



Maximizer CRM™ 10

MaxLink *for Palm® OS*



Maximizer Software
Simply Successful CRM

Getting Started Guide

Introducing MaxLink

MaxLink is a tool offering the client management features of Maximizer, while taking advantage of the portability and convenience of the Palm and Handspring handheld organizers. 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. Use MaxLink to synchronize record additions, changes, and deletions between the two products. When you synchronize data regularly, performance is better because only records that have been modified are read during the process.

You can transfer the following types of records between PC Maximizer and the Palm or Handspring:

Maximizer Records

Companies, Individuals & Contacts
Appointments (Calendar)
Tasks (Hotlist)
Notes, Journal
Basic Information tab fields,
table fields and alphanumeric fields

Palm or Handspring Records

Address Book
Date Book
To Do List
Memo Pad & Notes
Custom Fields

Getting Help

For information on each of the tabs in MaxLink, press F1 while the tab is active. If the help does not first appear, try clicking directly on the tab name in MaxLink and pressing F1 again.

You can also refer to the MaxLink User's Guide, which is available in PDF format from the MaxLink program item on the Start menu or from the CD.

Minimum System Requirements

Before you begin, review the following system requirements for MaxLink.

- 600 MHz processor or higher
- Windows 2000, XP, 2003, Vista
- Maximizer CRM 10 installed on your computer
- Palm Desktop application version 4.0 or higher installed on your computer

Visit our website at www.maximizer.com for the most up-to-date product compatibility information.

Be sure to back up your Maximizer Address Books before using MaxLink.

For information about the installation, setup and operation of your Palm or Handspring, refer to the documentation supplied with it.

Contacting Maximizer

- **Maximizer Website** - <http://www.maximizer.com>
- **Knowledge Base** - <http://www.maximizer.com/knowledgebase>
- **Supported PDAs, wireless browsers, and other third-party products** - <http://www.maximizer.com/support/products.html>

Using MaxLink

MaxLink is an application specifically designed for synchronizing Maximizer data with your Palm or Handspring PDA.

Installing MaxLink

Follow these instructions to install MaxLink.

1. Insert the MaxLink CD or the Maximizer CRM Workstation CD in your computer's CD-ROM drive.

If you have downloaded MaxLink from the Maximizer website, browse to the location of the setup files.
2. When using a CD, if the setup screen does not appear automatically, double-click the Autorun.exe.
3. Follow the on-screen instructions to complete the installation.

Synchronizing Data for the First Time

The first time you synchronize records, complete the following procedures:

➤ To select Address Book records

1. Start Maximizer and select the records to synchronize.
2. Open the MaxLink Configuration program from Programs > Maximizer CRM or Maximizer > MaxLink > MaxLink Configuration.
3. Specify the Maximizer Address Book entries and Contacts to synchronize.

➤ To set the synchronization method

1. Specify how your records should be synchronized. For example, you may choose to include or exclude appointment records in the synchronization.
2. Specify other options such as a date range to include only those appointments that fall within a specific time period.

➤ To synchronize Maximizer and Palm or Handspring records

1. Connect the Palm or Handspring to the computer.
2. Initiate the Palm or Handspring HotSync process to synchronize records.

Setting Synchronization Options

Before you synchronize records between Maximizer and the Palm or Handspring, decide how the records are to be synchronized. Each of the synchronization options are described below:

Synchronize Maximizer and Palm/Handspring Data

Synchronizes records based on MaxLink typical synchronization.

Overwrite Palm/Handspring Data with Maximizer Data

Overwrites Palm/Handspring Data with data in the current Maximizer Address Book.

Revert All Palm/Handspring Data to Your Previous Synchronization

- With typical synchronization circumstances, this option undoes all changes to the Palm or Handspring since the last synchronization. The data is reverted to the state after the previous synchronization.
- When communications have been interrupted during a synchronization for such reasons as a connection failure, this option resends synchronized data to the Palm or Handspring. During a synchronization, MaxLink saves data to be sent to the PDA on the PC's hard disk. If communications are interrupted, this option does erase changes to the PDA but resends the saved data to complete the failed synchronization.

Add All Archives to Palm/Handspring

Restores all deleted Palm or Handspring records that have been archived on the PC. The records are added as "unfiled" entries. If you recently had problems with a synchronization and received a message from MaxLink recommending the "Revert all Palm data..." option, you will not lose changes since your last successful synchronization. In this case, the "Revert" option returns your data to the state before the failed synchronization.

Don't Synchronize

This option is applicable to only calendar, Hotlist, and notes information.

Link Keys

MaxLink uses two special codes, called *Link Keys*, to establish relationships among Palm OS records. They detect changes to the records and synchronize those changes with the original Maximizer entries. Link Keys are made up of two different types of information—System Keys and User Keys. Information in both key types are contained in angle brackets << >>.

System Keys

System Keys establish relationships between records on the Palm or Handspring. MaxLink handles these keys automatically, and you **should not** modify them. They use the format <<x/y/z/q>>, where x,y,z, and q are numbers. Respectively, these represent the Client ID (x), Contact Number (y), Machine ID(z), and Sequence # (q).

Example of a System Key

During synchronization, *MaxLink* marks each record it transfers to the PDA with a System Key. Following is an example:

```
<<94030200071329828C/5/1571329828/51>>
```

This key is stored in the following locations on the Palm or Handspring:

<u>Palm/Handspring Record Type</u>	<u>System Key Location</u>
Address Book	Custom 4 field
Date Book	Note field within the text
To Do List	Note field within the text
Memo Pad	Appended to the end of the Memo text

User Keys

User keys distinguish information entered on the Palm or Handspring when synchronizing data with Maximizer. When you enter a User Key, you may use any unique number or combination of characters within a set of angle brackets to represent the record. For example, <<5>> or <<user_key>> represent a number or character string that you define for a specific Address Book entry. After Address Book records are entered on the PDA and then synchronized, they become typical entries in that they appear the same as a record that has been entered in Maximizer. The following tutorial provides step-by-step instructions on entering various types of User Keys—Companies, Individuals, Contacts, Appointments, Hotlist Tasks, and Notes.

Example of a User Key

This example demonstrates how to create and add the User Key to Palm/Handspring records. The following are examples of the two types of User Keys:

The first is for records associated with Address Book entries:

<<3>> where 3 is a unique Client ID

<<Acme>> where Acme is a unique Client ID

The second is for records associated with Contacts:

<<3/1>> where 3 is the associated Client ID and 1 is a unique Contact ID

<<Acme/3>> where Acme is the Client ID and 3 is a unique Contact ID

Add this key in the following fields on the Palm:

Palm/Handspring Record Type

System Key Location

Address Book

Custom 4 field

Date Book

Note field, within the text

To Do List

Note field, within the text

Memo Pad

Appended to the end of the Memo text

Tutorial – Entering a New Company and Contacts

This tutorial guides you through the steps of adding one Company, two Contacts, and several appointments, Hotlist tasks, and notes on a Palm or Handspring, and synchronizing with Maximizer.

➤ To add a Company to a Palm or Handspring

1. Create a new Address Book entry, and fill in the fields, leaving the **First name** or **Last name** fields blank.

NOTE: Do not perform a synchronization until the last step of this tutorial. Otherwise, the client <<5>> will be removed from the Custom 3 field and any new Contacts, Appointments, Hotlist Tasks, or Notes you add after synchronization will not be attached to this particular company.

2. In the **Company** field, type **New Technology**.
3. In **Custom field 3**, type <<5>>.

➤ To add a Contact for New Technology

1. Create a new Address Book entry, filling in all fields.
2. In the **Last name** field, type **Smith**.
3. In the **First name** field, type **John**.
4. In the **Custom 3 field**, type <<5/J 5>>.

After synchronization, John Smith becomes a Contact of New Technology. The Contact key you assigned (J 5) can be any phrase or number that is not currently associated with Client 5.

➤ **To add another Contact for New Technology**

1. Create a new Address Book entry, filling in all fields.
2. In the **Last name** field, type **White**.
3. In the **First name** field, type **Tom**.
4. In the **Custom 3 field**, type <<5/63>>.

After synchronization, Tom White becomes another Contact of New Technology. In your regular synchronization process, the Contact number you assign (63) can be any number except the number of another Contact of this Company.

➤ **To add an appointment for New Technology**

1. Create a new Date Book entry, filling in all fields.
2. In the **Note** field, type <<5>>.

After synchronization, this appointment becomes an appointment for New Technology as it has the same User Key as the New Technology Address Book record.

➤ **To add an appointment for John Smith**

1. Create a new Date Book record, filling in all fields.
2. In the **Note** field, type <<5/J S>>.

After synchronization, this appointment becomes an appointment for John Smith of New Technology as it has the same User Key as the John Smith Address Book record.

➤ **To add a Hotlist task for New Technology**

1. Create a new To Do List record, filling in all fields.
2. In the **Note** field, type <<5>>.

After synchronization, this Hotlist task becomes a Hotlist task for New Technology as it has the same User Key as the New Technology Address Book record.

➤ **To add a Hotlist task for Tom White**

1. Create a new To Do List record, filling in all fields.
2. In the **Note** field, type <<5/63>>.

After synchronization, this Hotlist task will become a Hotlist task for Tom White of New Technology as it has the same User Key as the Tom White Address Book record.

➤ **To add a note for New Technology**

1. Create a new Memo Pad record, filling in all fields.
2. Anywhere in the Memo text, enter <<5>>.

After synchronization, this note becomes a note for New Technology as it has the same User Key as the New Technology Address Book record.

➤ **To add a note for John Smith**

1. Create a new Memo Pad record, filling in all fields.
2. Anywhere in the Memo text, type <<**5/J S**>>.

After synchronization, this note will become a note for John Smith of New Technology as it has the same User Key as the John Smith Address Book record.

➤ **To synchronize data**

1. In the MaxLink Configuration, select **Synchronize Maximizer and Palm or Handspring Data** for all four applications on the Synchronization Method screen.
2. As described in the Palm or Handspring manual, connect the PDA to your computer and press the HotSync button.

After synchronization, the following records are added in *Maximizer* from the Palm or Handspring records you have just added:

Company – New Technology

Two Contacts for New Technology – John Smith and Tom White

An **appointment** for New Technology and another appointment for John Smith

A **Hotlist task** for New Technology and another Hotlist task for Tom White

A **note** for New Technology and another note for John Smith

Refer to the MaxLink User's Guide for another tutorial about adding a new contact for an existing company. This guide is available in PDF format from the MaxLink program item on the Start menu and from the CD.

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