order the training guide, you receive a CD demonstrating online step-by-step instructions for all tutorial exercises in the guide, as well as a printed manual to follow along with.





## CHAPTER **Finding Information** 2

*Access Maximizer CRM Help and User Guides*

In this chapter...

“Overview” on page 12

“Press F1 for Help” on page 13

“Opening the Help Table of Contents” on page 14

“Reading the Maximizer Guides Online” on page 15

“Exploring Maximizer with the Sample Address Books” on page 16

## Overview

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're 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.
- **Contents Help** – online step-by-step instructions with a table of contents, an index, and search.
- **Online manuals** – on-screen versions of the printed documentation that you can read using Adobe Acrobat Reader.

Whether you're looking for help using a particular dialog box or looking for instructions on how to perform an activity, you can always find what you're looking for in the Help. Maximizer Help provides not only step-by-step instructions for each module, but also detailed descriptions of every control in every dialog box and window. See "Press F1 for Help" on page 13 and "Opening the Help Table of Contents" on page 14.

Each Maximizer module has its own Help. To find out how to use a module, select Contents from the module's Help menu or press F1 in any window or dialog box.

In addition to the Maximizer User's Guide (this book), Maximizer also includes online documentation in Adobe PDF format. You can read the PDFs using Adobe Acrobat or Acrobat Reader, which you can download from the Adobe website ([www.adobe.com](http://www.adobe.com)). See "Reading the Maximizer Guides Online" on page 15.

# Press F1 for 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.

The screenshot shows the 'Maximizer CRM' F1 Help window. At the top, there are buttons for 'Hide', 'Back', 'Print', and 'Options'. Below these is a search field with the text 'Type in the keyword to find:' and the input 'Calendar window'. A 'List Topics' button is to the right of the search field. Below the search field is a list of topics under the heading 'Select Topic to display:'. The list includes items like 'Access Rights', 'Access Rights for user', 'Access Settings for user', 'Add Windows User Name for Maximizer Use', 'Add/Modify Appointment - Appointment Tab', 'Add/Modify Plan Appointment', 'Basic Information (Case for)', 'Calendar (day)', 'Calendar (one month)', 'Calendar (week)', 'Calendar (weekly list)', 'Calendar/Hotlist', 'Email Window', 'Estimate', 'General', 'Hotlist Task', 'Hotlist Window', 'Invoice', 'Logging', 'My Work Day', 'Opportunities Window', 'Properties for Group', 'Purchase Order', 'Schedule Action Plan (for Address Book ent', 'Schedule\_an\_Action\_Plan', 'Search for Knowledge Base Articles', 'Solution Information & Billing', 'Status', 'System Defaults', and 'Users and Resources Color Legend'. A 'Display' button is at the bottom right of the list. To the right of the list is a preview pane for the selected topic, 'Calendar (week)'. The preview pane contains text describing the calendar view and navigation options, along with a list of tasks for managing appointments.

Enter a keyword and click List Topics to search for topics containing the keyword.

"Shortcuts" like this one link you directly to more information about what you're doing.

Topics containing your search keyword are displayed in this list.

Click this button to open the selected topic. You can also open a topic by double-clicking it.

## Opening the Help Table of Contents

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.

### ➤ To open the Help Contents for a module

- In any module, select **Help > Contents**.

### ➤ To print one topic

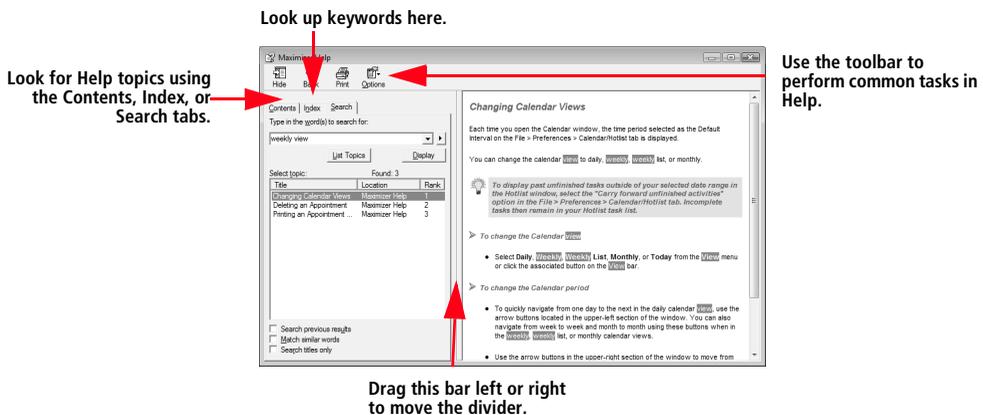
- Select the topic in the Contents and click **Print**.

### ➤ To print multiple topics

- 1** Select a book in the Contents.
- 2** Click **Print**.
- 3** Select **Print the selected heading and all subtopics**.

### ➤ Search for topics by any word or words

- In the **Search** tab, type the word or words you are looking for and click **List Topics**. Help lists the matching topics and ranks them by how close the topics match your search parameters.



# Reading the Maximizer Guides Online

A typical installation of Maximizer includes manuals that you can read online using Adobe Acrobat or Acrobat Reader. Having the Maximizer manuals in this format offers the advantage of full-text search, as well as hyperlinks on the table of contents, index, and any cross-references.

## ➤ Install Adobe Acrobat Reader

- You need Adobe Acrobat Reader to open the online manuals. You can download the free Reader from the Adobe website ([www.adobe.com](http://www.adobe.com)).

## ➤ To access the online guides

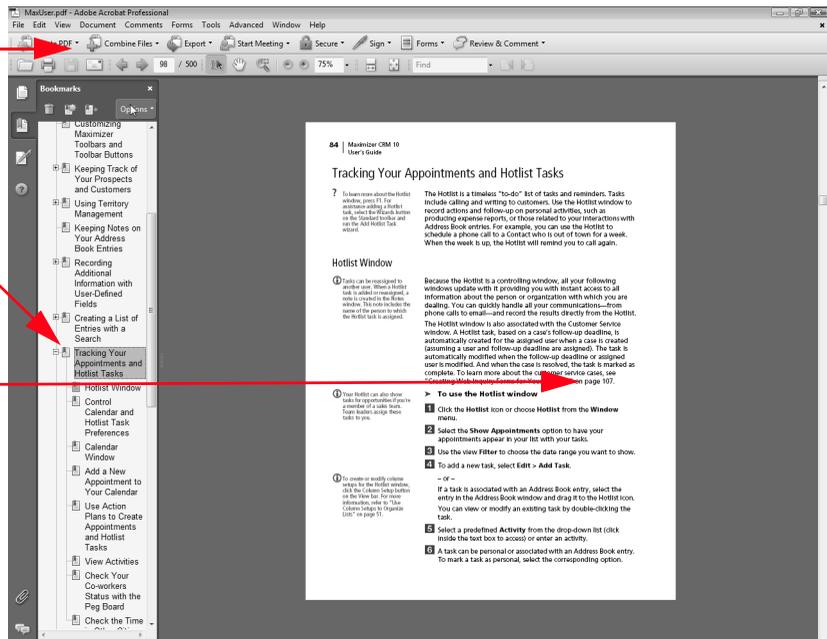
- From the Help menu, select the guide you would like to use.  
– or –
- From the Start menu, select Programs > Maximizer > Documentation and Help > Maximizer Documentation.

If you want to increase the size of the text, you can easily adjust the magnification. Open the **View** menu, and select **Zoom To**.

Use the toolbar to navigate—turn the page, change the magnification, search for text in the manual, and more.

Click on a heading in the table of contents to open the page you want.

Click on a referenced topic page number to go directly to the topic.



The pages appear on the screen as they would if they were printed—all of the graphics and text appear the same as in the printed manual. You can “turn the page” by using the previous and next arrows or pressing the Page Up or Page Down keys.

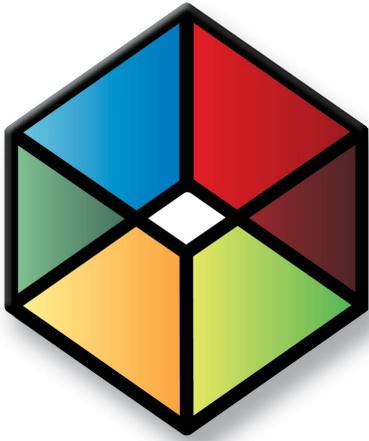
## Exploring Maximizer with the Sample Address Books

In a typical 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. You can supplement your learning experience through the use of the *Maximizer Training Guide* and CD.

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 Installing Maximizer

### In this chapter...

- "Third-party Components Installed with Maximizer CRM" on page 18
- "Windows Login Account Rights Required for Installation" on page 20
- "Upgrading from a Previous Version of Maximizer" on page 20
- "Installing Maximizer CRM" on page 22
- "Installing ecBuilder Pro Lite" on page 27
- "Installing MaxLink for Palm OS" on page 27
- "Adding and Removing Maximizer CRM Components" on page 28
- "Installing Licenses" on page 29
- "Updating Maximizer Installations with Live Update" on page 31
- "Where to Go from Here..." on page 33

## Third-party Components Installed with Maximizer CRM

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

- Microsoft SQL Server Express Database Engine
- Microsoft .NET Framework
- Crystal Reports Viewer
- Microsoft Data Access Components (MDAC)

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

### Microsoft SQL Server Express Database Engine

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

Upgrading an existing Pervasive or Btrieve Address Book requires the Pervasive.SQL database engine, which must be installed from your Pervasive.SQL CD if necessary.

### Microsoft SQL Server Management Studio Express

Microsoft SQL Server Management Studio is a tool you use to manage your database. The setup is found in the following location:

MaxCRM\3RDPARTY\SQLExpr

### Crystal Reports

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

The Maximizer CRM Server installation creates the following folder, which contains shared reports:

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

All folders and reports within this folder are accessible from the Reports > Crystal Reports menu in Maximizer. Maximizer installs a set of standard reports, but you can also create your own custom, shared reports and save them in this folder.

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

- ...My Documents\MaximizerReports

This local folder is the default location for personal report templates, which can be created from the Reports > Crystal Reports > Personal Custom Report menu in Maximizer. Users must belong to the Crystal Reports Users security group to use this function.

## Windows Login Account Rights Required for Installation

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

## Upgrading from a Previous Version of Maximizer

**i** ALWAYS back up the Address Book before upgrading Maximizer. For instructions on backing up, refer to the User's Guide for your previous version of the software. If you have customized the dictionary, also back those files up separately before upgrading.

If you are currently running an earlier version of Maximizer and want to upgrade, it is strongly recommended that you install the new version without manually uninstalling the previous version.

When you install the new version, the setup will prompt you to uninstall the old version automatically. This method does not overwrite your Maximizer settings. Window layout, colors, fonts, and other Maximizer settings are carried over to the new version.

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

- 1** Back up your Maximizer Address Book. Refer to the instructions in the User's Guide for your previous version of the software.
- 2** If you have customized the dictionary, also back those files up separately before upgrading. For instructions, refer to "Backing up the Dictionary and Holiday Files" on page 239.
- 3** Uninstall Maximizer components such as MaxLink for Palm OS, on your computer.
- 4** Install the new version of Maximizer, as described in this chapter.
- 5** Upgrade your Maximizer Address Book database to the new version, as described in "Upgrading or Converting an Address Book" on page 42.

If the automatic uninstall is unsuccessful, you can use the following steps to uninstall Maximizer manually.

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

### ➤ To uninstall Maximizer

- 1** Click **Start > Settings > Control Panel > Add/Remove Programs**. In Windows Vista, click **Start > Control Panel > Programs and Features**.
- 2** In the list of currently installed programs, select **Maximizer CRM**.
- 3** Click **Change/Remove**. In Windows Vista, select **Uninstall/Change**.
- 4** Click **Yes** to confirm.  
  
The Remove Programs From Your Computer dialog box displays the uninstall progress.
- 5** If the Remove Shared File? dialog box opens, click **No To All**.
- 6** When the uninstall is complete, click **OK** to close the dialog box.
- 7** Reboot the computer.

# Installing Maximizer CRM

**i** You must be logged into Windows as an administrator to install Maximizer. After installation, it prompts you to restart the computer, and then you must log in as an administrator again to complete the installation.

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

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

An installation wizard steps you through the process of installing the software on the computer. The instructions in this section complement the wizard to provide additional information.

## ► To install Maximizer

**1** Close all programs running on the computer.

**2** Insert the Maximizer CRM CD in the CD-ROM drive.

The setup starts automatically.

**3** Select **Install Maximizer CRM**.

The InstallShield Wizard starts.

**4** Click **Next** to begin the installation.

**5** Read the license agreement, and click **Yes** to continue.

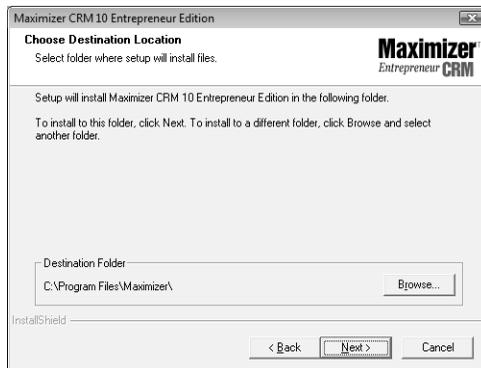
**6** Enter your **Product Serial Number, First name, and Last name** into the required fields, and click **Next**.

**7** Read the Release Notes, and click **Next**.

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

– or –

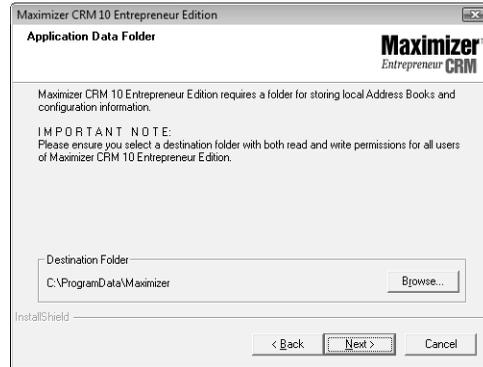
Click **Browse**, select a destination folder, and click **Next**.



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

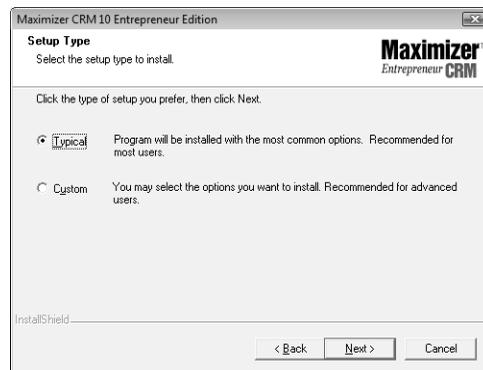
– or –

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



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

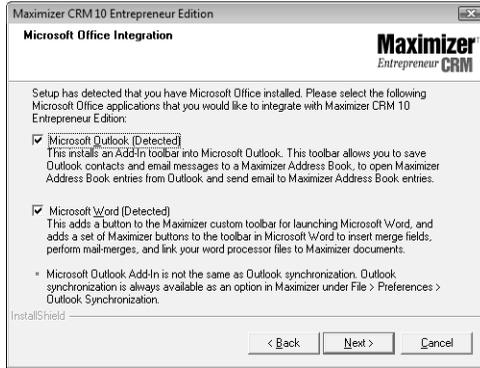
**10** Select a setup type, and click **Next**.



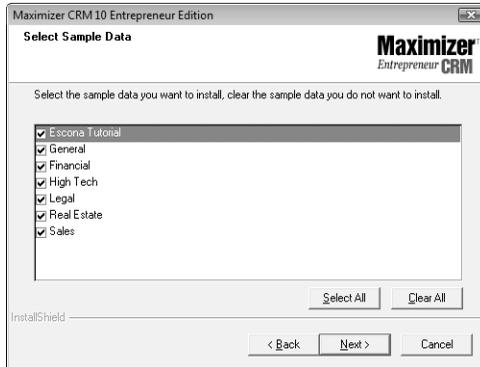
**Typical** installs a default set of software, such as drivers. It also installs a default set of Maximizer applications. Maximizer recommends that you select the Typical installation, unless you have a specific reason not to.

**Custom** enables you to select specific Maximizer modules to install. Select this option only if you have a specific reason to alter the default Maximizer installation provided by the Typical installation. If you would like to install additional components, such as Form Designer, click the + to expand the selection.

**1 1** If you have Microsoft Outlook or Microsoft Word installed on this computer, the wizard prompts you to integrate either or both of those applications with Maximizer. Select which applications to integrate, and click **Next**.



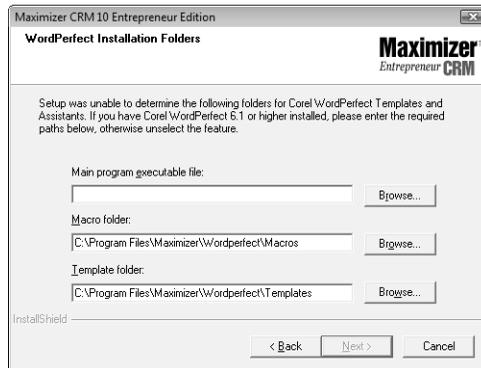
**1 2** (This step applies to Typical installations only.) Select which sample Address Books to install, and click **Next**. Note that the EsconaTutorial Address Book is required for the Maximizer Training Guides.



**1 3** (This step applies to Custom Installations only.) Select which features to install, and click **Next**.



**1 4** (This step applies to the Corel WordPerfect Office Integration option only.) If the setup cannot locate Corel WordPerfect Office on the computer, it prompts you to provide the path to these files and folders. Click **Browse** to select the correct paths, and click **Next**.

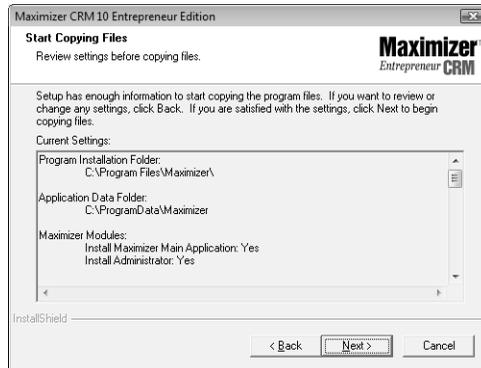


**1 5** Select any of the following options, and then click **Next**:

**Create Maximizer desktop shortcut**—This option creates an icon on the Windows desktop that runs Maximizer when you double-click it.

**Create Maximizer Start Menu shortcut**—Creates a shortcut to Maximizer on the Windows Start menu.

- 1 6** Review the installation settings, and click **Next** to begin installing.



The wizard displays an installation progress indicator.

When the installation is complete, you are prompted to restart your computer.

- 1 7** Click **Finish** to close the wizard and restart the computer.
- 1 8** After the computer restarts, log into Windows using an administrator account. This step is required to complete the installation.

## Installing ecBuilder Pro Lite

**i** To upgrade to the full version of ecBuilder, contact your nearest Maximizer office.

ecBuilder is a wizard-based website creation program, complete with an online catalog, credit card ordering, and encrypted security. Orders and inquiries generated by the catalog site are automatically integrated with Maximizer's OrderDesk window.

In addition to the software used for creating your online catalog, the ecBuilder installation includes sample catalogs and detailed online documentation.

### ► To install ecBuilder Pro Lite

- 1** Close all programs running on the computer.
- 2** Insert the Maximizer CD in the computer's CD-ROM drive.
- 3** The setup starts automatically.
- 4** Select **Install ecBuilder Pro 6.0 Lite**.
- 5** Click **Next**, and follow the on-screen instructions to complete the installation.

**i** Your Maximizer software comes with a product serial number for ecBuilder Pro Lite. Enter this number when you reach the product registration screen.

## Installing MaxLink for Palm OS

MaxLink for Palm OS (MaxLink), the tool for synchronizing your data with your Palm operating system device, is available from the Maximizer website as a download.

The MaxLink installation includes a Getting Started guide to get you started, as well as a detailed manual with step-by-step instructions on using MaxLink. These manuals are in PDF format.

### ► To install MaxLink for Palm OS

- 1** Close all programs running on the computer.
- 2** Browse to the location of your MaxLink Setup files. These are the files you download from the Maximizer website.
- 3** Double-click the **Autorun.exe** and follow the on-screen instructions to complete the installation.

## Installing MaxMobile

Refer to your MaxMobile documentation for specific instructions on installing MaxMobile.

## Adding and Removing Maximizer CRM Components

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

### ► To add or remove Maximizer CRM components

- 1** Close all programs running on the computer.
- 2** Insert the Maximizer CD in the computer's CD-ROM drive.
- 3** On the Setup CD Autorun screen, select **Install Maximizer CRM**.

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

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

Checkboxes are automatically selected for any currently installed components.

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

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

- 7** Click **Next**.

Maximizer begins the update.

 Expand the branches to add or remove sub-components.

# Installing Licenses

When you purchase licenses from Maximizer Software, you receive a Product License Number (PLN), which includes licenses for a specified number of users. Maximizer comes with a default single-user license. Because Maximizer licenses are stackable, any additional licenses applied to Maximizer will be added to your current license count. For example, if you have the default single-user license and want to upgrade to eight licenses, you need a new PLN for seven users only, and you can apply it in addition to the original single-user PLN.

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

## Installing a License

After you install Maximizer or purchase additional licenses, you must install the PLN(s).

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

- 1 Run Administrator.
- 2 Select **Utilities > Install Multi-User License**.
- 3 Enter the PLN.
- 4 Click **Install License**.

License	Product	User Count	De
---------	---------	------------	----

- 5 Repeat steps 3 and 4 to install any additional licenses.

**6** Click **Close**.

Administrator closes automatically.

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

## Applying a License

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

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

**1** After installing the license as described above, start Administrator.

**2** Open and close each Address Book that you are applying licenses to.

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

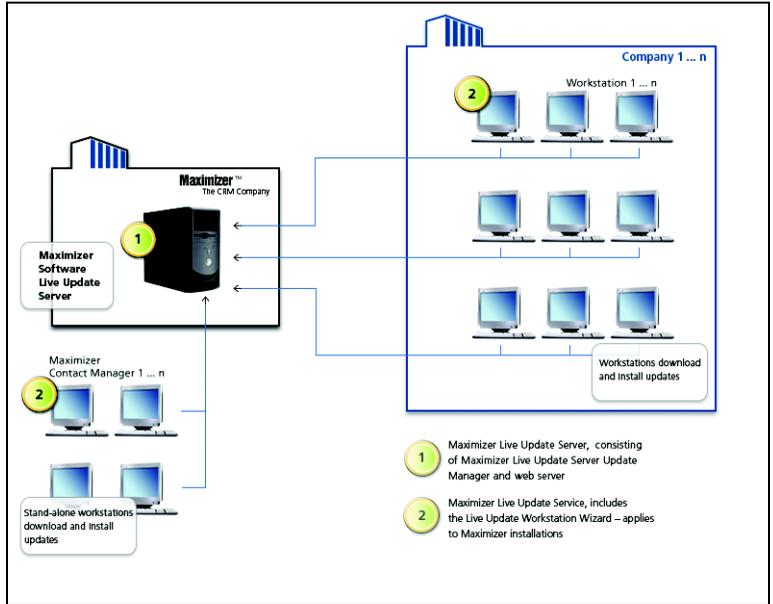
## Viewing Applied and In-use Licenses

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

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

# Updating Maximizer Installations with Live Update

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

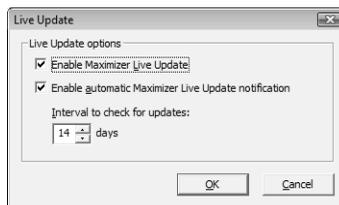


By default, Live Update is enabled, automatic notifications are enabled, and the interval to check for updates is set to 1 day. You can modify these preferences as required in Administrator.

## ➤ To configure Live Update preferences

- 1 Start Administrator (Start > Programs > Maximizer > Administrator) and log into the Address Book.
- 2 Select **File > Preferences**.
- 3 On the System Options tab, click **Live Update**.
- 4 Update any of the preferences as desired, and click **OK**.

**i** Press F1 in the Live Update dialog box for information about each of the settings.



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

➤ **To start the Live Update Wizard**

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

➤ **To download software updates from the server**

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



- 2** Click **Next**.

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

- 3** Select the update(s) to download.

- 4** Click **Next** to download the selected updates.

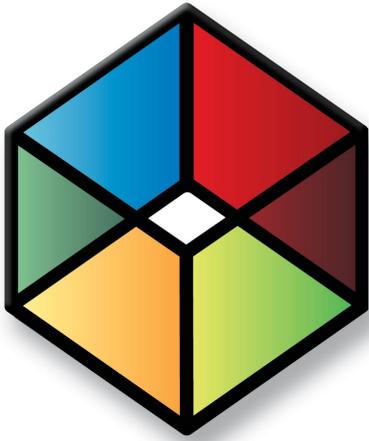
- 5** Click **Finish** to close the wizard.

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

## Where to Go from Here...

- Create a new Address Book or upgrade an existing Address Book to the latest version of Maximizer, as described in chapter 4 “Creating or Upgrading an Address Book” on page 35.
- Create login accounts for Maximizer users and assign users to security groups, as described in chapter 5 “Setting up Users and Groups” on page 45.
- Configure Address Book preferences, including duplicate Address Book entry handling, user-defined fields, and key fields, as described in chapter 6 “Configuring an Address Book” on page 65.
- For more information on converting a database, please refer to chapter 12 “Managing Address Book Data” on page 233.





# CHAPTER 4

## Creating or Upgrading an Address Book

In this chapter...

- "What is Administrator?" on page 36
- "Creating a New Address Book" on page 37
- "Connecting to an Address Book" on page 39
- "Maximizer System Login Accounts" on page 40
- "Changing the MASTER User Password" on page 41
- "Upgrading or Converting an Address Book" on page 42
- "Importing Vertical Templates" on page 43

## What is Administrator?

Administrator is the administrative center of Maximizer. Use it to

- manage users and security groups,
- create and configure Address Books, and
- manage Maximizer application settings.

Once Administrator is running, you can open any Address Book and perform administrative tasks. There will be no database conflicts if you open an Address Book while it is in use by another user. (However, you should ensure all users have logged out before backing up or restoring the Address Book.) Also, changes to the user's settings require the corresponding logged-in user to log into the Address Book again before the settings will take effect.

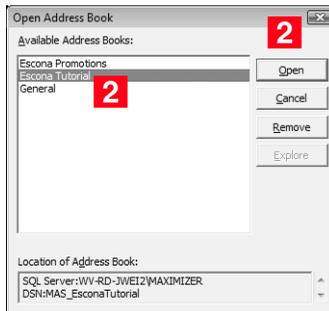
### ➤ To start Administrator

- Click **Start > Programs > Maximizer CRM > Administrator**.

### ➤ To open an Address Book in Administrator

**1** Start Administrator.

**2** Select an Address Book, and click **Open**.



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

**3** Type the **Password**, and click **OK**.



The selected Address Book opens in Administrator.

## Creating a New Address Book

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

**i** For information about transferring Address Book information, refer to “Importing Address Book Data from MXI or XML Files” on page 248 and “Transferring Entries between Address Books” on page 269.

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

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

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

### Checklist: Setting up a New Address Book

**i** These steps highlight the major tasks involved in creating a new Address Book.

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

- 1 Create the new Address Book.** For detailed information, refer to “Creating a New Address Book” on page 38.
- 2 Change the MASTER user password.** For instructions, refer to “Changing the MASTER User Password” on page 41.
- 3 Enable security for an Address Book.** This applies only if there are multiple users in your Address Book. To enable security, select the **Enable security** option on the **System Options** tab in Administrator preferences.
- 4 Add users to the Address Book.** When you create a new Address Book, it contains only the MASTER user account. Create an account for each Maximizer user.

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

- 5 Set up security for users and security groups.** You may want some users to have more access to your Address Book data than other users. Administrator lets you restrict access to specific users and groups of users. For information about users and security groups, refer to “Setting up Users and Groups” on page 45.

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

## Creating a New Address Book

**i** The location of this folder may be different if you specified a different folder during the Maximizer installation.

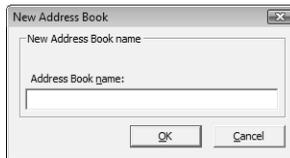
Use Administrator or Maximizer to create new Address Books.

Maximizer Address Book files are stored in the ...\\Documents and Settings\\All Users\\Application Data\\Maximizer\\AddrBks folder. If other users should be able to access these files, you must grant those users access permissions to the folder.

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

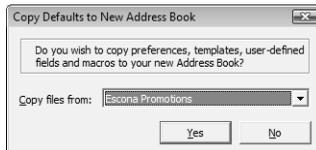
### ► To create a new Address Book

- 1** Select **File > New Address Book**.



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

Maximizer prompts you to copy defaults from an existing Address Book to the new Address Book.



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

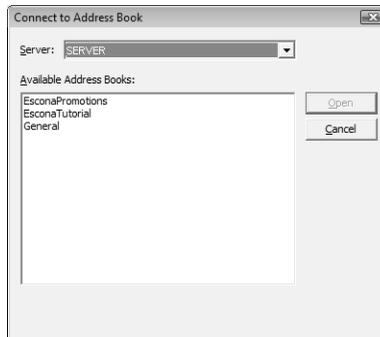
Maximizer creates the new Address Book.

# Connecting to an Address Book

Maximizer allows you to connect to any Address Book on a computer running SQL Server Express.

## ➤ To connect to an Address Book

- 1** From Administrator or Maximizer, select **File > Connect to Address Book**.
- 2** In the **Connect to Address Book** dialog box, select the computer that hosts the Address Book to which you would like to connect.
- 3** Choose an Address Book from the **Available Address Books** list and click **Open**.



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

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

## Maximizer System Login Accounts

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

- **MASTER** is required to log into the Administrator module of Maximizer.
- **COMPANY** is used for the company calendar, which displays company events in the Maximizer calendar. Company calendar events are created under the COMPANY user account. This user account provides read-only access of its calendar to all users.

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

It is important to leave the MASTER user account enabled and with its default settings. Maximizer requires this account to function correctly. Note that the MASTER user account consumes a license only if you are logged into Maximizer with the MASTER user account.

It is important to change the password for this system login account from its default immediately after creating an Address Book. For instructions on changing the account password, refer to "Changing the MASTER User Password" on page 41.

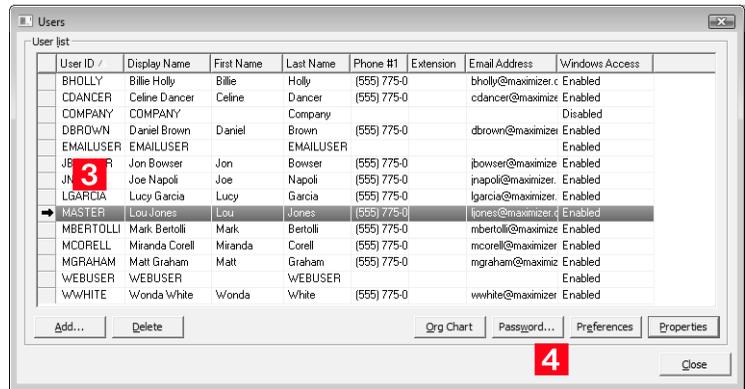
# Changing the MASTER User Password

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

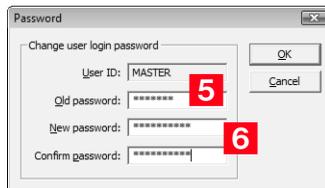
The default password for the MASTER user is **control**. For security reasons, you should change this password immediately after creating a new Address Book.

➤ **To change the MASTER user password**

- 1** Run Administrator and log into the Address Book as MASTER.
- 2** Select **File > Users**.
- 3** Select **MASTER** from the user list.



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



The MASTER user password has now been changed.

## Upgrading or Converting an Address Book

**i** ALWAYS back up the Address Book before upgrading. For instructions on backing up, refer to “Backing up and Restoring Address Book Data” on page 234. For older databases, refer to the User’s Guide for your previous version of the software. If you have customized the dictionary and holidays, also back those files up separately before upgrading.

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

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

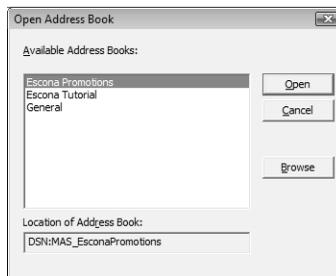
You can also upgrade an Address Book by opening it in Administrator or Maximizer. Administrator also has a built-in utility to convert existing Maximizer databases from older versions to the current version, and to convert Maximizer Pervasive databases to Maximizer SQL databases.

If you are upgrading Maximizer from a previous version and you have old reports in the Crystal Reports file structure for Maximizer, the old reports are archived in a folder named after the Address Book with a .BAK file extension, where your other report files for Maximizer are stored (e.g., ...\\My Documents\\MaximizerReports folder). You can copy the reports to any of your working folders to access the reports from Maximizer.

After upgrading a database, you should always perform an Address Book validation and recovery. For further information, refer to “Verifying and Recovering Address Book Data” on page 240.

### ➤ To upgrade a Maximizer Address Book

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



The upgrade process begins.

# Importing Vertical Templates

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

## ➤ To import a vertical template

**1** Log into the Address Book in Administrator or Maximizer.

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

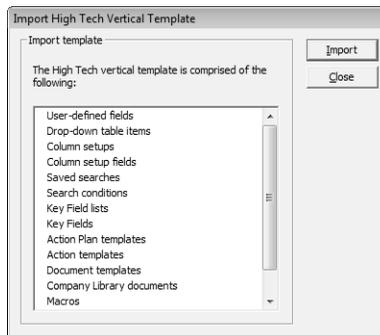
**2** Select **File > Import > Vertical Templates > [industry]**.

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

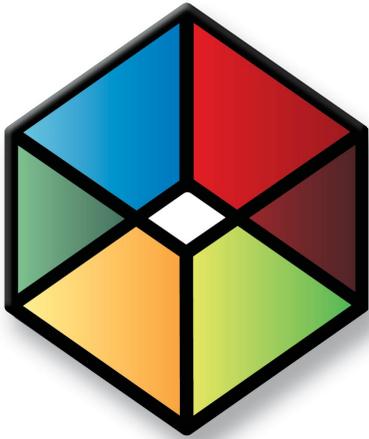
**3** Click **Import**.

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

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







CHAPTER  
**Setting up** **5**  
**Users and Groups**

In this chapter...

"Adding a User to an Address Book" on page 46

"Changing a User's Password" on page 49

"User and Group Security" on page 50

"Security Groups" on page 56

"Record Ownership" on page 61

"User Preferences" on page 63

## Adding a User to an Address Book

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

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

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

**i** The Users dialog box is available in both Maximizer and Administrator, where users can view other users' information and modify their own.

Before a user can log into Maximizer, you must assign that person a Maximizer user ID. All security in Maximizer is based on user IDs and the rights you assign to them. You should also assign a user Display Name, which easily identifies the user throughout Maximizer. When you fill in the First name and Last name fields in the Add User dialog box, the Display name field is completed automatically to include the user's first and last name together. You can change this display name.

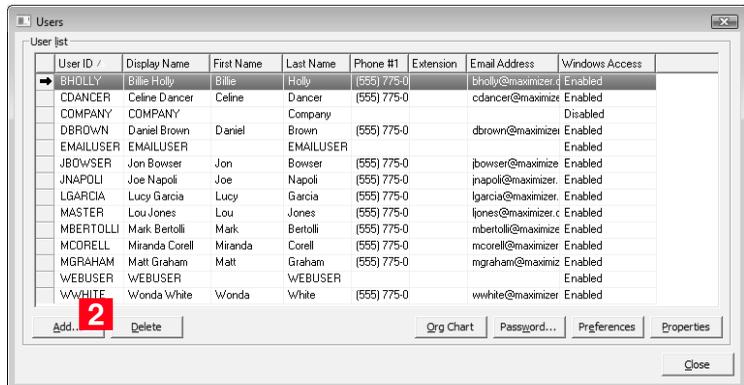
Use the User Properties dialog box to enter a user's name and contact information, assign user-defined fields, specify access rights, and add a user to security groups. Note that you can also add users to security groups using the Security Groups tab.

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

**1** Select **File > Users**.

The Users dialog box opens.

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



The Copy Selected User's Settings dialog box opens.

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



The Add User dialog box opens.

- 4 Fill in the information for this user in the **General** tab.

The User ID and Last name fields are the only required fields, and the User ID is needed to log into the Address Book.

Save time by filling in only the **User ID**, **First name**, and **Last name** fields, and let the user fill out the rest of the information.

The **Display name** field fills in automatically with the user's first and last names. You can change the display name.

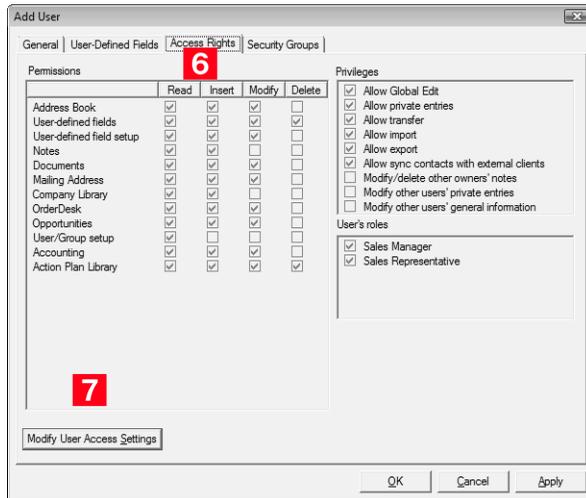
A screenshot of the "Add User" dialog box, General tab. The "Name and position" section has a red "4" over the "First name" field. The "Company and main address" section is filled with "Escona Estate Wines", "Sales", "US - West", "1344 Eastside Road", "Petaluma", "CA", "94954", and "USA". The "Phone numbers and phone extensions" section has "1: (555) 775-0999" and "2: (555) 775-0900". The "Internet information" section has "Email:" and "Website: http://www.escona.com". The "Module Login" section has "Windows Access" set to "Enabled". Buttons at the bottom are "OK", "Cancel", and "Apply".

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

You can set up these custom fields in the File > Set Up User-Defined Fields dialog box. Refer to "Setting up User-Defined Fields for an Address Book" on page 72 for more information.

**6** Click the **Access Rights** tab.

**7** Click the **Modify User Access Settings** button.



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

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 50.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 51.

**9** Click **OK** to close the Access Settings dialog box.

**10** In the **Security Groups** tab, select any security groups to which the user should belong.

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

**11** Click **OK**.

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

The new User ID and its associated information now appear in the User list.

# Changing a User's Password

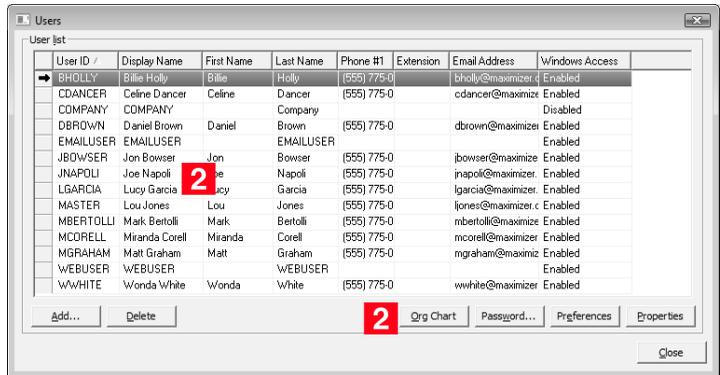
The following procedure explains how to change user passwords in Administrator. However, users can also change their own passwords through the File > Users dialog box in Maximizer.

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

**1** In Administrator or Maximizer, select **File > Users**.

The Users dialog box opens.

**2** Select the user whose password you wish to change, and click **Password**.



The Password dialog box opens.

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

**3** Type the new password, then retype it on the next line to confirm it.

**4** Click **OK** to accept the change of password and close the dialog box.



## User and Group Security

As the Administrator, you can restrict each user's access rights to types of entries, essentially providing per-module security. User access rights are accessible through **File > User > [User ID] > Properties > Access Rights**. These user access rights consist of the access settings (security settings) of the user account as well as the access settings of any security groups the user is a member of. For example, if the Opportunity Delete permission is not granted in the user's access settings, but is granted in the access settings of a group the user is a member of, then the user is granted Delete permissions to Opportunity entries.

Each checkbox contains one of the following potential values:

Checkbox State	Access Setting	Access Right
<input checked="" type="checkbox"/>	Granted	Granted
<input type="checkbox"/>	Not Granted	Not Granted
<input checked="" type="checkbox"/>	Black = Denied Grey = Disabled	n/a

The following table illustrates user access rights derived from user and group access settings.

User Access Setting	+	Group Access Setting	=	User Access Right
<input type="checkbox"/>	+	<input type="checkbox"/>	=	<input type="checkbox"/>
<input type="checkbox"/>	+	<input checked="" type="checkbox"/>	=	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	+	<input type="checkbox"/>	=	<input checked="" type="checkbox"/>
<input type="checkbox"/>	+	<input checked="" type="checkbox"/>	=	<input type="checkbox"/>
<input checked="" type="checkbox"/>	+	<input type="checkbox"/>	=	<input type="checkbox"/>
<input checked="" type="checkbox"/>	+	<input checked="" type="checkbox"/>	=	<input type="checkbox"/>
<input checked="" type="checkbox"/>	+	<input checked="" type="checkbox"/>	=	<input type="checkbox"/>
<input checked="" type="checkbox"/>	+	<input checked="" type="checkbox"/>	=	<input checked="" type="checkbox"/>

If the user belongs to more than one group, the conflict illustrated below results in the user not being granted the access right.

User or Group Access Setting	+	User or Group Access Setting	+	User or Group Access Setting	=	User Access Right
<input type="checkbox"/>	+	<input checked="" type="checkbox"/>	+	<input checked="" type="checkbox"/>	=	<input type="checkbox"/>

## User Access Rights and User/Group Access Settings

**i** If a Read permission is denied (X), then the Insert, Modify, and Delete permissions are automatically disabled. A user cannot have Insert, Modify, or Delete permissions without having Read permission.

The following tables describe each of the user access rights and user or group access settings.

### Permissions

Permissions	Controls the selected user's or group's right to view, add, change, or remove . . .
Address Book	Entries in the Address Book window
User-defined fields	Values in user-defined fields
User-defined field setup	User-defined field definitions
Notes	Entries in the Notes following window Users must have the Delete checkbox selected to be able to use the File > Purge > Notes function.
Documents	Entries in the Documents following window Users must have the Delete checkbox selected to be able to use the File > Purge > Documents function.
Mailing Address	Mailing addresses of Address Book entries
Company Library	Files and folders in the Company Library
OrderDesk	Entries in the OrderDesk window
Opportunities	Entries in the Opportunities window
User/Group setup	Users and Security Groups <ul style="list-style-type: none"> <li>• If the user does not have any User/Group Setup rights, other users' or groups' properties are not accessible.</li> <li>• If the user has read rights only, the related tabs are visible, but information cannot be modified.</li> <li>• Insert, Modify, and Delete rights provide the corresponding access rights to all user and group properties.</li> </ul>
Accounting	Accounting Link transactions Note that the Delete permission is disabled because Accounting Link transactions cannot be deleted through Maximizer.
Action Plan Library	Action plans in the Action Plan Library

## Privileges

Privilege	Grants authorization to . . .
Allow Global Edit	Perform global edits of Address Book entries in Maximizer (Edit > Global Edit). Consider advising users with this privilege to back up the Address Book before making significant changes with Global Edit.
Allow private entries	Add Address Book entries that are not visible to other users. The user can use the Owner, Full Access, or Read Access fields to create private entries or restrict entries to a group.
Allow transfer	Transfer Address Book entries between Maximizer Address Books. If you do not select this option, the menu items for transferring are disabled.
Allow import	Import Address Book entries between Maximizer Address Books. If you do not select this option, the menu items for importing are disabled.
Allow export	Export Address Book entries between Maximizer Address Books. If you do not select this option, the menu items for exporting are disabled. This option also applies to the security right to export information to Excel.
Allow Sync Contacts with External Clients	Synchronize Address Book entries and notes using Outlook Synchronization or MaxMobile synchronization. However, users can still synchronize calendar appointments or Hotlist tasks without this access right.
Modify/delete other owners' notes	Change and delete other users' notes. However, to be able to view other users' private notes, the user must have the "Modify other users' private entries" privilege enabled.
Modify other users' private entries	View and modify entries marked as private that belong to other users.  If a user has this privilege enabled, the user has full read and modify access to all entries, regardless of the entry's Full Access, Read Access, or Owner settings. This security privilege is very powerful and should be granted with caution.

Privilege	Grants authorization to . . .
Modify other users' general information	<p>Change information in the General and User-Defined Fields tabs of the User Properties dialog box for another user.</p> <p>Modifying a user's general information, such as Last Name, First Name, Company, and Phone Number, does not have to be restricted to the MASTER user. In many cases, an administrative assistant or a receptionist can be granted the rights to modify user's general information without compromising the security of Maximizer. This privilege allows the user to have access to all Maximizer users' general information without giving them full security rights to the Address Book.</p>

### User's Roles

User Role	Grants authorization to . . .
Sales Manager	Belong to the Account Manager field. Sales Managers can also re-assign the Account Manager field to a different user.
Sales Representative	Similar to the Sales Manager role, Sales Representatives can be assigned to the Account Manager field. A Sales Representative can assign the Account Manager field to anyone else, but only if the Account Manager field was assigned to him/herself or blank and not assigned to another user.

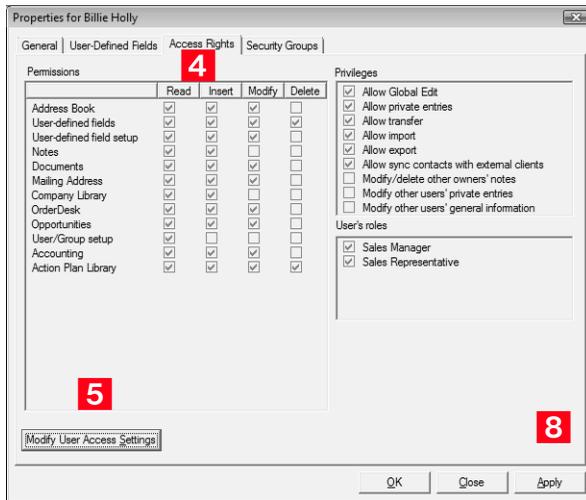
## Modifying User Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 50.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 51.

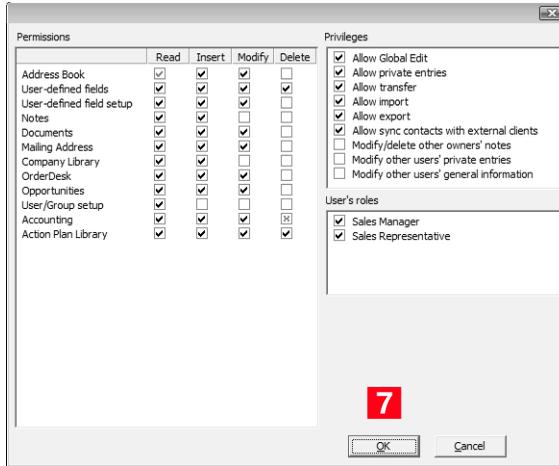
### ► To modify access settings of an existing user

- 1 Select **File > Users**.
- 2 Select the **User ID**.
- 3 Click **Properties**.
- 4 Click the **Access Rights** tab.



- 5 Click the **Modify User Access Settings** button.

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



**7** Click **OK** to close the Access Settings dialog box.

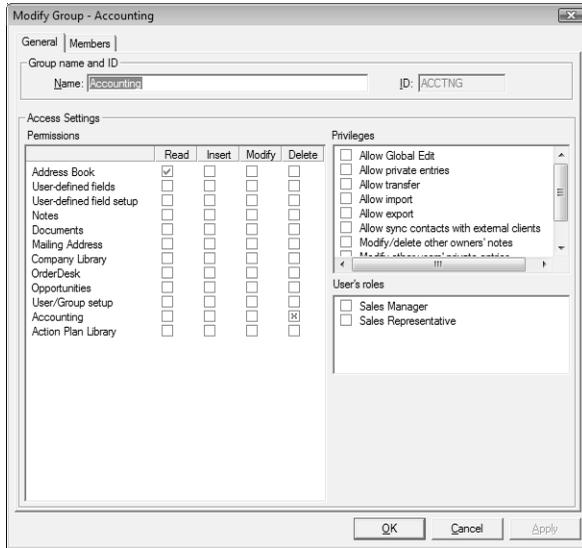
**8** Click **Apply** to save the changes.

# Security Groups

A security group is a group of users, usually belonging to a functional group such as a Finance department, who have access to entries related to their group and have specific security Access Settings. A user may be a member of more than one security group.

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

The Group dialog box is shown below.



## Group Name and ID

Every security group has a name and an ID that identify the group. Changing the name has no effect on the group functionality. However, you cannot change the group ID. If you ever need to recreate these security groups, it is imperative that you use the correct security group IDs (the group name is irrelevant).

## Group Access Settings

A security group has Access Settings that affect the level of access its members have within the Address Book. It is important to note that granting an Access Setting to a group does not necessarily mean that all members of the group will have that Access Right. The level of access each individual user has to the Address Book is controlled by the Access Settings of the user account and the Access Settings of any groups the user belongs to. For more information about user and

group Access Settings, refer to “User and Group Security” on page 50.

### Group Members

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

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

## Default Security Groups in all New Address Books

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

Security Group Name	Group ID	Enables group members to...
Accounting	ACCTNG	Restrict accounting transaction notes to members of this group. If an Accounting Link user is not a member of the Accounting security group, notes for any accounting transactions created by that user are Public. However, notes for transactions created by members of the Accounting group are restricted to members of that group.
Crystal Reports Users	R_CRU	Generate new reports from the Reports > Crystal Reports > Personal > Custom Report menu in Maximizer. Note that the user must also have the Custom Reports access right enabled to be able to generate reports.

 For more information about security settings related to Crystal Reports, refer to “Set the user-related preferences on each of the tabs.” on page 63.

## Creating a New Security Group

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 50.

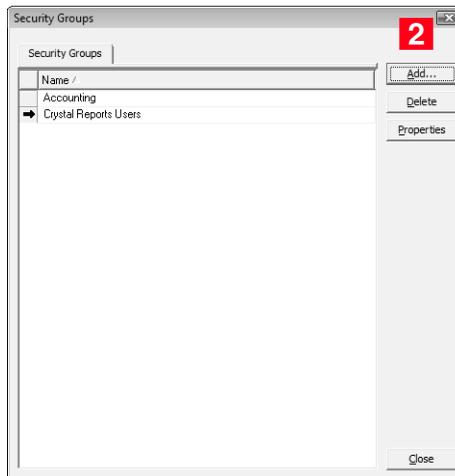
For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 51.

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

**i** The File > Security Groups menu item is also available in Maximizer if the logged-in user has Insert rights for User/Group setup.

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

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

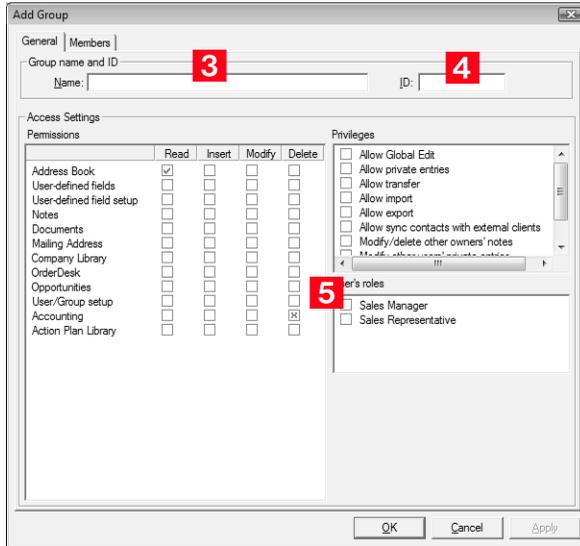


**3** Enter a **Group Name**.

**4** Enter a unique **Group ID** (up to 9 characters). The first character of the Group ID must be a letter.

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

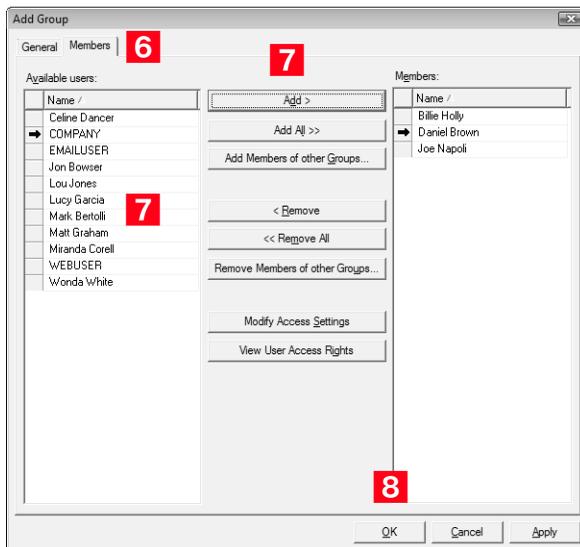
Access Settings for the group affect the Access Rights of all users who are members of the group.



**6** Click the **Members** tab.

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

**7** From the **Available Users** list, select a user to add to the security group, and click **Add**. Repeat to add additional users.



**8** Click **OK** to close the Add Group dialog box.

The security group has now been created.

## Modifying Group Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 50.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 51.

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

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

**2** Select the group name.

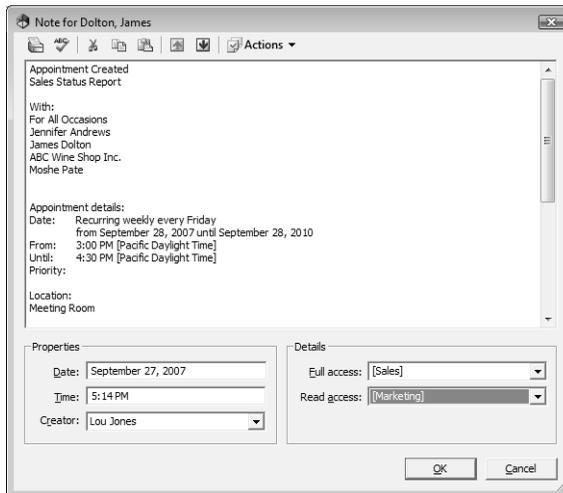
**3** Click **Properties**.

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

**5** Click **Apply** to save the changes.

## Record Ownership

In Maximizer, many entries have an Owner field, or Full Access and Read Access fields. These fields control who can view or edit the entry. Users can access their own private records, all publicly owned records, and private records owned by their group. For example, the user “Alice” of the “Finance” group can view all of her own records, all records owned by the “Finance” group, and all Public records. See the example below as an example.



Sometimes it's important to allow users to have private entries because some entries aren't meant to be shared with your entire organization. In Maximizer, it's possible to specify Full Access and Read Access to specific users or groups for each entry in the Address Book. In addition to Address Book entries, you can specify ownership of notes, documents, and other types of entries.

When a user creates a new Address Book entry, he or she can designate access for that entry. Full Access or Read Access can be granted to a specific user, a group, or it can be Public.

To be able to use the Owner, Full Access, or Read Access fields, the user must have the "Allow private entries" access right enabled.

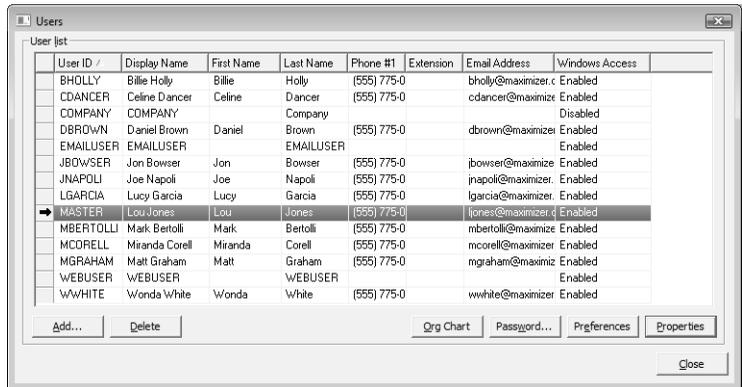
Field	Value	Description
Owner	Public	All users can view and modify the entry, regardless of their user or group security settings.
	User	Only the specified user can view or modify the entry.
	Group	Only members of the specified group can view or modify the entry, regardless of their user or group security settings.
Full Access	Public	All users can modify the entry, regardless of their user or group security settings. Note that the Read Access field becomes disabled if Full Access is set to Public.
	User	Only the specified user can modify the entry.
	Group	Only members of the specified group can modify the entry, regardless of their user or group security settings.
Read Access	Public	All users can view the entry.
	User	Only the specified user can view the entry.
	Group	Only members of the specified group can view the entry.

# User Preferences

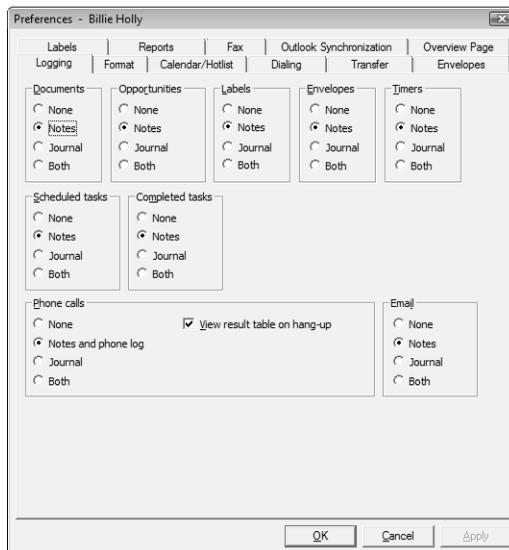
The Address Book administrator is responsible for setting up initial user preferences in Administrator. However, users can change many of their user preferences in Maximizer.

➤ **To set Address Book user preferences**

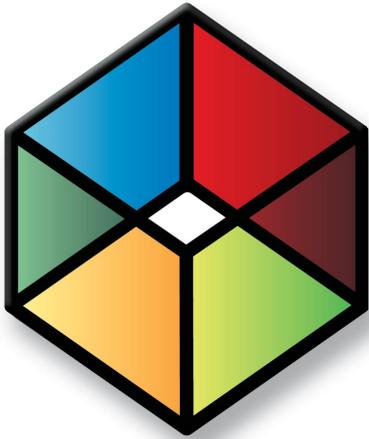
- 1** Select **File > Users**, select a user, and click **Preferences**.



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







CHAPTER  
**Configuring an  
Address Book** 6

In this chapter...

"Address Book Preferences" on page 66

"Preventing Duplicate Address Book Entries" on page 68

"Setting up User-Defined Fields for an Address Book" on page 72

"Creating Key Fields Lists" on page 81

"Recording Holidays in the Holiday Editor" on page 84

# Address Book Preferences

You can set Address Book preferences by selecting File > Preferences in Administrator. The following table outlines the settings available on each tab of the Preferences dialog box. For more information about any of these preferences, go to File > Preferences, select a tab, and press F1.

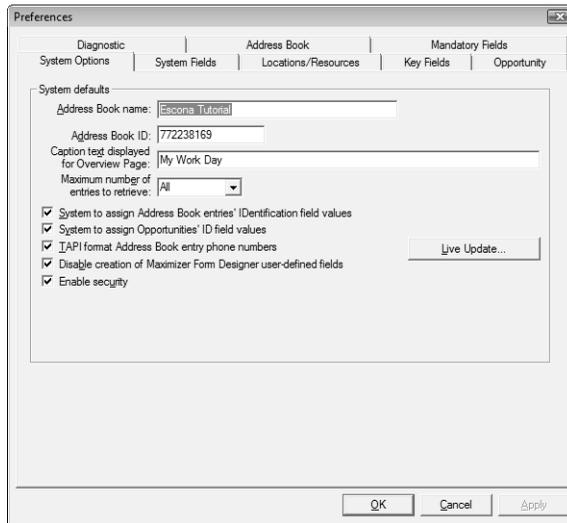
On this tab...	You can set the following preferences...
Address Book	<ul style="list-style-type: none"> <li>values available in the Category field for Address Book entries</li> <li>fields to check for duplication of Address Book entries (refer to "Preventing Duplicate Address Book Entries" on page 68 for more information)</li> </ul>
Diagnostic	<ul style="list-style-type: none"> <li>log file settings for Maximizer modules</li> </ul>
Key Fields	<ul style="list-style-type: none"> <li>key user-defined fields available on the Basic Information tab of Address Book entries and opportunities (refer to "Creating Key Fields Lists" on page 81 for more information)</li> </ul>
Location/Resource	<ul style="list-style-type: none"> <li>locations available for appointments</li> <li>resources available for appointments</li> </ul>
Mandatory Fields	<ul style="list-style-type: none"> <li>mandatory or optional data entry requirements for basic fields in Address Book entries and opportunities</li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>opportunity stages and probabilities of close</li> <li>opportunity confidence ratings</li> <li>opportunity completion reasons</li> </ul>
System Fields	<ul style="list-style-type: none"> <li>add, modify, and delete values of system fields note/document categories and products/services</li> </ul>
System Options	<ul style="list-style-type: none"> <li>Address Book name</li> <li>Address Book ID</li> <li>system-assigned Address Book entry IDs and opportunity IDs</li> <li>TAPI phone number format</li> <li>user-defined field creation in Form Designer</li> <li>Overview page caption</li> <li>Live Update options</li> </ul>

**i** Users can also set Diagnostic preferences in Maximizer. Refer to "Using Log Files for Diagnosis" on page 277 for more information.

**i** The MASTER user is responsible for devising and implementing ratings schemes and completion reasons in Administrator.

➤ **To set Address Book preferences**

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



## Using Passwords

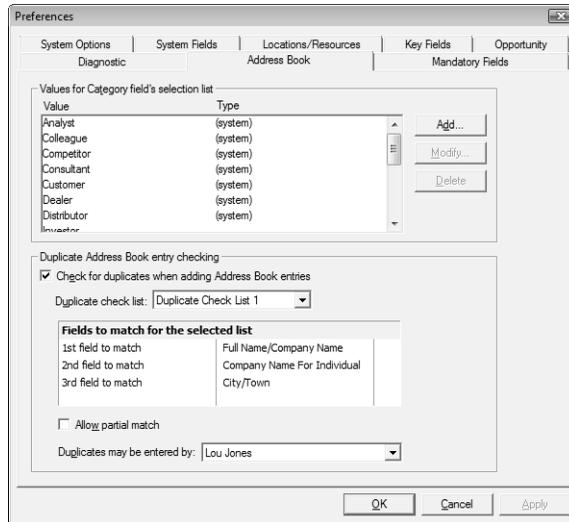
If you apply a user password for an Address Book, all Address Books on the server hosting the Address Book will use the same password. It is not possible to have different passwords for different Address Books for the same user on the same computer.

## Preventing Duplicate Address Book Entries

When more than one Address Book entry exists for the same person or organization, the entries are considered duplicates. These duplicates may occur when users create a new Address Book entry without determining whether an entry already exists for the person or organization. They can also occur when entries are created automatically by operations such as importing. Duplicate entries are undesirable because information related to the person or organization becomes fragmented. You can prevent most duplicate entries by using Maximizer's duplicate Address Book entry checking options.

**i** For information about preventing duplicates when importing data, refer to the sections about importing in chapter 12 "Managing Address Book Data" on page 233.

You can configure duplicate checking in Administrator (File > Preferences > Address Book tab).



Administrator enables you to prevent most duplicate Address Book entries by specifying up to three combinations of fields that must be unique to each entry. If a user attempts to create a new Address Book entry, and the values of any of those field combinations match an existing entry, Maximizer does not allow the duplicate entry to be created.

A combination of fields that must be unique to each entry is called a "duplicate check list". You can create up to three duplicate check lists, using up to three fields in each list.

Maximizer considers an entry to be a duplicate if the values of all fields from List 1, or all fields from List 2, or all fields from List 3 match an existing entry.

List 1	OR	List 2	OR	List 3
1st Field		1st Field		1st Field
AND		AND		AND
2nd Field		2nd Field		2nd Field
AND		AND		AND
3rd Field		3rd Field		3rd Field

**i** The "Full Name/Company Name" matching field checks the Full Name of Individual or Contact entries and checks the Company field of Company entries. The "Company for Individual" matching field checks the Company field of Individual entries.

The default duplicate check lists, described below, effectively prevent most duplicate entries:

- Duplicate Check List 1:**
  1. Full Name/Company Name
  2. All Phone Numbers
  3. None
- Duplicate Check List 2:**
  1. Full Name/Company Name
  2. Zip/Postal
  3. None
- Duplicate Check List 3:**
  1. None
  2. None
  3. None

When a user creates a new Address Book entry in Maximizer, and Maximizer detects it as a potential duplicate Address Book entry, the user is presented with the following list of options:

- **Merge with selected entry:** The newly created or modified Address Book entry merges with, and overwrites, the existing (selected) entry.
- **Edit selected entry:** The existing (selected) Address Book entry opens, allowing it to be edited by the user. Any information entered in the newly created entry that was detected as a duplicate must be re-entered.
- **Add the new entry:** This option adds the new entry. It is available only under certain circumstances. If a user or group has permission to create duplicate entries ("Duplicates may be entered by" field in the Address Book tab), he or she has the option to create duplicate entries. This option is also available if partial matching is enabled and Maximizer finds a partial match.

## Partial Matching

Partial matching identifies an entry as a possible duplicate even if not all fields in any of the duplicate check lists are the same in both the new entry and an existing entry.

With partial matching, the order of the fields (1st, 2nd, 3rd) in the duplicate check lists is important, as described in the following scenarios:

**i** If the first field only is defined in the list (the second and third fields are set to None), partial matching doesn't apply because matching one field is a complete match.

- If the first and second fields only are defined in the list (the third field is set to None), an entry is considered a possible duplicate if only the first field matches.
- If all three fields are defined in the list, an entry is considered a possible duplicate if only the first field matches, or if both the first and second field match.

If the first field doesn't match, an entry is never considered a possible match, even if the second and/or third field matches.

Maximizer displays the list of possible duplicates in order of number of fields matched.

<b>List 1</b>	OR	<b>List 2</b>	OR	<b>List 3</b>
1st Field		1st Field		1st Field
OR		OR		OR
1st & 2nd Field		1st & 2nd Field		1st & 2nd Field

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

By default, partial matching is disabled. To turn partial matching on, select the "Allow partial match" checkbox.

The "Allow partial match" checkbox applies to all Duplicate Check Lists. You cannot allow partial matches for some lists and not for others.

Partial matching is relevant only if no exact matches exist. If all the fields in any of the duplicate check lists match an existing entry, it is considered a duplicate entry, and partial matching does not apply. However, if Maximizer finds no exact matches, it returns a list of entries matching any of the fields from the duplicate check lists.

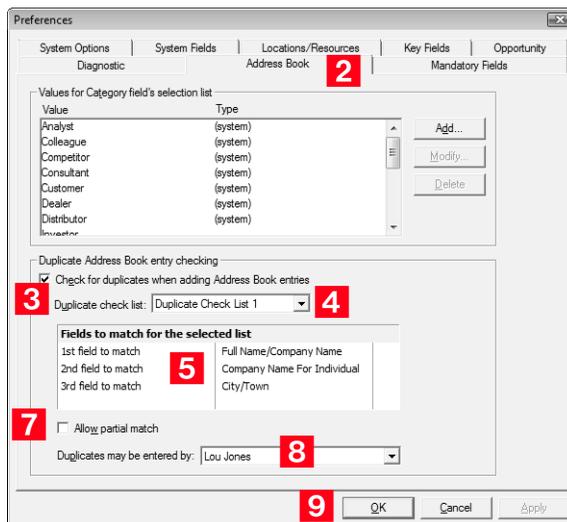
## Permission to Create Duplicate Entries

If some users or groups require the ability to create duplicate Address Book entries, you can select a user or group from the "Duplicates may be entered by" drop-down list. If more than one user requires this ability, add those users to a new security group and then select that group from this drop-down list. In Maximizer's Duplicate Address Book Entry Found dialog box, the user(s) can then choose the "Add the new entry" option.

## Configuring Duplicate Address Book Entry Checking

### ➤ To configure duplicate Address Book entry checking

- 1** In Administrator, select **File > Preferences**.
- 2** Click the **Address Book** tab.
- 3** Select the **Check for duplicates when adding Address Book entries** checkbox.
- 4** From the **Duplicate check list** field, select one of the Duplicate Check Lists.
- 5** In the **Fields to match for the selected list** box, select the first, second, and third field to match. (You can select up to three fields, but selecting all three fields is not required.)
- 6** Repeat the previous two steps to configure any of the other Duplicate Check Lists.
- 7** To enable partial matching, select the **Allow partial match** checkbox.
- 8** If you want any users or groups to be able to create duplicate entries, select the name of the user or group from the **Duplicates may be entered by** drop-down list.
- 9** Click **Apply**, and then click **OK**.



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

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

**i** User-defined fields can be created and modified in both Administrator and Maximizer (if users have the necessary rights) using the File > Set Up User-Defined Fields menu item.

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

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

### Types of User-Defined Fields

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

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

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

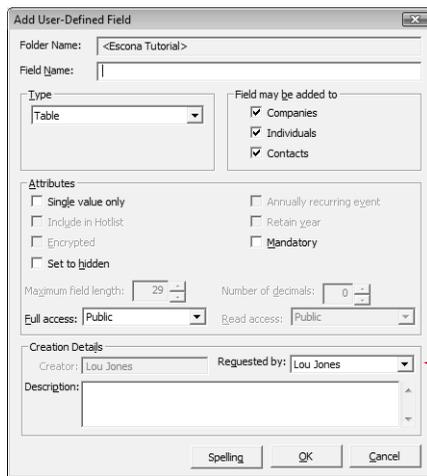
## User Access Rights for User-Defined Fields

As the Address Book administrator, you are responsible for creating user-defined fields in Administrator for Maximizer users. However, you can give any user the ability to create, change, or delete user-defined fields in Maximizer by enabling the following access rights in Administrator (File > Users > [user] > Properties > Access Rights):

- The **User-defined fields** access right enables the user to assign values to user-defined fields, but not create fields.
- The **User-defined field setup** access right enables the user to create new user-defined fields.

For information about assigning user access rights, refer to “User and Group Security” on page 50.

You can also restrict user access to a specific user-defined field. The user-defined field properties has options for Full Access (read and write) and Read Access (read-only) permissions.



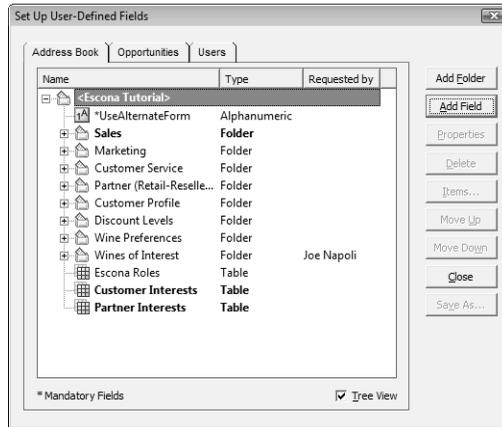
The screenshot shows the 'Add User-Defined Field' dialog box. The 'Folder Name' is '<Escona Tutorial>'. The 'Field Name' is empty. The 'Type' is 'Table'. The 'Field may be added to' section has checkboxes for 'Companies', 'Individuals', and 'Contacts', all of which are checked. The 'Attributes' section has checkboxes for 'Single value only', 'Include in Holiday', 'Encrypted', 'Set to hidden', 'Annually recurring event', 'Retain year', and 'Mandatory', all of which are unchecked. The 'Maximum field length' is 29 and the 'Number of decimals' is 0. The 'Full access' and 'Read access' dropdown menus are both set to 'Public'. The 'Creation Details' section shows 'Creator' as 'Lou Jones' and 'Requested by' as 'Lou Jones'. A red arrow points to the 'Full access' and 'Read access' dropdown menus, with the text 'Full Access and Read Access permissions.' next to it.

The Full Access and Read Access fields contain a drop-down list of users, groups, and Public. Select which user(s) the Full Access or Read Access permission applies to:

- **Public** assigns the user-defined field access permission to all users
- **[user]** assigns the user-defined field access permission to an individual user
- **[security group]** assigns the user-defined field access permission to all members of a security group

## About the Set Up User-Defined Fields Dialog Box

User-defined fields are created and modified through the Set Up User-Defined Fields dialog box, which is available from the File menu in both Maximizer and Administrator.



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

## Mandatory User-Defined Fields and System Fields

**i** Key fields are specified on the Key Fields preferences tab in Administrator. (File > Preferences > Key Fields)

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

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

## Sort order

There are two methods of changing the order of fields and folders:

- **Drag and drop:** You can use the mouse to drag and drop fields or folders to a different position in the list. Dragging it onto a field places it immediately below that field. Dragging onto a folder places it at the top of the list inside that folder. Holding the mouse on a folder for about a second expands the folder, and then you can continue dragging the item to a specific position in that folder.
- **Move Up and Move Down buttons:** Click the Move Up and Move Down buttons to move a field or folder up or down in the

list. These buttons only move items within their current folder level. You cannot use them to move items in or out of folders.

## Creating a New Folder for User-Defined Fields

Use the Set Up User-Defined Fields dialog box to create new user-defined fields and folders for use with Address Book entries, opportunities, and user accounts. This dialog box is available from the File menu in both Administrator and Maximizer, although users can create user-defined fields in Maximizer only if the **User-defined field setup** access right is granted in their user account.

You can group similar user-defined fields into folders and sub-folders to a maximum folder depth of 3 levels. Grouping user-defined fields into folders is particularly useful if you have a large number of user-defined fields. Grouping them makes them easier to find and reduces the amount of scrolling needed to find the one you're looking for.

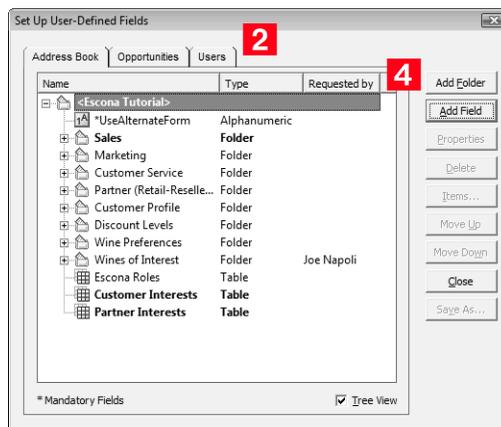
### ➤ To create a new folder

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

– or –

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

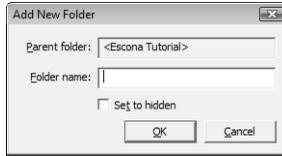
- 4 Click the **Add Folder** button.



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

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

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



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

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

## Creating a New User-Defined Field

Create user-defined fields for Address Book entries, opportunities, and user accounts in the Set Up User-Defined Fields dialog box. This dialog box is available from the File menu in both Administrator and Maximizer, although users can create user-defined fields in Maximizer only if the **User-defined field setup** access right is granted in their user account.

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

**1** Open the Set Up User-Defined Fields dialog box (**File > Set Up User-Defined Fields**).

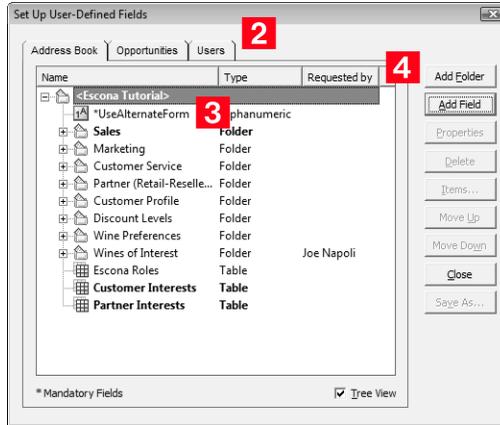
**2** Select the tab for the category of user-defined field to create.

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

– or –

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

**4** Click the **Add Field** button.



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

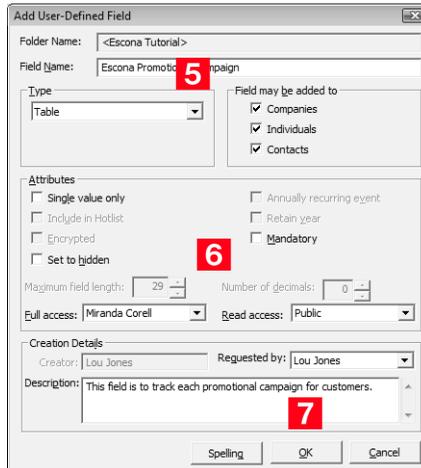
**5** In the **Field Name** field, type a name for the user-defined field.

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

For detailed information about each of the property fields, click inside the dialog box and press **F1**.

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

You have now created a user-defined field.



**8** You can move the new field to a different position in the list if necessary.

## Adding Items to a Table User-Defined Field

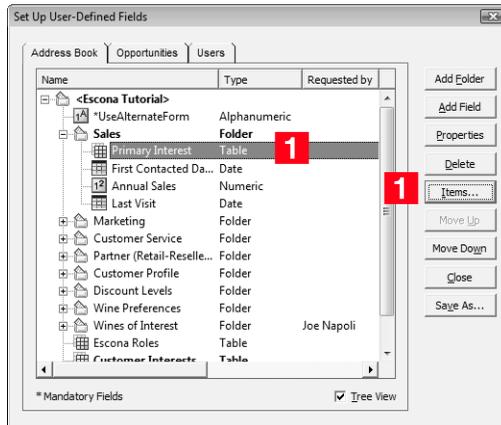
Table user-defined fields contain a list of similar items from which a user may select one or more items. As part of the process of creating a new user-defined field of this type, you should add the items to the table. However, while using the user-defined field in Maximizer, users may find a need to add an item to the list. A user can add items to a table user-defined field on-the-fly if the user account has sufficient privileges. Both procedures are explained below.

### ➤ To add items to a Table user-defined field

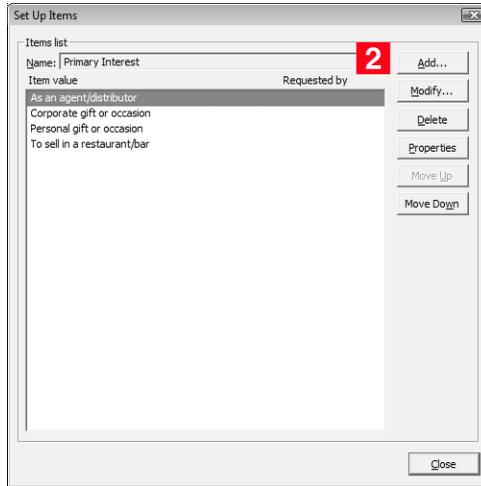
**1** In the Set Up User-Defined Fields dialog box, select the table-type user-defined field, and click the **Items** button.

– or –

Double-click the table user-defined field.



**2** In the Set Up Items dialog box, click **Add**.

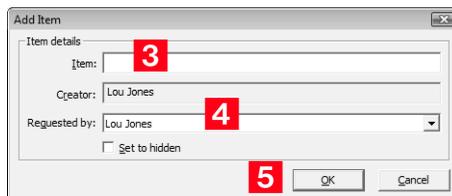


**i** If you set the item to hidden, the user can hide it from the Available values list by deselecting the Show hidden items option. The user must also ensure that the item is not selected in the list. If it is, the item will still be displayed.

**3** Type a name for the item.

**4** In the **Requested by** field, select the name of the user who requested the item creation.

**5** Click **OK**.



**6** Repeat these steps to add any additional items to the Table user-defined field.

## Transferring User-Defined Fields between Address Books

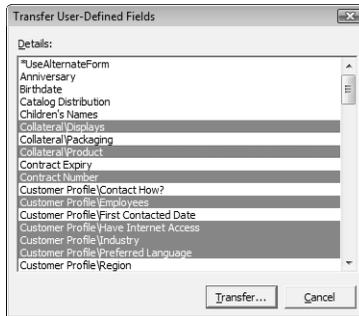
### ➤ To transfer user-defined fields between Address Books

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

**1** In Maximizer, select **File > Transfer > User-Defined Fields**.

**2** In the Transfer User-Defined Fields dialog box, select the user-defined fields to transfer.

- 3 Click the **Transfer** button.



- 4 To copy the data into a target Address Book that is accessible from the computer, select the **Direct Address Book access** transfer method. Accessible Address Books are listed in **Available target Address Books**.

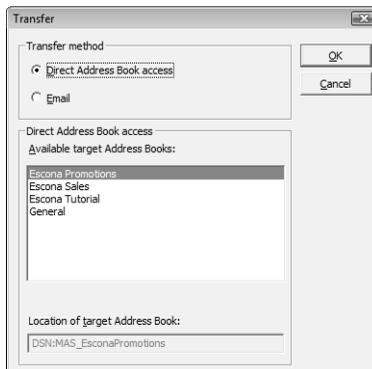
– or –

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

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

– or –

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



## Creating Key Fields Lists

**i** Assigning a user-defined field to a Key Fields list does not remove it from the User-Defined Fields tab. Those fields appear in both tabs.

Key Fields are important user-defined fields that are highlighted on the Basic Information tab in Maximizer Address Book entries and opportunities, making them more readily accessible. Which user-defined fields appear as Key Fields is up to you. You might select mandatory user-defined fields as Key Fields, so users don't miss them when creating a new record. You might also select frequently used user-defined fields, making it easier for users to quickly enter these values. And you might select user-defined fields important to a particular group of users because different Key Field lists can be defined for a specific user or group, or for all users.

### Specifying Key Fields by Entry Type

When you create a Key Fields list in Maximizer, you can specify up to eight user-defined fields for each entry type. The entry types are described in the table below.

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

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

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

## Restricting Key Fields to Specific Users

The Key Fields in the Basic Information tab of Maximizer entries are visible only to the user(s) that the Key Field list is assigned to. However, other users may still be able to access the field through the User-Defined Fields tab, depending on which users or groups the user-defined field is assigned to. Assigning a user-defined field to a Key Fields list does not determine who can access the user-defined field. It only determines who can access the field from the Key Fields list. Users can see all the Key Fields from public Key Field lists, personal Key Fields lists, and Key Fields lists for any security groups a user belongs to.

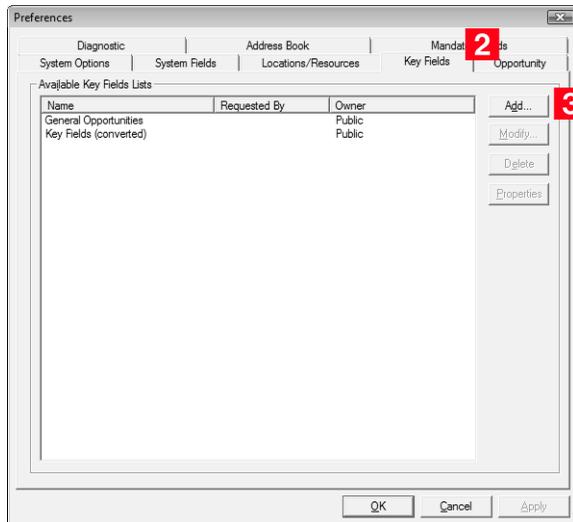
## Creating a Key Fields List

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

### ► To create a Key Fields List

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

**2** Select the **Key Fields** tab.



**3** Click **Add** to open the Add Key Fields dialog box.

**4** In the **List name** field, create a name for the Key Fields list.

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

**5** From the **Assigned to** drop-down list, select a user or security group to assign the Key Field list to, or leave it as Public.

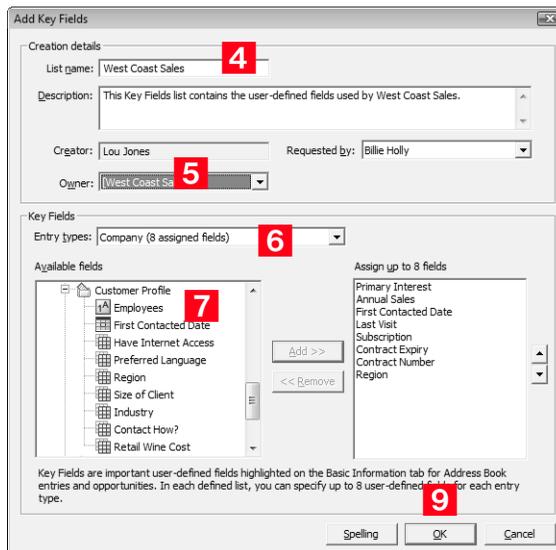
**6** From the **Entry types** drop-down list, select the type of Maximizer entry to assign Key Fields to.

The fields for that module appear in the Available Fields list.

**7** Add up to eight user-defined fields to the Key Fields list by selecting each field and clicking **Add**.

**8** Repeat steps 6 and 7 to add Key Fields for other modules.

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



## Recording Holidays in the Holiday Editor

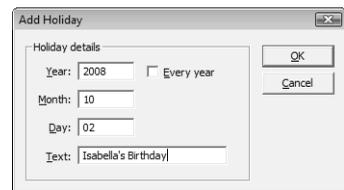
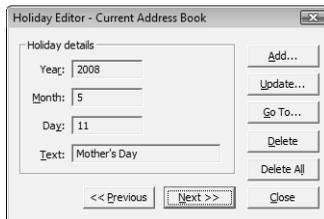
The Holiday Editor is a utility you can use to add or edit holidays in the Maximizer calendar. By default, the Holiday Editor contains many North American holidays. The holidays listed in the Holiday Editor also appear in the Calendar window in Maximizer. You can use Administrator to modify or delete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

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

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

### ➤ To add a holiday to your calendar

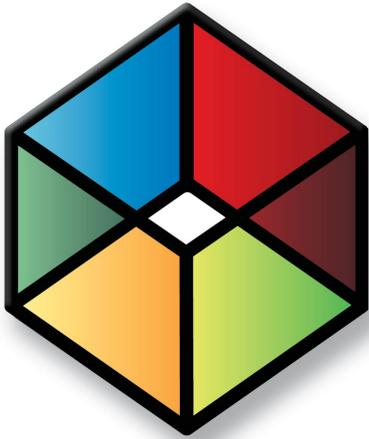
- 1 In Administrator, select **Utilities > Holiday Editor**.
- 2 Click **Add**.
- 3 Enter the details of the new holiday.
- 4 Click **OK** to close the Add Holiday dialog box.



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

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

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



# CHAPTER 7

## Configuring Email, Fax, Phone, and Synchronization

### In this chapter...

- "Setting Up Maximizer to Use Email" on page 86
- "Configuring Microsoft Outlook Synchronization" on page 89
- "Using Fax Software with Maximizer" on page 94
- "Enabling TAPI with Maximizer" on page 97
- "Phone Masks" on page 102

## Setting Up Maximizer to Use 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 Extended MAPI email application, but has additional functionality that enables you to easily integrate your Address Book entries with your email.

### Supported Email Clients

To use these features, you must already have a Messaging Application Programming Interface (MAPI) or VIM (Vendor Independent Messaging) email client. Email clients that should work with Maximizer when properly configured include those listed below:

- Lotus cc:Mail
- Lotus Mail
- Lotus Notes
- Microsoft Exchange Sever
- Microsoft Outlook/Microsoft Outlook Express
- Novell GroupWise
- Novell GroupWise 7

Please see the Maximizer website at [www.maximizer.com](http://www.maximizer.com) for the latest version information of compatible email programs.

### Configuring Maximizer for 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 Maximizer's Advanced Email Preferences (File > Preferences > Email tab). If you do not select the correct option, a program fault error will occur when using the Email window. For Lotus cc:Mail and Lotus Mail, you also must have the "Override Extended MAPI" option selected in the File > Preferences > Email tab.

## Configuring Maximizer for Microsoft Exchange

If you are using a version of Microsoft Exchange prior to 5.0 and you have the “Read messages using email service provider's editor” option selected in Email Preferences, the Reply, Reply All, Forward, Previous and Next buttons will not work when you open a message in the Maximizer Email window. Upgrading to Microsoft Exchange 5.0 or higher fixes this problem.

## Configuring Maximizer for Microsoft Outlook Express

Because Outlook Express is a Simple MAPI program, the Maximizer Email window shows the contents of the Outlook Express Inbox only. To use Outlook Express with Maximizer, you must configure settings in both Maximizer and Outlook Express, as described in the following procedures.

### ➤ **Step 1: To Configure Maximizer for Outlook Express 6.x**

- 1** Start Maximizer. If necessary, open the **Address Book** you use.
- 2** Select **File > Preferences**.
- 3** Select the **Email** tab.
- 4** Enable the **Override extended MAPI** option.
- 5** Click **Advanced**.
- 6** Select **Other email system** and click **OK**.
- 7** Click **OK** to close the Preferences window.
- 8** Close Maximizer.

### ➤ **Step 2: To Configure Outlook Express 6.x for Maximizer**

- 1** Start Outlook Express.
- 2** Select **Tools > Options**.
- 3** On the General tab, click the **Make Default** button beside **This application is NOT the default Mail handler**.

If the button is unavailable, and the option says **This application is the default Mail handler**, then you can proceed to the next step because Outlook Express is already the default Mail handler.

- 4 Click **Apply**, and then click **OK**.

Windows may prompt you to restart your computer.  
Maximizer is now integrated with Outlook Express.

## Configuring Maximizer for Microsoft Outlook

**i** Maximizer cannot use Extended MAPI with the Internet Mail Only installation type. Ensure the installation type is Corporate or Workgroup.

Microsoft Outlook is an Extended MAPI program, which means the Maximizer Email window will display the Outlook folders.

### ► To use Outlook with Maximizer

- 1 In Maximizer, select **File > 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 **Apply**, and then click **OK**.
- 5 Exit Maximizer.
- 6 Restart Maximizer.

When you select the Email window (Window > Email), it displays Outlook folders such as Inbox, Outbox, Sent Items, Deleted Items, and your personal folders.

For more information on configuring Maximizer for Outlook Synchronization, refer to "Configuring Microsoft Outlook Synchronization" on page 89 and the Maximizer and Administrator online help (Help > Contents) and F1 Help.

# Configuring Microsoft Outlook Synchronization

**i** Outlook Synchronization works with Microsoft Outlook only, not Microsoft Outlook Express.

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, regardless of machine name or Windows username. Typically, users configure their own Outlook Synchronization settings through File > Preferences in Maximizer. However, you can also configure their settings through Administrator's user preferences.

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

**i** For information on how Maximizer and Outlook fields are mapped to each other in Outlook Synchronization, refer to "Field Mapping" on page 253.

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

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

**i** The same preferences are available through File > Preferences > Outlook Synchronization in Maximizer.

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

## Appointment and Task Synchronization

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

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

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

### Recurring Appointments

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

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

### Recurring Tasks

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

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

## Group Appointments

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

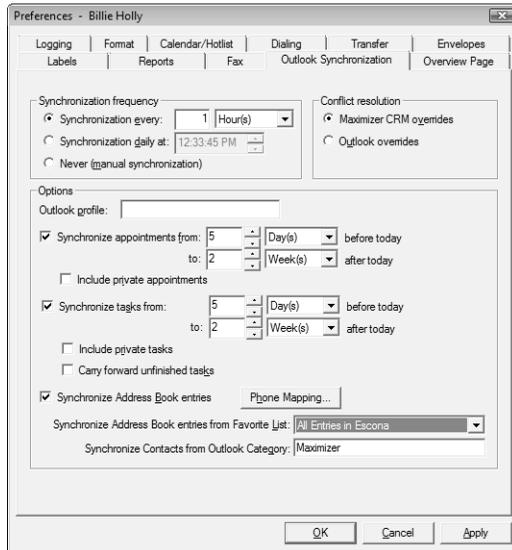
## Synchronization from Outlook to Your PDA

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

## Configuring Outlook Synchronization

### ➤ To configure Outlook Synchronization

- 1** In Administrator, select **File > Users**.
- 2** Select the **User ID** and click **Preferences**.
- 3** Click the **Outlook Synchronization** tab.



**i** For detailed information about Outlook Synchronization preferences, click inside the dialog box, and press **F1**.

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

If you select **Never (manual synchronization)**, the user must synchronize manually by clicking the Synchronize with Outlook toolbar button or selecting **Tools > Synchronize with Outlook** from the menu bar in Maximizer.

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

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

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

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

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

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

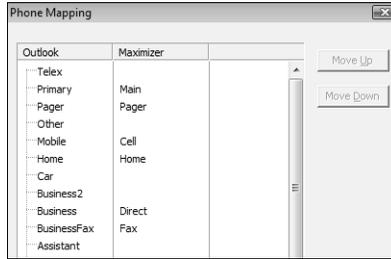
To also synchronize incomplete tasks that are scheduled prior to the specified date range, select the **Carry forward unfinished tasks** checkbox.

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

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

**i** The Synchronize Address Book entries checkbox is disabled if the user does not have the "Allow Sync Contacts with External Clients" access right.

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



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

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

**1 2** In the **Synchronize Contacts from Outlook Category** drop-down list, select the Outlook category to synchronize.

**1 3** Click **OK**.

## Using Fax Software with Maximizer

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

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

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

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

### Third-party Faxing Configuration

In order for third-party fax drivers to function with Maximizer, the following properties must be configured correctly:

- correct registry settings for the FAXDDE key
- fax application path

### FAXDDE Registry Key Settings

The FAXDDE registry key of the Maximizer Word Processor (Maximizer Editor) must have the following keys filled in:

- Application
- Fax Driver
- Topic

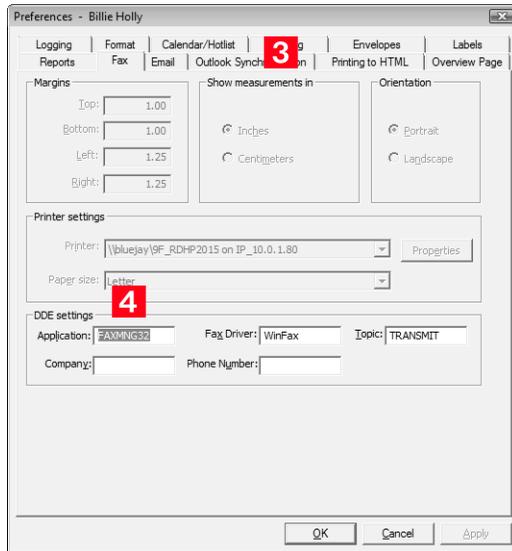
The following table shows the FAXDDE values for WinFax.

Value Name	Value Data
Application	FAXMNG32
Fax Driver	WinFax
Topic	TRANSMIT

Maximizer uses the WinFax FAXDDE values as the default configuration. If you are using a fax driver other than WinFax, refer to the fax documentation for the corresponding FAXDDE values and update the values in the registry.

➤ **To update the FAXDDE registry keys**

- 1** In Administrator, select **File > Users**.
- 2** In the Users dialog box, click **Preferences**. (You can select any user.)
- 3** Click the **Fax** tab.
- 4** In the DDE settings fields at the bottom of the tab, enter the FAXDDE values for your fax driver.



- 5** Click **Apply**, and then click **OK** and **Close** to exit the User Setup dialog box.

The FAXDDE values have now been updated in the registry.

## Setting the Fax Application Path

To ensure the correct path to WinFax Control Center (FAXMNG32.EXE) can be found by Maximizer, you must add the full path of the FAXMNG32.EXE to PATH environment variable.

### ➤ To set the WinFax Application Path

**1** Identify the path for **FAXMNG32.EXE**.

For example:

"C:\Program Files\Symantec\WinFax"

**2** In the Windows Control Panel, double-click the **System** icon to open the System Properties dialog box.

**3** Select the **Advanced** tab, and click **Environment Variable**.

**4** Locate the **PATH** variable (in the System Variable section) and add the full path you identified in step 1 to the existing value.

**5** Close the dialog box and restart the computer.

## Enabling TAPI with Maximizer

**i** You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab).

**i** For more information, refer to your TAPI system and Windows documentation.

Maximizer can use TAPI (Telephony Application Programming Interface) to detect incoming phone numbers (using Caller ID) and to 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 computer's modem must be compatible with TAPI.
- You must install your TAPI driver on your computer.
- Maximizer must be configured for TAPI, as described in this section.

## 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 TAPI 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. Contact your local phone company to obtain more information regarding your caller ID standard and compare it to the standard used by the TAPI driver.

## Reasons why caller ID may not work

If you use a TAPI-enabled modem (as opposed to a PBX, H.323, or other TAPI hardware), and your telephone company provide MESH-format caller ID information (rather than SDM, another common format), caller ID call detection is unlikely to work.

Microsoft's UniModemV TAPI driver and MODEM.INF file, provided with most TAPI modems, do not support MESH caller ID format, which means your modem (and Maximizer) may never receive caller ID information from TAPI. If your modem manufacturer provides its own TAPI modem or PBX driver and the appropriate INF file, or you are able to obtain SDM-format caller ID, you might have more success.

## Phone Number Matching with TAPI

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

### Smart Phone Number Matching

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

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

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

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

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

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

## Exact Phone Number Matching

If you select the “Enable exact number matching” checkbox in the TAPI preferences in Maximizer, it uses the Exact Phone Number Matching algorithm instead of Smart Phone Number Matching.

Exact Phone Number Matching considers an Address Book entry to match the incoming call only if both numbers contain exactly the same phone number with the specified number of digits.

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

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

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

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

For instructions on enabling and configuring Exact Phone Number Matching, refer to “Configuring Maximizer to Use TAPI” on page 100.

## Configuring Maximizer to Use TAPI

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

### ➤ To configure Maximizer to use TAPI

**i** To configure TAPI from Maximizer, select **File > Preferences**, and click the **Dialing** tab.

- 1** In Administrator, select **File > Users**.
- 2** Select the user for whom to enable TAPI, and click **Preferences**.
- 3** Click the **Dialing** tab.
- 4** In the Method group box, select the **TAPI** option
- 5** Click **Properties**.
- 6** Fill in your location information, and click **OK** twice to return to the Maximizer Dialing Preferences.

Location Information

Before you can make any phone or modem connections, Windows needs the following information about your current location.

What country/region are you in now?  
Canada

What area code (or city code) are you in now?  
604

If you need to specify a carrier code, what is it?

If you dial a number to access an outside line, what is it?  
9

The phone system at this location uses:  
 Tone dialing    Pulse dialing

OK   Cancel

- 7** Click **Device**.
- 8** Select your TAPI device name from the **Line** drop-down list, and click **OK**.

Device

Connect using this line and address

Line: RAS PPPoE Line0000

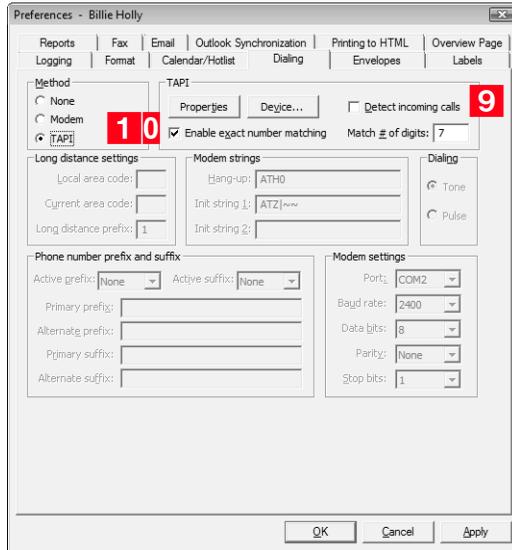
Address: Address 0

OK   Cancel

- 9** Select the **Detect incoming calls** option.

**1 0** Select the **Enable exact number matching** option, if desired.

**1 1** If you enabled exact number matching, enter the number of phone number digits to match exactly in the **Match # of digits** box, or leave the default setting of 7.



**1 2** Click **OK** to close the Preferences dialog box.

**1 3** Repeat this procedure to enable incoming call detection for any other Maximizer users.

# Phone Masks

**i** Exercise caution when working in the Windows Registry.

**i** If the Phone Mask registry key does not exist, you must create it as a String value.

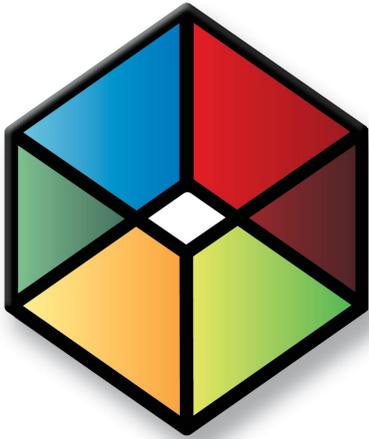
The registry entry (HKEY\_CURRENT\_USER\Software\Maximizer Software\Maximizer\Modules\AMGR\INTL\Phone Mask) overrides the default format of a phone number with the phone mask provided as a value. The mask uses # to indicate digits and can include any other characters (e.g., + - ,).

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

## Examples

Phone Mask	Digits	Value Typed in	Display
Not specified (default)	7	1234567	123-4567
	10	1234567890	123456-7890
###-####	7	1234567	123-4567
	10	1234567890	123456-7890
(###) ###-####	7	1234567	123-4567
	10	1234567890	(123) 456-7890
+1 (###) ###-####	7	1234567	123-4567
	10	1234567890	+1 (123) 456-7890
### # #####-#####	15	123456789012345	123 45 5678-012345

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



CHAPTER **8**  
**Working with  
Maximizer**

*Manage Your Address Book Entries*

**In this chapter...**

- "What is Maximizer CRM?" on page 104
- "Opening an Address Book" on page 109
- "My Work Day View" on page 110
- "Main Address Book Window" on page 111
- "Customizing Maximizer Toolbars and Toolbar Buttons" on page 115
- "Keeping Track of Your Prospects and Customers" on page 120
- "Keeping Notes on Your Address Book Entries" on page 131
- "Working with User-Defined Fields" on page 135
- "Creating a List of Entries with a Search" on page 138
- "Tracking Your Appointments and Hotlist Tasks" on page 146
- "Using Organizational Charts" on page 162
- "Sharing Your Files in the Company Library" on page 164
- "Making Entries in Your Journal" on page 167
- "Monitoring Income and Expenses" on page 168
- "Creating Web Inquiry Forms for Your Website" on page 169
- "Maximizer CRM Gadgets" on page 171

## What is Maximizer CRM?

Maximizer CRM is a complete software solution that brings together elements of contact management, eCommerce, 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 emails 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 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 view is an area where everyone in your company using Maximizer can see 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 helps you and your colleagues manage complex sales that involve the participation of more than one person in the buying decision.

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're 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.

## 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.

## 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.

## 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 a document, or delete a document.

## Company Library



The Company Library is used to store vital sales and marketing information for everyone to access. The Company Library allows you to preview and open any note and many types of files in the preview pane.

## OrderDesk



When you receive orders or inquiries from your website, you can manage them using the OrderDesk window for tracking and post-order fulfillment. 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 pre-authorized 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 and Opportunities windows.

## Accounting



You can access this window if you have the Accounting Link Designed for use with QuickBooks® add-on component installed. This window contains all your invoices, estimates, and purchase orders for your Address Book entries. You can create these items in Maximizer and the transactions are automatically shared with your QuickBooks software.

For information on using Accounting Link, see the online manual.

## Window Layout

You can control what windows are displayed and how they're laid out. The Window > Window Settings > Window Layout menu provides three 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 only want the Address Book and Calendar windows open, without their following windows open. Open the windows you want using the Window menu or the icons on the icon bar, and then tile the windows using the Window > Window Management > Tile feature. Of course, you can manually size any window.

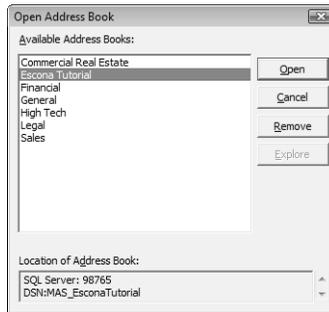
You can also control such things as the colors, fonts, and grid lines in your windows. The Window > Window Settings > Set Color and Window > Window Settings > Set Font menu items allow you to do so.

# Opening an Address Book

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.

## ➤ To open an Address Book

- 1 Select **File > Open Address Book**.



- 2 Select the **Address Book** to open. The Login dialog box appears.

- 3 Type your **password** and click **OK**. The name of the Address Book appears in the application title bar.

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

## ➤ To log into the current Address Book as another user

- 1 Select **File > Login** or double-click in the **Users** section of the **Maximizer status bar** at the bottom of the window. The Login dialog box appears.
- 2 Enter a **user ID** and **password**.
- 3 Click **OK**.

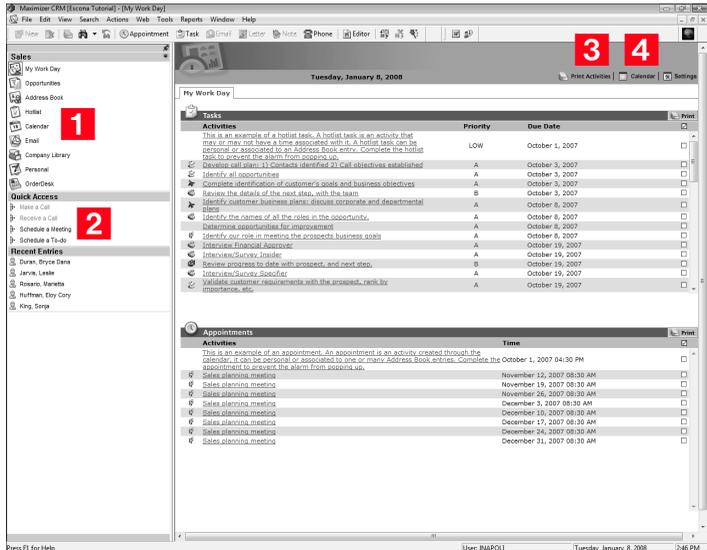
# My Work Day View

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

## Adjust the My Work Day View

You can adjust the My Work Day view to suit your own preferences.

### ► To adjust the My Work Day view



- 1 Use the icons to access the main windows in Maximizer.
- 2 Use the **Quick Access** section to perform common tasks. The **Recent Entries** section displays the most recently used Address Book entries. Click on an entry to make it current.
- 3 Use the **Print Activities** button to print tasks, appointments, and activities for the day.
- 4 To switch to another calendar day in the My Work Day view, click the **Calendar** button.

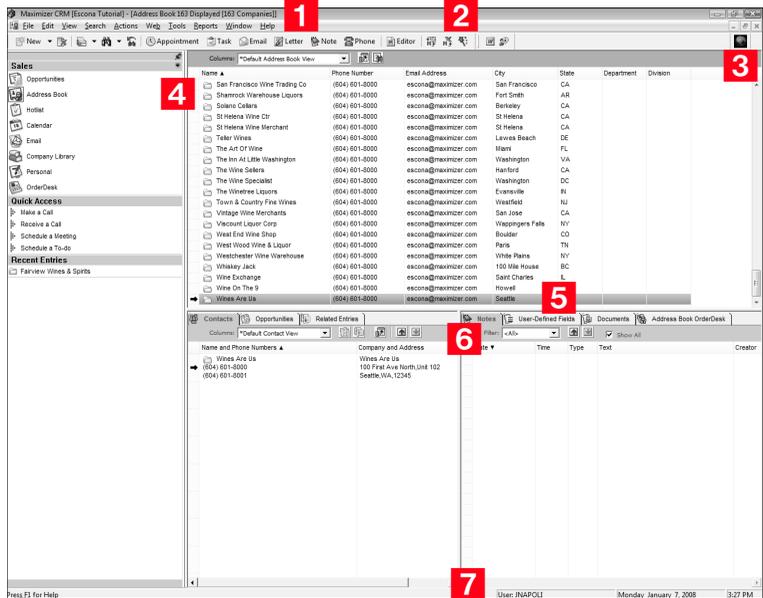
# Main Address Book Window

Maximizer is a list-based module, which means that all of the information it accesses is displayed in rows and columns. Lists make it easy to see many entries at once and customize your views.

## Address Book Window

**i** You can view a Contact in the main Address Book window by selecting a Contact and choosing View [Contact] in Address Book from the Search or shortcut menu. You can also select multiple Contacts and select the corresponding menu option from the Search or shortcut menus to view the entries in the Address Book window.

Typically, most of your activities are done in the Address Book window.



### ➤ To work with the Address Book window

- 1** There are menu options for all tasks you can perform in the Address Book window and toolbar buttons are available for common tasks.
- 2** Maximizer wizards are available to help you through tasks such as creating appointments, Hotlist tasks, and web forms.
- 3** The status indicator shows you when the module is busy when doing tasks such as searches.
- 4** Icons representing Companies, Individuals, and Contacts differentiate the types of entries.
- 5** Tabbed following windows display information and attached entries for the selected entry in the main window.

**6** The view bars in a window or following window contain a view filter and buttons for common tasks and the column setup. You can also use the arrow buttons to move from one entry to the next.

**7** The status bar displays help on the item your mouse pointer is over, and shows the current user, the date, and the time.

As you work with Maximizer, you'll learn to use the many time-saving features. To open one of the Maximizer windows, click an icon in the icon bar or select an item from the Window menu. If you're not sure what a button or icon does, hold your mouse pointer over it to see a "tooltip"—a short description. The status bar also helps you with descriptions of buttons, icons, and menu commands.

Toolbars and the Quick Access section of the window give you quick access to frequently used menu commands. You can display only the toolbars you want or even create your own custom toolbars.

Some functionality is common to both Maximizer and Administrator. For example, adding user-defined fields and adding users can be done in both programs. You can also refer to the Maximizer and Administrator Help for more information.

## Select Address Book Entries

There are different ways to select Address Book entries.

### ➤ To select Address Book entries

- To select an Address Book entry, click on the gray box to the left of the entry. To select multiple entries, click on the entries one at a time while holding down the Control key down. Or, select an entry and while holding the Shift key down, select another entry. This selects all entries in between the two you initially selected. To select all entries in the current view, click the **gray box** in the upper-left corner of the Address Book window.

Click this box to select all entries in the current view.

A screenshot of the Address Book window. At the top, it says 'Columns: \*Default Address Book View'. Below that is a table with two columns: 'Name' and 'Phone Number'. The table contains five entries, each with a small gray box to its left. The first entry is 'ABC Wine Shop Inc.' with phone number '(604) 601-8000'. The second is 'Aggassi Cold Beer & Wine Store' with '(604) 601-8000'. The third is 'Albert's Steak House' with '(604) 601-8000'. The fourth is 'All The Best Spirits' with '(604) 601-8000'. The fifth is 'Amelia Liquors South' with '(604) 601-8000'.

Name	Phone Number
ABC Wine Shop Inc.	(604) 601-8000
Aggassi Cold Beer & Wine Store	(604) 601-8000
Albert's Steak House	(604) 601-8000
All The Best Spirits	(604) 601-8000
Amelia Liquors South	(604) 601-8000

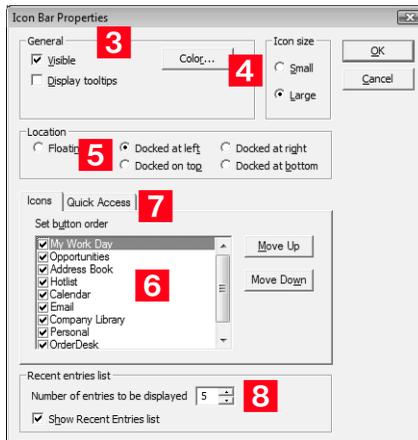
## Adjust the Icon Bar

You can adjust the icon bar properties and also choose the state of the icon bar's visibility.

### ➤ To adjust the icon bar

- 1** Select **Toolbars** from the **View** menu, or right-click in the toolbar area and select **Customize** from the shortcut menu. The Toolbars dialog box appears.
- 2** Select **Icon Bar** and click **Properties**.
- 3** Set your defaults in the General group box:
  - 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.
  - Click **Color** to change the background color of the icon bar.
- 4** Set the icon size to **Small** or **Large**.
- 5** Set the location of the icon bar. The **Floating** option allows you to place the icon bar anywhere inside the Maximizer window. The **Docked** option places the icon bar on a border of the Maximizer window.
- 6** Select the icons you want to be displayed. Use the **Move Up** and **Move Down** buttons to position the icons.
- 7** Click **Edit** on the **Quick Access** tab to add or remove commonly performed tasks displayed in the Quick Access section. To hide the section, deselect the **Show Quick Access list** option.

- 8** Set the number of entries to be displayed in the **Recent Entries** section. To hide the section, deselect the **Show Recent Entries list** option.



# Customizing Maximizer Toolbars and Toolbar Buttons

**i** To change the properties of an existing custom toolbar or toolbar button, select **View > Toolbars**, select the custom toolbar and click **Customize**. You can then select a specific button to modify its properties.

From a Maximizer custom toolbar you can perform specific actions such as launching another application or performing a specific search that was saved in your search catalog.

## ➤ To create or modify a custom toolbar

**1** Select **View > Toolbars** from the menu.

– or –

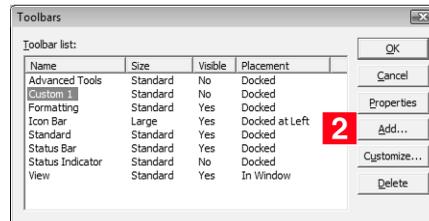
Right-click in any frame containing a toolbar and select **Customize** from the shortcut menu.

The Toolbars dialog box appears.

**2** To create a new custom toolbar, click **Add**.

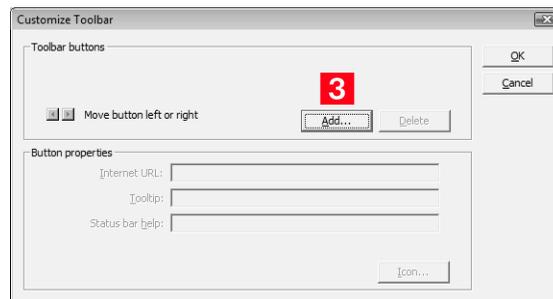
– or –

To add a button to an existing Custom toolbar, select the existing custom toolbar, and then click **Customize**.



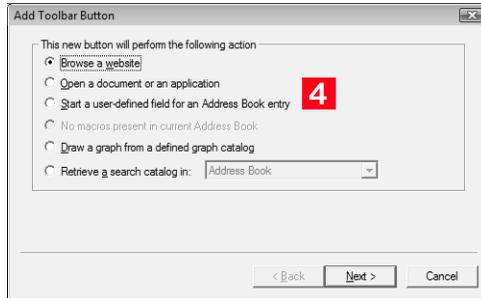
The Customize Toolbar dialog box opens.

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



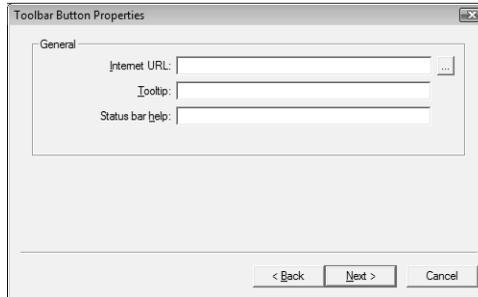
The Add Toolbar Button dialog box appears.

**4** Under **This new button will perform the following action**, select one of the following options, and then click **Next**.



- **Browse a website**  
To add a button to browse a specific website or website document (usually beginning with http:// or www), select this option.
- **Open a document or an application**  
To add a button to start an application such as a word processor, spreadsheet, graphics program, or to open a specific document or file, select this option.
- **Start a user-defined field for an Address Book entry**  
This option enables you to set up a relationship between an alphanumeric user-defined field and a toolbar button. When the toolbar button is clicked, the value of the specified UDF is treated as the fully qualified name of a document or an application that is to be started (opened).
- **Run a Maximizer macro**  
To add a button to run a Maximizer macro, select this option. This option is grayed out if no macros are present in the current Address Book.
- **Draw a graph from a defined graph catalog**  
To add a button to run a graph that has been saved in the graph catalog, select this option. The option is grayed out if no graphs have been saved in the catalog.
- **Retrieve a search catalog in [window]**  
To add a button to perform a search that has been saved in the search catalog, select this option. Also choose the window to which the search pertains from the drop-down list. For example, if you have created a search catalog entry for searching in the Opportunities window, select Opportunity.

- 5** If you have chosen to **Browse a website** or **Open a document or an application**, click **Next**, and type the path of the document/application or web address (URL). Or, click **Browse** to locate the document/application or URL to run. If you would like an application to open a specific file, make sure that the application path is enclosed in double quotes and put a space after the path of the application. Then click **Next**.

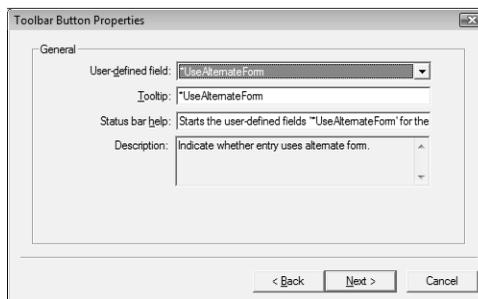


For example, to launch WordPad and open the file Notes.txt, in the Document/Application text box type the following:

"C:\ProgramFiles\Accessories\WordPad.exe" C:\Notes.txt

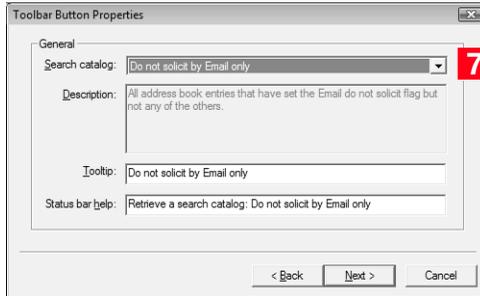
To load a new instance of an already running program, click the **Load new instance** checkbox.

- 6** If you have chosen to **Start a user-defined field for an Address Book entry**, **Run a Maximizer macro**, or **Draw a graph from a defined graph catalog**, click **Next**, and select it from the drop-down list. Then click **Next**.

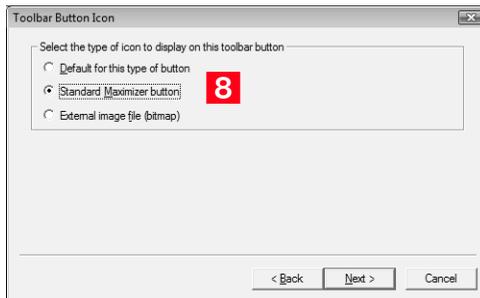


The lists contain all user-defined fields, macros, and graphs in the current Address Book.

- 7** If you have chosen to **Retrieve a search catalog**, select the search catalog from the drop-down list in the Toolbar Button Properties dialog box, click **Next**, and then edit the **Tooltip** and **Status Bar Help** text if you wish. Then click **Next**.

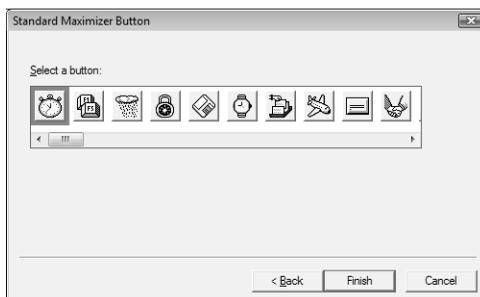


- 8** Select the type of button you would like to display in the toolbar, and then click **Finish** or **Next** depending on the option you chose.

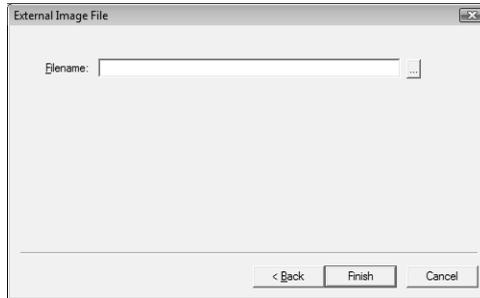


If you choose to display the default button, Maximizer will select the button automatically and you may go on to step 11.

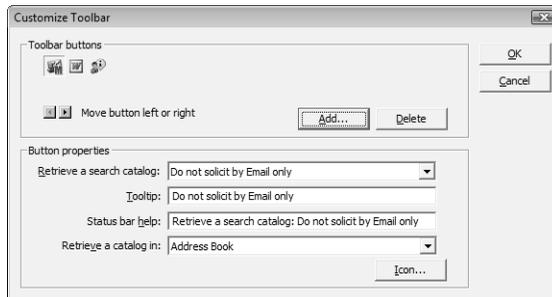
- 9** If you choose to use a **Standard Maximizer button**, select one of the available buttons.



- 10 If you choose to use an **External image file (bitmap)**, locate the image using the **Browse** button.



- 11 Click **Finish**.
- 12 If desired, change the position of the new button on the toolbar using the arrows.



- 13 Click **OK** and then click **OK** again to close the Toolbars dialog box.

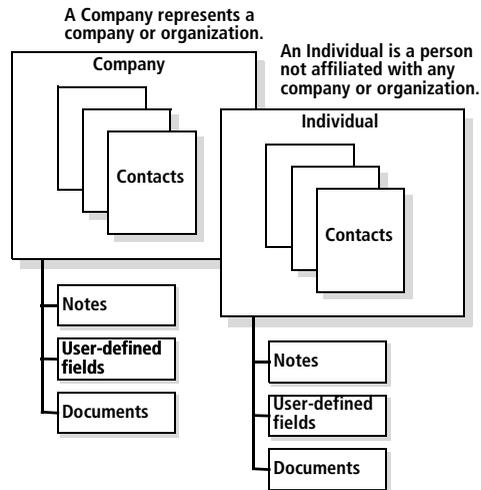
## Keeping Track of Your Prospects and Customers

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.

Company and Individual type Address Book entries contain Contacts (people associated with a Company or Individual). You can attach notes, user-defined fields, and documents to Address Book entries.



### Add Address Book Entries 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 a Company or Individual. "Address Book entries" refers to all Companies, Individuals, and Contacts in your Address Book window.

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.

**i** Note that depending on the type of entry you are creating determines its available Key Fields.

**i** Mandatory user-defined fields and Key Fields are set up in Administrator.

**i** You have the option of opening Address Book entries in view mode or edit mode. This setting is controlled in the Address Book window Preferences dialog box (click the Preferences button). You can also control this setting in the System Defaults preferences tab.

**i** If you are in view mode in the Address Book entry dialog box, you can click the **Copy** button to quickly copy the text to your clipboard so you can paste it into other documents.

## ➤ To add an Address Book entry

**1** To add an Address Book entry, click the **arrow** button next to the **New** button on the toolbar and select one of the options. You can also right-click in the Address Book window and choose an option from the Add menu.

To add a Contact for an entry, select the Company or Individual to which the Contact will belong. In the Contacts window, press Insert or right-click and select Add Contact. Alternatively, you can press the New button or right-click in the Address Book window to add a new Contact.

**2** Enter the name, the mailing address details, website, phone numbers, and email addresses as required. Phone number and email address description types are entered in the field on the left of the number or address.

To enter an alternate address for the entry, click **Address**. To use an alternate address as the default address, select it in the Mailing Address dialog box and click the Select button.

**3** Select the **Key Fields module** and specify a value for the **Key Fields**. These are common used fields that are specific to your company.

Up to eight key fields can be specified for the various Address Book entry types and opportunities. Key fields are set up in Administrator—they will not appear in Maximizer unless they have been specified. For more information on key fields, see “Creating Key Fields Lists” on page 81.

**4** Enter the Address Book entry details (**Company Details**, **Individual Details**, or **Contact Details**) such as the Address Book entry **Category**. Click inside the field on the right and then click the ellipsis button for access to the possible field values.

**5** You can click the **Print** button to print an Address Book entry report.

**6** You can click the **Favorite List** button to see which Favorite Lists to which the entry is assigned. This button also provides you with a way to quickly remove the entry from a Favorite list or add the entry to a Favorite List.

**7** You can click the **Properties** button for access to information such as the creation date and Address Book entry identification number.

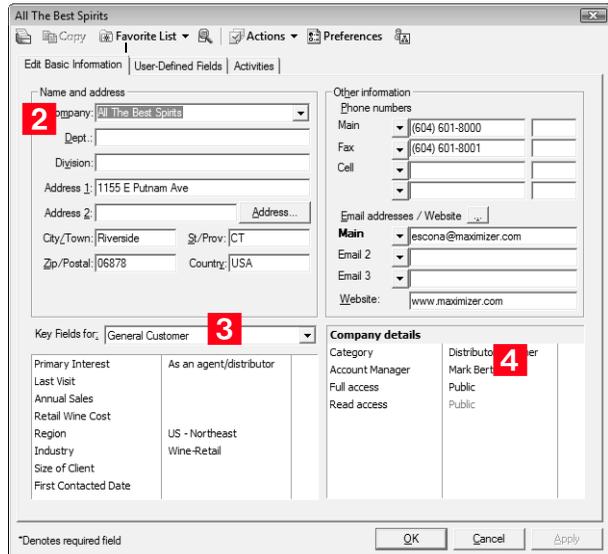
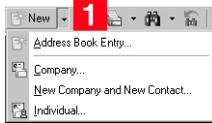
**8** You can perform common tasks associated with the Address Book entry by clicking the **Actions** button.

**i** To view an Address Book entry's properties, select the entry, right-click, and select Properties.

**9** You can click the **Preferences** button to set the default for opening an Address Book entry to View or Edit mode. You can also set your preference for the mailing address format.

**10** Click the **User-Defined Fields** tab and fill in any associated 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.

Selecting the **Show Blank Fields** option shows all fields in the Address Book, not just those with values defined for the Address Book entry.



## Create a Default Address Book Entry

- i** Default entries are user-specific so each user in the Address Book can have different default entries.
- i** If you are logged in as the MASTER user, you can edit multiple default entries at once. Select View > Default Entries for All Users, then select the entries you would like to edit, and select Edit > Global Edit.

Creating a default entry provides you with some fields that are already filled in when you create a new Address Book entry. Default entries are useful if you often enter many fields in common, such as the same city or country. Each user in an Address Book can have a unique default entry.

### ► To create a default Address Book entry

- 1** In the Address Book window, select **Default Entry** from the Edit menu. The Default Entry dialog box appears.
- 2** Fill in the fields to include as default information.
- 3** Click the **User-Defined Fields** tab to include specific fields in the default entry.
- 4** When you are finished, click **OK**.

Now, when you create a new Company or Individual, the entry screen appears with the default fields already filled in. The default entry affects all the new Address Book entries you create. When you no longer want to use default information, you should delete the default entry.

## Change Several Address Book Entries with Global Edit

You can update a number of Address Book entries at the same time with the Global Edit command. For example, you may want to add a FAX Phone extension to several entries. Global Edit is a very powerful feature, so you might consider making a backup of your Address Book before making significant changes using Global Edit.

### ► To perform a global edit

- 1** In the Address Book window or Contacts window, select the entries you want to modify.
- 2** Select **Global Edit** from the **Edit** menu. The Global Edit dialog box appears.

**i** For detailed information, see F1 Help. Also refer to Maximizer Help for information on applying global edits to user-defined fields.

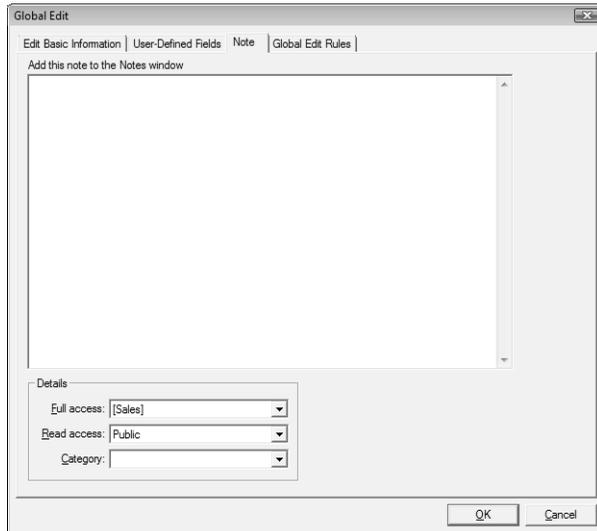
Apply your edits to the Basic Information or User-Defined Fields tabs. Changes made to these tabs are applied in the same way as when you are entering an Address Book entry. The changes are applied to all Address Book entries included in the global edit. If you don't select any entries, the edits are applied to all your entries in the current list.

The screenshot shows the 'Global Edit' dialog box with the following fields and sections:

- Name and address:** Mr/Ms (dropdown), First name, Middle name, Last name, Position, Salvt., Dept., Division, Company, Address 1, Address 2, City/Town, St/Prov, Zip/Postal, Country.
- Other information:** Phone numbers (dropdown, text, text), Email addresses / Website (dropdown, text, text), Website (text).
- Details:** Category, Account Manager, Full access, Read access.

Buttons: OK, Cancel.

- 3** Click the **Note** tab and add a description for the global edit. This adds a note to each of the affected entries. You can also specify the **Access Rights** for the default note and a **Category** (categories are created in Administrator preferences).



- 4** Click the **Global Edit Rules** tab.

- 5** Under **Mailing Rules**, set the mailing address options.

All options in this tab have three possible states selected, not selected, and selected with a gray background.

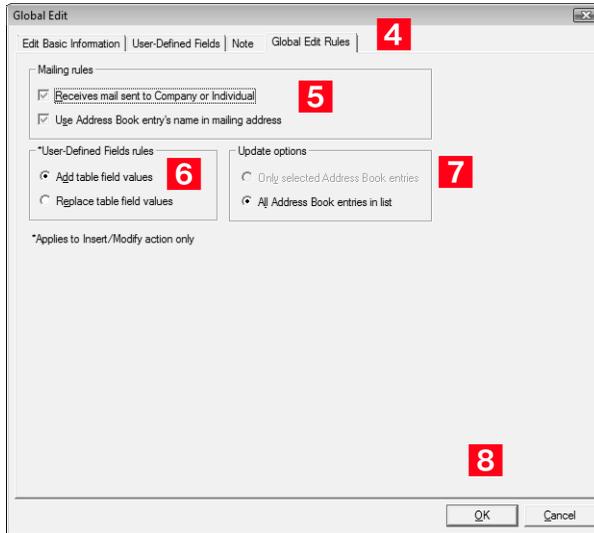
- The **Receives Mail Sent to Company or Individual** option applies to Contacts. Select it if you want to send mailings to the associated Contacts when sending mail to the Company or Individual.
- The **Use Address Book Entry's Name in Mailing Address** option lists the Address Book entry name as well as the Contact name (if applicable) in the mailing address.

**i** These options apply to table user-defined fields in the User-Defined Fields tab and in the Edit Basic Information tab (Details list).

- 6** Select the appropriate item in the **User-Defined Field Rules** group box. The options in this group box apply only to table user-defined fields. To replace the current user-defined field values with a new list, select Replace Table Field Values. To add new table user-defined field values to existing values, select Add Table Field Values. Note, however, that 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.

- 7** Select the appropriate item in the **Update Options** group box. This option applies only if you have entries selected in your Address Book window.

- 8 Click **OK** to perform the global edit. You are prompted with a message to verify that you want to continue with the operation.



## View and Address Book Entries

After entering your search criteria and clicking OK, the entries that match the text you entered are displayed in the Address Book window.

### ➤ To view and modify Address Book entries

- 1 To view the details of a Address Book entry, click on the entry to open it.
- 2 To select multiple entries, click on the entries one at a time. To select all entries in the current view, click the **gray box** in the upper-left corner of the **Address Book** window.

Click this box to select all entries in a list.



Columns: *Default Address Book View	
Name ▲	Phone Number
ABC Wine Shop Inc.	(604) 601-8000
Aggassi Cold Beer & Wine Store	(604) 601-8000
Albert's Steak House	(604) 601-8000
All The Best Spirits	(604) 601-8000
Amelia Liquors South	(604) 601-8000

## Use Column Setups to Organize Lists

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. This allows you to display different fields in various combinations.

### ➤ To create a column setup

- 1** Select **Column Setup** from the **View** menu or click the **Column Setup** button on the **View** bar.
- 2** In the **Column Setup** dialog box, click **Add**. The **Defined View Properties** dialog box opens.
- 3** Type a **Name** in the **Details of View** group box.
- 4** Select an option from the **Full Access** drop-down list.  
If you leave **Public** selected, all users can modify or delete the column setup. If you select a group or user, only members of that group or that particular user can perform these actions.
- 5** Select an option from the **Read Access** drop-down list.  
If you leave **Public** selected, all users can see and use the column setup. If you select a group or user, only members of that group or that particular user can see and use the column setup.
- 6** Click a column header in the **Columns in View** group box.
- 7** Click the **Properties** button to modify the column title or width. In the **Column Properties** dialog box, modify the **title** and/or **width** and click **OK**.
- 8** Click the plus symbol to expand a fields folder and select a field in the **Available Fields** list.
- 9** Click **Add** to add it to the current column. Fields in the current column appear in display order in the Selected Fields list.
- 10** Change the name of the field label in the **Field Label** field if necessary. Optionally, you can select field separator characters from the drop-down list such as commas, spaces, blanks, or dashes to conserve space and place multiple fields on the same line.

**1 1** Repeat steps 6-9 for each field to add to the column setup.

**1 2** Click **OK** to save the column setup.

➤ **To use a column setup**

- Retrieve a column setup for use with the current window by selecting **View > Column Setups**, selecting the column setup view, and clicking **Use Now**.

## Record Relationships with Related Entries

**i** Press F1 in the Related Entries window for more information on 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 record these types of relationships in the Related Entries window.

➤ **To relate to entries**

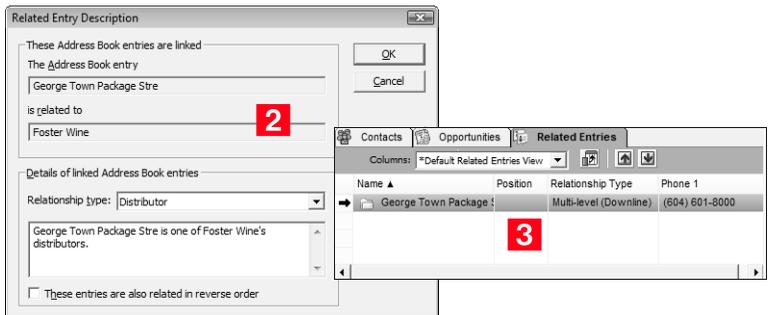
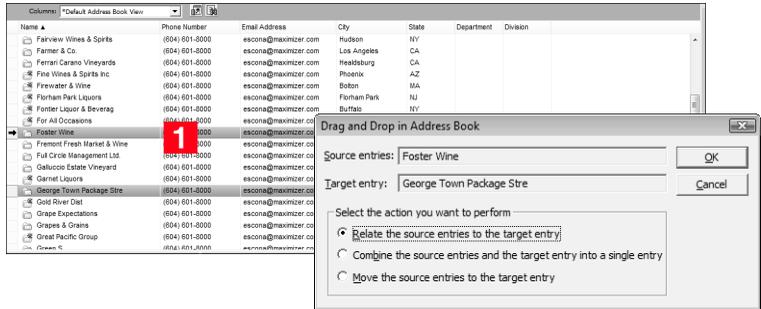
**1** Select the two entries you wish to relate to each other and select **Edit > Relate Entries**.

– or –

Drag an entry and drop it on to another entry. In the resulting dialog box, select **Relate the source entry to the target entry**.

**2** Specify the nature of the connection between the two entries.

**3** Each entry appears in the other's 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 window.

➤ **To unlink Address Book entries**

- Occasionally, relationships that you set up between two Address Book entries will change, and you will want to remove the relationship. You can “unlink” two entries by selecting one of the related entries in the Related Entries window and selecting **Edit > Unlink Selected Entries**.

## Convert Individuals to Companies and Contacts to Individuals

If you originally created an entry as an Individual and now decide the entry would be 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—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.

Any number of Contacts or Individuals can be converted at once.

### ➤ **To convert Address Book entries**

- To convert Individuals to Companies, select the Individuals you want to convert and select **Edit > Convert Individuals to Companies**. To convert Contacts to Individuals, select the Contacts you want to convert and select **Edit > Convert Contacts to Individuals**.

## Keeping Notes on Your Address Book Entries

Notes are used to record activities associated with Address Book entries and opportunities. The Notes window is a following window, which means it displays notes only for the selected Address Book entry or opportunity.

Use the Notes window 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 have the ability to create a default note for the Address Book, Opportunities, and Journal windows. The default note for each window can be different and is specific to the current user. The text automatically appears as part of the note body when you create a new note. The note owner and category can also have default values.

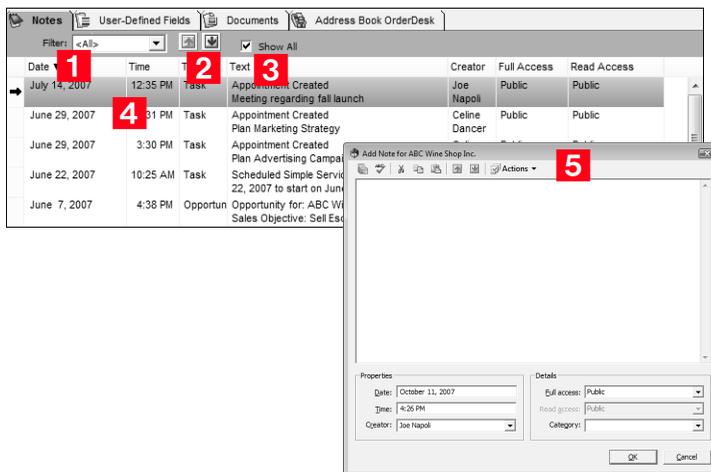
 By default, notes are logged for all of the main activities you can perform in Maximizer. Logging can be adjusted on the File > Preferences > Logging tab.

Other note types are automatically created by Maximizer, providing a history of all your email, phone calls, letters, timed notes, opportunities, appointments, tasks, and transferred Address Book entries. The note type descriptions are as follows:

- **Email** – created in the Address Book window when you send an email to one or more Address Book entries.
- **History** – created in the Opportunities window when opportunities are added or changed.
- **Mail-outs** – created when you print documents, labels, envelopes, or letters using the Maximizer Word Processor's merge feature.
- **Manual** – added manually to the Notes window.
- **Opportunity** – created in the Address Book window when opportunities are added or changed. Opportunity notes can be printed or searched only from the Address Book window.
- **Phone calls** – created when you dial a phone number, or log a received call.
- **Tasks** – 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.

➤ **To work with the Notes window**

- 1** Use the **Filter** to narrow the entries to a specific note type (e.g., "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.
- 2** Use the up and down arrows to view the notes for the previous or next Address Book entry.
- 3** Use **Show All** to display all notes for a selected Address Book entry. This includes notes belonging to the selected Company/Individual and all associated Contacts. If this checkbox is not enabled, only those notes belonging to the Company/Individual or the selected Contact are displayed.
- 4** Double-click an entry to view the entire note. To add a note, right-click in the Notes window or press the **Insert** key.
- 5** You can perform common tasks by clicking the **Actions** button in the Notes dialog box. You can also spell check your note text.



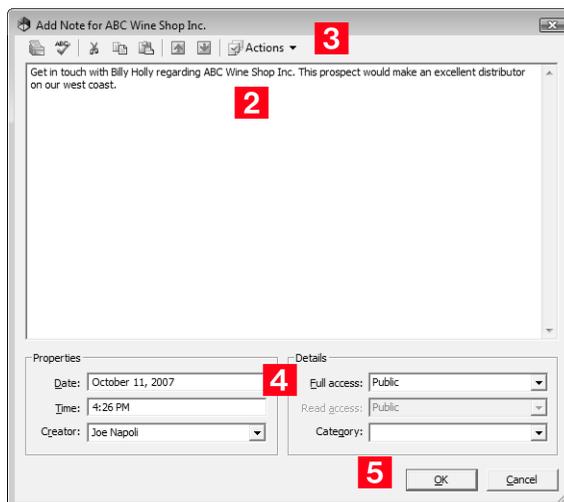
Select Search > Notes to find any note you want and select Reports > Notes to produce a Notes report. Simply select the types of notes you want in your search or report.

**i** You can also add a note by copying text to the Windows Clipboard, right-clicking in the Notes window, and choosing Paste Link.

**i** The Category field is available for only manual notes.

## ➤ To add a note

- 1** In a controlling window, drag an entry to the **Notes** window or to the **Note** button on the Standard toolbar.  
– or –  
From the Notes window, while your entry is selected, right-click and select **Add Note**.  
– or –  
Double-click a blank note cell.
- 2** In the Add Note dialog box, type your note.
- 3** Use the **Menu Bar** at the top of the note for various tasks.  
  
See the mouse-over text or F1 Help for a description of each button. For example, you can check the spelling in your note using the Maximizer Spell Checker. Click the **Spelling** button to initiate the process.
- 4** Adjust the **Date**, **Time**, **Creator**, **Full access**, **Read access**, and **Category**, if necessary. Categories are created in the System Fields tab of the Administrator preferences.  
  
Press F1 for detailed assistance.
- 5** Click **OK**.



➤ **To add a default note**

**1** In the **Address Book**, **Opportunities**, or **Journal** windows, select **Default Note** from the **Edit** menu.

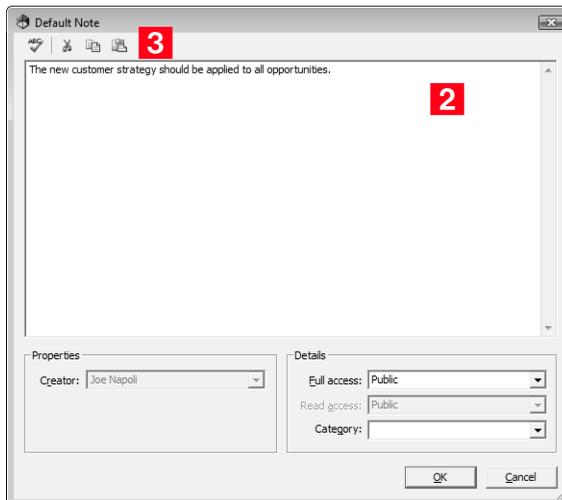
**2** Enter the body text, and if necessary select a user or group for the Full Access and/or Read Access fields. You can also select a note category (these are set up on the System Fields tab in the Administrator preferences).

This information appears as part of the note each time a note for an Address Book entry, an opportunity, or a journal entry is created. Note that the default note can be different for each type of entry.

**3** Use the **Menu Bar** at the top of the note for various tasks.

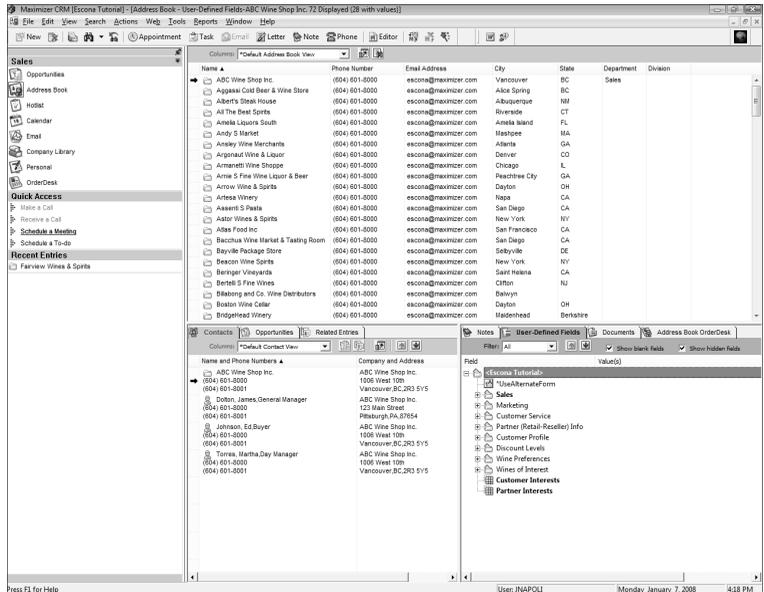
See the mouse-over text or F1 Help for a description of each button. For example, you can check the spelling in your note using the Maximizer Spell Checker. Click the **Spelling** button to initiate the process.

**4** Click **OK** to save the default note for each window.



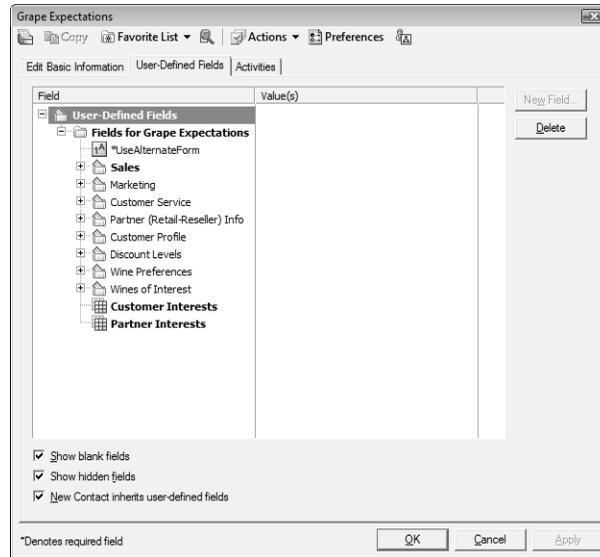
# Working with User-Defined Fields

User-defined fields for Address Book entries and opportunities are available in the User-Defined Fields following window. Which category of user-defined field is visible in the following window depends on which of the main windows is active. For example, when viewing the Address Book window, the User-Defined Fields following window contains only user-defined fields that pertain to Address Book entries, as shown in the following graphic.



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

following graphic shows the User-Defined Fields tab of an Address Book entry.



User-defined fields that pertain to user accounts are available from **File > Users > Properties > User-Defined Fields**.

Keep the following points in mind when working with user-defined fields:

- By default, user-defined fields are displayed in tree view, where fields are nested within folders. You can also display the fields in an alphabetical list, without their folder structure. You can set your default user-defined field view by selecting **File > Preferences**, and setting the **View User-defined fields in tree view** option on the **System Defaults** tab.
- When you select the **Show blank fields** option on the User-Defined Fields tab, all user-defined fields in the Address Book are displayed, not only the fields with existing values. Double-clicking on a field in the window allows you to add or modify a user-defined field value.
- When you select the **Show hidden fields** option on the User-Defined Fields tab, fields and folders that are set to hidden appear shaded. When you deselect this option, the fields and folders are completely hidden.
- **Mandatory fields** are denoted with an asterisk displayed after the field name and type. This is not the same as having an asterisk included as part of the field name. System-defined fields are shown in bold, black text.
- The kind of **Address Book information** to which user-defined fields apply—Address Book entries, opportunities, or users—

controls the window in which the user-defined field is available. For example, if you create an opportunity user-defined field, it will be available in the User-Defined Fields following window only when the Opportunities window is the controlling window.

- If a **Contact** is associated with an entry, the **Company** and **Contact** user-defined fields are shown in separate folders.
- Your selection of user-defined fields is usually set up by your system administrator using Administrator. However, any user can be given the rights to create, change, or delete user-defined fields in Maximizer. If you have not been given the ability to set up user-defined fields, you can only assign values to existing fields.

# Creating a List of Entries with a Search

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.

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

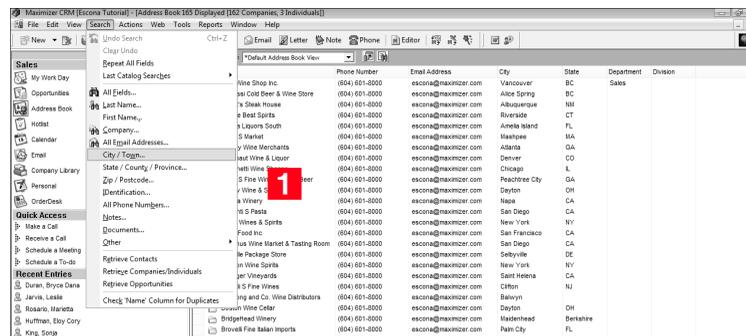
Maximizer's search features let you search any field for the data you specify and modify your current list with the matching entries. If you wanted to create a list of Address Book entries in Washington State, for example, you would search the State/Province field for entries with "WA" in that field.

## Search for Entries by a Field

Maximizer makes it easy to search by some of the basic fields, such as Last Name, Company, City/Town, or Email for Address Book entries or by Status or Revenue for opportunities. The Search menu varies depending on what window is selected.

### ➤ To search entries by a field

**1** From one of the main windows such as the Address Book or Opportunities window, select the field you are searching for from the **Search** menu. Select **Other** to see additional fields by which to search your Address Book entries.



**2** In the Search By [field] dialog box, specify the search criteria.

**i** Encrypted user-defined fields are not searchable.

You can select one of three options for updating the current list with your search results:

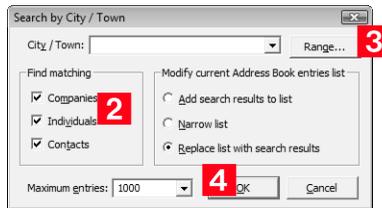
- **Add search results to list** searches the entire Address Book and adds the matching entries to your list.

- **Narrow list** searches your current list and reduces it to the matching entries.
- **Replace list with search results** searches your Address Book and replaces your current list with the matching entries.

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

**4** 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.

**i** 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.



## Perform an Advanced Search by All Fields

**i** In the Address Book window, you can click Repeat All Fields to repeat the last search. Once a search is saved in the catalog, you can access the most recent catalog searches right from the search menu.

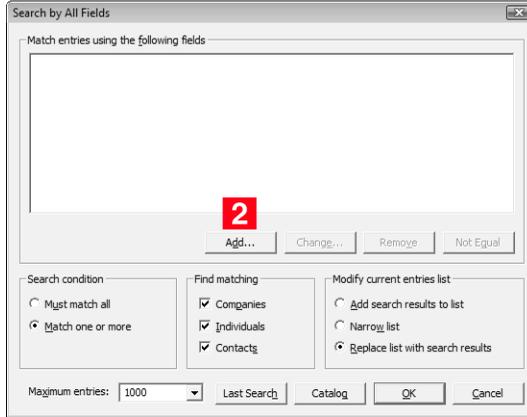
Maximizer's Search by All Fields feature is useful when you need to search by fields that aren't listed in the Search menu or when you want to search by more than one field. In the Search by All Fields dialog box, you can build complex search arguments and even save your search in the catalog for later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

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

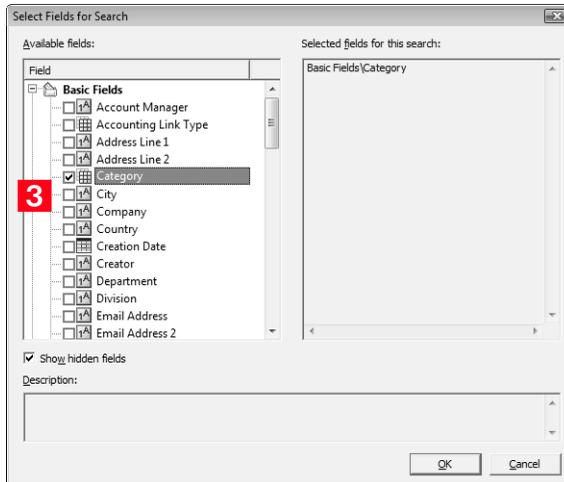
➤ **To search by all fields**

**1** In the Address Book window, select **Search > All Fields**.

**2** In the Search by All Fields dialog box, click **Add**.



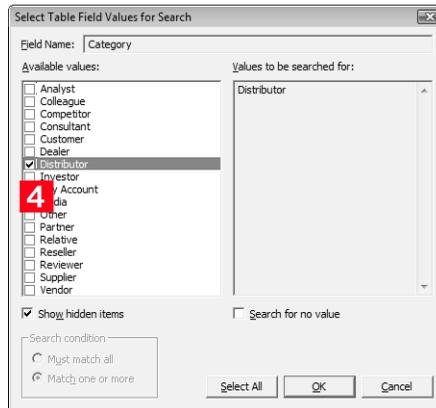
**3** In the Select Fields for Search dialog box, select one or more fields and click **OK**.



**i** Select the **Search for no value** checkbox to search for entries where no value is assigned to the selected field.

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

If applicable, indicate under **Search conditions** whether to return entries that match all values, or that match one or more values.



**i** To retrieve all Address Book entries that do not have email addresses, do a search by all fields, choose the email field, leave the search range blank, and then click the **Not Equal** button.

**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.

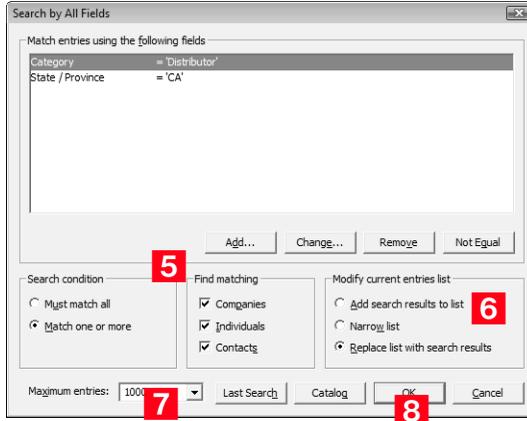
**6** In the **Modify current entries list** group box, select one of the options.

- **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.

**i** Use **Last Search and Catalog** for previously defined searches.

**7** Select or type the **Maximum entries** you would like to be returned.

**8** Click **OK** to start the search.



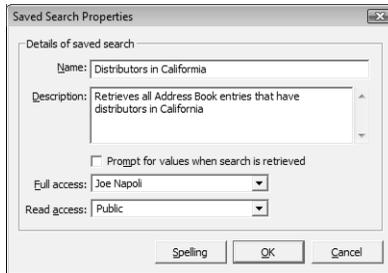
➤ **To save your search to the search catalog**

**1** Enter your search criteria in the Search by All Fields dialog box.

**2** Click **Catalog** and click **Add**.

**3** Specify the saved search properties and click **OK**.

**i** See F1 Help for detailed information on saved search properties.



The search is added to the search catalog. To retrieve a saved search, click **Catalog**, select the search, and then click **Retrieve**.

## Use the Undo Search and Last Catalog Searches Menu Items

You can quickly undo a search or perform a recent search in the Address Book or Opportunities windows.

### ➤ To undo a search

- After performing a search, select **Search > Undo Search**. This replaces the current list with the entries from the previous list.

### ➤ To retrieve a previous catalog search

- Select **Search > Last Catalog Searches** and select a previous search. This retrieves the list of entries associated with the previous catalog search.

## Create a Favorite List from a Search

After you've performed a search, you can create a Favorite List so it can be easily accessed. Favorite Lists are available in the Address Book window.

### ➤ To create a Favorite List of entries

- 1** Search for the entries you want saved in the Favorite List.
- 2** Select **View > Favorite Lists** and then click **Add**.
- 3** In the Favorite List Properties dialog box, enter a **Name** and **Description** for the list.
- 4** Select an option from the **Full Access** drop-down list.  
If you leave **Public** selected, all users can modify or delete the Favorite List. If you select a group or user, only members of that group or that particular user can perform these actions.
- 5** Select an option from the **Read Access** drop-down list.  
If you leave **Public** selected, all users can see and retrieve the Favorite List. If you select a group or user, only members of that group or that particular user can see and retrieve the Favorite List.
- 6** If you are creating a Favorite List for Address Book entries and want this Favorite List to appear each time you open Maximizer,

select the **Retrieve this list when an Address Book is opened** option in the Favorite List dialog box.

Once this option is selected, the setting overrides the **Ask at program startup which Address Book list to view** option on the **System Defaults** tab.

➤ **To retrieve saved Favorite Lists**

- To retrieve the list, select **View > Favorite Lists** and select the list you want to view. You can also use the **View > Recent Favorite Lists** to retrieve Favorite Lists you've recently accessed.

➤ **To add entries or remove entries in a Favorite List**

- 1** In the **Address Book** window, select the entries to appear in your updated list.
- 2** Select **Add to Favorite List** or **Remove From Favorite List** from the **View** menu.
- 3** In the Favorite Lists dialog box, select the **Favorite List** you are updating.
- 4** Select **Selected entries**, **Current entries**, or **All entries**.
- 5** Click **OK** to confirm that you want to update the list.  
Maximizer replaces the selected Favorite List with the entries in the current list.

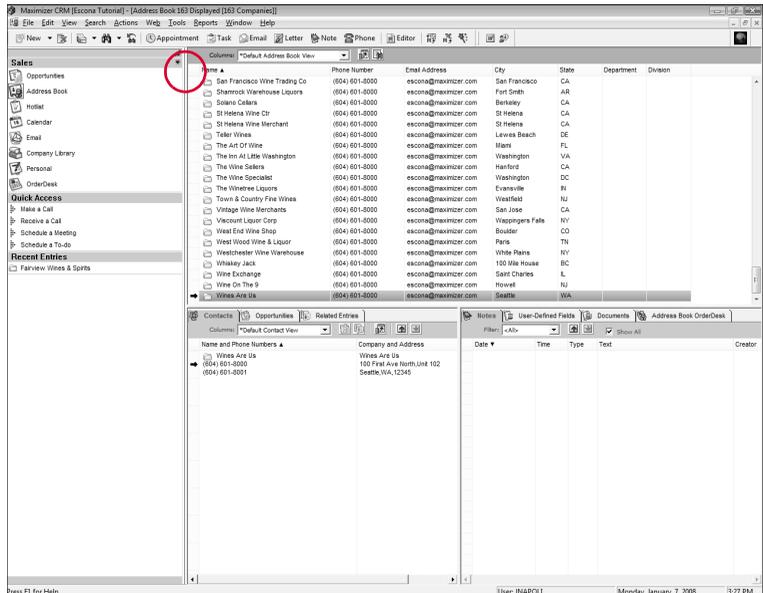
## Select and Display Entries in a List

After you've performed a search, you will most likely want to perform some action on the entries or a subset of the entries. There are a couple of ways to quickly select and display entries in a list.

➤ **To select all entries in a list**

- Click the gray button on the top left of the corner of a main window such as the Address Book window, as shown below.

Click this box to select all entries in the current list.



➤ **To display only selected entries**

- If you have selected several Address Book entries in your current list, select **Edit > Make Selected List Current** to remove the deselected entries from the current list and only display the selected entries.

## Tracking Your Appointments and Hotlist Tasks

**i** To learn more about the Hotlist window, press F1. For assistance adding a Hotlist task, select the Wizards button on the Standard toolbar and run the Add Hotlist Task wizard.

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.

### Hotlist Window

**i** Tasks can be reassigned to another user. When a Hotlist task is added or reassigned, a note is created in the Notes window. This note includes the name of the person to which the Hotlist task is assigned.

Because the Hotlist is a controlling window, all your following windows update with it providing you with instant access to all information about the person or organization with which you are dealing. You can quickly handle all your communications—from phone calls to email—and record the results directly from the Hotlist.

#### ► To use the Hotlist window

- 1** Click the **Hotlist** icon or select **Hotlist** from the **Window** menu.
- 2** Select the **Show Appointments** option to have your appointments appear in your list with your tasks.
- 3** Use the view **Filter** to select the date range you want to show.
- 4** To add a new task, select **Edit > Add Task**.

– or –

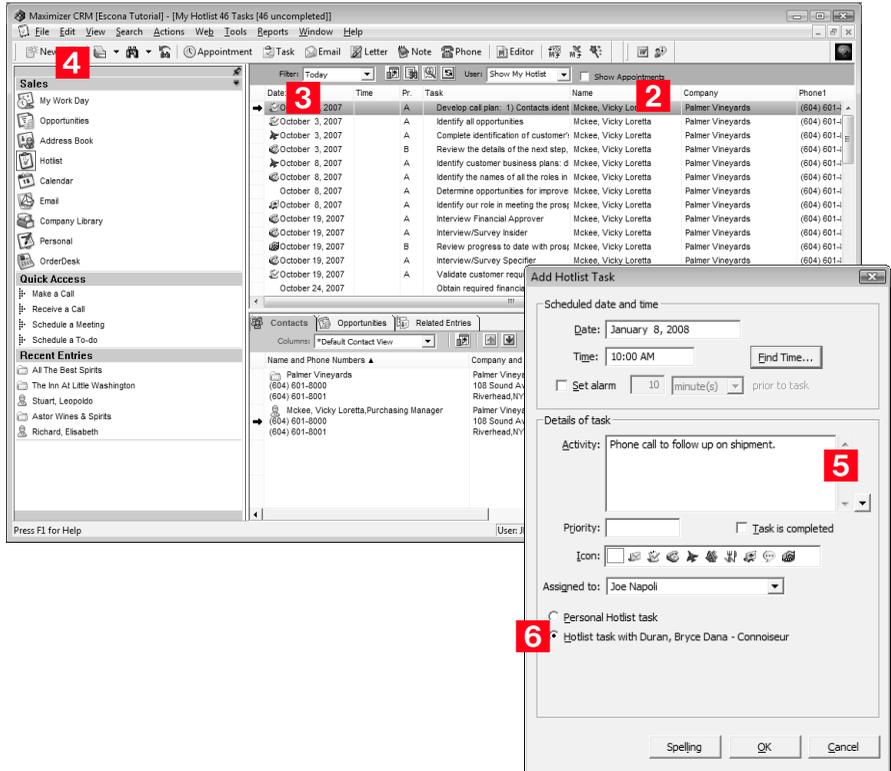
If a task is associated with an Address Book entry, select the entry in the Address Book window and drag it to the Hotlist icon.

You can view or modify an existing task by double-clicking the task.

- 5** Select a predefined **Activity** from the drop-down list (click inside the text box to access) or enter an activity.

**i** To create or modify column setups for the Hotlist window, click the Column Setup button on the View bar. For more information, refer to “Use Column Setups to Organize Lists” on page 127.

**6** A task can be personal or associated with an Address Book entry. To mark a task as personal, select the corresponding option. Otherwise, the task is created for the current Address Book entry



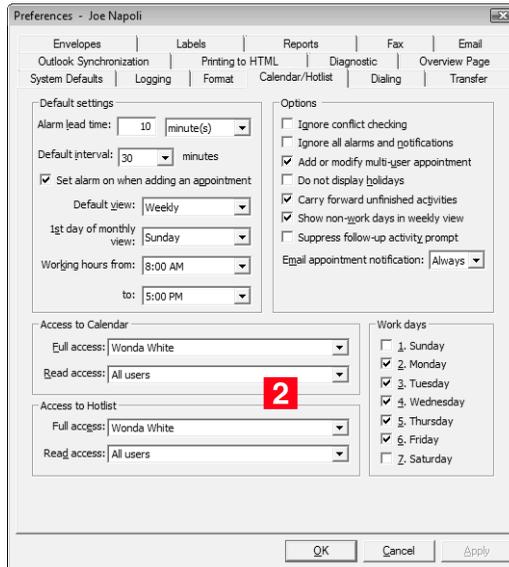
## Control Calendar and Hotlist Task Preferences

Use the Calendar/Hotlist preferences tab to change your Hotlist task and calendar preferences. Most of the options on this tab apply to the calendar.

**i** Hotlist and calendar preferences can also be controlled in Administrator using the user preferences Calendar/Hotlist tab.

### ➤ To set calendar and task preferences

- 1** Select **File > Preferences** and click the **Calendar/Hotlist** tab.
- 2** Set your calendar and hotlist default options. For detailed information on each option, press **F1**.



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.

**i** Appointments can be reassigned through the Hotlist window.

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.

## Calendar Window

**i** The daily view shows your day in half-hour intervals—use the Calendar/Hotlist preferences tab to change this interval length.

**i** If the appointment is assigned to multiple Address Book entries, all the entries are displayed in the pop-up window.

**i** A scroll bar appears when all the appointments don't fit in the day cell.

The Calendar window is where you schedule meetings and appointments. You can view, add, update, and delete appointments.

The following views are available in the Calendar window: Daily, Weekly, Weekly List, and Monthly. All views allow you to see your appointments at a glance.

To assist you with scheduling, color bars/icons indicate the attendees and booked resources and locations for the appointment. You can display the appointments for other users if they have given you access to their calendars. Calendar access is set on the Calendar/Hotlist tab in preferences.

Use the Utilities > Holiday Editor in Administrator to set up the holidays that are displayed in the Calendar window. These holidays can be changed. For further information, see “Recording Holidays in the Holiday Editor” on page 84.

### ➤ To view appointments in the Calendar window

**1** In the **Calendar** window, click the associated button to choose your calendar view—**Daily, Weekly, Weekly List, Monthly, or Today**.

**2** In the monthly view, holding your mouse pointer over a day displays all the appointment details for that day in a pop-up window. You can then hold your mouse over a particular appointment to view the appointment details. Or, you can click on the appointment in the pop-up window to open it.

In the weekly, weekly list, and daily views, holding your mouse over an appointment displays the appointment details. Double-clicking on an appointment opens it.

In the weekly list view, all the appointments for a day are listed in an easy-to-view format. Appointment details such as start/end time and location are displayed.

**3** Open another user's calendar by selecting the user's name from the **Users** drop-down list. Both the selected user's appointments and your own appointments are displayed. You can also view the booked time for meeting locations and resources by choosing the corresponding value in the list.

**4** To quickly navigate from one day to the next in the daily calendar view, use the arrow buttons located in the upper-left section of the window. You can also navigate from week to week and month to month using these buttons when in the weekly/weekly list or monthly calendar views.

Use the arrow buttons in the upper-right section of the window to move from one year (monthly view) or month (daily and weekly/weekly list view) to the next. Click on a month or day to show it in the main portion of the Calendar window.

**i** If a scheduling conflict with a user or a resource/location occurs, Maximizer prompts you with a message.

- 5** The day's Hotlist tasks are listed in the Hotlist Tasks section. Click a Hotlist task to view the details of the task.
- 6** You can view another user's appointment by adding the user to the **Calendar Users** list and selecting the checkbox beside the user's name. Use the **Check All** and **Uncheck All** options to quickly select or deselect all users in your Calendar Users list. Use the **Edit List** option to add users and resources to the calendar, and to set icon colors for these users and resources.
- 7** Use these buttons to hide the associated section of the Calendar window.

The screenshot displays the Maximizer CRM calendar interface with several panels and views. Red callout boxes are placed over specific UI elements:

- 1:** Points to the navigation arrows in the top right of the calendar window.
- 2:** Points to a pop-up window for a meeting on July 9, 2007, showing details like time (12:30PM - 1:00PM), location (Cafeteria), and resources (Projector).
- 3:** Points to the 'Users' dropdown menu in the top left of the calendar window.
- 4:** Points to the 'Show My Calendar' dropdown menu in the top left.
- 5:** Points to the 'Hotlist Tasks' section on the right side of the calendar window.
- 6:** Points to the 'Calendar Users' list on the right side, which includes checkboxes for users like Joe Napoli, Celine Dancer, and Daniel Brown.
- 7:** Points to the 'Hotlist Tasks' section in a separate window on the right, showing a list of tasks with dates and descriptions.

## Add a New Appointment to Your Calendar

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 even 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 even send an email to the selected users, the associated Address Book entries, and yourself.

You can schedule appointments from any controlling window, or from the Calendar window. If you add an appointment from a controlling window, 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.

**i** If the appointment is assigned to multiple Address Book entries, the text "(with multiple Address Book entries)" is displayed in the Name column of the Hotlist task.

Appointments can be viewed in the Hotlist window provided you select the Show Appointments option on the Hotlist's View bar (if you are using the Outlook Style window layout, you may need to drag the following windows a little to the right). Calendar appointments can be reassigned to other users through the Hotlist window.

Other users can view your appointments, or even schedule them, if you have given them access using your Preferences > Calendar/Hotlist tab. When an appointment is marked as private, even those with access to your calendar cannot see the appointment details.

### ➤ To schedule an appointment

**1** In a controlling window, select an entry if you would like to schedule the appointment with a specific Address Book entry and do one of the following:

- Right-click and select **Schedule > Meeting**.
- Click the **Appointment** button on the toolbar.
- Drag the entry from the controlling window to the **Calendar** window or the **Calendar** icon.

– or –

In the Calendar window, select a date and do one of the following:

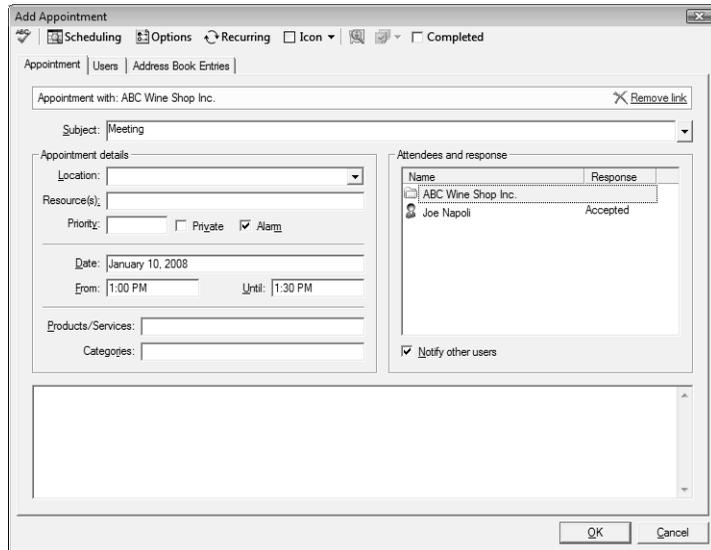
- Right-click and select **Add Appointment**.
- Click the **Appointment** button on the toolbar.
- From the **Edit** menu, select **Add Appointment**.

**2** In the Add Appointment dialog box, fill in the details of the appointment. For more information, see “Using the Add/Modify Appointment Dialog Box” on this page.

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

## Using the Add/Modify Appointment Dialog Box

This dialog box contains a toolbar and three tabs: Appointment, Users, and Address Book Entries.



## Using the Toolbar

The toolbar allows you to set appointment options and perform tasks such as checking spelling and finding free meeting times.

**i** If a scheduling conflict with a user or a resource/location occurs, Maximizer prompts you with a message.

- Click the **Scheduling** button to open the Find Free time dialog box, where you can find free time slots for locations, resources, and users who have allowed you access to their calendars.
- To set lead times for alarms, click the **Options** button. (To control the default setting for alarms, select File > Preferences > Calendar\Hotlist.)

- If you want the appointment to change your Peg Board status, click the **Options** button and select the **Sign Out of Peg Board** checkbox.



- To schedule a recurring appointment, click the **Recurring** button. See F1 Help for more information.
- Click the **View in Address Book** button to view selected Address Book entries in the Address Book window.
- Click the **Icon** button to select an icon to display with the message in the Calendar and Hotlist windows.
- In the Modify dialog box, the **Actions** menu is available if you select an Address Book entry in the attendee list. If you select a user, this menu is disabled.
- Select the **Completed** checkbox to mark the appointment as completed.

### Using the Appointment Tab

Use this tab to fill in appointment details and view information about the appointment.

- When you add an appointment from a controlling window, it is by default linked to the current entry. Information about the entry is displayed in the information bar. If the current entry is an opportunity, the entry is displayed as a link in the saved appointment. When you open the appointment, you can click the link to view the entry in the associated controlling window.
- When you add an appointment from the Calendar window, it is by default created as a personal appointment. You can, however, link the appointment to the current entry or assign entries to it in the Add/Modify Appointment dialog box.
- When creating an appointment, you can unlink the current entry from the appointment by clicking **Remove link**.



- If the appointment you are creating is linked to an opportunity, the assigned Contact is added to the **Assigned Attendees list** on the Address Book Entries tab. If you click **Remove link**, the Contact is removed from this list.
- When an appointment is not linked to an opportunity, and no Address Book entries are assigned to it, the appointment is designated a personal appointment.
- Select a **location** for the appointment and specify the needed **resources**. These values are set in Administrator. Use the **Scheduling** button to look for free times.
- To set a **priority** for this appointment, set a value in the **Priority** drop-down list.
- To keep the appointment details private, select the **Private Appointment** checkbox. When this option is selected, even those with access to your calendar cannot see the appointment details. The appointment appears in the calendar with the activity displayed as "Private Activity".
- To set an alarm, select the **Alarm** checkbox.
- You can display products/services and categories related to the appointment by selecting values from the **Products/Services** and **Categories** boxes.
- The **Attendees and response** list displays meeting invitees and their responses (blank if no response, Accepted, Tentative, or Declined).
- To notify invitees about the meeting and allow them to accept or decline, select the **Notify Other Users** checkbox.
- You can add a note to the appointment in the text box in the lower part of the dialog box.

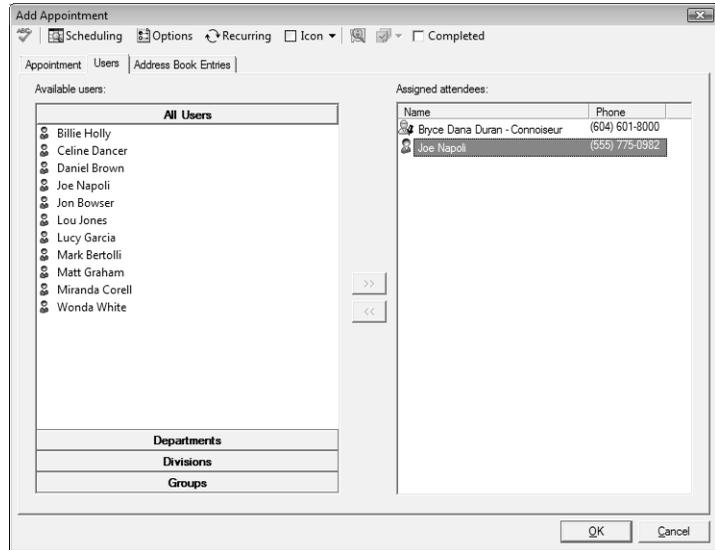
 For more information on displaying products/services and categories, see Maximizer Help.

## Using the Users Tab

Use this tab to select users to attend the meeting.

- Available users are displayed on the Users tab by group (all users, departments, disabled users, divisions, security groups). If you don't want to display users by group, deselect the **Display Users by Groups** option. (Select **File > Preferences > System Defaults**.) If you don't want to display a specific group, deselect it on the System Defaults tab.
- To add a user to the **Assigned Attendees** list, select the user and click the right arrow button. To add all the users in a group to this list, select the group and click the right arrow button. To

remove a user from the list, select the user and click the left arrow button.



### Using the Address Book Entries Tab

Use this tab to search for Address Book entries and assign them to an appointment. Also use this tab to unassign the current Address Book entry from the appointment.

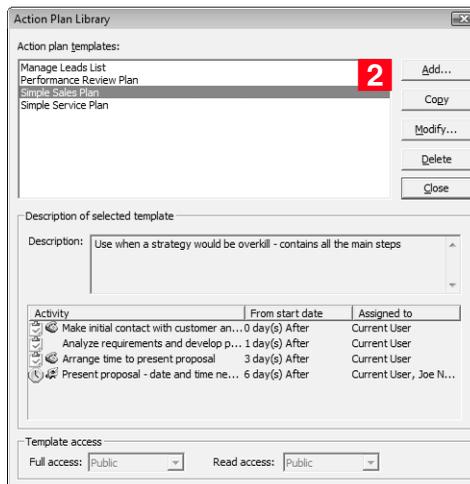
- Search for entries by **Last Name** or by **Company**. Select an entry in the search results list and click the right arrow to add the entry to the **Assigned Attendees** list.
- To remove an Address Book entry from the **Assigned Attendees** list, select it and click the left arrow.
- If the appointment is linked to a case or opportunity, you cannot remove the assigned Contact from the **Assigned Attendees** list.

## Use Action Plans to Create Appointments and Hotlist Tasks

You can create Action Plan templates, which can later be scheduled to create appointments and Hotlist tasks for Address Book entries. Action Plans can apply directly to the Address Book entry or to an opportunity for an Address Book entry. You can also schedule Action Plans to create personal appointments and Hotlist tasks.

### ► To create an Action Plan template

- 1 Select **File > Action Plan Library**.
- 2 Click **Add**.



- 3 In the **Add Plan Template** dialog box, 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 and click **OK**. You will now see the activity listed as part of the template.  
Repeat steps 4 and 5 for each activity you are adding to the template.
- 6 If you wish to modify the start date of an activity, change the information in the **Schedule activity** fields.
- 7 Click the ellipsis button beside the **Assigned to** field to assign an activity to another user. By default, the current user is the assigned user.

**i** Click the Properties button to view creation details of the plan such as the Action Plan ID number and creation date. The Properties button is also accessible when you are modifying an Action Plan template.

- 8** Select the **Personal activity** option to mark this task as not associated with an Address Book entry.
- 9** Select a user or group name in the **Full Access** and **Read Access** fields to make this Action Plan template accessible to only a particular user or group.

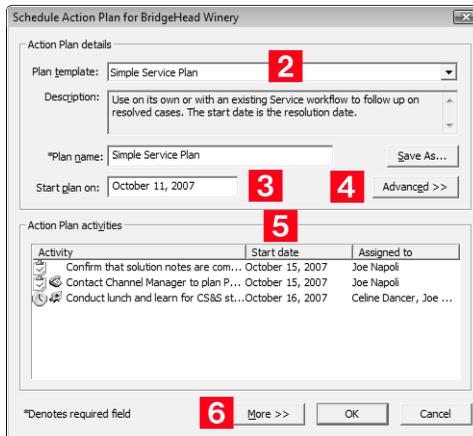
### ➤ To schedule an Action Plan for an Address Book entry

**i** Each time an Action Plan is scheduled for an Address Book entry, a note is logged in the Notes window.

- 1** To schedule an Action Plan associated with an Address Book entry, select an entry in the Address Book or Opportunities window, right-click and select **Schedule > Action Plan** or **Schedule an Action Plan**. The Action Plan is scheduled for the associated Address Book entry.
- 2** Select an Action Plan from the **Plan template** drop-down list. Optionally, you can modify the **Plan name** and **Description**. The **Save As** button allows you to save a modified Action Plan as a different template.
- 3** Enter a start date in the **Start plan on** field. You can click inside the field and then click the ellipsis button to choose a date from a popup calendar.
- 4** Click **Advanced** to toggle between the advanced and simplified view of the dialog box.
- 5** Enter the Action Plan details.  
The **Replace current user with** option allows you to assign another user to all appointments and tasks included in the Action Plan. Similarly, you can assign a specific appointment or

task to another user when the appointment or task is created or modified. The **Skip non-work days** option excludes days you have marked as non-work days in your Calendar preferences from the Action Plan.

- 6 Click **More** to add a new appointment or task to the Action Plan. You can also modify or delete a selected appointment or task in the Action Plan using the More button.



➤ **To schedule a personal Action Plan**

- To schedule a personal Action Plan, right-click and select **Schedule > Action Plan** or **Schedule an Action Plan** without an entry selected. The appointments and tasks associated with the Action Plan are automatically created as personal.

## View Activities

**i** When an Action Plan is scheduled in the Address Book window, it does not appear on the Activities tab in the Opportunity window. If scheduled in the Opportunities window, it does appear in the Address Book entry's Activities tab.

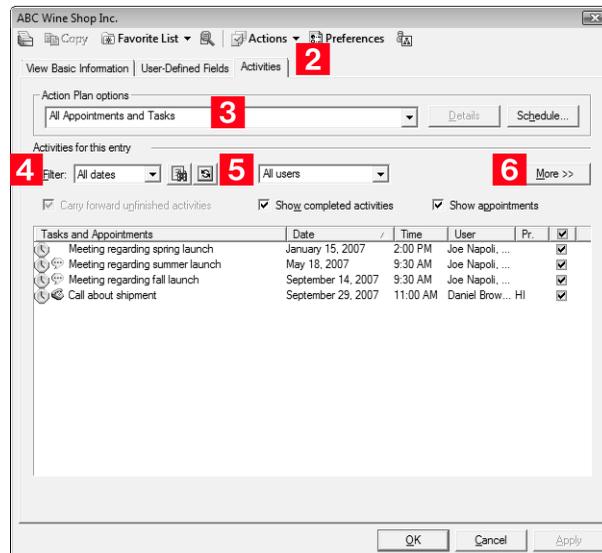
**i** The Details button allows you to view the details for a selected Action Plan such as the description or properties. The Schedule button allows you to schedule a new Action Plan for the current Address Book entry.

You can view activities scheduled for Address Book entries from the Address Book window. You can also view activities specific to an Address Book's opportunities in the related window.

### ► To view activities for Address Book entries

- 1** Open the related Address Book entry.
- 2** Click the **Activities** tab.
- 3** By default, all activities are displayed in the Activities tab. You can choose to view only Action Plan activities or filter the list to view only those Action Plan activities related to a specific date range, module, and/or user.
- 4** Further filtering can be done for the activities list by using the **Filter** drop-down and **User** drop-down lists, the **Custom Filter** button, and also the **Show Appointments** option.
- 5** Click the **Refresh** button to update the list of activities when you add an activity to an Action Plan.
- 6** Click **More** to add, modify, or delete an activity in a selected Action Plan.

You can also view a list of all your activities by choosing **View > Activities [for Address Book entry]**. The activities shown in this dialog box are related specifically to Address Book entries, unless you have no Address Book entries in your current list, in which case the list displays personal activities.



➤ **To view activities related to opportunities**

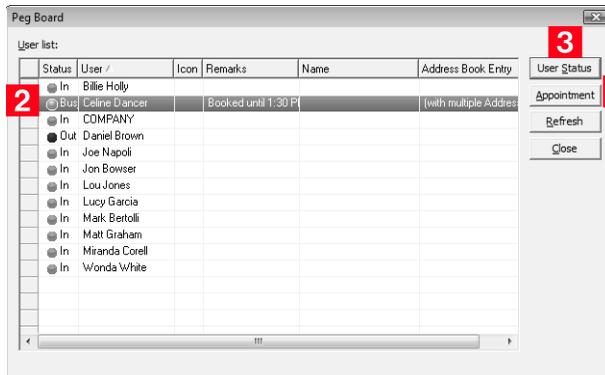
- 1 Open the related opportunity.
- 2 Click the **Activities** tab.
- 3 Follow the steps listed in the previous heading procedure to filter your activities list or make changes to an Action Plan.

## Check Your Co-workers Status with the 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.

➤ **To view the Peg Board**

- 1 Select **View > Peg Board**.
- 2 The status indicators denote if a user is busy or not. When a user creates an appointment, the **Sign out of Peg Board** option must be selected so the Peg Board is updated.
- 3 To override the calendar status, click on the **User Status** button to manually set a user's status.
- 4 You can see other users' busy periods if they have allowed you to view their calendars (File > Preferences > Calendar/Hotlist tab). If a user has allowed others to view their calendar, you can click the **Appointment** button to view the details of the user's appointment.



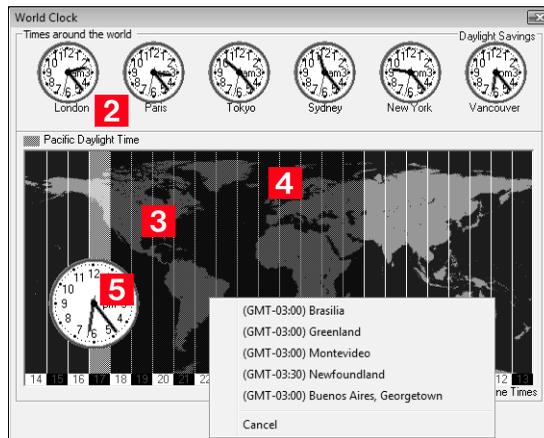
## Check the Time in Other Cities Using the World Clock

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.

### ► To use the World Clock

- 1 Select **Tools > World Clock**.
- 2 To select a time zone, right-click on one of clocks.
- 3 To view time zone information, click in the corresponding area of the world map.
- 4 The shaded area indicates night time. Right-click to turn the **Show night** option on or off.
- 5 Click on any time zone in the world map to view the time in the large clock.



# Using Organizational Charts

You can easily see the hierarchical structure of a Company or an Individual entry using organizational charts. Maximizer users can also be viewed within an organizational chart. Using drag and drop, you can change the structure of the chart as well.

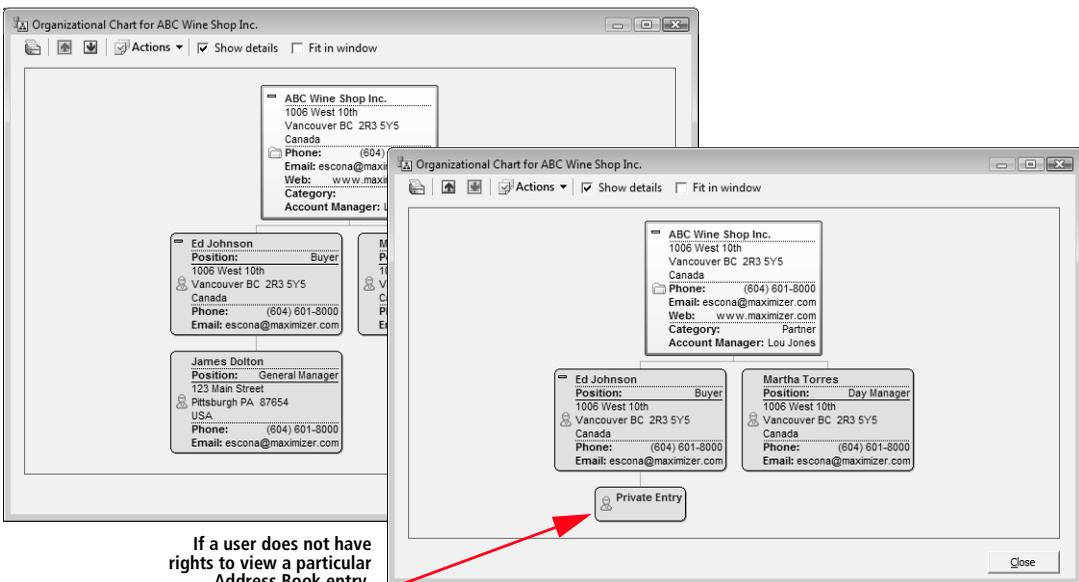
➤ **To view an organizational chart for a Company or Individual**

**1** In the **Address Book** window, select the Address Book entry for which you would like to view the organizational chart.

**2** From the **View** menu, select **Organizational Chart**.

The organizational chart appears displaying the entry's associated Contacts in a hierarchical format.

- To view the organizational chart for the previous or next entry in the Address Book list, use the **Previous entry** and **Next entry** buttons.
- Use the **Print** button to print the organizational chart.
- You can choose not to show the details such as a Contact's position by not selecting the **Show details** checkbox.
- To fit the entire organizational chart into the dialog box, choose the **Fit to page** option.



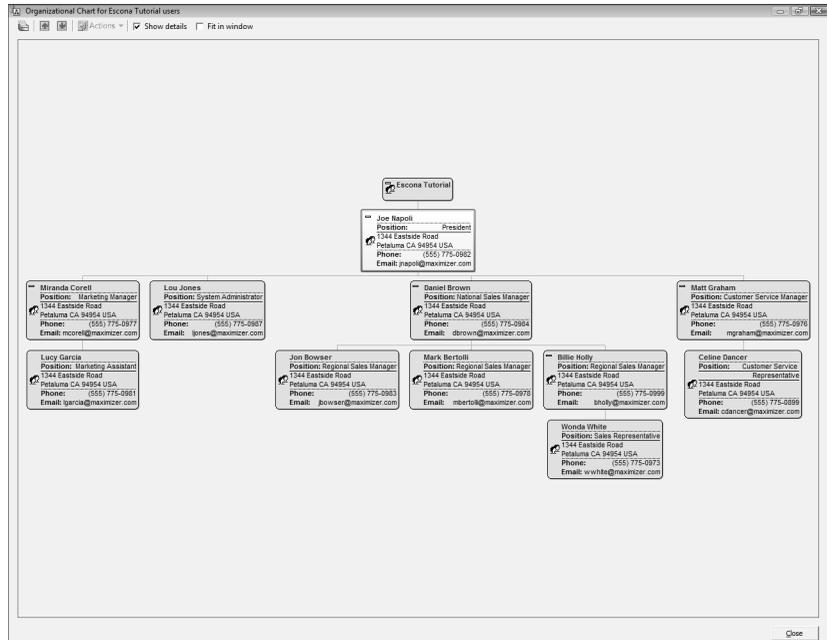
If a user does not have rights to view a particular Address Book entry, Private Entry displays in place of the entry details.

➤ **To view an organizational chart for Maximizer Users**

- 1** From any Maximizer window, select **Users** from the **File** menu.
- 2** Click **Org Chart**.

**i** Disabled users are shown in organizational charts.

The organizational chart appears displaying all Maximizer users in a hierarchical format.



➤ **To modify an organizational chart**

There are two ways to modify the structure of an organization chart as follows:

- Drag and drop a Contact on to the Contact you want the first Contact to report to. For example, if you would like Billie Holly to report to Joe Napoli, you'd drag her entry on to Joe's (these are the Escona sample Address Book users). Click **OK** to confirm the reporting change.
  - or –
- Change the **Reports to** field on the Contact's Basic Information tab.

## Sharing Your Files in the Company Library

**i** You can search for files in the Company Library by using the search commands on the Search menu when the window is active. The Search Next command allows you to repeat a previous search. The Search button allows you to search for a filename.

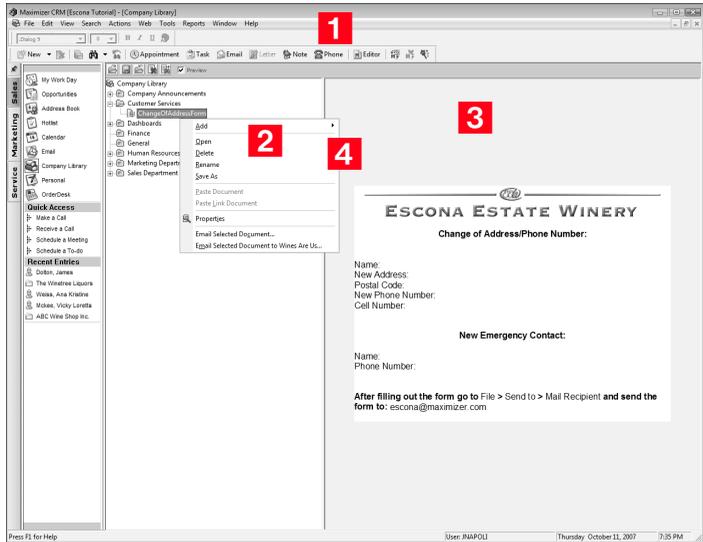
You know the value of keeping an organized database of your marketing materials and other company collateral. Brochures, price lists, photos, magazine reviews—all of these materials should be easy to find when you need them. The Company Library provides shared access to a central library of these materials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

The Company Library window is divided into two panes: the left pane is a tree view, which displays the folders and files in your library; the right pane is a preview area, in which you see a preview of certain file types or type text notes.

### ► To share files in the Company Library

- 1** Use the toolbar for common tasks, like **Open File**, **Save Note**, **Close Note**, **Find**, and **Preview**.
- 2** The area in the left side of the window lists your folders and files in a tree view—much like Windows Explorer.
- 3** The area in the right side of the window displays a preview of most file types. You can also view and edit notes here.  
  
Deselect the **Preview** checkbox to display an icon rather than a preview.
- 4** 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**.
  - Email your document by right-clicking on the file and choosing **Email Document** or **Email Document to [current entry]**. You can email multiple documents at one time by clicking on the documents while holding the Ctrl or

Shift key down and then choosing **Email Selected Documents** from the shortcut menu.



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 files, folders, and notes as either private or public entries. 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.

The easiest way to add an item to the Company Library is to right-click on the folder where you wish to place the new item, and select Add from the shortcut menu. You then choose which type of item to add to the folder:

- **Document** – select this item to add a file. The file doesn't have to be a document, but the preview only works for documents.
- **Note** – select this item to add a text-only document that you can write and edit in the preview pane.
- **Folder** – select this item to add a new folder.

You can either create a new file using the associated application, or you can browse for an existing file on your hard disk drive or network. If you browse for a file, you can choose to either “link” or “embed” the file in the Company Library. Embedding is usually a better choice, as a link is only a “shortcut” to the original file, which may get moved, renamed, or may not be accessible to all Maximizer users.

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

# Making Entries in Your Journal

**i** If you always want a journal entry to appear at the top of the list in the Journal window, type or select a date that is a few years in the future.

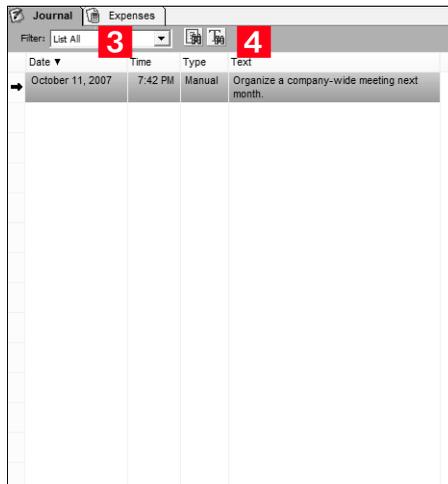
The Journal window provides you with a location to keep personal records. Journal entries can be business activities, reference notes, and personal ideas. These entries are similar to notes, except they are not attached to an Address Book entry.

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 on the File > Users > [user ID] > Preferences > Logging tab.

## ➤ To use the Journal window

- 1** Select **Window > Journal**.
- 2** Right-click and select **Add Journal Note**.
- 3** Filter your journal entries by selecting one of the following items from the view filter—**List All**, **Today**, **Yesterday**, **This Week**, or **This Month**.
- 4** To search for a note by date range or text, click the corresponding search icon.



# Monitoring Income and Expenses

**i** Expense/income entries cannot be imported from another Address Book.

Use the Expenses window to record your income and expense items in separate accounts.

## ➤ To use the Expenses window

- 1** Select **Window > Expenses**.
- 2** Right-click in the window and select **Add Account**. Type a **Name** and **Description** for the entry.
- 3** Choose to make it an **Expense** or **Income**.
- 4** You can mark the entry as **Public** to let others see the entry.
- 5** Then open the account, choose the day to which the expense or income applies (the current day is the default), enter the dollar amount and choose to add, subtract, or replace the amount.

The screenshot shows the 'Expenses' window with a table of income and expenses for October 2007. The table has columns for 'Account', 'October', and 'YTD 2007'. Under 'Income', there is a 'Total Income' row with values \$0.00 and \$0.00. Under 'Expenses', there are 'Total Expenses' and 'Total Net Income' rows, all with values of \$0.00.

Three dialog boxes are overlaid on the screenshot, illustrating the steps:

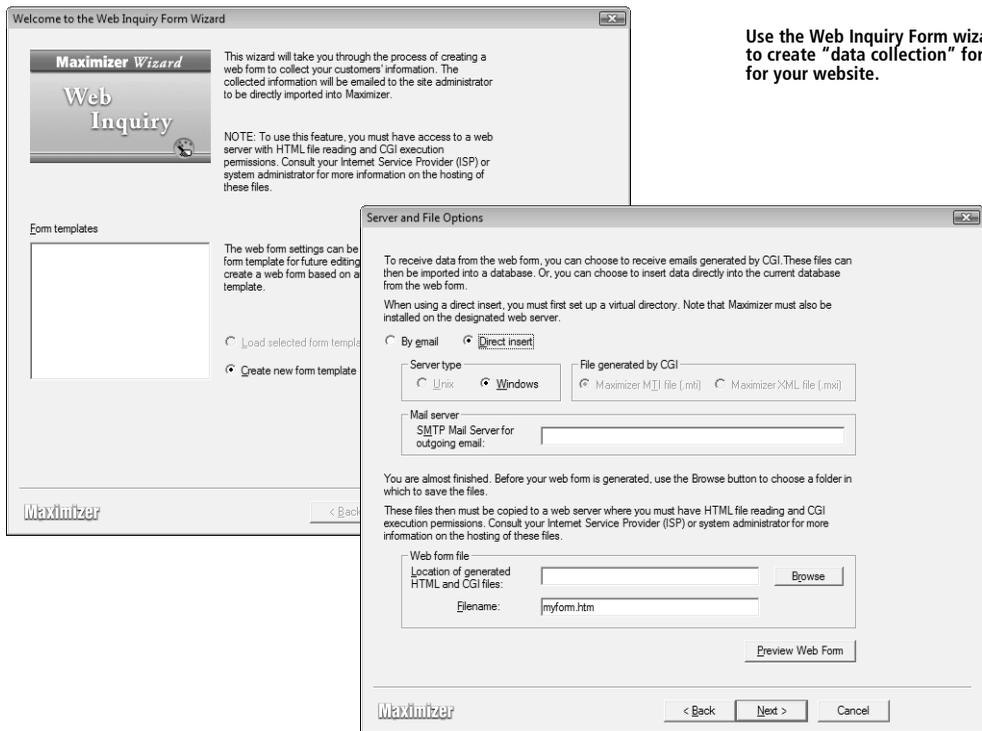
- Dialog 1 (New Income/Expense Account):** Shows fields for 'Name' and 'Description'. A red '2' is next to the 'Name' field.
- Dialog 2 (Type and Security):** Shows radio buttons for 'Expense' and 'Income' (with a red '3' next to 'Expense'), and 'Public' and 'Private' (with 'Private' selected).
- Dialog 3 (Account - ExpenseAccount):** Shows a 'Daily summary' table with dates from October 4, 2007, to October 12, 2007, and an 'Amount' field. A red '5' is next to the 'Amount' field. Below the table are 'Add', 'Subtract', and 'Replace' buttons.

# Creating Web Inquiry Forms for Your Website

**i** When using a direct insert, you must first set up a virtual directory. Note that Maximizer must also be installed on the designated web server.

Maximizer can help you create an inquiry form to collect pertinent information from your website visitors. The collected information is emailed 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.

Open the Web Inquiry Form Wizard by selecting Web > Create Web Form. Follow the instructions on each of the wizard pages.



Use the Web Inquiry Form wizard to create "data collection" forms for your website.

Use Maximizer's Web Inquiry Form 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 emailed 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.

## Maximizer Web Form Requirements

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">
```

# Maximizer CRM Gadgets

If your computer uses Microsoft Windows Vista™, you can add the Address Book gadget to Windows Sidebar. You add the gadget from the Gadget Gallery, where all installed gadgets reside.

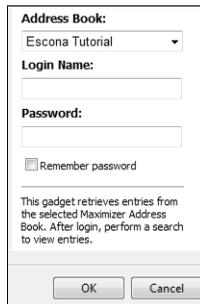
## ➤ To add a Maximizer CRM Gadget to Windows Sidebar

- 1 Click the plus sign at the top of Windows Sidebar to open the Gadget Gallery.
- 2 Double-click the Maximizer CRM gadget you want to add. The gadget is now docked to Windows Sidebar.

**i** To remove a gadget from Windows Sidebar, point to the gadget and click the Close button that appears at the top in the upper-right corner.

## ➤ To log into a Maximizer CRM Gadget

- 1 Point to the gadget and click the Options button that appears second from the top in the upper-right corner. Or right-click in the gadget and select **Options**. The Settings page opens.



The screenshot shows a dialog box titled "Address Book:" with the following fields and options:

- Address Book:** A dropdown menu currently showing "Escona Tutorial".
- Login Name:** An empty text input field.
- Password:** An empty text input field.
- Remember password
- Below the fields, a small text box reads: "This gadget retrieves entries from the selected Maximizer Address Book. After login, perform a search to view entries."
- At the bottom, there are "OK" and "Cancel" buttons.

- 2 Select an Address Book, enter your **Login Name** and **Password**, and then click **OK**.

## Work with the Address Book Gadget

Use the Address Book gadget to quickly search for and view Address Book entries and contact information.

- To search for Address Book entries, enter search text and click the drop-down arrow to select a search category (last name, first name, company, or phone number). The entries that match the search criteria are displayed.

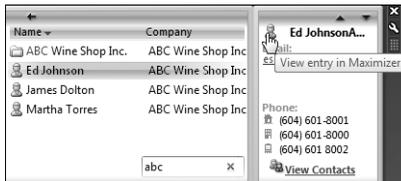


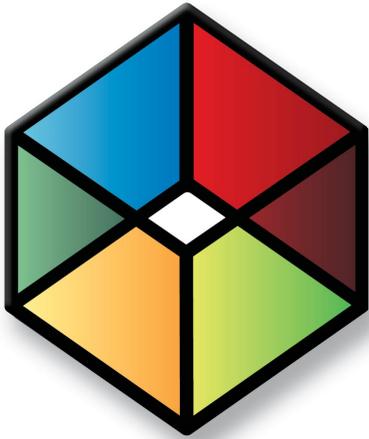
**i** In the detail view, click the Up and Down arrows to move from entry to entry. Click the horizontal arrow to return to the entry list.

- Click an entry to display details such as email addresses and phone numbers. Click an email address to send an email to a customer. To view all contacts related to the entry, click **View Contacts**.



- Drag the Address Book gadget from Windows Sidebar to display both the list and details in the gadget window.
- When the gadget window is expanded, you can click any column header in the entry list to sort by the information in that column.
- To view an entry in Maximizer, select the entry and click the **View entry in Maximizer** icon.





CHAPTER 9

# Communicating with Your Customers

## In this chapter...

"Keeping in Touch with Your Customers" on page 174

"Working with Documents and Templates" on page 175

"Broadcasting Documents Using Mail Merge" on page 182

"Sending and Receiving Email" on page 184

"Integrating Maximizer and Outlook" on page 188

"Synchronizing Address Book Entries with Microsoft Outlook" on page 199

"Keeping a Record of Your Telephone Calls" on page 205

## Keeping in Touch with Your Customers

 For more information on using the Maximizer Word Processor and the Documents window, see the Maximizer Help.

Maximizer makes it easy to maintain good communication with your customers. You can send email, letters, and faxes to any of your Address Book entries. When you want to make a phone call, Maximizer will show you the number to dial, or if you have a modem, Maximizer can dial the number for you. Any communications—via mail, the Internet, or telephone—can be logged and tracked in Maximizer.

The Email window works with many popular email service provider applications, such as Microsoft Outlook and others. This means that if you already use one of these service providers, you have access to the powerful email features in Maximizer.

You can make a phone call from Maximizer by selecting the Address Book entry you want to phone and clicking the Phone button in the toolbar. As you make the call, Maximizer lets you keep notes on your conversation as it's happening.

With the Documents window, you can keep any documents or files you send to the Address Book entry, or store any file that is somehow related to your activities with the Address Book entry.

If you prefer to use another word processor, Maximizer integrates with both Microsoft Word and Corel WordPerfect.

# Working with Documents and Templates

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.

## Use the Maximizer Word Processor

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

**i** To run a spell check, with the document or template open in the Maximizer Word Processor, place your cursor at the top of the page, and then select **Tools > Spell Check** or click the **Spell Check** button on the toolbar.

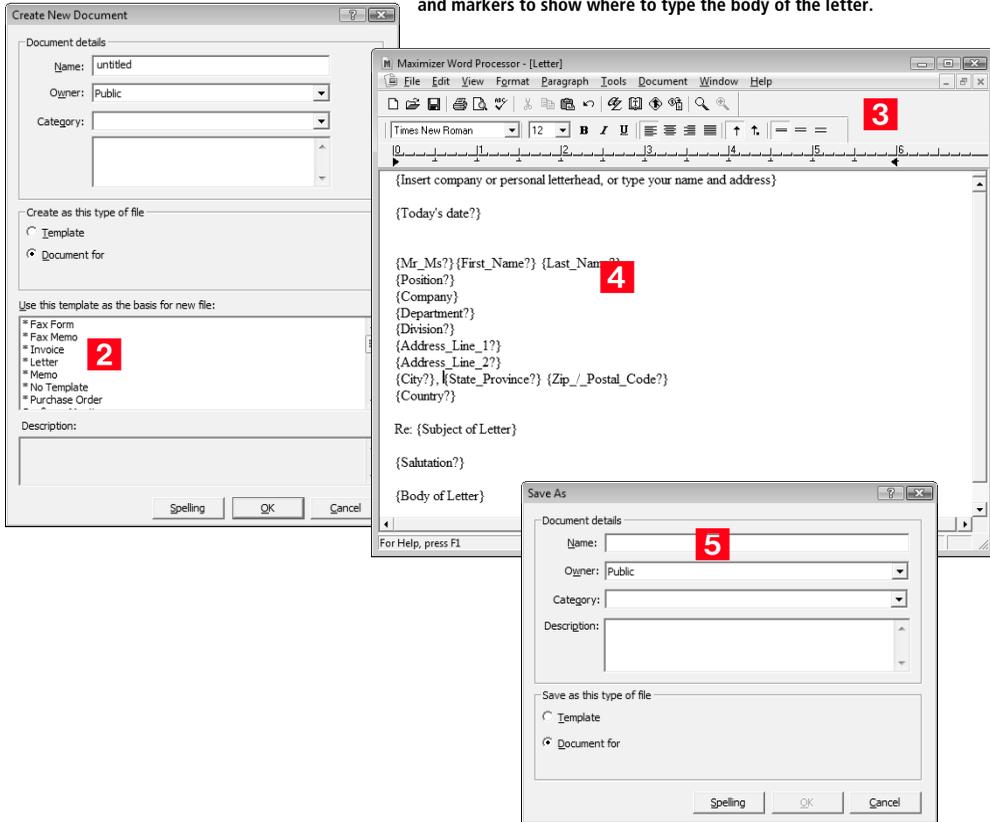
**i** The word processor includes fax, invoice, letter, and memo templates. You can customize these templates or create your own custom templates. For more information on templates, refer to “About Templates and Documents” on page 176.

### ➤ To create a document

- 1** Launch the Maximizer Word Processor in one of the following ways:
  - Drag an **Address Book** entry to the Documents window.
  - Click the **Editor** button or the **Letter** button on the Standard toolbar.
  - Select an **Address Book entry** and click the **Letter** button. To write a fax, select **Write a Fax** from the **Actions** menu.
  - Press **F8**.
  - Select **Tools > Maximizer Word Processor**.
  - Select **Actions > Write a Letter, Write a Fax, or Write a Document**.
- 2** Select **File > New** if you want to create the document based on one of the word processor’s templates. Enter the document’s name now or enter it when you save the document.
- 3** Use the **toolbars** for common tasks and formatting text and paragraphs.
- 4** 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.

- 5 When you are finished, select **File > Save As** and enter a name for the document. You can also specify the owner of the document, select a document category, and choose whether to save it as a template. If you've already specified the name, select **File > Save**.

In this sample letter, the template includes merge fields and markers to show where to type the body of the letter.



## About Templates and Documents

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.

## Use Microsoft Word or Corel WordPerfect

You can use Word or WordPerfect as your word processor. Both applications are fully integrated with Maximizer.

Ensure Word or WordPerfect is installed prior to installing Maximizer. Maximizer adds a button to the Maximizer custom toolbar for launching your word processor, and adds a set of Maximizer buttons to the toolbar in the word processor itself.

If you want to use the template files associated with WordPerfect or Microsoft Word, when installing Maximizer, select the Custom installation option. In the features dialog box, choose the related option.

### Maximizer Macro Security Setting

While some of your personal macros may require a “medium” security setting to run, Maximizer macros can operate in Word with a “high” security setting. To adjust your macro security setting, go to Tools > Macro > Security and make your selection in the Security Level tab.

After installing Maximizer, and the first time you open Word, you will be prompted to trust the Maximizer macros. Simply select the “Always trust macros from this source” option and click the Enable Macros button; the dialog box will not appear again.



### Unlinking Merge Fields in Word

You can insert merge fields from Maximizer into a Word document by using the embedded Maximizer toolbar. The links between the Maximizer fields and the corresponding fields in the Word document are dynamic, which means that the field values in the document change depending on which Address Book entry is selected.

**i** Dynamic links are created in the Word document only if the Link checkbox is selected in the Insert Merge Field dialog box. For more information on inserting merge fields, refer to “Use Merge Fields in a Document Template” on page 179.

If you don't want the document's merged values to change when a different Address Book entry is selected, you can break the merge field links by performing the following procedure.

➤ **To keep fields from changing when a different Address Book entry is selected**

- 1 Highlight the entire Word document by selecting **Edit > Select All**.
- 2 Press **Ctrl+Shift+F9**.

## Use Merge Fields in a Document Template

**i** 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.

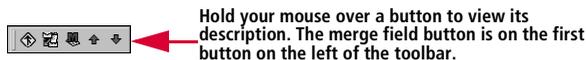
Merge fields are simply place-holders in your document that can be replaced by basic Address Book entry or user-defined field information when you perform a merge. For example, in the body of a letter, you can insert a merge field for a Contact's name:

{First Name?}

When you perform the merge, the name of each recipient will display in place of the merge field. If the entry doesn't 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, opportunities, and OrderDesk information as well.

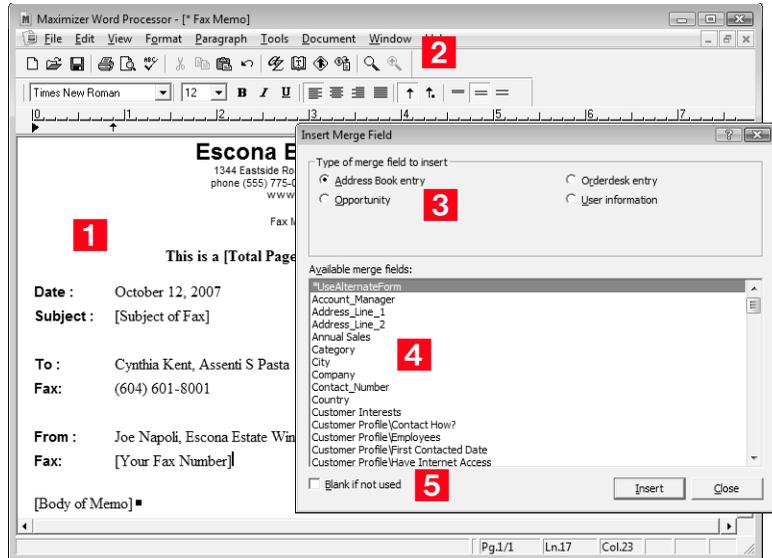
Note that you can create document templates with merge fields from Maximizer in Microsoft Word or Corel Word Perfect. Follow the steps listed below using the Maximizer toolbar embedded in the word processor to insert the merge fields. In the steps listed below, we are using the Maximizer Word Processor.



➤ **To insert a merge field**

- 1 With a document open in the Maximizer Word Processor, place your cursor where you want to insert a merge field.
- 2 Select **Merge Field** from the Maximizer Word Processor Tools menu, or click the **Merge Field** button on the toolbar.
- 3 In the Insert Merge Field dialog box, select the type of merge field you would like to insert.
- 4 Select a merge field from the list and click the **Insert** button. The selected merge field is inserted in the template.

- 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 Repeat steps 3-5 for each merge field you want to add.
- 7 When you are finished, click **Close**.



## Insert a File into the Documents Window

**i** If you want workstations other than your own to access a linked file, make sure that the file resides in a location they can access. When inserting the file, specify the full UNC path. For example: \\[server name]\Documents folder\maximizer.doc.

You can bring into Maximizer files that you created in other application such as Microsoft Word, Microsoft Excel, Microsoft Paint, and Adobe Acrobat, to list a few.

- 1** In a controlling window, click the entry to which to add the file.
- 2** Select **Insert File** from the **Edit** or shortcut menu.
- 3** Enter a **Name** and **Owner** of the file. Select your user name in the **Owner** field if you don't want to share the file with other users. If you want to link the file, select the **Link** checkbox.
- 4** Click **Browse** to browse to the file you want to insert. Select the file and click **Open**.

The file is inserted in the Documents window.

You can also insert files that have been copied to the Windows Clipboard (e.g., from Windows Explorer) by right-clicking in the Documents window and selecting **Paste Link**.

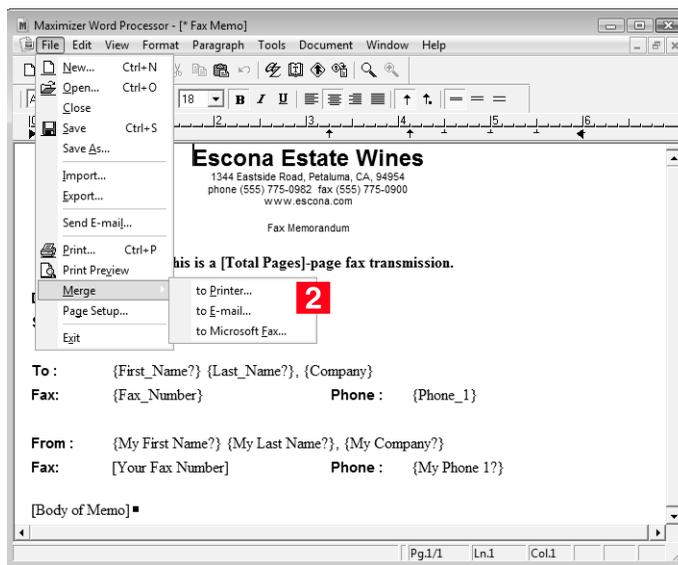
## Broadcasting Documents Using Mail Merge

If you wish to send a letter, an email, or a fax to many recipients, the Maximizer Word Processor's mail merge is the tool to use. The merge feature allows you to send a single document to multiple Address Book or Contact entries via fax, email, or regular mail. This type of merge is called a "broadcast" merge.

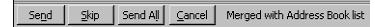
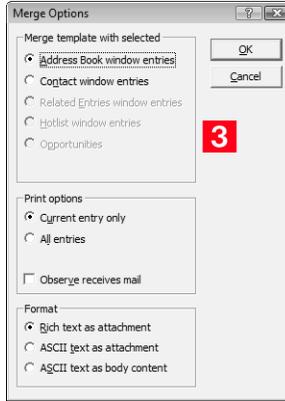
Because the word processor has merge fields for your Address Book information, you can create a document with a merge field in place of a specific name. These merge fields are replaced with the recipient's information when you perform the merge and send the document.

### ➤ To send a mail merge

- 1** To send a document in a broadcast merge, you first 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. Depending on what window you have active, the available merge entries vary. Click **OK** to continue with the merge.
- 4 Select **Print** or **Send** to merge the document with the first entry in your selected list of entries, or select **Send All** or **Print All** to merge the document with all of your selected entries. Click the **Skip** button to go on to the next entry.



## Sending and Receiving Email

**i** Both Maximizer and Administrator are used to control email preferences. Select File > Preferences to open the Preferences dialog box.

You can use Maximizer's Email window to send and receive email using your existing email system. You can also email Address Book entries directly from Maximizer's main windows.

By default, the Send Email dialog box opens when you compose, reply to, or forward email messages from Maximizer. However, if you disable the "Always display the Send Email options before composing email" option in preferences, this dialog box opens only if you use File > Send Email. Otherwise, the Compose Email Message dialog box opens directly, and default preferences for sending the email are used.

To send emails to Address Book entries or users when scheduling appointments, see "Add a New Appointment to Your Calendar" on page 151."

### Use the Email window

**i** To send emails to Address Book entries or users when scheduling appointments, see "Add a New Appointment to Your Calendar" on page 151.

The Email window works much the same as any standard email application, but has additional functionality that enables you to easily integrate your Address Book entries with your email. Using drag and drop you can quickly associate an email message with an existing entry in your Address Book or create a new entry in a few simple steps. You can also create appointments and Hotlist tasks by dragging an email message to the Calendar window or the associated icon (Calendar or Hotlist icon).

#### ► To send an email

**1** Click the **Compose** button in the Email window. The Send Email dialog box opens.



**i** See "Send Email Options" on page 186 for information on setting these options.

**2** If necessary, adjust the Send Email options. Click **OK**. The Compose Email Message dialog box opens.

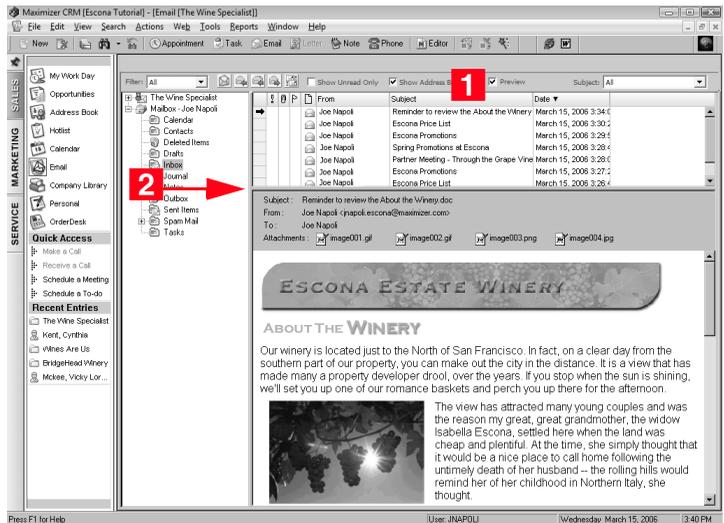
- 3 Compose your email message. Select the **Compose in HTML** checkbox if you want to use HTML formatting.
- 4 To attach a file, click **Add** under **File Attachments**.
- 5 Use the **To**, **Cc**, and **Bcc** buttons to select the recipients of the email. If you are sending out an email to a single recipient, you have the option of choosing a Maximizer Address Book entry or an Outlook contact.
- 6 Click **Send**.

## Email Preview Pane

You can preview email in the Email window just as you would in other email applications. To adjust the size of the preview window, move the upper preview border up and down.

### ➤ To use the email preview pane

- 1 In the Maximizer Email window, select **View > Preview** or select the **Preview** checkbox in the view bar of the **Email** window. By default, the preview pane is turned on.
- 2 Adjust the size of the preview window by moving the upper review border up and down.



## Send an Email to One or More Address Book Entries

You can quickly write an email message to one or more Address Book entries from any of the main Maximizer windows: Address Book or Opportunities. You can also log the email message to selected Address Book entries.

### ► To send an email to one or more selected entries

**i** See "To send an email" on page 184 for more detail on composing email messages.

**i** If you want to save a generic note to each Address Book entry, enter the text in the "Note Text for Each Entry" box.

**1** To send an email to one selected entry, click the **Email** button. To send the email to multiple Address Book entries, select **File > Send Email**. The Send Email dialog box opens.

**2** If necessary, adjust the Send Email options. Click **OK**. The Compose Email Message dialog box opens.

**3** Compose the email and click **Send**.

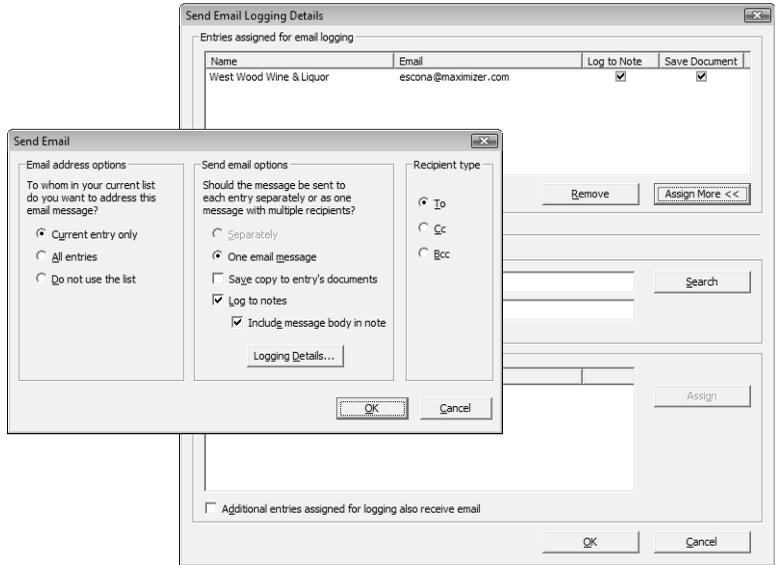
## Send Email Options

**i** To learn more about Send Email options, see Maximizer Help.

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:

- If you want to send the email 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.
- The **Log to notes** and **Include message body** options are unavailable if email logging options are disabled in the Preferences dialog box.
- Select **Logging Details** to open a dialog box in which you can view and adjust the logging details for the email recipients, and remove or assign entries for email logging.

- If you select email logging options, but no Address Book entries are assigned for logging, when you close the Send Email dialog box, a message appears asking you to assign entries.



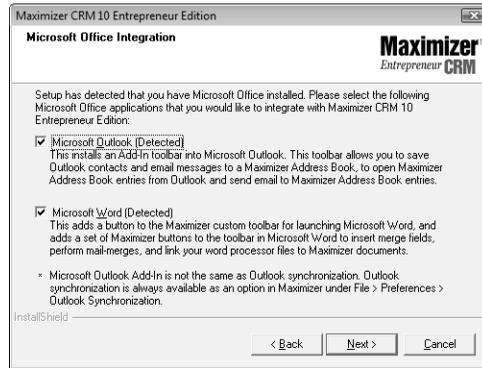
# Integrating Maximizer and Outlook

**i** Outlook integration works with Outlook XP, 2003, or higher. It does not work with Outlook Express.

**i** Outlook integration is not the same as Outlook synchronization. For information about Outlook Synchronization, refer to "Synchronizing Address Book Entries with Microsoft Outlook" on page 199.

If Outlook integration is installed and configured, you can use it to save Microsoft Outlook contacts and email messages to a Maximizer Address Book, to open Maximizer Address Book entries from Outlook, and to send email to Maximizer Address Book entries.

A typical installation of Maximizer installs Outlook integration by default if the necessary version of Microsoft Outlook is installed on the machine. The following installation screen determines whether Outlook integration is installed.



**i** If you are using Word as your email editor, the Maximizer Addresses button may not be available in the New email message window. For more information, go to page 195.

Outlook integration installs the following toolbars in Outlook.

Toolbar	Outlook Window	Buttons
	Mail (Inbox and other incoming email folders.)	<ul style="list-style-type: none"> <li>• Save Contact to Maximizer</li> <li>• Save Email to Contact in Maximizer</li> <li>• View Contact in Maximizer</li> </ul>
	New email message	<ul style="list-style-type: none"> <li>• Send Email and Save to Contact in Maximizer</li> <li>• Maximizer Addresses</li> </ul>
	Contacts	<ul style="list-style-type: none"> <li>• Save Contact to Maximizer</li> <li>• Save Email to Contact in Maximizer (disabled)</li> <li>• View Contact in Maximizer</li> </ul>
	Contact information	<ul style="list-style-type: none"> <li>• Save Contact to Maximizer</li> <li>• View Contact in Maximizer</li> </ul>

**i** If you are set up for synchronization with Outlook, creating a Contact through the buttons in Outlook, the Contact is added to the Favorite List and synchronized from that point forward.

If you don't see the Outlook integration buttons on the Outlook toolbar, select View > Toolbars, and make sure "Maximizer Add-In" is checked.

Before you can use Outlook integration, you must specify which Address Book to save the contacts and email messages to, as described below.

## Specify a Maximizer Address Book for Outlook Integration

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, and if you want, you can specify a different Address Book for integration on each machine.

If multiple users log into the same machine using different Windows login accounts, each user must specify the Address Book for integration in Maximizer on that machine.

### ➤ To specify an Address Book for integration

**1** In Maximizer, select **File > Preferences** and click the **Other Options** button on the System Defaults tab.

**2** Click **Address Book**.

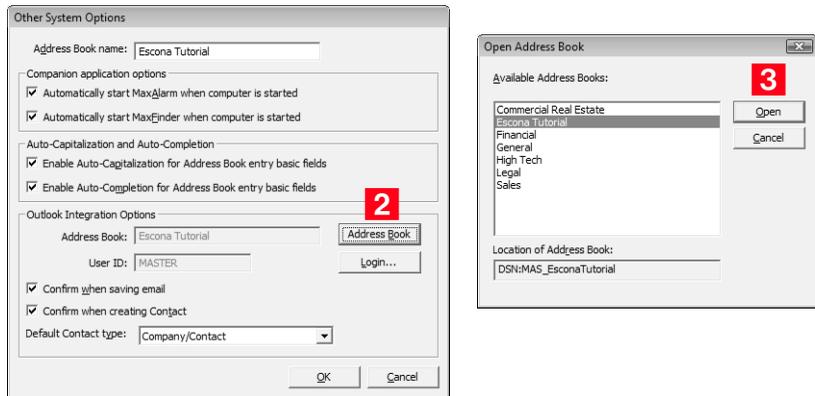
**3** Select the Address Book to integrate with Outlook, and click **Open**.

**4** Enter your **User ID** and **Password** in the Login dialog box.

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.

**i** Only one Address Book can be integrated with Outlook at a time.

- 5** Click **OK** to close the Login dialog box, and click **OK** again to close the Other System Options dialog box.



## Select the Outlook Address List to Integrate with Maximizer

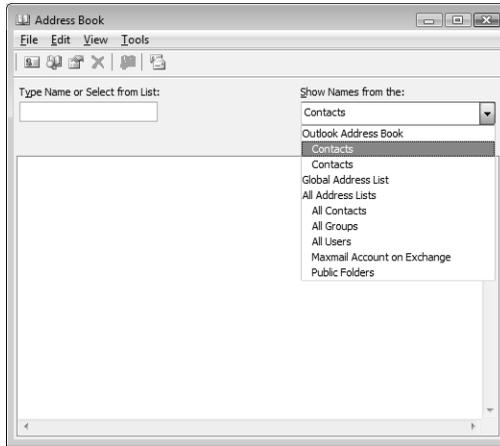
Outlook integration with Maximizer only works with address lists in the Outlook Address Book (such as Contacts), and only with one address list at a time. It doesn't work with the global address list or other address lists.

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.

### ➤ To select an Outlook address list

- 1** In Outlook, select **Tools > Address Book** from the menu.
- 2** In the Address Book dialog box, 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.

## Create Address Book Entries from Microsoft Outlook

**i** You must have the Address Book Insert access right to be able to create Maximizer Address Book entries from Outlook.

When you have Outlook integration installed and configured, you can create Maximizer Address Book entries from Outlook contacts or email messages, even if Maximizer isn't open.

If you are also using Outlook Synchronization for Address Book entries, as described on page 199, Outlook integration 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.

## Set Preferences for Creating Entries

When you create an entry, by default a Save Contact to Maximizer dialog box opens in which you can view and edit the information that will be used to create the entry.

If you want to always use the Maximizer defaults for creating Address Book entries, you can disable the dialog box as follows:

**1** In Maximizer, select **File Preferences** and click the **Other Options** button on the System Defaults tab.

**2** Deselect the **Confirm when creating Contact** checkbox.

Another preference you can set on this tab is whether entries are created from Outlook as Company/Contact or as Individual entries. The default setting is Company/Contact. If you want Address Book

entries to be created by default as Individuals, select Individual from the Default Contact drop-down list.

## Create an Address Book Entry from an Outlook Contact

### ➤ To save an Outlook contact to Maximizer



Save Contact to Maximizer  
button in Microsoft Outlook

- 1 In Outlook, select the contact.
- 2 Click the **Save Contact to Maximizer** button. The Save Contact to Maximizer dialog box opens.

\* Denotes required field

- 3 If necessary, change the Address Book entry type.

If you select the **Contact for an existing Company/Individual** option, click **Search** to find and select the Address Book entry for which you want to create a contact. Click **OK**.

Name	Email
Emma Beck	escona@maximizer.com

- 4 Edit the information in the available fields as required.

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

If you deselected the Confirm when creating Contact checkbox, as described in “Set Preferences for Creating Entries” on page 191, Maximizer creates entries as follows:

- If **Individual** is selected in the **Default Contact Type drop-down** list, Maximizer creates an Individual Address Book entry.
- If **Company/Contact** is selected in the **Default Contact Type** drop-down list, Maximizer creates a Company/Contact Address Book entry. If the Outlook contact information doesn't include a company name, you are prompted to provide one in the Save Contact to Maximizer dialog box.

## Create a Maximizer Address Book Entry from an Outlook Email Message

You can also create a Maximizer Address Book entry from an Outlook email message. The entry is created from the email sender (From address).

### ➤ To save an Outlook email sender to Maximizer



Save Sender As Contact to Maximizer button in Microsoft Outlook

**1** In Outlook, select the email message.

**2** Click the **Save Sender As Contact to Maximizer** button. The Save Contact to Maximizer dialog box opens.

**3** If necessary, change the Address Book entry type.

If you select the **Contact for an existing Company/Individual** option, click **Search** to find and select the Address Book entry for which you want to create a contact.

**4** Edit the information in the available fields as required.

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

If you deselected the Confirm when creating Contact checkbox, as described in “Set Preferences for Creating Entries” on page 191, Maximizer creates Address Book entries as follows:

- If **Individual** is selected in the **Default Contact Type drop-down** list, Maximizer creates an Individual Address Book entry.
- If **Company/Contact** is selected in the **Default Contact Type** drop-down list, you are prompted to supply a Company name in the Save Contact to Maximizer dialog box.

## View Maximizer Address Book Entries from Outlook

Use the View Contact in Maximizer button in Outlook to view the related Address Book entry in Maximizer. If Maximizer is not running or a different Address Book is open, clicking this button starts Maximizer and opens the related Address Book.

Clicking this button with an email message selected takes you to the Address Book entry related to the message sender.

Clicking this button with an Outlook contact selected takes you to the Address Book entry related to that contact.

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.

### ➤ To view a Maximizer Address Book entry from Outlook

**1** In a mail or contacts window in Outlook, select an email message or contact.

**2** Click the **View Contact in Maximizer** button.

The Address Book window in Maximizer opens. The related entry is highlighted in the list.



View Contact in Maximizer button in Microsoft Outlook

## Use Outlook to Send an Email to an Address Book Entry

You can use Outlook to send an email message to a Maximizer Address Book entry, even if that Address Book entry does not have a related contact record in Outlook.

Please note that 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.

➤ **To use Outlook to send an email message to a Maximizer Address Book entry**



Maximizer Addresses button in new Outlook email message

- 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 Repeat these steps to add any additional Address Book entries, as needed.
- 7 Click **OK**.

The Maximizer Addresses dialog box closes, and the selected email addresses appear in the new mail message dialog box.

## Save Outlook Email Messages as Documents in Maximizer

When Outlook integration is installed and configured, you can save Outlook email messages to Maximizer Address Book entries, even if Maximizer isn't open. You can save email messages you have already received, or you can save email messages when you send them.

If there are no Address Book entries associated with the email, you either create an entry yourself or let Maximizer create it for you, depending on your preference settings. The email is then saved to this entry's documents. If the email address doesn't have a record in Outlook contacts, Maximizer creates a corresponding Outlook contact.

If you are using Outlook Synchronization for Address Book entries, as described on page 199, 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.

### Set Preferences for Saving Emails

When you save an email to Maximizer as a document, by default a Save Email to Maximizer Addresses dialog box opens in which you can view and adjust the entries to which the email will be saved.

If you want to use the Maximizer defaults for creating Address Book entries, you can disable the dialog box as follows:

- 1** In Maximizer, select **File Preferences** and click the **Other Options** button on the System Defaults tab.
- 2** Deselect the **Confirm when saving email** checkbox.

### Save a Received Email Message to a Maximizer Address Book Entry's Documents

You can save an email message you received in Outlook to the Documents window of one or more Address Book entries in Maximizer.

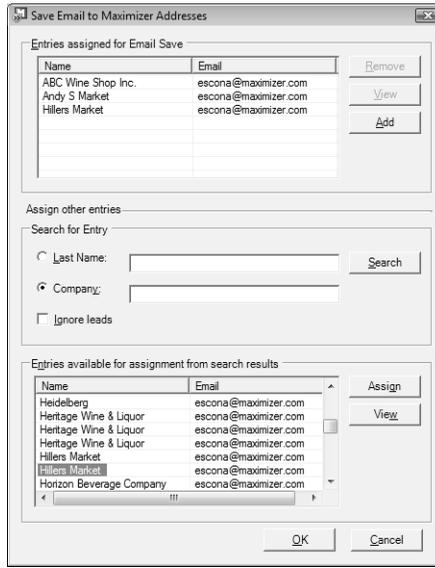
#### ➤ **To save an email message to Address Book entries in Maximizer**

- 1** In Outlook, select the email message to save.
- 2** Click the **Save Email to Contact in Maximizer** button.



Save Email to Contact in Maximizer button

The Save Email to Maximizer Addresses dialog box opens. Any Address Book entries associated with the sender's email address are displayed in the **Entries assigned for email save** list. If no such entries exist, this list is empty.



 Click View to view an entry in Maximizer.

- 3** If necessary, click **Add** to create an Address Book entry to save the email to. The Save Contact to Maximizer dialog box opens. Enter and edit information as required and click **OK**.
- 4** To remove an entry from the **Entries assigned for email save** list, select the entry and click **Remove**.
- 5** To save the email to other Address Book entries:
  - 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**. The entries are moved to the Entries assigned for email save list.
- 6** Click **OK**.

The email is saved as a document to the assigned entries.

If you deselected the **Confirm when saving email** checkbox in the Other Systems dialog box, Maximizer saves the document only to the Address Book entries that contain the sender's email address.

## Send an Email Message and Save it to a Maximizer Address Book Entry's Documents

You can save an email message you send from Outlook to the Documents window of one or more Address Book entries in Maximizer.



Send Email and Save to Contact in Maximizer button

### ➤ **To send an email message and save it to an Address Book entry in Maximizer**

**1** Open the Compose dialog box in Outlook.

**2** Compose the email message.

Click the **Send Email and Save to Contact in Maximizer** button.

If the Confirm when saving email checkbox is selected, as described on page 196, you can adjust the entries the email will be saved to in the Save Email to Maximizer Addresses dialog box. If no Address Book entries are associated with a recipient's email address, you may need to create one.

If you disabled the Confirm when creating Email option, the Maximizer defaults for saving emails will be used. That is, the email is saved as a document only to the recipient's Address Book entries in Maximizer. If the email message has multiple recipients, it may save the email message to more than one recipients' Address Book entry in Maximizer, based on the following criteria:

- If one of the Address Book entries is a company or individual, and one or more of the entries is a contact for that company or individual, Maximizer adds the document to the contacts only.
- If any of the companies or individuals are not related to the contacts in the email message, Maximizer also adds the document to those companies or individuals.

**i** See the previous section for details on how to work with the Save Email to Maximizer Addresses dialog box.

# Synchronizing Address Book Entries with Microsoft Outlook

**i** Outlook Synchronization works with Microsoft Outlook only, not Microsoft Outlook Express.

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, regardless of machine name or Windows username.

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

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

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

## Appointment and Task Synchronization

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

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

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

## Recurring Appointments

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

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

## Recurring Tasks

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

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

## Group Appointments

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

## Prepare Your Outlook Address Book

Each Outlook contact that you want to synchronize, must be assigned to a category. Contacts are then synchronized with Maximizer.

➤ **To assign a category to an Outlook contact**

- 1 In Outlook, open the Address Book list you selected in the procedure described on page 190. (For example, if you selected the Contacts address list, open **Contacts**, as shown here.)
  - 2 From the **Edit** menu, select **Select All**.
  - 3 From the **Edit** menu, select **Categories**.
  - 4 Click the **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**.
- All selected Outlook contacts are now assigned to the Maximizer category.

## Prepare Your Maximizer Address Book

In Maximizer, you must create a Favorite List that specifies which Address Book entries are to be synchronized with Outlook.

➤ **To prepare your Maximizer Address Book**

- 1 In Maximizer, select **Favorite Lists** from the **View** menu.
- 2 Click **Add**.
- 3 Enter a **name** for your Outlook synchronization Favorite List and click **OK**.
- 4 Close the Favorite List dialog box.

## Configure Outlook Synchronization

 For detailed information about Outlook Synchronization preferences, click inside the dialog box, and press F1.

➤ **To configure Outlook Synchronization**

- 1 Select **File > Preferences**.
- 2 Click the **Outlook Synchronization** tab.
- 3 In the **Synchronization frequency** group box, specify how often Maximizer should synchronize with Outlook.  
If you select **Never (manual synchronization)**, the user must synchronize manually by clicking the Synchronize with Outlook toolbar button or selecting **Tools > Synchronize with Outlook** from the menu bar in Maximizer.

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

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

**6** 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.

**7** 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.

**8** To synchronize Maximizer Address Book entries and Outlook contacts, select the **Synchronize Address Book entries** checkbox.

**9** To specify the mapping between Outlook and Maximizer phone number fields, click the **Phone Mapping** button, 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. Click **OK**.

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. For information on the process that determines which phone numbers are synchronized, see "How Phone Numbers are Synchronized from Outlook" on page 203.

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

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

**12** Click **OK**.

## How Phone Numbers are Synchronized from Outlook

**i** Only mapped phone numbers are synchronized.

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.

In the following examples, the phone number descriptions in the default entry are Main, Fax, and Cell, and the mapped phone numbers are as shown below:

Phone numbers		
Main		
Fax		
Cell		

Phone Mapping		
Outlook	Maximizer	
Telex		<input type="button" value="Move Up"/> <input type="button" value="Move Down"/>
Primary	Main	
Pager	Pager	
Other		
Mobile	Cell	
Home	Home	
Car		
Business2		
Business	Direct	
BusinessFax	Fax	
Assistant		

**i** 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's already been synchronized.)

### Example 1

If Outlook values exist for all mapped phone numbers, the following phone numbers would be included in the synchronized entry:

Phone numbers		
Main	[(604) 601-8000]	
Fax	[(604) 601-8001]	
Cell	[(718) 385-4221]	
Pager	[(580) 555-0812]	

**i** As in the previous example, Maximizer uses Pager for the fourth phone number description. In a later pass, Maximizer determines that there isn't an Outlook value for Fax, so it replaces the Fax phone number description with Home (the highest, not yet synchronized phone number in the phone mapping list).

### Example 2

If Outlook values exist for all mapped phone numbers except Fax, the following phone numbers would be included in the synchronized entry.

Phone numbers		
Main	[(604) 601-8000]	
Home	[(604) 681-9230]	
Cell	[(718) 385-4221]	
Pager	[(580) 555-0812]	

## Synchronize Your Maximizer Address Book with Outlook

After you've prepared Maximizer and Outlook for synchronization, the process is simple.

### ➤ **To synchronize your Maximizer Address Book with Outlook**

**1** Click the **Synchronize with Outlook** button on the Maximizer toolbar.

Depending on how many Outlook contacts you are synchronizing, the processing time will vary. A message box appears when the synchronization is complete.

**2** In Maximizer, open the **Address Book** window.

**3** From the **View** menu, select **Favorite** Lists.

**4** Select the Favorite List you configured for synchronization with Outlook and click **Retrieve**.

# Keeping a Record of Your Telephone Calls

With Maximizer, you can quickly dial an Address Book entry, make a series of phone calls, receive calls, and record incoming and outgoing phone call activities in the Phone Log.

Use the Previous and Next buttons in the Phone dialog box to work through the current Address Book entry list.

Users can transfer incoming calls to any other phone extension in the phone company’s system. If a note is logged for the phone call transfer (logging must be enabled for phone calls in File > Preferences), the logged note includes the transfer information.

If you are using TAPI, follow these steps to take incoming calls. See “Set Up Automatic Dialing” on page 208 for more information on setting up TAPI.

**i** You can put a caller on hold by clicking the Hold button. To resume a call, click the Release button.

## ➤ To phone a Company, Individual, or Contact

**1** Click the **Phone** button on the toolbar and click **Incoming**.

– or –

Right-click on an Address Book entry and select **Phone > Make a Call**. Alternatively, you could select **Actions > Make a Call**.

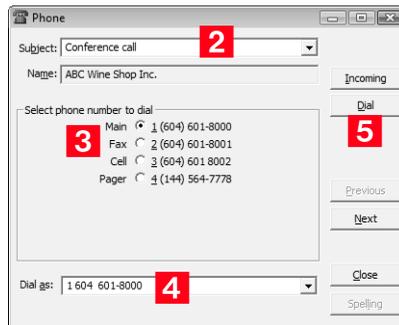
**2** Select or type a **Subject** for your phone call.

**3** Select the number to dial in the **Select a phone number to dial** section of the dialog box.

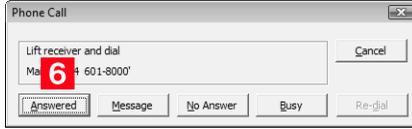
**4** Select a phone number format from the **Dial as** field.

These formats are set up in Dialing preferences tab (File > Preferences > Dialing tab).

**5** Click **Dial**.



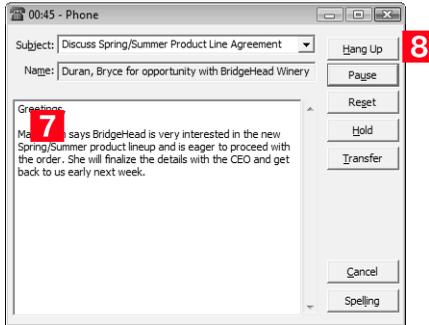
**6** In the Phone Call dialog box, choose a response. For example, if the call was answered, choose **Answered**.



**i** In order for the Phone notes dialog box to appear automatically, logging must be enabled for Phone Calls in preferences (File > Preferences > Logging tab).

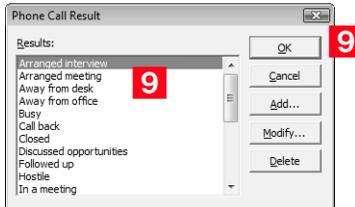
**7** After clicking a response, the Phone dialog box appears. Record notes on your call as you talk.

**8** Click **Hang Up** when you are finished, and then click **Close**.



**i** To later view the details of calls you made, access the Phone Log from the View menu.

**9** Optionally, you can record the result of the outgoing call in the Phone Call Result dialog box. Click **OK** to close the dialog box.



➤ **To receive a call**

**1** Click the **Phone** button on the toolbar and click the **Incoming** button in the Phone dialog box.

– or –

Right-click on an Address Book entry and select **Phone > Receive a Call**. Alternatively, you could select **Actions > Receive a Call**.

**2** Select or type a **Subject** for your phone call.

**3** Record notes on your call as you talk.

**4** Click the **Hang Up** button when you are finished.

**5** Optionally, you can record the result of the outgoing call in the Phone Call Result dialog box.

**i** In order for the Phone notes dialog box to appear automatically, logging must be enabled for Phone Calls in preferences (File > Preferences > Logging tab).

➤ **To transfer a call**

**1** When you have an incoming call that you'd like to transfer, click the **Transfer** button in the Phone dialog box.

**2** Select a user in the **Display name** list or enter a valid extension for your company's phone system. Note that a phone extension doesn't have to be associated with a user in the current Address Book.

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

## Set Up Automatic Dialing

**i** If your modem can dial out in other applications, then you can use your modem in 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 using the Preferences dialog box 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.

### ➤ To configure your modem in Maximizer

- 1** Select **File > Preferences**.
- 2** In the **Dialing** tab, select **Modem** or **TAPI**.
- 3** If you selected **TAPI**, click the **Properties** button to configure the dialing properties for the modem, and click the **Device** button to configure the Device properties for the modem.  
– or –

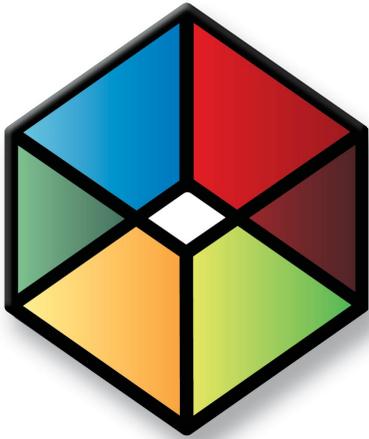
If you selected **Modem**, fill in the remaining fields.

- 4** Click **OK**.

Your modem is now ready for use in Maximizer.

For more information on setting up dialing preferences, including documentation on using TAPI, refer to "Enabling TAPI with Maximizer" on page 97.

**i** For a list of each control and how to fill in the field, press F1 while in the Dialing tab.



# CHAPTER 10 **Managing Opportunities**

*Organize Your Sales with Opportunity Management*

In this chapter...

“Using Opportunities” on page 210

“Configuring Opportunity Preferences” on page 211

“Entering a Default Opportunity” on page 212

“Pursuing a Sales Opportunity” on page 213

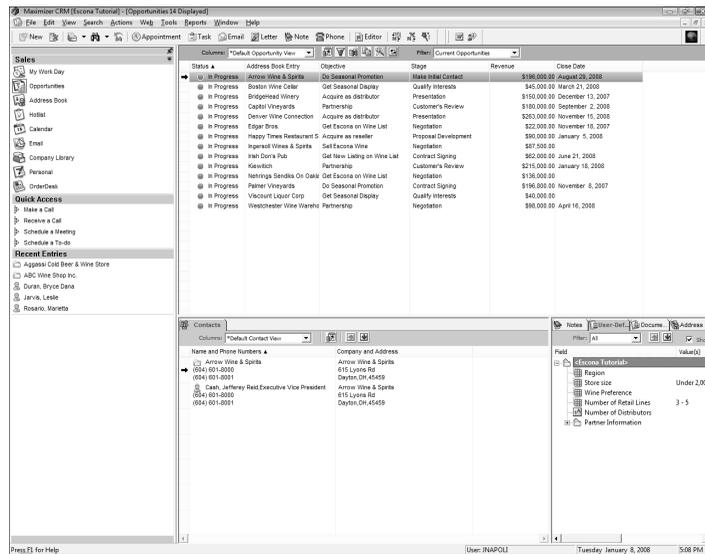
“Modifying Opportunities with a Global Edit” on page 215

“Viewing the Opportunity Pipeline Report” on page 216

# Using Opportunities

Keep the following points in mind when working with the Opportunities window:

- Use the **view bar** buttons for common opportunity tasks.
- Use the **view filter** to show all opportunities, or current opportunities.
- Double-click an **opportunity** to view or modify it.
- You can view the Address Book entries associated with a single opportunity or multiple opportunities by clicking the **View in Address Book** button in the View bar or by choosing the option from the shortcut menu.
- The **following windows** show additional information for the selected opportunity.
- Maximizer automatically creates **notes** to record opportunity activity.



# Configuring Opportunity Preferences

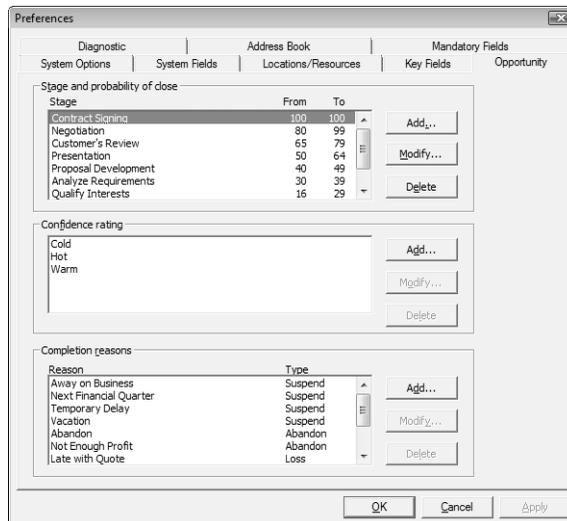
Configure opportunity stages, probabilities of close, confidence ratings, and completion reasons in Administrator. These settings determine the values in the Stage, Confidence rating, Probability, and Reason (Completion details) fields of the Opportunity dialog box:

- **Stage** indicates the level of progress of the opportunity and determines the **Probability of close**.
- **Confidence rating** indicates the salesperson's opinion of the likelihood of closing the sale.
- **Completion reason** appears on the Status tab of the Opportunity dialog box. It specifies details about why an opportunity was won, lost, abandoned, or suspended.

## ➤ To configure opportunity preferences

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

**2** Click the **Opportunity** tab.



**3** **Add, Modify, or Delete** the field values as required.

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

## Entering a Default Opportunity

If you frequently assign or enter the same opportunity values and want to save time by having those values pre-entered each time you create an opportunity, you can define default field values in the Default Entry for opportunities.

### ► To define defaults for opportunities

**i** Default entries are user-specific so each user in the Address Book can have different default entries.

- 1** Open the **Opportunities** window.
- 2** Select **Edit > Default Entry**.
- 3** Enter the default values for any fields that you want to have pre-defined values when an opportunity is created.

Opportunity details	
Next action	
Revenue	\$0.00
Cost	\$0.00
Leader	Joe Napoli

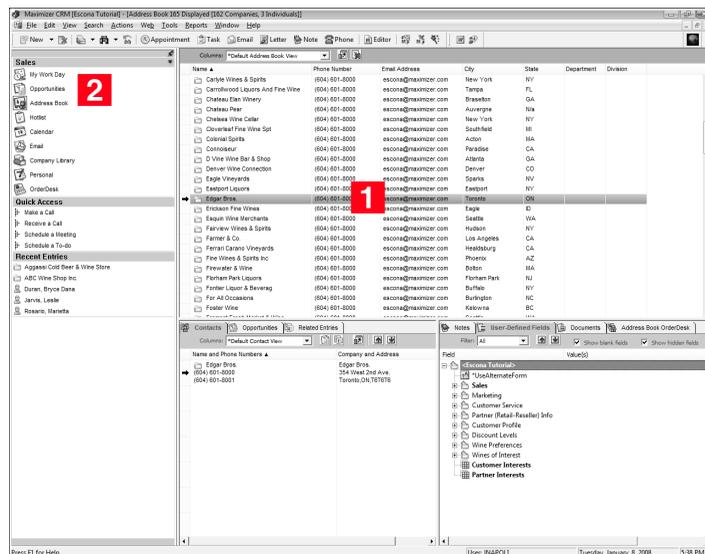
- 4** Click **OK** to save the Default Entry.

# Pursuing a Sales Opportunity

You enter new opportunities by selecting an Address Book entry in the Address Book window and adding the new opportunity in the Opportunities window. All opportunities have an associated Address Book entry.

## ➤ To add an opportunity

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



**i** You can view associated Contact details while an opportunity is selected in the Contacts following window.

- 2 Drag and drop the Address Book entry or Contact to the **Opportunities** icon.

– or –

Select **Add Opportunity** from the **Edit** menu.

– or –

Click **Insert**.

A new opportunity dialog box opens.

- 3 Enter the opportunity **Objective**. The objective should describe the goal of this opportunity.

- 4 Select the applicable **Products/Services** and **Categories**.

- 5 Enter the **Description** of the opportunity.

**i** For information on selecting products/services and categories, see **Maximizer Help**.

**i** If you have opportunity data you are upgrading from a previous version of Maximizer, ratings are transferred to the Stage field.

**i** Mandatory opportunity fields are denoted by an asterisk.

**6** Select the **Stage** of the opportunity.

For example, if you feel confident the opportunity is a good investment of your time, you may select a value such as "Initiate Contact". The stage coincides with the Probability bar. Note that stages are set up in Administrator in the Opportunity preferences tab.

You can also enter the **Confidence rating**. This field is similar to the Stage field, however, it is not linked to the probability of close and is set based on the sales representative's feeling about the opportunity.

**7** Select a **Key Fields** list and then select the appropriate **Key Fields** for the opportunity.

Key Fields are important user-defined fields specific to opportunities and are defined by your administrator in the Administrator's Key Fields preferences tab. An unlimited number of Key Fields lists can be set up using up to 8 opportunity user-defined fields for each list.

**8** Enter the opportunity's details such as the **Revenue** (potential revenue). You can change this amount later, if necessary.

**9** Choose the user that should work on this opportunity.

**10** You can perform common tasks by clicking the **Actions >>** button from any of the opportunity dialog box tabs. Work through the remaining tabs, entering the opportunity's details including the user-defined fields and status.

The screenshot shows the 'Edgar Bros.' opportunity dialog box. It has tabs for 'Basic Information', 'User-Defined Fields', and 'Status'. The 'Basic Information' tab is active. The 'Probability' bar is at 0%. The 'Company/Individual' field is 'Edgar Bros.' and the 'Contact' field is empty. The 'Opportunity description' section includes 'Objective' (3), 'Products/Services' (4), and 'Description' (5). The 'Opportunity Analysis' section shows 'Stage' as 'Not Started' (6) and 'Confidence rating' as 'Warm'. The 'Key Fields for' dropdown is set to 'General Opportunities' (7). The 'Opportunity details' section shows 'Status' as 'In Progress', 'Start date' as 'January 8, 2008' (8), 'Close date', 'Next action', 'Revenue' as '\$0.00', 'Cost' as '\$0.00', and 'Leader' as 'Joe Napoli' (9). At the bottom, there is a note '\*Denotes required field' and buttons for 'OK', 'Cancel', and 'Apply'.

# Modifying Opportunities with a Global Edit

You can update a number of opportunities at the same time with the Global Edit command. For example, you may want to change the start date of several opportunities. This is a very powerful feature, so you might consider making a backup of your Address Book before making significant changes using Global Edit.

## ➤ To perform a global edit

- 1** In the Opportunities window, select the **entries** you want to modify.
- 2** Select **Global Edit** from the **Edit** menu. The Global Edit dialog box appears.
- 3** Apply your edits to the various different opportunity tabs. Changes made to these tabs are applied in the same way as when you are entering a new opportunity although not all fields and buttons are available. The changes are applied to all opportunities included in the global edit. If you don't select any opportunities, the edits are applied to all your opportunities in the current list.

The screenshot shows the 'Global Edit' dialog box. The 'Basic Information' tab is selected, and a red '3' is placed over the 'Global Edit Rules' tab. The dialog contains several input fields and dropdown menus for editing opportunity data.

- 4** Click **OK** to apply the global edits.

# Viewing the Opportunity Pipeline Report

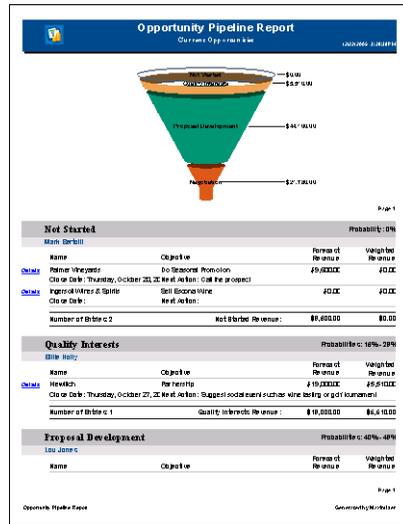
With a single click, you can view the current opportunities in the pipeline. The Opportunity Pipeline Report can also be modified—it is a Crystal Report.

➤ **To view the opportunities in the pipeline**

- 1** In the Opportunities window, click the **Display Opportunity Pipeline Report** button.
- 2** You are prompted for which entries to include in the report. Make your selection and click **OK**.



Display Opportunity Pipeline Report



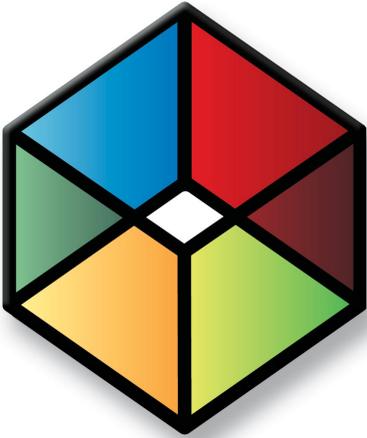
**i** To create or modify Crystal Reports, you must have the full program installed.

### ➤ To modify the Opportunity Pipeline report

- 1** Copy the Opportunity Pipeline report file from the **MaData6** folder in your Maximizer program folder to your Crystal Reports working folder. You should make a backup copy of the original report file just in case you need to use the file again.
- 2** Open **Crystal Reports** and make your changes.
- 3** Save your new Opportunity Pipeline report in the **MaData6** folder where you have installed Maximizer – (e.g., ...\\Program Files\\Maximizer\\MaData6).

For more information on reporting in Maximizer, refer to “Reporting and Graphing” on page 219.





CHAPTER **1 1**  
**Reporting and  
Graphing**

*Report and Make Graphs on the Progress  
of Your Business*

In this chapter...

"Crystal Reports" on page 220

"Printing Reports from Maximizer" on page 221

"Exporting Entries to Microsoft Excel" on page 223

"Graphing and Charting with Maximizer" on page 224

# Crystal Reports

The Crystal Reports viewer is installed automatically with Maximizer and is accessible from the Reports menu. To create or modify reports, you must have the full Crystal Reports program installed.

Maximizer installs a set of standard Sales reports, but you can also create your own custom reports and save them in the MaximizerReports folder (in My Documents) where they can be accessed from the Reports menu.

## Create and Access Personal Reports

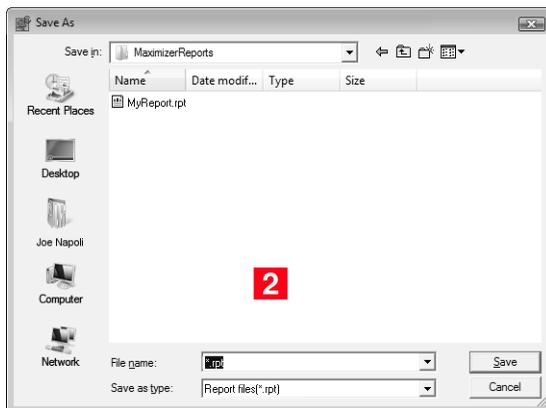
**i** In order to launch Crystal Reports from the Crystal Reports > Personal > Custom Report menu, you must be part of the Crystal Report Users security group. See "Security Groups" on page 56 for more information.

Maximizer installations create the local folder ...My Documents\MaximizerReports. This local folder is the default location for your personal report templates.

The File > Print > Custom Reports command enables you to create new report templates, edit existing report templates, and to view reports using existing report templates. The Custom Reports command is also available from the Reports > Crystal Reports > Personal menu.

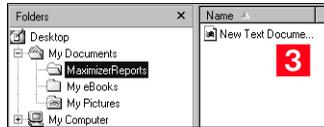
### ➤ To create and access a personal Crystal Report from Maximizer

- 1** Create a custom report by choosing **Create a new custom report template** from the Custom Report dialog box (Crystal Reports > Personal > Custom Report).
- 2** You are prompted to enter a **report name**. By default, the report is saved in ...My Documents\MaximizerReports.



**i** You are prompted with a login screen when previewing a new report or modifying an existing report. Enter your **Maximizer user name** and **password**.

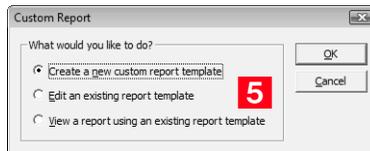
**3** Create the report in Crystal Reports and save the report file in the MaximizerReports folder on your local drive.



**i** If you create your own folder, it appears as one of the submenu items under Crystal Reports > Personal.

**4** Select **Reports > Crystal Reports > Refresh**.

**5** To access a custom report, choose the report from **Crystal Reports > Personal**. Alternatively, you can select Personal > Custom Report from the Reports > Crystal Reports submenu and choose the **View a report using an existing report template** option in the Custom Report dialog box. If you'd like to edit the report template, choose **Edit an existing report template**.



## Printing Reports from Maximizer

Column reports are a fast way to print Maximizer information as it appears in your current list, while a Detailed report lets you print more detailed information. Other reports, such as the Notes and Name/Address/Telephone reports, allow you to 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 or File > Print menus. The Reports menu gives you access to every type of Maximizer report, irrespective of the window that is open. For example, if you're in the Address Book window, and want to print an opportunity report, select Reports > Opportunities > [type of report]. The Opportunities window automatically opens and the report extracts information from the current opportunities list. The File > Print menu item prints reports strictly related to the window that's currently open.

The Reports menu allows you to print reports on the following Maximizer information:

- Address Book entries
- Contacts
- User-defined fields
- Notes
- Opportunities
- Documents
- Hotlist
- Calendar
- OrderDesk
- Journal entries
- Expenses
- Related entries
- Activities
- Phone log

The following is a summary of some of Maximizer's reports:

- **Column Report** – displays the same information you see displayed in a controlling window, such as names and addresses or opportunity information.
- **Detailed Report** – includes mailing address information, appointments, Hotlist tasks, user-defined fields, Contacts, document summaries, and notes for an Address Book entry or opportunity.
- **User-Defined Field Report** – lists the user-defined fields attached to each of your Address Book entries.
- **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.
- **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.

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.

# Exporting Entries to Microsoft Excel

**i** Microsoft Excel must be installed to be able to export entries to Excel.

**i** You must have the “Allow export” Access Right enabled in your user account to be able to export entries to Excel.

Maximizer enables you to quickly and easily export selected entries to a Microsoft Excel spreadsheet from the Address Book or Opportunities controlling windows, or the Contacts, Opportunities, or Related Entries following windows.

Maximizer exports the currently selected entries for the active controlling or following window using the columns 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.

Note that reports exported to Excel are not dynamic, meaning they will not automatically update when changes to the exported entries are made. To update an exported report, repeat the export process.

## ➤ To export to Excel

- 1** Select the window to export entries from.
- 2** Create a list of entries or select specific entries to export.
- 3** Select a column setup to use for the export.
- 4** Click the Export to Excel button on the toolbar.

– or –

Right-click in the window and select **Export to Excel**.

– or –

Select **Tools > Export to Excel**.

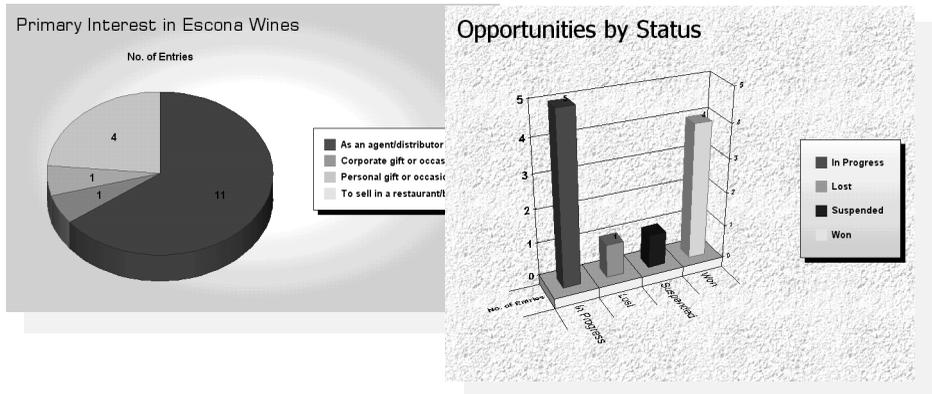
Excel opens and displays the selected entries.

- 5** To keep the report, save it to your computer with a unique file name.

## Graphing and Charting with Maximizer

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 ecommerce 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're trying to graph, click the Graphing button or choose Graphing from the Tools menu 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.

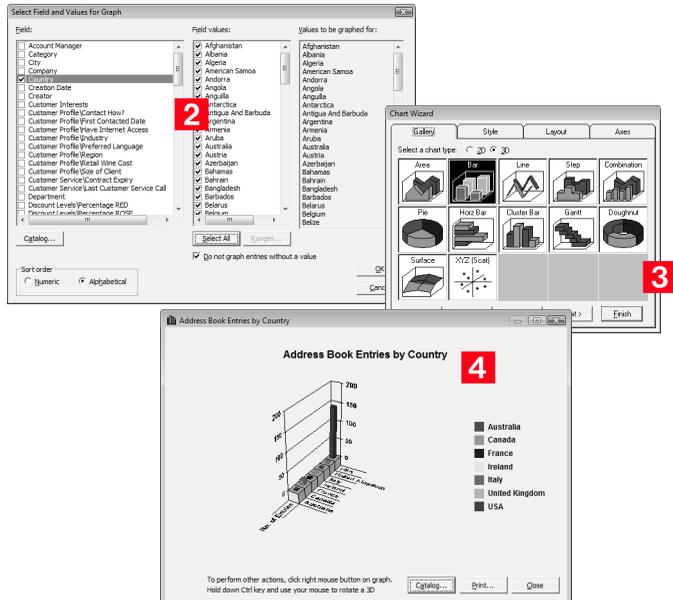
The Chart wizard walks you through the steps of creating a graph or chart. You can then edit the final product to make it look attractive.

## Graph Your Address Book Entries or Opportunities

Generating a graph from your current list of entries is a simple process.

### ➤ To create a graph

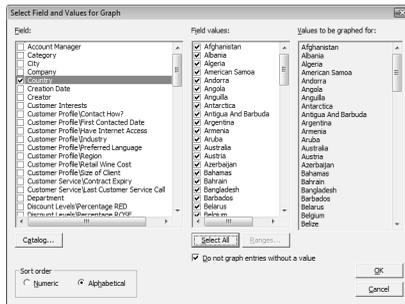
- 1** Create the desired list of entries in the Address Book or Opportunities window, and then click the **Graphing** button. Alternatively, you can select **Tools > Graphing**.
- 2** Choose the fields and values you're graphing. For example, you could graph Address Book entries by the City/Town or State/County/Province field. Defining the values lets you narrow the range or selection of values to graph.
- 3** Use the **Chart wizard** to choose the graph type, style, and layout.
- 4** 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.



## Select the Field and Values for Your Graph

**i** Press F1 in the Select Field and Values for Graph dialog box to learn more about making your selection.

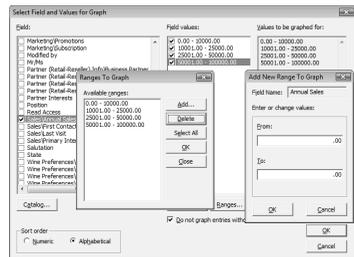
When you click the Graphing button, Maximizer prompts you to choose a field to graph. Your choice of fields depends on the type of entries you are graphing. If the Address Book window is active when you begin graphing, you choose from Address Book entry and user-defined fields, such as Company, City, 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".



This example shows the Country Address Book entry field with all possible values selected for graphing.

**i** 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).

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.



Click the Range button to specify a range (or ranges) of values for non-table fields.

Finally, choose numeric or alphabetical as the sort order:

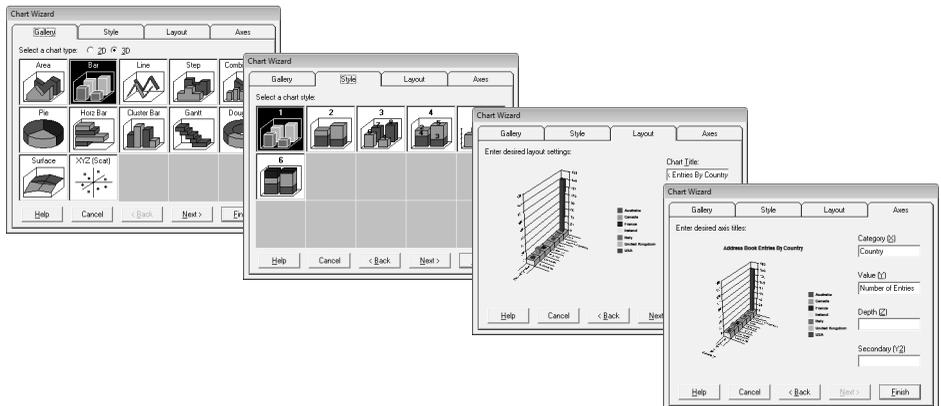
- **Numeric** displays charted values in numeric order, from lowest to highest. For example, if you choose a bar chart to graph the values of the City/Town field, the city/town (value) assigned to the least number of Address Book entries is shown on the left of the chart while the city/town assigned 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.

## Define the Appearance of Your Graph

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.

## Use 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.

### ➤ To insert a title or footnote merge field

- 1 Start a new graph.
- 2 In the Chart wizard, select the **Layout** tab.
- 3 Enter any fields you want to appear in the **Chart Title** and **Chart Footnote** fields. Remember to surround the field with square brackets, [like this].

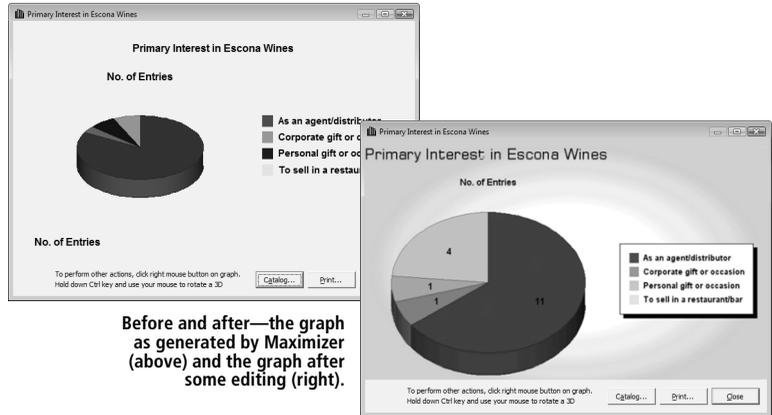
- 4 Finish creating your graph and save it to the **Graph Catalog**.

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.

## Add “Zip” to Your Graph

**i** Press F1 in the Graphing window to find out more ways to edit your graph.

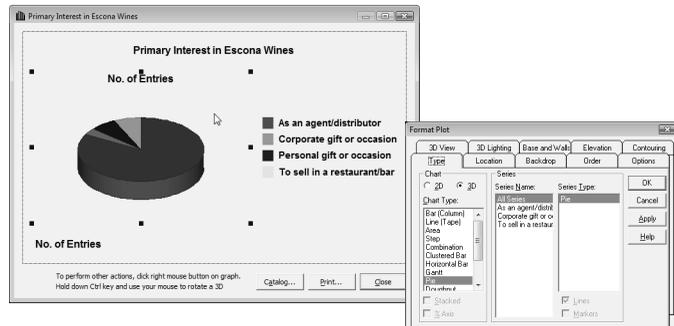
At first, your completed graph may not look like much—by default, it has a plain gray background and the graph’s colors are chosen for you. You can easily add your own touches to your graph by editing it in the Graphing window.



**i** You can also right-click inside the graph to display a pop-up menu.

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.

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 as shown below. The Format Plot dialog box lets you make many changes to your graph.

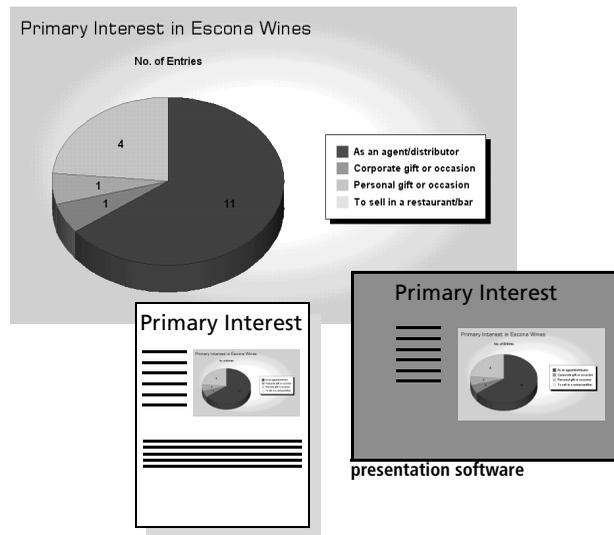


**i** Click the Help button in the Format Plot dialog box for help using any of the settings.

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 that element.

## Use Your Graph 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'll 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.

## Reuse Your Graph Settings

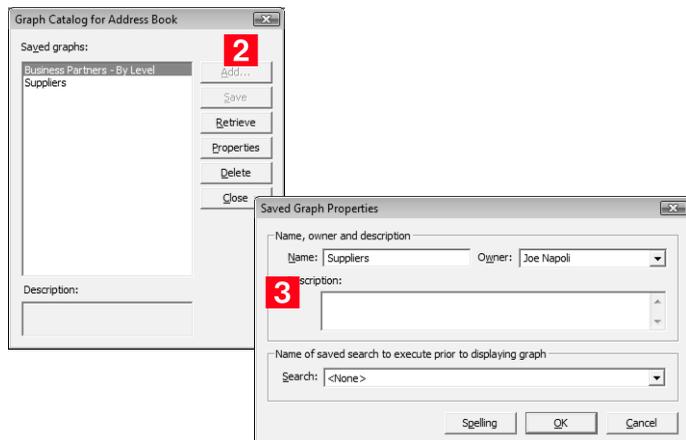
If you find yourself often creating the same type of graph, save yourself some time by saving the graph settings as a graph template in the Graph Catalog. After you generate the graph, use the Catalog button to save your graph template.

Graphs for Address Book entries and opportunities are stored in separate catalogs; the available catalog depends on whether the Address Book or Opportunities window is selected.

### ➤ To use the graph catalog

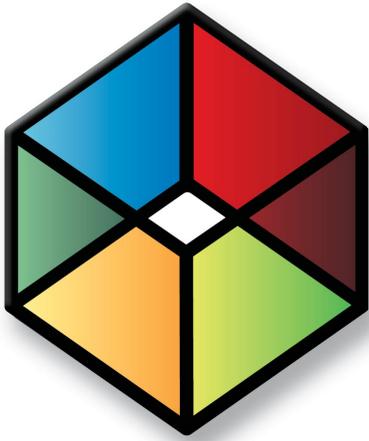
- 1** In the Graphing window, click the **Catalog** button to open the graph catalog.
- 2** Click the **Add** button to add your graph to the catalog.
- 3** Type a descriptive name and choose Public as the **Owner** to make the template available to all users.
- 4** If you have a search saved in the search catalog, select it in the search list to have Maximizer perform the search before generating the graph.

**i** 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. For detailed information on saved search properties, see F1 Help.



Once your graph template is saved to the Graph Catalog, you can use the template when you next create a graph.





# CHAPTER 12

## Managing Address Book Data

### In this chapter...

- “Backing up and Restoring Address Book Data” on page 234
- “Verifying and Recovering Address Book Data” on page 240
- “Exporting Data from Maximizer” on page 242
- “Importing Address Book Data from MXI or XML Files” on page 248
- “Importing Data from Other File Formats” on page 251
- “Field Mapping” on page 253
- “Transferring Entries between Address Books” on page 269
- “Purging Outdated Notes and Documents” on page 275
- “System Reports” on page 279

# Backing up and Restoring Address Book Data

This section explains how to back up and restore Maximizer Address Book database files, which contain the majority of your Maximizer data, including Address Book entries, opportunities, etc. However, if your Address Book uses a custom dictionary or holidays, you must back up those files separately. Instructions for backing up dictionary and holiday files are on page 239.

## Backing up an Address Book

There are two types of backup procedures available:

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

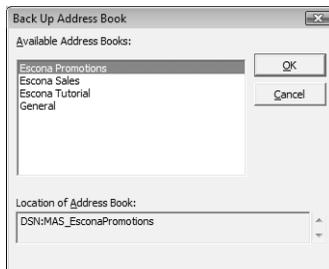
## Regular Backup

**i** The extension of the backup file is .bak.

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

### ➤ To perform a Regular Backup

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



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



The Backup / Restore Details dialog box opens.

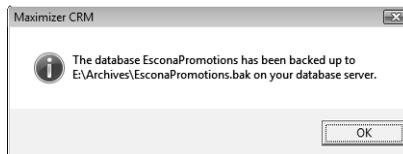


**i** The default location is where the SQL database files for the Address Book are stored.

- 5** Select the backup folder:

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

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



- 6** Click **OK**.

## Quick Backup

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

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

The backup file name includes the current date as an identifier. For example, the following backup file was created from a Quick Backup

performed on March 23, 2007. (The backup was saved to the following default location).

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

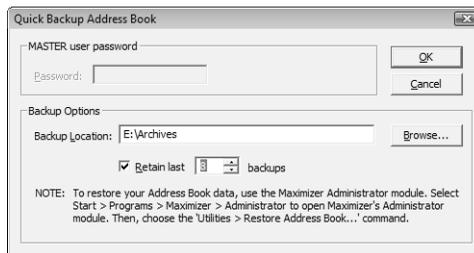
The “\_01” is added to the file name to differentiate between backups from the same day, so a second backup on the same day would be saved as follows:

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

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

### ► To perform a Quick Backup

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



- 3 Enter the MASTER user password.

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

- 4 Select the backup folder:

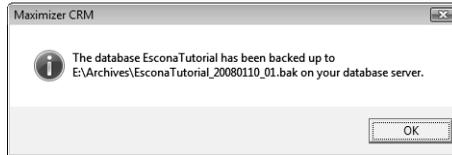
If you want to save the backup file to the default location (Address Book folder), leave the Backup Location field blank.

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

- 5 Specify the number of previous backups to retain.

- 6 Click **OK** to begin backing up.

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



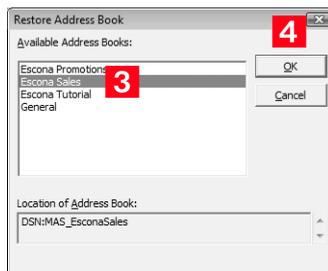
- 7 Click **OK**.

## Restoring an Address Book from a Backup

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

### ➤ To restore an Address Book

- 1 To determine if users are logged in, open the Address Book in Administrator and select Reports > Current Users. Ensure that the Address Book you want to restore is not currently open by a user.
- 2 In Administrator, close the Address Book and select **Utilities > Restore Address Book**.
- 3 Select the Address Book to restore.
- 4 Click **OK**.



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



The Backup / Restore Details dialog box opens.

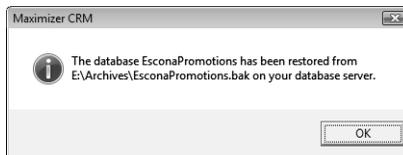


**6** Click **Browse**, select the backup file you want to restore, and click **Open**. The full path of the backup file is displayed in the Backup Location field.



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

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



## Backing up the Dictionary and Holiday Files

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

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

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

User Dictionary File Location:

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

Holiday File Location:

...\Program Files\Maximizer\MaData6\Mxzholiday.nam

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

## Verifying and Recovering Address Book Data

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

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

Address Book Verification and Recovery identifies the following Address Book items.

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

Address Book Item	Description
Misplaced Document records	Documents whose Owner field contains an incorrect value.
User-defined fields that do not have associated database views	User-defined fields for which a database view has not been created.
Invalid Table UDF Item records	Table user-defined field items that have the wrong type (Company, Individual, Contact, etc.).
Invalid/orphan Table UDF values	Table user-defined field values that reference non-existent table items.
Orphan Link Records	Opportunities that do not have a related Address Book entry.

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

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

### ➤ To verify an Address Book

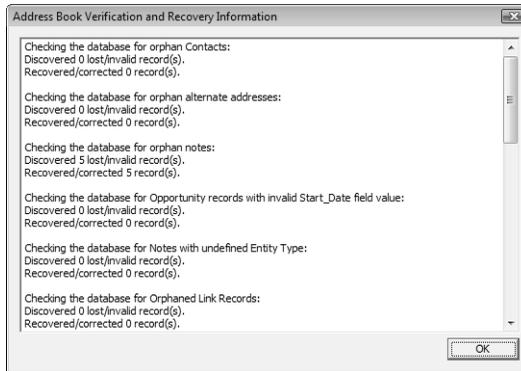
- 1** In Administrator, open the Address Book.
- 2** Select **File > Address Book Verification**.
- 3** Choose either the **Verify Only** or **Verify and Recover** option, and click **OK**.



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

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

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



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

## Exporting Data from Maximizer

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

### Exporting Address Book Entries

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.

#### XML Format

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

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

You can optionally export the following additional information:

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

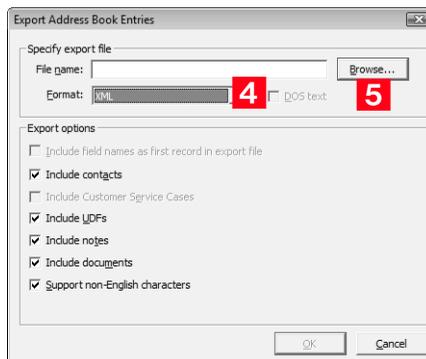
- **Include contacts** exports the contacts associated with the exported Address Book entries.

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

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

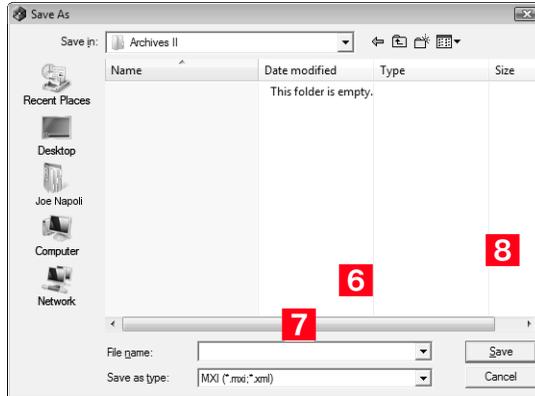
- 1** In Maximizer, open the Address Book window.
- 2** Select the Companies and Individuals to export. If you don't select any entries, Maximizer will export all entries currently displayed in the Address Book list.
- 3** Select **File > Export Address Book entries**.

The Export Address Book Entries dialog box opens.



- 4** From the **Format** drop-down list, select **XML**.

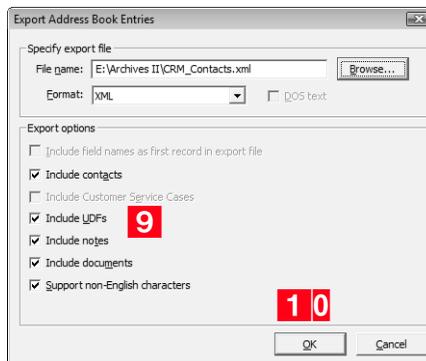
**5** Click the **Browse** button.



**6** Specify the destination location and **File name** for the exported file.

**7** In the **Save as type** drop-down list, select either **MXI** or **XML**.

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



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

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

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

## Comma-Separated Values or Tab-Delimited Format

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

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

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

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

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

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

### Selecting Fields for Export

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

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

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

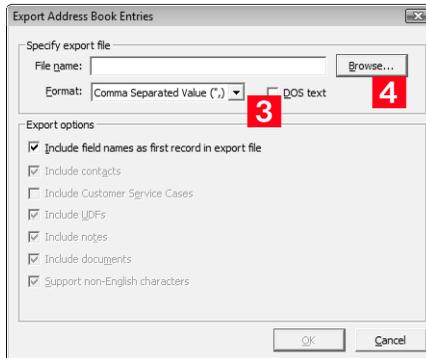
Once you have established the order of export fields as you would like it, you can click the Catalog button to save the export list for future exports. In the Export Catalog dialog box, click Add to create a new saved export list, or click Save to overwrite an existing export list. The Retrieve button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

➤ **To export Address Book entries in CSV or Tab-delimited format**

**1** In Maximizer, open the Address Book window.

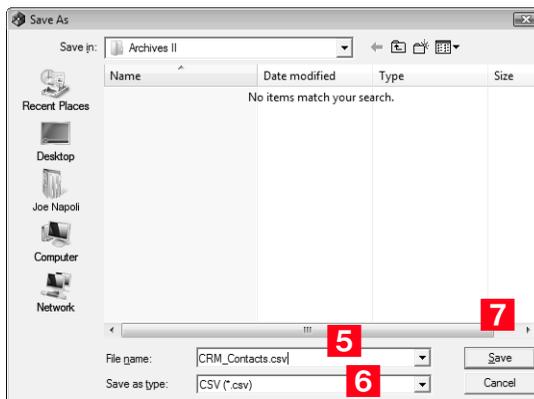
**2** Select **File > Export > Address Book entries**.

The Export Address Book Entries dialog box opens.



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

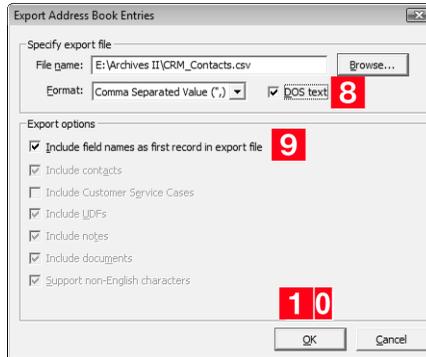
**4** Click the **Browse** button.



**5** Specify the destination location and **File name** for the exported file.

**6** Verify that the format you selected previously appears in the **Save as type** field.

**7** Click **Save**.



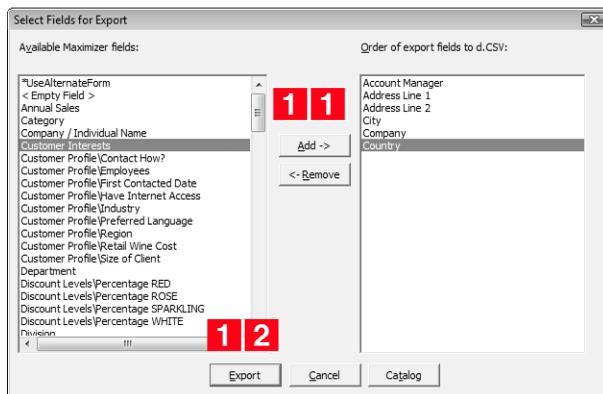
**8** Select the **DOS text** checkbox to export data that is in DOS standard ASCII.

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

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

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

The Select Fields for Export dialog box opens.



**i** For more information about using the Select Fields for Export dialog box, refer to the section before this procedure.

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

– or –

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

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

## Importing Address Book Data from MXI or XML Files

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

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

### Importing MXI or XML Files Using Advanced Import

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

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

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

- 1** Open the Address Book to import into.
- 2** Select **File > Import > Advanced Import**.
- 3** For the **File name** field, click **Browse** and locate the .xml or .mxi file to import.

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

**i** For detailed information about any of the fields in this dialog box, press F1 while the dialog box is active.

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

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

Advanced Import

Select XML or MXI import file

File name: E:\Archives II\CRM\_Contacts.xml **3** Browse...

Address Book entry update options **4**

Always insert

Use Identification field to match entries

Use Name field to match entries

Use this user-defined field to match entries: [ ]

Contact update options

Always insert

Use Identification field to match entries

Use Name field to match entries

Use this user-defined field to match entries: [ ]

Client ID generation

Follow system setting

Always system generated

Use values from the import file

**5** OK Cancel

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

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

## Unattended Import of MXI or XML Files

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

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

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

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

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

- 5** Click **OK**.

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

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

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

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

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

Keep the following points in mind:

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

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

## Importing Data from Other File Formats

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

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

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

- **Address Book Entries:** This method imports entries from a CSV (comma-separated values) or tab-delimited text file that is created when you export from Maximizer or another application. Outlook, for example, can export its address book to a text file. When you import from a text file, you must choose to import all the entries as Companies/Individuals or as Contacts, or you can do a two-tier import to import Companies/Individuals first and then import the associated Contacts. For more information, refer to “Two-Tier Import” on page 254.
- **ACT! or GoldMine Database:** Importing an ACT! or GoldMine database is straightforward because Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. Refer to “Importing Data from ACT! and GoldMine” on page 259.
- **Other Contact Manager Database:** This option enables you to import a variety of data file formats, including Organizer, Clipper, dBASE, FoxBase, and FoxPro, among others. For more information, refer to “Importing from Other Contact Managers” on page 256.

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

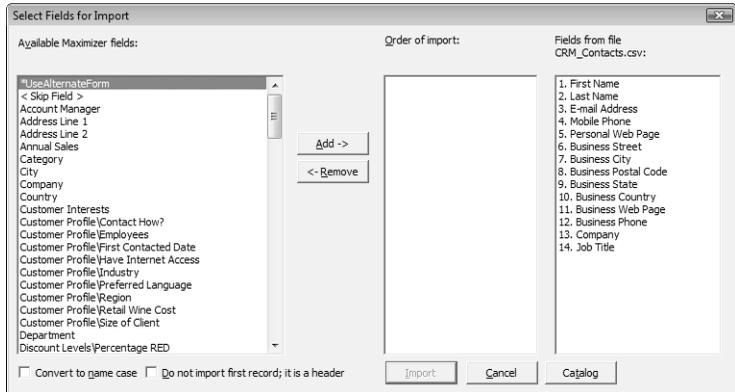
<b>File Type</b>	<b>Import Method(s) (File &gt; Import &gt; ...)</b>
ACT! 1.x, 2.x, 3.x, 4.x, 2000, 6.x (* .dbf)	ACT! 6.0 or 2004 or earlier
ACT! 2005-2008 or ACT! Premium for Workgroups 2005-2008	ACT! 2005-2008 and ACT! Premium for Workgroups 2005- 2008
GoldMine 2.x, 3.x, 4.x, 5.x, 6.x (* .dbf)	GoldMine 6.5 or earlier
GoldMine 6.7 Corporate Edition	GoldMine 6.7 Corporate Edition
Organizer 1.x (*.org)	Other Contact Manager Database
Delimited (*.txt, *.prn)	Other Contact Manager Database
Comma Delimited (*.csv) Tab Delimited (*.txt)	Address Book Entries
Clipper Summer '87 (*.dbf)	Other Contact Manager Database
Clipper 5.x (*.dbf)	Other Contact Manager Database
dBase III, III+, IV (*.dbf)	Address Book Entries
dBase V (*.dbf)	Other Contact Manager Database
Visual dBase 5.x (*.dbf)	Other Contact Manager Database
FoxBase/FoxBASE+ (*.dbf)	Other Contact Manager Database
FoxPro 1.x, 2.x (*.dbf)	Other Contact Manager Database
Visual FoxPro 3.x (*.dbf)	Other Contact Manager Database

## Field Mapping

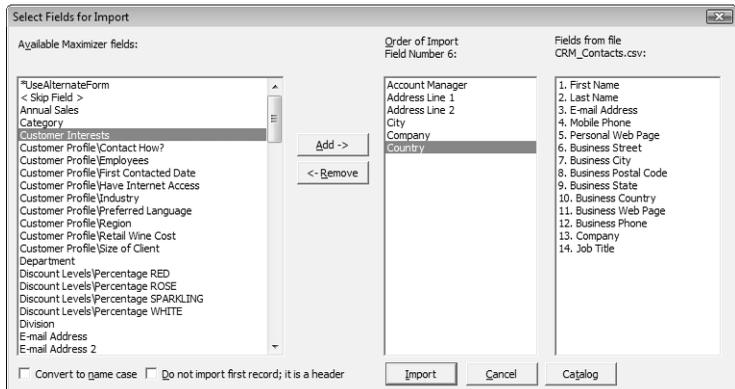
**i** When you import from a recognized database type, such as GoldMine or ACT!, Maximizer automatically maps the fields for you.

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

When you are importing a file type that requires you to map fields, a dialog box similar to the following opens.



For each field in the source file (shown in the far right column), 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, as illustrated below.



## Two-Tier Import

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

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

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

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

- Companies
- Contacts for Companies

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

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

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

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

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

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

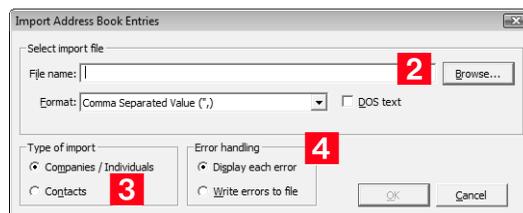
The Import Address Book Entries dialog box opens.

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

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

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

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



The Select Fields for Import dialog box opens.

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

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

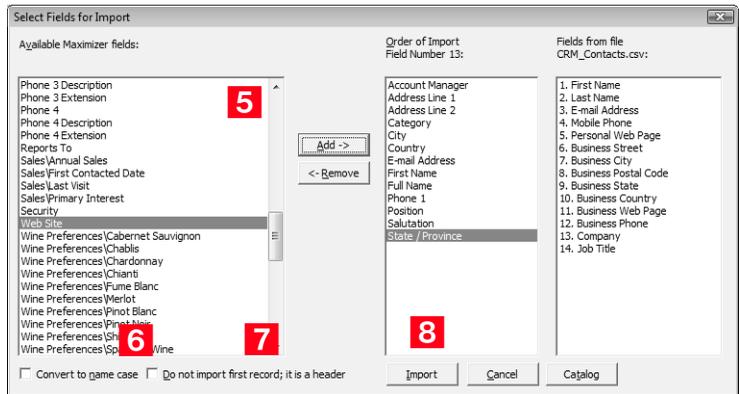
For example, if the first field in the right column is First Name, select First Name from the Available Maximizer fields.

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

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

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

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



The data from the source file now imports into Maximizer.

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

## Importing from Other Contact Managers

The instructions below describe importing data from a contact manager other than ACT! or GoldMine. For information about importing from ACT! or GoldMine, refer to page 259.

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

 Always back up the Address Book before importing.

- 1** From the File menu, select **Import > Other Contact Manager Database**.

The Import Databases dialog box opens.

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

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

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

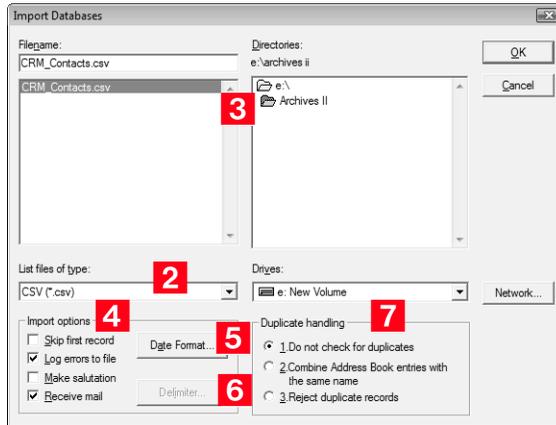
- 5** If you are importing a character delimited text file, you must specify a **Date Format**.

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

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

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

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



The Select Fields for Import dialog box opens.

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

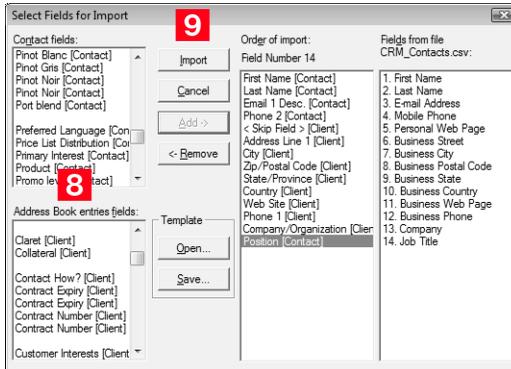
**i** To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

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

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

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

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



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

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

## Importing Data from ACT! and GoldMine

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

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

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

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

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

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

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

– or –

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

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

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

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

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

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

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

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

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

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

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

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

## Importing from ACT! 2005-2008 or ACT! Premium for Workgroups 2005-2008

Because ACT! 2005-2008 and ACT! 2005-2008 Premium for Workgroups run on their own SQL instance, the following steps must be performed to import data from them.

### ➤ **To import from ACT! 2005-2008 or ACT! Premium for Workgroups 2005-2008**

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

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

The Backup is typically saved to C:\Documents and Settings\

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

**3** The extracted file is a SQL backup. Restore this backup to a normal SQL 2000 (or greater) server.

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

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

**5** Start Administrator.

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

**7** Select **File > Import > ACT! 2005-2008 and ACT! Premium for Workgroups 2005-2008**.

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

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

You will be prompted for your sa password.

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

Maximizer begins importing the data.

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

- 1** Open **Control Panel > Administrative Tools > Data Sources (ODBC)**.
- 2** Click the **System DSN** tab, and click the **Add** button.
- 3** Select **SQL Server**, and click **Finish**.
- 4** Give a meaningful name and description, select the SQL server where you placed the restored backup, and click **Next**.
- 5** Select the **With SQL Server authentication** option, fill in the Login ID as **sa**, enter the sa password, and click **Next**.
- 6** Select **Change the default database to**, select the restored ACT! database from the drop-down list, and click **Next**.
- 7** Click **Finish**.
- 8** Click the **Test Data Source** button to make sure the DSN was configured correctly.
- 9** Click **OK** and then **OK** again to save the DSN.

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

 Always back up your Maximizer Address Book before importing data.

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

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

You will be prompted for your sa password.

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

Maximizer begins importing the data.

## Setting User Passwords and Properties After Import

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

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

- 1** In Administrator, select **File > Users**.
- 2** Select the user's User ID, and click the **Password, Preferences, or Properties** button.

## ACT! Data Conversion

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

<b>ACT! 2000 (5.0), 6.0, 2004, 2005, 2006, 2007, or 2008</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Company	Company	Yes	
Contact	First Name & Last Name	Yes	ACT! Contacts are imported as Contacts in Maximizer and the basic information about each Contact such as email address are imported into the Basic Info tab in the Address Book entry dialog box. If any of the information associated with the Contact cannot be mapped to a Maximizer field in this tab, the information is imported as user-defined fields. In ACT!, First and Last Name belong to the same single field. The correct names may not be properly imported into Maximizer. For example, a Contact 'Toni Spooner (female)' in ACT! is imported into Maximizer as "Toni Spooner" in the First name field and "(female)" in the Last name field.
Title	Position	Yes	
Department	Department, Position	Yes	In Maximizer, Department is populated with the Department information of the first Contact and the rest in the Position field separated by comma.
Phone	Phone 1	Yes	
Fax	Phone 2	Yes	Adds FAX to Extension field in Maximizer.
Mobile	Phone 4	Yes	Adds CELL to Extension field in Maximizer.
Alt Phone		No	
Ticker	UDF Ticker Symbol	Yes	Adds UDF to Company.
ID/Status	UDF ID/Status	Yes	Adds UDF to Company.

<b>ACT! 2000 (5.0), 6.0, 2004, 2005, 2006, 2007, or 2008</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Address	Address	Yes	First address line in ACT! is imported as Address 1 in Maximizer. Second line goes to Address 2. Address comes from one of the Contacts for this Company and if there is no address, it may end up empty. Alternate addresses are added to Maximizer from different Contacts of the Company and alternate addresses are named by that Contact. The same address is not added but renamed by the other Contact. For some Contacts, the appropriate alternate address may not be selected.
Address	Division		Division in Maximizer may be populated by the address line in ACT!.
City	City/Town	Yes	Imported correctly to main and alternate addresses.
State	St/Co/Prov	Yes	Imported correctly to main and alternate addresses.
Zip	Zip/Postcode	Yes	Imported correctly to main and alternate addresses.
Country	Country	Yes	Imported correctly to main and alternate addresses.
Referred By	UDF Referred By	Yes	Adds UDF to Company.
Web Site	Website	Yes	Imported into the Company's website field.
E-mail Address	Email	Yes	Imported into the Contact's email field.
Last Result	Creates Table UDF named "Result"	Yes	Adds Company Table UDF with corresponding items selected for each Contact.
Assistant		No	
Asst. Title		No	
Asst. Phone		No	
User fields for Contacts and Companies (ACT! 2005-2008 & ACT! 2005-2008 Premium only)	Creates UDFs for Contacts and Companies with the same name as in the source database	Yes	These fields can be renamed and can be changed to different field types. Any fields that are of MEMO type or are more than 120 Characters are converted to Notes in Maximizer.

<b>ACT! 2000 (5.0), 6.0, 2004, 2005, 2006, 2007, or 2008</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
User 1...User 15 (ACT! 2000 (5.0), 6.0, or 2004 only)	Creates UDFs named "Details Field 1"... "Details Field 15"	Yes	Adds UDFs to Company. Some UDFs that belong to some different Contacts in ACT! may be lost.
Users	Users	Yes	ACT! users are imported into Maximizer as users. Passwords are set to "maximizer" if the import was done using a DBF file. Users are displayed in the Administrator's Users dialog box which may be accessed by selecting File > Users. If a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. By default, passwords for users are set to "maximizer". Passwords can be changed manually for each imported user.
Notes	Notes	Yes	
Schedule Call Schedule To-do	Hotlist Task	Yes	The Duration information of a task in ACT! is imported as "Prior to task" in Maximizer. The Company name of some conflicting tasks may not be preserved.
Schedule Meeting	Appointments	Yes	Recurring appointments are not imported.
Notes Attachments	Notes Attachments	No	
Document	Document	No	
Groups	Groups	No	
Sales/ Opportunities	Opportunities	No	
History (ACT! 2005-2008 & ACT! 2005-2008 Premium only)	Notes	Yes	Each entry from the History tab in ACT! becomes a Note in Maximizer.

## GoldMine Data Conversion

The following table describes field mapping between GoldMine and Maximizer.

Note that Action, Call, and Appointment notes in GoldMine 6.0 may be in HTML format. When you import these notes into Maximizer, they contain HTML tags.

<b>GoldMine 5.x, 6.0, &amp; 6.5, &amp; 6.7</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Company	Company	Yes	
Contact First Name Initial Last Name	First Name Initial Last Name	Yes	GoldMine's Contact field contains (First Name) (Initial) (Last Name) separated by spaces. In Maximizer, appropriate fields are populated accordingly.
Title	Position	Yes	
Dept	Dept.	Yes	In Maximizer, Dept. is populated with the department of the main Company's Contact.
Asst	Assistant (UDF)	Yes	Adds UDF to Contact record.
Source	Contact type (UDF)	Yes	Adds UDF to Contact record.
Address	Address1 & Address2	Yes	Address from the main Contact becomes the main Company address. The first line in the Address field from GoldMine goes to Address1 in Maximizer. The second line goes to Address2. The third line from GoldMine is NOT imported. Alternate Addresses in Maximizer are created from the addresses of the Contact from the Contacts tab in GoldMine. Appropriate Alternate Addresses are selected for imported Contacts.
City	City/ Town	Yes	Imported correctly to main and alternate addresses.
State	St/Co/Prov	Yes	Imported correctly to main and alternate addresses.
Zip	Zip	Yes	Imported correctly to main and alternate addresses.
Country	Country	Yes	Imported correctly to main and alternate addresses.
Phone 1-3	Phone 1-3	Yes	Appropriate extensions are imported.
Fax	Phone 4	Yes	Adds FAX to Extension field in Maximizer.

<b>GoldMine 5.x, 6.0, &amp; 6.5, &amp; 6.7</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
E-mail	Email	Yes	Email address of the main Contact is imported. Email addresses of Contacts from the Contacts tab in GoldMine are also imported.
Web Site	Website	Yes	Imported to main Contact record.
Contact Type	Contact Type	Yes	Adds UDF to Contact record.
Business	Business	Yes	Adds UDF to Contact record.
Interest	Interest	Yes	Adds UDF to Contact record.
Accnt Mngr	Accnt Mngr	Yes	Adds UDF to Contact record.
Open	Open	Yes	Adds UDF to Contact record.
Summary	Note	Yes	A note containing details from the Summary tab is created for the Company.
Role Status Account Type Account Size No. of Users Key Interest Competitor Platform	User role Purchase Status Account Type Account Size Users Key Interest Competitor Platform	Yes	Appropriate UDFs are created in Maximizer and populated with proper values.
Notes	Note	Yes	A note is created for the Contact in Maximizer and contains all the notes from the Notes tab in GoldMine.
Documents	Document	No	
Users	Users	Yes	GoldMine's users are imported into Maximizer as users. Users are displayed in the Administrator's Users dialog box, which is accessible through the File > Users menu. If spaces are included in a user name, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. By default, passwords for users are set to "maximizer". Passwords can be changed manually for each imported user.
Details	Notes	Yes	For every detail, a note is created. Details are referred to as Profiles in the notes.

<b>GoldMine 5.x, 6.0, &amp; 6.5, &amp; 6.7</b>	<b>Maximizer</b>	<b>Imported?</b>	<b>Comments</b>
Pending	Hotlist Task	Yes	Each entry from the Pending tab in GoldMine is imported as Hotlist task in Maximizer.
Calendar	Hotlist Tasks	Yes	Calls and Activities from GoldMine's Calendar are imported as Hotlist tasks in Maximizer.
Referrals	Notes	Yes	A note is created for every Referral. Referrals are called References.
History	Notes	Yes	Each entry from the History tab in GoldMine becomes a Note in Maximizer.
Members		No	
Tracks		No	
Links		No	
Opptys		No	
Projects		No	
Partner	Notes	Yes	Limited information is imported.

## Field Mapping for Outlook

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

 For more information on Outlook Synchronization, refer to "Configuring Microsoft Outlook Synchronization" on page 89.

<b>Microsoft Outlook</b>	<b>Maximizer</b>
<b>Appointments</b>	
Subject	Subject
Start and End time date	Date
Start time	Start time
End time	End time
Reminder	Alarm time
Toggle alarm	Toggle alarm
Importance	Priority
Private	Private
Location	Location
Note (text box)	Note (text box)
<b>Tasks</b>	

Microsoft Outlook	Maximizer
Due date	Date
Alarm time	Time
Subject	Activity
End time	End time
Reminder set	Alarm set
Priority	Priority
Private	Private

## Transferring Entries between Address Books

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

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

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

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

## What Happens During a Transfer?

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

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

**i** Note that each Address Book entry has a unique ID.

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

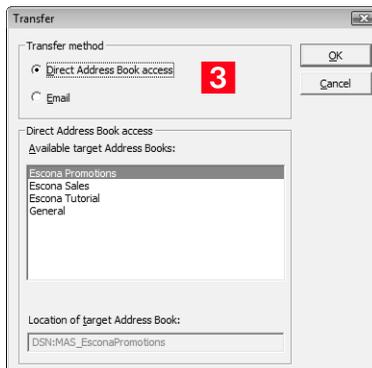
**i** For more information about transferring other information such as column setups, see the online help.

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

### ► To transfer Address Book entries

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

- 1** In the Address Book window in Maximizer, select the entries to transfer.
- 2** Select **File > Transfer > Address Book Entries**.
- 3** Select **Direct Address Book Access** or **Email** as the transfer method.
- 4** If you have chosen to transfer your Address Book entries using **Direct Address Book access**, select the **target Address Book** before clicking **OK**.



A login dialog box appears.

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

The Transfer Address Book Entries dialog box appears.

**6** Select the **Transfer options**.

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

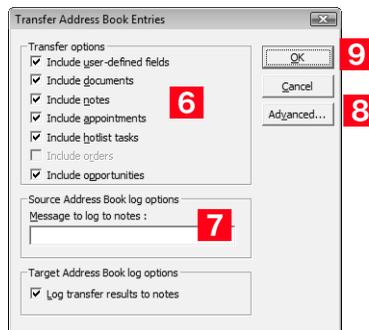
**7** Enter a **Message to log to notes** to be logged for each Address Book entry affected by the transfer in the source Address Book, if necessary.**8** To set the advanced options, click the **Advanced** button.

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

**9** Click **OK** to begin the transfer.

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

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

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

## Transfer Summary Reports and Logging

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

As well, for each Address Book entry updated in the target Address Book, Maximizer can optionally add a note. The note summarizes the fields that have been added, changed, and deleted. This feature can

also be used if you want to find the data that has been added or modified. After a transfer, simply do a search by notes.

## Adjusting Address Book Transfer Settings

**i** Only the MASTER user can modify protection on fields.

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

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

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

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

# Converting Embedded Documents to Linked Documents

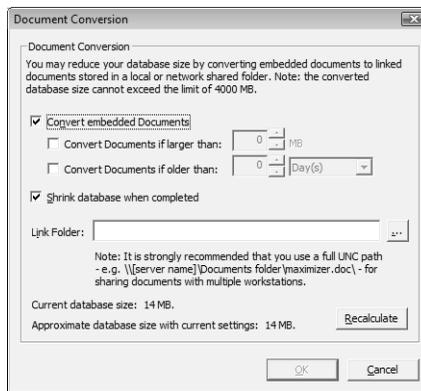
**i** Note that a converted Address Book size cannot exceed 4 GB (4000 MB).

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

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

## ➤ To convert embedded documents to linked documents

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

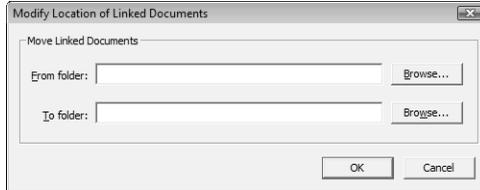


- 2** Select the **Convert embedded documents** option.
- 3** Specify the document size and age limits. If these values are left as zeros, all embedded documents regardless of size/age are converted to linked documents.
- 4** Optionally, select the **Shrink database when completed** option. This reduces the size of the Address Book once the conversion is complete. If you haven't chosen to convert your embedded documents, this reduces the size of the Address Book by removing any unused space.
- 5** Specify the folder in which linked documents will be stored in the **Link Folder** field.  
You should use the full UNC path as the location. For example, enter \\[computer name]\Linked Documents\. To ensure the correct UNC path is used, browse to computer and folder where the linked documents are to be stored.

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

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

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



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

You should use the full UNC path for both folders.

## Purging Outdated Notes and Documents

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

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

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

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

➤ **To purge notes**

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

➤ **To purge documents**

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

## Using Log Files for Diagnosis

One of the most powerful tools in diagnosing a Maximizer installation is the automated logging feature. Maximizer supports logging for a number of server and client components.

You can control the amount of detail that is logged for various modules. The range of logging levels is 0 through 7:

- 0 = logging disabled
- 1 = least detailed
- 7 = most detailed

You can also control the frequency in which the log files are purged and if the information is sent to the Windows event log.

Logs are written into the default folder “\Program Files\Maximizer\Logs”. You can define logging preferences in Administrator and Maximizer. These preferences control the following registry keys.

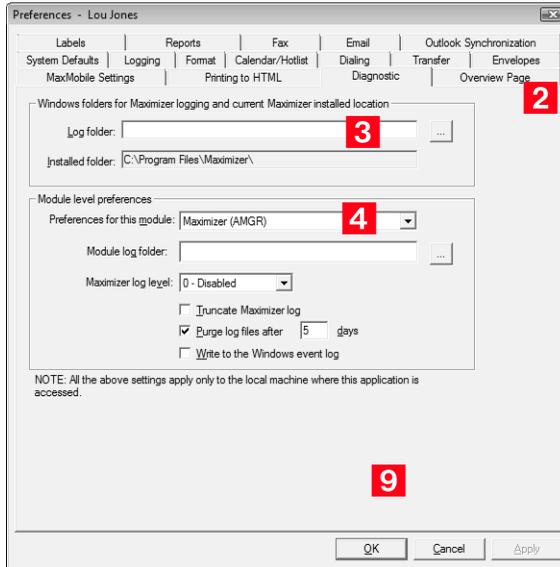
Component	Registry Key	Log File
Maximizer (AMGR)	HKEY_LOCAL_MACHINE\SOFTWARE\Maximizer Software\Maximizer\Modules\AMGR	AMGR_yyyymmdd.log
Administrator (ADMN)	HKEY_LOCAL_MACHINE\SOFTWARE\Maximizer Software\Maximizer\Modules\ADMN	ADMN_yyyymmdd.log

### ➤ To set logging preference values

- 1 In Administrator or Maximizer, select **File > Preferences**.
- 2 Select the **Diagnostic** tab.
- 3 If you want logs for all modules saved in one specific location, specify a default folder where your log files will be saved. If you don't specify a location in this field or a location per module, logs are saved in the Logs folder where Maximizer is installed (e.g., Program Files\Maximizer\Logs).
- 4 Select a module from the **Preferences for this module** drop-down list.
- 5 If you want logs related to a module saved in a specific location, specify a folder in the **Module log folder** field.
- 6 Select a logging detail level from the **Maximizer log level** drop-down list.
- 7 Set your other logging preference values such as the frequency logs are purged. By default, logs are purged after 5 days.

**8** Repeat the previous steps to configure logging for any other module(s).

**9** Click **OK**.



## Maximizer Email Service Log Files

The Maximizer Email Service log files store the following codes:

- 1 = Initialization or database connection problem
- 2 = Not used
- 3 = Exception (other error code)

Samples and explanations of both Maximizer Email Service log files are included below.

# System Reports

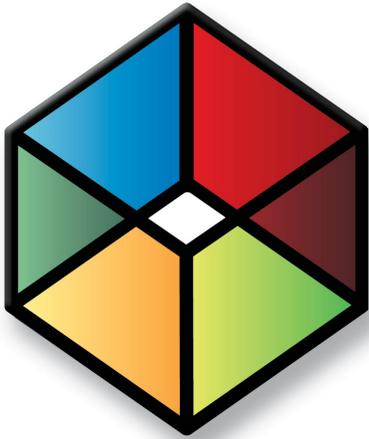
 HTML reports can be opened easily in Microsoft Excel, where you can edit the data as required.

The Reports menu in Administrator enables you to quickly create a number of reports about the open Address Book, as described below.

Report	Information Reported
User ID List	<ul style="list-style-type: none"> <li>• Total number of users in the Address Book</li> <li>• Total number of security groups in the Address Book</li> </ul> <p>For each user in the Address Book:</p> <ul style="list-style-type: none"> <li>• User ID</li> <li>• Display Name</li> <li>• First and Last Name</li> <li>• Phone number</li> <li>• Email Address</li> <li>• Maximizer Login Enabled/Disabled status</li> <li>• User's Roles (Access Rights)</li> </ul> <p>For each security group in the Address Book:</p> <ul style="list-style-type: none"> <li>• Group Name</li> <li>• Group ID</li> <li>• Group members</li> </ul>
User-Defined Fields	<ul style="list-style-type: none"> <li>• Folder (if applicable) and field name</li> <li>• Type of entry the field is applicable to (Company, Individual, Contact, Opportunity, or User)</li> <li>• Full Access and Read Access</li> <li>• Type (Table, Date, Alphanumeric, Numeric)</li> <li>• Creator</li> <li>• Requested by</li> <li>• Description</li> <li>• Attributes</li> <li>• Items in Table user-defined fields</li> <li>• Usage count (only if Show Usage Count checkbox selected in Print Report dialog box)</li> </ul>

Report	Information Reported
Address Book Summary	<p>Total number of each of the following types of entries in the current Address Book:</p> <ul style="list-style-type: none"> <li>• Users</li> <li>• Security groups</li> <li>• Companies and Individuals</li> <li>• Lowest, highest, average, and total number of contacts per Company and Individual</li> <li>• Opportunities (total and per status)</li> <li>• User-defined fields (total and per type)</li> <li>• User-defined field entries (total and per type)</li> <li>• Notes</li> <li>• Documents</li> </ul>
Current Users	<ul style="list-style-type: none"> <li>• Number of licenses in use</li> </ul> <p>For each user currently logged into the Address Book:</p> <ul style="list-style-type: none"> <li>• User name</li> <li>• Computer name</li> <li>• Date and time logged in</li> <li>• Maximizer module connected</li> </ul> <p>Licenses installed:</p> <ul style="list-style-type: none"> <li>• Product license number (PLN)</li> <li>• Computer name</li> <li>• Product</li> <li>• User count</li> <li>• Description</li> <li>• Total number of applied licenses</li> </ul>

**i** This report displays on-screen rather than printing. To print the report, press Alt and Print Screen to capture the report window to the Windows clipboard, and then paste it into a word processor or graphics program .



APPENDIX **A**

# Administrator's Reference

In this chapter...

"MxzDir.cfg File" on page 282

"Maximizer File Types" on page 284

"Maximizer XML Interface (MXI)" on page 285

## MxzDir.cfg File

The MxzDir.cfg file contains various global settings, which apply to all Address Books on the server, and Address Book-specific settings. The settings listed are for reference only. Maximizer performs all configuration during the installation. Each of the settings is described below.

**Table 1 Global Settings in MxzDir.cfg File**

Setting	Description
DB_SERVER	Name of the database server.
DB_SYS_TYPE	The type of database.
USE_UNIFIED_LOGIN	This entry enables or disables the "Trusted Connection" login security. 0 = disabled 1 = enabled
ENCRYPTION_TYPE	The type of encryption: 0 = standard 1 = no encryption 2 = BLOWFISH40
BTI_PATH	Defines the UNC location of the "Maximizer\Address Books" folder on the Maximizer Main Server. The "Address Books" folder is usually shared as "EAddress Books", so that in a typical installation the UNC path would be "\\<servername>\EAddress Books".
COMMON_WORKSPACES	Defines the Maximizer Address Books that are to appear in the Address Books list when you are opening an Address Book. The Address Book names should be separated by a comma, as in "COMMON_WORKSPACES=Address Book1,Address Book2,Address Book3". Each Address Book listed here should have a corresponding section in the MxzDir.cfg file. For example "Address Book1" would have a "[Address Book1]" section.
Install Path	The local path of the Maximizer program folder on the Maximizer Application Server.
Maximizer Server Setup	The Maximizer series number installed on the Maximizer Application Server. This value is set by the installation program.
Maximizer Server	This entry is the network machine name of the Maximizer Server.
Server Path UNC	Refers to the UNC path of the "Maximizer\ServerShared" folder. The "ServerShared" folder is shared as "MaximizerServer" during a Maximizer installation. For example, a typical installation would have the entry "Server Path UNC=\\<servername>\MaximizerServer".

**Table 2 Address Book Settings in MxzDir.cfg File**

<b>Setting</b>	<b>Description</b>
DB_SYS_TYPE	The type of database used for the Maximizer Address Book.
DB_SERVER	The network machine name of the computer that hosts the Maximizer configuration file (MxzDir.cfg).
DB_NAME	The actual name of the Maximizer database. It can be different from the display name.
DB_USERFRIENDLY_NAME	
SERVICE_WORKSPACE_PATH	Path to the Address Book.

## Maximizer File Types

The following table lists the extensions of file types created in the registry during the Maximizer installation.

<b>Extension</b>	<b>Application</b>	<b>Comment</b>
.MDE	MaxWin.exe	Maximizer Data Exchange file used by email transfer (prior to version 7 – now .MET)
.MEC	ecMeclm.exe	OrderDesk's order data file
.MET	MaxWin.exe	Maximizer Email Transfer files (version 7 and higher)
.MXD	MaxWord.ter	Maximizer Document extension
.MXI	MaxWin.exe	Maximizer XML format data file
.MTI	MaxWin.exe	Maximizer Transfer Interface (CSV format data file – elaborate or skip CSV altogether; manual says EDI, flags, etc.)

The following table lists the extensions of file types used by Maximizer. These file types have no association in the registry.

<b>Extension</b>	<b>Application</b>	<b>Comment</b>
.ETF	MaxWord.ter	Template files used by MaxWord

The following table lists the extensions of file types created in the registry during the ecBuilder installation.

<b>Extension</b>	<b>Application</b>	<b>Comment</b>
.MBD	ecBuild.exe	ecBuilder project data file

## Maximizer XML Interface (MXI)

Maximizer enables you to import Address Book entries from Maximizer or other applications using XML. If the records were exported from Maximizer in MXI (Maximizer XML Interface) or XML format, you can import them back into Maximizer directly. However, to import records from other applications in XML format, you must ensure that the XML file conforms to the Maximizer XML schema. The Maximizer XML schema file is named MXISchema.xsd and is installed with Maximizer in the ..\Program Files\Maximizer directory. The schema describes the XML elements and attributes used to identify records and fields for importing data into Maximizer.

After you have converted your data to XML format and it has been validated against the MXISchema.xsd, you can use the Advanced Import feature available in both Maximizer and Administrator to import this data into an Address Book.

The following pages provide detailed information about the Maximizer XML schema elements and attributes. The names of and relationships between the elements correspond to the Maximizer Address Book fields, with a few exceptions. Several elements are named "Detail...". These elements correspond to user-defined fields:

- DetailDef = definition of a user-defined field
- DetailDate = date user-defined field
- DetailNumber = numeric user-defined field
- DetailString = alphanumeric user-defined field
- DetailList = single-value table user-defined field
- DetailListMulti = multiple-value table user-defined field

The following sections outline the tree-structure hierarchy of Maximizer XML elements. The first section outlines just the top-level elements, and the following sections outline the elements below the top-level. Mandatory elements are shown in bold, and are mandatory only if their parent element is used.

For further details about the properties of each of the elements, refer to "Element Details" on page 294.

## Top-Level Elements

The <AllData> element is the root element, which contains the following elements, which contain all other elements. For specific information about each of the elements, refer to the appropriate section on the following pages.

### <AllData>

<ImportOptions>

See next section on this page.

</ImportOptions>

<DetailDef>

Refer to page 289 for sub-elements.

</DetailDef>

<Individual>

Refer to page 290 for sub-elements.

</Individual>

<Company>

Refer to page 291 for sub-elements.

</Company>

</AllData>

## <ImportOptions> Elements

The <ImportOptions> element and its sub-elements describe how Address Book entries should be imported.

<ImportOptions>

<ClientIdGeneration></ClientIdGeneration>

<LogFile></LogFile>

<LogLevel></LogLevel>

<ClientOptions>

<MatchMode></MatchMode>

<MatchDetail></MatchDetail>

</ClientOptions>

<ContactOptions>

<MatchMode></MatchMode>

<MatchDetail></MatchDetail>

</ContactOptions>

</ImportOptions>

The following table describes the values of each of the <ImportOptions> elements.

The valid values for each element are listed in the Value column. The Equivalent Field column identifies the field in the import dialog boxes that sets the same import option.

<b>Element Name</b>	<b>Valid Values</b>	<b>Equivalent Field(s) in Maximizer</b>	<b>Description</b>
ClientIdGeneration	Setting	Follow system setting	If the imported Address Book entry contains a Client ID, it uses the Client ID of the imported entry. If the imported Address Book entry does not contain a Client ID, and the "System to assign Address Book entries' IDentification field values" setting is turned ON, it creates a new Client ID for the imported Address Book entry. If the imported Address Book entry does not contain a Client ID, and the "System to assign Address Book entries' IDentification field values" setting is turned OFF, the Address Book entry will fail to import.
	System	Always system generated	Creates a new Client ID for each imported Address Book entry.
	File	Use values from the import file	Uses the Client IDs of the Address Book entries being imported.
LogFile		Log File	Path and filename where the log file should be saved (e.g., c:\folder\file.log).
LogLevel	0	n/a	Do not log (leaving this element value blank has same result).
	1	Errors	Log errors only.
	5	Info	Log record additions and field changes.
	7	Trace	Record all details (very large log file size).
ClientOptions	n/a	n/a	Client Options apply to Company and Individual Address Book entries; Contact Options apply to Contact Address Book entries. Client Options and Contact Options are defined in the nested <MatchMode> and <MatchDetail> elements.
ContactOptions	n/a	n/a	

<b>Element Name</b>	<b>Valid Values</b>	<b>Equivalent Field(s) in Maximizer</b>	<b>Description</b>
MatchMode	AlwaysInsert	Address Book entry update options/ Contact update options: Always insert	Inserts all Company, Individual, and Contact records from the import file and does not match imported records to existing records. Duplicate entries may result.
	Id	Address Book entry update options/ Contact update options: Use IDentification field to match entries	Uses Address Book identification values as the criteria for matching records. For Company and Individual records, this option uses the Client ID field to match entries. For Contact records, this option uses the Client ID and Contact Number fields to match entries.
	Name	Address Book entry update options/ Contact update options: Use Name field to match entries	Company records will use the Company field, and Individual and Contact records will use the Last Name field as the criteria for matching records.
	Detail	Address Book entry update options/ Contact update options: Use this user-defined field to match entries	Specifies an alphanumeric user-defined field to use as the criterion for matching records. Only Address Book entry user-defined fields that apply to the applicable record type appear in this list.
MatchDetail		Address Book entry update options/ Contact update options: Use this user-defined field to match entries	Name of the alphanumeric user-defined field to use to match entries when MatchMode is set to Detail.

## <DetailDef> Elements

The <DetailDef> element and its sub-elements describe the user-defined field definitions. If the user-defined field includes a description, it appears in the <Description> element. If it is a table user-defined field, the table items each appear in the <ListItem> elements.

```
<DetailDef Name="" Type="">
  <Description></Description>
  <ListItem></ListItem>
</DetailDef>
```

Much of the information about the user-defined field is stored in the element's attributes, which are described in the following table.

Attribute	Data Type	Valid Values	Description
Name	string		Name of the user-defined field.
Type	string	Multiple Single Date String Number	Indicates the type of user-defined field: <ul style="list-style-type: none"> <li>• Multiple = Table user-defined field that allows selection of multiple items.</li> <li>• Single = Table user-defined field that allows selection of single item only.</li> <li>• Date = Date user-defined field.</li> <li>• String = Alphanumeric user-defined field.</li> <li>• Number = Numeric user-defined field.</li> </ul> This attribute also applies to the <Detail> elements within other elements. The maximum length of the Type attribute is 80 characters.
Cases	string	No Yes	Indicates whether the user-defined field can be assigned to Cases.
Companies	string	No Yes	Indicates whether the user-defined field can be assigned to Company, Individual, or Contact Address Book entries.
Individuals	string	No Yes	
Contacts	string	No Yes	
DateAnnual	string	Yes	Applies to Date user-defined fields only. Yes = Annually recurring event.
RetainYear	string	Yes	Applies to Annually Recurring Date user-defined fields only. Yes = Retain year in annually recurring dates.
Hotlist	integer	1	Applies to Date user-defined fields only. 1 = Create Hotlist task.
Length	integer		Applies to Alphanumeric user-defined fields only. Indicates the maximum length of the field value.

## <Individual> Elements

The <Individual> element describes an Address Book entry for an Individual. Mandatory sub-elements are shown in bold.

```

<Individual>
  <ContactNo></ContactNo>
  <FirstName></FirstName>
  <LastName></LastName>
  <Initial></Initial>
  <MrMs></MrMs>
  <Title></Title>
  <Salutation></Salutation>
  <Phone>
    <Number></Number>
    <Extension></Extension>
    <Description></Description>
  </Phone>
  <Email>
    <Address></Address>
    <Description></Description>
  </Email>
  <Department></Department>
  <Division></Division>
  <ReportsTo></ReportsTo>
  <AssignedTo></AssignedTo>
  <Category></Category>
  <DoNotSolicitBy></DoNotSolicitBy>
  <Website></Website>
  <Created></Created>
  <LastModified></LastModified>
  <SalesLead></SalesLead>
  <Address>
    Refer to "<Address> Elements" on page 293.
  </Address>
  <DetailDate Name=""></DetailDate>
  <DetailNumber Name=""></DetailNumber>
  <DetailString Name=""></DetailString>
  <DetailList Name=""></DetailList>
  <DetailListMulti Name="">
    <Value></Value>
  </DetailListMulti>
  <Note>
    Refer to "<Note> Elements" on page 293.
  </Note>
  <Document>
    Refer to "<Document> Elements" on page 293.
  </Document>
  <Id></Id>
  <Firm></Firm>
  <Contact>
    Refer to "<Contact> Elements" on page 292.
  </Contact>
</Individual>

```

## <Company> Elements

The <Company> element describes an Address Book entry for a Company. Mandatory sub-elements are shown in bold.

```

<Company>
  <Id></Id>
  <Name></Name>
  <Department></Department>
  <Division></Division>
  <Phone>
    <Number></Number>
    <Extension></Extension>
    <Description></Description>
  </Phone>
  <Email>
    <Address></Address>
    <Description></Description>
  </Email>
  <Website></Website>
  <AssignedTo></AssignedTo>
  <Category></Category>
  <DoNotSolicitBy></DoNotSolicitBy>
  <Created></Created>
  <LastModified></LastModified>
  <SalesLead></SalesLead>
  <Address>
    Refer to "<Address> Elements" on page 293.
  </Address>
  <DetailDate Name=""></DetailDate>
  <DetailNumber Name=""></DetailNumber>
  <DetailString Name=""></DetailString>
  <DetailList Name=""></DetailList>
  <DetailListMulti Name="">
    <Value></Value>
  </DetailListMulti>
  <Note>
    Refer to "<Note> Elements" on page 293.
  </Note>
  <Document>
    Refer to "<Document> Elements" on page 293.
  </Document>
  <Contact>
    Refer to "<Contact> Elements" on page 292.
  </Contact>
</Company>

```

## <Contact> Elements

The <Contact> element describes an Address Book entry for a Contact. This element is nested within the <Individual> and <Company> elements. Mandatory sub-elements are shown in bold.

```

<Contact>
  <ContactNo></ContactNo>
  <FirstName></FirstName>
  <LastName></LastName>
  <Initial></Initial>
  <MrMs></MrMs>
  <Title></Title>
  <Salutation></Salutation>
  <Phone>
    <Number></Number>
    <Extension></Extension>
    <Description></Description>
  </Phone>
  <Email>
    <Address></Address>
    <Description></Description>
  </Email>
  <Department></Department>
  <Division></Division>
  <ReportsTo></ReportsTo>
  <AssignedTo></AssignedTo>
  <Category></Category>
  <DoNotSolicitBy></DoNotSolicitBy>
  <Website></Website>
  <Created></Created>
  <LastModified></LastModified>
  <SalesLead></SalesLead>
  <Address>
    Refer to "<Address> Elements" on page 293.
  </Address>
  <DetailDate Name=""></DetailDate>
  <DetailNumber Name=""></DetailNumber>
  <DetailString Name=""></DetailString>
  <DetailList Name=""></DetailList>
  <DetailListMulti Name="">
    <Value></Value>
  </DetailListMulti>
  <Note>
    Refer to "<Note> Elements" on page 293.
  </Note>
  <Document>
    Refer to "<Document> Elements" on page 293.
  </Document>
</Contact>

```

## <Address> Elements

The <Contact> element describes the address of an Address Book entry. This element is nested within the <Individual>, <Company>, and <Contact> elements.

```
<Address>
  <Description></Description>
  <AddressLine1></AddressLine1>
  <AddressLine2></AddressLine2>
  <City></City>
  <StateProvince></StateProvince>
  <Country></Country>
  <ZipCode></ZipCode>
</Address>
```

## <Note> Elements

The <Note> element describes any notes for Address Book entries. This element is nested within the <Individual>, <Company>, <Contact>, and <Case> elements. Mandatory sub-elements are shown in bold. The body of the note is stored in the <Text> element.

```
<Note>
  <Date></Date>
  <Creator></Creator>
  <Owner></Owner>
  <Type></Type>
  <Text></Text>
</Note>
```

## <Document> Elements

The <Document> element describes any Documents for Address Book entries. This element is nested within the <Individual>, <Company>, <Contact>, and <Case> elements. Mandatory sub-elements are shown in bold. The body of the document is stored in the <DocData> element.

```
<Document>
  <DocumentId></DocumentId>
  <Name></Name>
  <Date></Date>
  <Creator></Creator>
  <Owner></Owner>
  <Extension></Extension>
  <DocData></DocData>
</Document>
```

## Element Details

The following table lists all the elements in the Maximizer XML schema in alphabetical order and describes the following properties of each:

- **Element Name:** The name of the XML element. An element name may be listed more than once if it has different properties depending on its parent element. Most of the element names correspond to Maximizer field names.
- **Parent Element(s):** The name of the XML element(s) within which the element is nested. If an element with the same name and same properties may exist within more than one parent element, all parent elements are listed.
- **Min. Occur.:** The minimum number of times the element must occur within its parent element. A value of 1 indicates that the element is mandatory, and a value of 0 indicates it is not.
- **Max. Occur.:** The maximum number of times the element may occur within its parent element. The infinity symbol indicates that the maximum occurrences are unbounded (unlimited).
- **Data Type:** The type of data that may be stored in the element.
- **Max. Length:** The maximum length of the element contents. If this value is blank, there is no maximum length.

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Address <sup>a</sup>	Email	1	1	string	120
Address <sup>a</sup>	Individual Company Contact	0	1	none <sup>b</sup>	
AddressLine1	Address	0	1	string	80
AddressLine2	Address	0	1	string	80
AllData	none	1	1	none <sup>b</sup>	
Category <sup>a</sup>	Individual Company Contact	0	1	string	
City	Address	0	1	string	80
ClientIdGeneration	ImportOptions	0	1	string	
ClientOptions	ImportOptions	0	1	none <sup>b</sup>	
Company	AllData	0	unlimited	none <sup>b</sup>	
Contact	Individual Company	0	unlimited	none <sup>b</sup>	
ContactNo <sup>a</sup>	Individual Contact	0	1	integer	
ContactOptions	ImportOptions	0	1	none <sup>b</sup>	
Country	Address	0	1	string	80

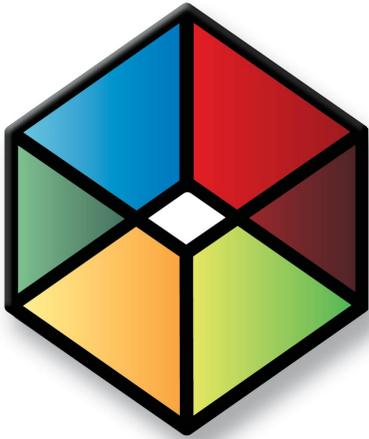
Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Created	Individual Company Contact	0	1	dateTime	
Creator	Note Document	0	1	string	80
Date	Note Document	1	1	dateTime	
Department	Individual Company Contact	0	1	string	80
Description <sup>a</sup>	Phone Email	0	1	string	22
Description <sup>a</sup>	Address	0	1	string	80
Description <sup>a</sup>	DetailDef	0	1	string	
DetailDate	Individual Company Contact	0	unlimited	date	
DetailDef	AllData	0	unlimited	none <sup>b</sup>	
DetailList	Individual Company Contact	0	unlimited	string	80
DetailListMulti	Individual Company Contact	0	unlimited	none <sup>b</sup>	
DetailNumber	Individual Company Contact	0	unlimited	double	
DetailString	Individual Company Contact	0	unlimited	string	120
Division	Individual Contact Company	0	1	string	80

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
DocData	Document	0	1	string	
Document	Individual Company Contact	0	unlimited	none <sup>b</sup>	
DocumentId	Document	0	1	integer	
DoNotSolicitBy	Individual Company Contact	0	1	string	
Email	Individual Company Contact	0	3	none <sup>b</sup>	
Extension	Phone Document	0	1	string	22
Firm	Individual	0	1	string	80
FirstName	Individual Contact	0	1	string	80
Id	Individual Company	1	1	string	23
ImportOptions	AllData	0	1	none <sup>b</sup>	
Individual	AllData	0	unlimited	none <sup>b</sup>	
Initial	Individual Contact	0	1	string	80
KnowledgeBaseArticle	AllData	0	unlimited	none <sup>b</sup>	
LastModified	Individual Company Contact	0	1	dateTime	
LastName	Individual Contact	1	1	string	80
LeadHandling	ImportOptions	0	1	string	
ListItem	DetailDef	0	unlimited	string	80
LogFile	ImportOptions	0	1	string	
LogLevel	ImportOptions	0	1	integer	
MatchDetail	ClientOptions ContactOptions	0	1	string	
MatchMode	ClientOptions ContactOptions	1	1	string	

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
MrMs	Individual Contact	0	1	string	80
Name	Company Document	1	1	string	80
Note	Individual Company Contact	0	unlimited	none <sup>b</sup>	
Number	Phone	1	1	string	22
Owner	Note Document	0	1	string	80
Phone	Individual Company Contact	0	4	none <sup>b</sup>	
ReportsTo	Individual Contact	0	1	string	80
SalesLead	Individual Company Contact	0	1	boolean	
Salutation	Individual Contact	0	1	string	80
StateProvince	Address	0	1	string	80
Text	Note	1	1	string	
Title <sup>a</sup>	Individual Contact	0	1	string	80
Type	Note	0	1	string	80
Value	DetailListMulti	1	unlimited	string	80
Website	Individual Company Contact	0	1	string	120
ZipCode	Address	0	1	string	80

- a. This element is listed more than once because of differing properties depending on which element is the parent element.
- b. This element cannot contain a value; it can only contain other elements.





APPENDIX **B**

# Crystal Reports Database Views/Tables Reference

## *Maximizer Database Views/Tables Reference*

### In this chapter...

"Overview" on page 300

"Data Population for the Current Window" on page 300

"Database Views for User-Defined Fields" on page 301

"Database Driver Used to Create Crystal Reports" on page 301

"Filtering Data" on page 302

"Linking" on page 303

"Controlling Windows" on page 303

"Including Additional Views in Your Reports" on page 304

# Overview

This chapter is a technical reference for using Crystal Reports with Maximizer data. For more how-to information about generating and storing Crystal Reports for Maximizer, refer to “Crystal Reports” on page 220. For information on Maximizer SQL views and tables, refer to the Customization Suite documentation.

## Data Population for the Current Window

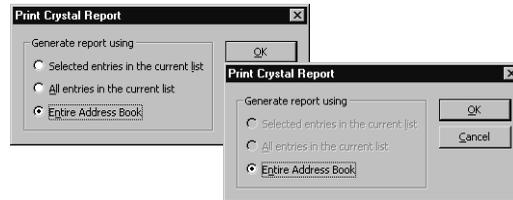
**i** For more information on user access rights for creating Crystal Reports, see the Maximizer CRM Administrator's Guide.

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 303 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

The Microsoft 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 in this version of the software. However, Crystal Reports created in some previous versions of Maximizer were created using the Maximizer ODBC driver.

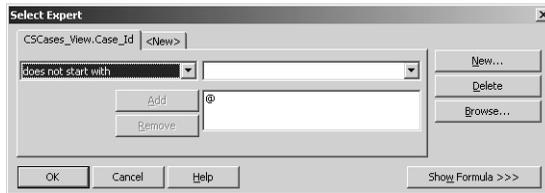
The Maximizer ODBC driver is still supported for compatibility reasons with previous versions of Maximizer. If you are creating new reports for use with Maximizer, use the SQL Server driver.

## 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.

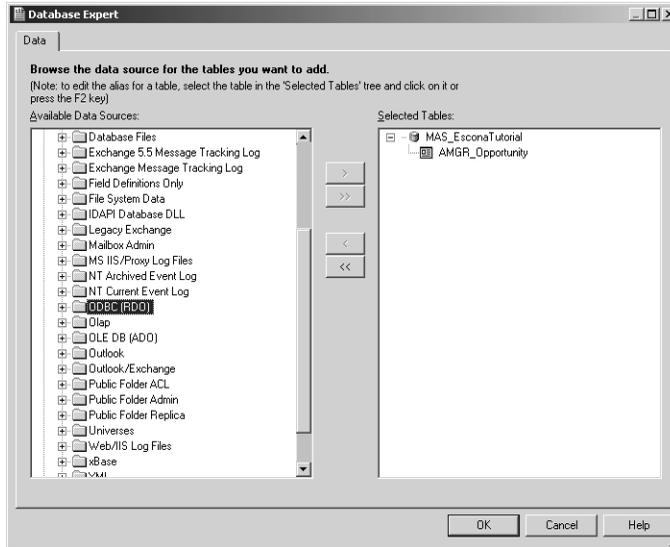
Crystal Reports enables you to specify the type of join and type of link you want to use when linking tables. Joins and links indicates how linked fields in two tables are compared when records are read. Join, enforce, and link options can be specified in the Links Options dialog box. Using the various 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.

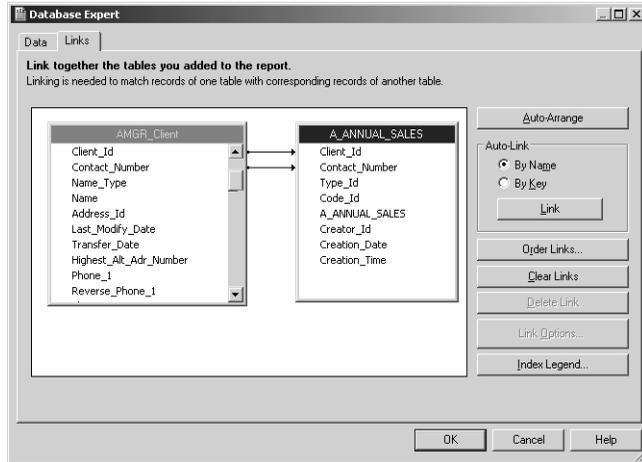


## User-Defined Fields Example

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".

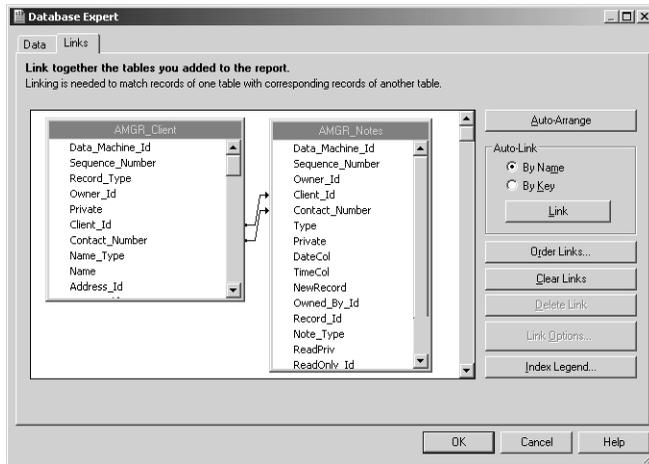
User-Defined Field	Microsoft SQL	Maximizer ODBC
User-defined field view name	A_<user-defined field name> example: A_ ANNUAL_SALES	U_<user-defined field name> example: U_ ANNUAL_SALES
Links	Client_Id => Client_Id Contact_Number => Contact_Number	Client_Id => Client_Id Contact_Number => Contact_Number

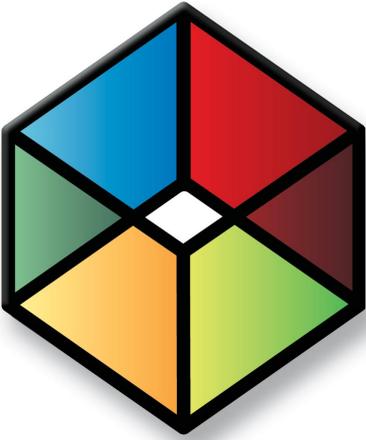


## Notes Example

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





APPENDIX  
**Glossary of Terms** **C**

## 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 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.

**Accounting Link** – a Maximizer add-on that enables users to connect to QuickBooks through Maximizer. For more information, refer to the *Accounting Link User's Guide* or the Maximizer website.

**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 menu in Maximizer.

**default entry** – an entry (such as an Address Book entry) containing default field values that are propagated to new entries by default.

**ecBuilder** – a tool to automate web-based sales.

**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.

**order screens** – some of the screens displayed to a customer when he/she orders a catalog item. Order screens can be customized by editing the order screen templates.

**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, or web page. Maximizer uses templates for word processor documents.

**Training Guide** – the Maximizer CRM Training Guide and CD introduces Maximizer using exercises and examples.

**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.



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