



MaximizerCRM™ 10

MaxMobile *Lite for Windows Mobile® Pocket PC*

Getting Started Guide



Maximizer Software

Simply Successful CRM

Welcome to MaxMobile Lite

Introduction

MaxMobile Lite 10 for Windows Mobile® Pocket PC provides you with a way to take your customer information on the road. You can take notes and synchronize them back to the corporate database, as well as check your schedule and make follow-up tasks for yourself to call back on important clients.

System Requirements

Before installing MaxMobile, install Maximizer CRM 10 and Microsoft ActiveSync 4.5 or higher (if your computer is running an operating system other than Windows Vista), or Windows Mobile Device Center 6.1 or higher (if your computer is running Windows Vista)

Mobile Powered Pocket PC and Mobile Powered Pocket PC Phone Edition devices running Windows Mobile 2003 (4.2) for Pocket PC, Windows Mobile 5, or Windows Mobile 6 are supported.

The following space requirements must also be met:

- 18 MB (minimum) free space on the device without the use of a storage card where MaxMobile, the database, and all other components are installed on the device.
- 13 MB to 18 MB free space on the device with the use of a storage card where only the database is installed on the storage card. MaxMobile and other components are installed on the device.
- 8 MB to 13 MB free space on the device with the use of a storage card using the Advanced Installation method where only the database is installed on the storage card. MaxMobile and other components are installed on the device.

Users must be enabled for MaxMobile Lite synchronization in the user properties dialog box in Administrator (File > Users > Properties > General tab).

Installing MaxMobile

The MaxMobile installation also installs Microsoft SQL Mobile 2005 and Microsoft .NET Compact Framework Service Pack 2 on the device if they are not already installed. These programs are required for MaxMobile. See the Maximizer website for the latest compatible product information at <http://www.maximizer.com/support/products.html>.

➤ To install MaxMobile

1. Close any Maximizer applications running on the computer.
2. Connect your Windows Mobile device to the computer.
3. Insert the MaxMobile installation CD into the computer's CD drive.

The installation program starts automatically. If it doesn't start, browse to your CD drive and double-click Autorun.exe.

4. Click **Install Software** under the **MaxMobile Lite for Windows Mobile Pocket PC**.

5. Follow the installation wizard on-screen instructions.

Do not disconnect the Windows Mobile device at any time during the installation.

The installation installs MaxMobile components on the computer, and then it installs MaxMobile on the device.

6. During the installation, you may be prompted to choose whether to install on the device or the storage card. This option determines where the MaxMobile database file will be installed. Select the location where you would like to install the database.

You may also be prompted whether to install the Microsoft SQL mobile server engine and Microsoft .NET CF on the device or the storage card. **Choose to install both of these components on the device.**

The installation may require you to restart the device.

4 **MaxMobile Lite 10 for Windows Mobile Pocket PC**

7. Tap **ok** to finish the installation on the device and restart if necessary.
8. Click **Finish** to close the installation wizard on the desktop computer.

The installation is now complete. You must configure your MaxMobile synchronization settings in Maximizer before you can synchronize with MaxMobile. See the Configuring MaxMobile Windows Settings topic for more information.

➤ **To install MaxMobile using the advanced method**

1. From the MaxMobile program item on the Start menu, choose the **MaxMobile Lite 10 for Windows Mobile Pocket PC Device Installer (Advanced Mode)** item.
2. When prompted, choose to install MaxMobile on the storage card. This installs only the database on the storage card; MaxMobile is installed on the device.
3. When the installation is complete, click **Done** on the device, and click **OK** on the desktop computer.
4. The Microsoft Compact Framework 2.0 installation begins. When prompted, choose to install the software on the device.
5. When prompted, restart the device.
6. Click **OK** once the device has restarted, ensuring you have an established connection with the device.
7. The Microsoft SQL Mobile 2005 installation begins. Choose to install the software on the device.
8. When the installation is complete, click **Done** on the device, and click **OK** on the desktop computer.

Starting MaxMobile

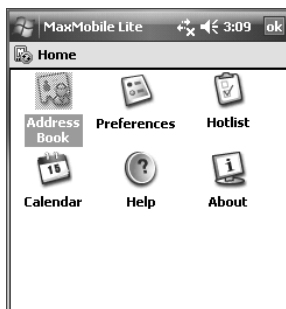
➤ To start MaxMobile on your Windows Mobile device

1. Tap **Start > Programs**.
2. Tap **MaxMobile Lite**.
3. Enter your Maximizer **User ID** and **Password** and tap **ok**. This is the same user ID and password you use for Maximizer. Note you must synchronize your data from Maximizer before opening MaxMobile.

Using MaxMobile

You can use MaxMobile in either portrait (vertical) or landscape (horizontal) display mode, according to the settings on your Windows Mobile device.

Tap an icon in the main window to open the Address Book, Hotlist, Calendar, Help, About, or Preferences windows. When you have the Address Book, Hotlist, or Calendar window open, you can go directly to another MaxMobile window by tapping the Windows menu and tapping the window.



Setting MaxMobile Preferences

From the MaxMobile home page, tap the Preferences icon to open the Preferences window.

Calendar/Hotlist Settings

Enable alarms turns the Hotlist task and appointment alarm functionality on or off. You can also specify how frequently MaxMobile should check for alarms.

Set working hours from determines the display hours of the Daily and Weekly views in the Calendar.

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

Email Settings

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

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

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

Note that email logging is available for only Windows Mobile 5 and Windows Mobile 6.

Retrieve Address Book entries at startup

Show all displays all Address Book entries when you open the Address Book window.

Show blank displays a blank list when you open the Address Book window.

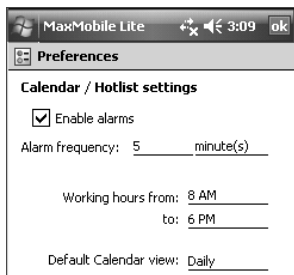
Retrieve the last list displays the most recent list of Address Book entries when you open the Address Book window.

Using the Menus

For each of the MaxMobile windows, a set of menus is available from the menu bar and additional context-sensitive menus appear when you tap and hold on an entry or inside a window.

> To use the menu bar

1. Tap on a **menu** on the menu bar.
2. Tap on one of the **menu items**.



➤ To use the context-sensitive menus

1. Tap and hold inside a **window**.

– or –

Tap and hold on an **entry**.

The menu related to the current window or type of entry appears.

Synchronization

Before you can synchronize, Maximizer and MaxMobile must both be installed on the same machine. Your Windows Mobile device must also be configured to synchronize with your computer.

Synchronization settings are configured on a per-user basis. To be able to synchronize Address Book entries, user-defined fields, and notes, you must have the “Allow Sync Contacts with External Clients” access right in Maximizer. However, you can still synchronize appointments and Hotlist tasks without this access right.

Address Book Entry Synchronization

To synchronize Address Book entries, create a Favorite List of those Address Book entries and specify the Favorite List in your MaxMobile synchronization settings. In most cases, only the Maximizer Address Book entries you have added to the Favorite List identified for synchronization will synchronize from Maximizer to MaxMobile. However, if a Contact belongs to the Favorite List, but the Contact’s associated Company or Individual Address Book entry does not belong to the Favorite List, the Company or Individual will also synchronize. All Address Book entries in MaxMobile automatically synchronize to Maximizer, and they are added to the Favorite List.

➤ To mark Address Book entries for synchronization

1. In Maximizer, create a Favorite List of the Address Book entries to synchronize with MaxMobile. For example, create a Favorite List called "MaxMobile Sync". For instructions on creating a Favorite List, refer to your Maximizer documentation.
2. In Maximizer, select the Favorite List from the **Synchronize Address Book entries from Favorite List** drop-down list in MaxMobile Settings (File > Preferences > MaxMobile Settings). For instructions on configuring MaxMobile Settings, refer to the Configuring MaxMobile Synchronization Settings topic later in this section.

The Address Book entries are ready for synchronization.

Changing the Synchronized Favorite List

If you change the synchronized Favorite List to one with a different name, the previously synchronized Address Book entries will no longer be synchronized unless they also belong to the new Favorite List.

➤ To change the synchronized Favorite List

1. Add any Address Book entries to synchronize to the new Favorite List.
2. In Maximizer, select **File > Preferences**, and click the **MaxMobile Settings** tab.
3. Select the new Favorite List from the **Synchronize Address Book entries from favorite list** drop-down list.
4. Click **OK** to save your MaxMobile Settings changes.

Using the Reset MaxMobile Option

Note that you cannot synchronize more than one Address Book with MaxMobile at a time. If you want to synchronize with a different database, you must first do a reset from Maximizer

by choosing **Tools > Reset MaxMobile**. The Reset MaxMobile option does a complete refresh of the data on the device with the data in Maximizer. This option is also useful to clean up your data on the device.

User-Defined Field Synchronization

When you configure MaxMobile synchronization settings in Maximizer, you can specify which Address Book entry user-defined fields to synchronize. You can select up to eight Address Book entry user-defined fields. MaxMobile cannot synchronize user-defined fields that have the “Encrypted”, “Include in Hotlist”, or “Annually recurring event” attributes.

Note Synchronization

When you configure MaxMobile synchronization settings in Maximizer, you can specify what types of notes to synchronize by clicking the Notes Options button. When selecting which note types to synchronize, consider which types are likely to contain information you will need. For example, Manual notes are likely to contain information you will need, whereas History notes may not. Only notes of the selected types will synchronize, and only for synchronized Address Book entries.

Document Synchronization

When you configure MaxMobile synchronization settings in Maximizer, you can specify what types of documents to synchronize by clicking the Document Options button. You can also filter documents for synchronization based on file size and age.

Appointment and Task Synchronization

MaxMobile can synchronize select calendar appointments and Hotlist tasks. When you configure MaxMobile synchronization settings in Maximizer, you can specify date ranges for appointments and tasks, and any appointments or tasks scheduled within those date ranges will synchronize between

Maximizer and MaxMobile. If you select the “Carry forward unfinished tasks” option, it will also synchronize tasks that are scheduled before the date range but are incomplete. All appointments and tasks created in MaxMobile synchronize to Maximizer, even if they fall outside the date range.

Configuring MaxMobile Synchronization Settings

Configure MaxMobile synchronization settings in Maximizer or Administrator. These settings control which Address Book entries, user-defined fields, notes, appointments, and Hotlist tasks are synchronized between a Maximizer Address Book on your PC and MaxMobile on your Windows Mobile device.

➤ To configure MaxMobile synchronization settings

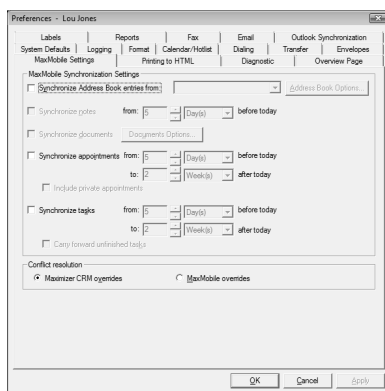
1. In Maximizer, select **File > Preferences** from the menu, and click the **MaxMobile Settings** tab.

– or –

In Administrator, select **File > Users**, select the user, click the **Preferences** button, and then click the **MaxMobile Settings** tab.

For more information about each of the synchronization settings, click inside the tab and press **F1**.

2. Specify your **MaxMobile Synchronization Settings** for Address Book entries, user-defined fields, notes, appointments, and tasks.
3. Specify your **Conflict resolution** settings, which determine whether Maximizer fields overwrite MaxMobile fields, or MaxMobile fields overwrite Maximizer fields, when changes



have been made to the same field in both Maximizer and MaxMobile.

4. Click **OK**.

Now you can synchronize with MaxMobile.

Synchronizing MaxMobile with Maximizer

Your first MaxMobile synchronization may take more time than subsequent synchronizations. On the first synchronization, all the specified records must be created on your Windows Mobile device. On subsequent synchronizations, only new or changed records will be synchronized.

➤ To synchronize MaxMobile with Maximizer

1. Configure your MaxMobile synchronization settings.
2. Connect the Windows Mobile device to the computer.
3. In Maximizer, select **Tools > Synchronize with MaxMobile** from the menu.

A progress indicator appears and a dialog box opens with a display of the synchronization summary once the session is complete. System Table entries are Maximizer system fields—such as Category for an Address Book entry—and all user-defined fields specified for synchronization combined. Entries that appear in the Failed column are entries that failed to synchronize due to synchronization problems such as a lost connection. Address Book entries are never deleted from Maximizer if they are deleted on the device—these entries are removed from the Favorite List.

Note that if appointments and/or tasks are synchronized, but the associated Company, Individual, or Contact entry is not in the synchronized Favorite List, the entry is added to the Favorite List and synchronized to the device.

You should not synchronize with any records open or make changes during a synchronization. Doing so could cause problems with your data.

Address Book Entries

Your MaxMobile database includes any Address Book entries synchronized from Maximizer, as well as any entries added in MaxMobile. When you add an Address Book entry in MaxMobile, it gets added to the synchronized Favorite List in Maximizer when you synchronize.

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

Viewing a List of Address Book Entries

When you open the Address Book window, no Address Book entries appear in the list. You must first perform a search to populate the Address Book list. If you click the arrows on the right side of the Address Book window title bar, it displays the total number of Address Book entries in the list, as well as the number of Company, Individual, and Contact entries.

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



Company



Individual



Contact

The Address Book list includes columns for the Company name (for Companies) or full name (for Individuals and Contacts), primary phone number, and city or town. You can sort by any column, either ascending or descending, by tapping the column title, and you can resize any column by dragging the divider.

Viewing Address Book Entry Details

Open the Address Book entry to view more information about the entry, including Contact information and other details, related Contacts, scheduled appointments and tasks, and notes.

> To open an Address Book entry

1. Open the Address Book window.
2. Search or sort to locate the Address Book entry.
3. Tap the Address Book entry.
 - or –

Select the entry and tap **Edit > Open**.

Searching for Address Book Entries

You can search for Address Book entries based on the value of a specific field. You can also retrieve a list of all Address Book entries in MaxMobile.

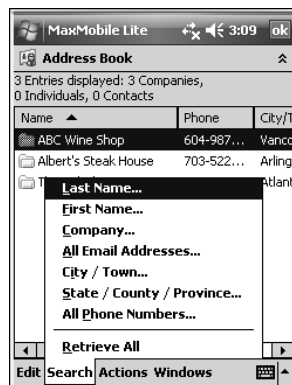
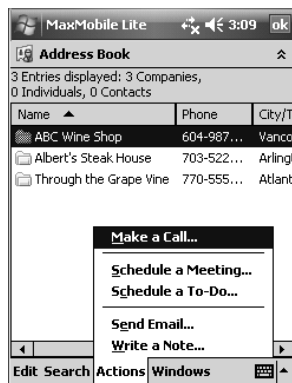
When you search for Address Book entries in MaxMobile, the search returns a list of all Address Book entries that match the search criteria and replaces the current list of Address Book entries in the window.

> To display all entries

- In the Address Book window, tap **Search > Retrieve All**.

> To search for specific entries

1. In the Address Book window, tap **Search**.
2. Select the type of field to search by from the menu.
3. Enter your search criteria in the Search By window, and tap **ok**.



Adding Address Book Entries

When you add an Address Book entry, it presents you with a blank form, unless you are adding a Contact, in which case the Contact inherits some fields from the Company or Individual. However, you can edit those fields if necessary.

To edit most fields, tap inside the field and enter the information. If the field has an ellipsis button or drop-down arrow, click the button or arrow to enter or select the information. Mandatory fields are indicated with an asterisk.

➤ To add a Company or Individual

1. In the Address Book window, tap **Edit > Add > Company or Individual**.
2. Enter the details.
3. Tap **ok** to save and close the entry.

➤ To add a Contact from the Address Book list

1. In the Address Book window, select the Company or Individual.
2. Tap **Edit > Add > Contact**.
3. Enter the Contact details.
4. Tap **ok** to save and close the Contact.

➤ To add a Contact to the Company or Individual

1. Open the Company or Individual entry.
2. Tap the **Contacts** tab.
3. Tap **Edit > Add**.
4. Enter the Contact details.
5. Tap **ok** to save and close the Contact.

Editing Address Book Entries

Fields shown with a gray box are read-only, which means you cannot edit those fields in MaxMobile. However, you can edit them in Maximizer after synchronizing.

> To edit an Address Book entry

1. Open the Address Book entry.
2. Tap **Edit**.
3. Tap the field to edit and enter your changes.
4. Tap **ok** to save your changes and close the entry.

Deleting Address Book Entries

Deleting an Address Book entry in MaxMobile deletes it on the device only. Synchronizing with Maximizer will not delete the entry in Maximizer, but it will remove the entry from the synchronized Favorite List.

> To delete an Address Book entry

1. In the Address Book window, select one or more Address Book entries to delete.
2. Tap **Edit > Delete**.

> To restore a deleted Address Book entry

1. In Maximizer, add the entry to the synchronized Favorite List.
2. Synchronize with MaxMobile.

Emailing Address Book Entries

You can easily email an Address Book entry. From the Actions menu, the default email address in an entry is used, but you can send an email to a different email address by opening the entry and tapping on any address. Up to three email addresses per entry can be stored in MaxMobile.

You can also save email in the form of a note for an Address Book entry. To enable this functionality, ensure you have the corresponding MaxMobile preferences set.

Email attachments can also be sent from MaxMobile.

➤ **To email an Address Book entry**

- While an entry is selected, choose **Send Email** from the **Actions** menu.

- or -

Open an entry and tap on any email address.

To send an email to an address other than the default email address, open the entry and tap on the address.

➤ **To save an email as a note**

1. In the MaxMobile preferences page, enable the **Save email to entry's note** option.
2. Select the **Include message body in notes** and **Prompt for entering extra logging notes** options for additional note logging options.

See the Setting MaxMobile Preferences topic in this guide for more information.

Phoning Address Book Entries

You can phone an Address Book entry if your device is phone-enabled. By default, the first phone number in an entry is used, but you can select a different phone number by opening the entry and tapping on the phone number. Up to four phone numbers per entry can be stored in MaxMobile.

➤ **To phone an Address Book entry**

- While an entry is selected, choose **Make a Call** from the **Actions** menu.

- or -

Open an entry and tap on any phone number.

To use a phone number other than the default number, open the entry and tap on the phone number.

Working with User-Defined Fields

If you have synchronized any user-defined fields from Maximizer, you can edit their values in the User-Defined Field tab of Address Book entries in MaxMobile. If you have not synchronized any user-defined fields from Maximizer, the User-Defined Fields tab will be blank. You cannot create, edit, or delete user-defined fields in MaxMobile. You can only modify the values of those user-defined fields.

Specify which user-defined fields to synchronize in the MaxMobile Settings tab of the Maximizer Preferences window (File > Preferences).

Viewing User-Defined Fields

View user-defined fields through the User-Defined Fields tab in the Address Book entry.

> To view user-defined fields

1. Open the Address Book entry.
2. Open the **User-Defined Fields** tab.

Editing User-Defined Field Values

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

> To edit user-defined field values

1. In the User-Defined Fields tab, tap the **Edit** button.
2. Edit the user-defined fields as needed.
3. Tap **ok** to save changes.

Removing User-Defined Field Values

➤ To remove user-defined field values

- For table user-defined fields that allow a single-value only, select the blank item from the drop-down list.
- or -
- For table user-defined fields that allow multiple values, clear the checkboxes for that user-defined field.
- or -
- For other types of user-defined fields, select the text and tap the backspace key in the keyboard.

Note that to delete date field values, you must tap and hold in the date field and select **None** from the menu.

Working with Notes

Your MaxMobile database includes any Address Book notes synchronized from Maximizer, as specified in your synchronization preferences, as well as any notes added manually in MaxMobile. MaxMobile does not add any automatic history notes.

Viewing Notes

View notes through the Notes tab in the Address Book entry. If you click the arrows on the right side of the Notes title bar, it expands to display the Notes header, where you can filter the list to display notes of a specific type only.

The Notes header also includes a Show All checkbox. If the checkbox is selected, it displays notes of the selected type for all related Contacts of the currently open entry. If the checkbox is cleared, it displays notes for the current Address Book entry only.

As with the Address Book entry list, you can sort and resize any of the columns in the Notes tab, and you can select multiple entries in the list.

➤ To view Address Book entry notes

1. Open the Address Book entry and open the **Notes** tab.
2. Select the note and tap **Edit > Open**.

When the note is open, you can click the up or down arrow to scroll to the next or previous note in the list.

Adding Notes

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

When you add a note, you can assign it a category. Only note categories synchronized from Maximizer are available. You cannot add new note categories in MaxMobile.

All notes added in MaxMobile will be synchronized with Maximizer, regardless of your synchronization preferences.

➤ To add an Address Book entry note

1. In the Address Book window, select the Address Book entry.
2. Tap **Actions > Write a Note**.
3. Enter the note.
4. Tap **ok** to save and close the note.

– or –

1. Open the Address Book entry.
2. Open the **Notes** tab.
3. Tap **Edit > Add**.
4. Enter the note.
5. Tap **ok** to save and close the note.



Editing Notes

You can edit any notes that you have permission to edit. If you do not have permission to edit a note in Maximizer, you also cannot edit that note in MaxMobile.

➤ To edit an Address Book entry note

1. Open the Address Book entry and open the **Notes** tab.
2. Select the note and tap **Edit > Open**.
3. Edit the note.
4. Tap **ok** to save and close the note.

Deleting Notes

If you delete a note in MaxMobile, the note will be deleted in Maximizer when you synchronize.

➤ To delete an Address Book entry note

1. Open the Address Book entry and open the **Notes** tab.
2. Select the note and tap **Edit > Delete**.
3. Tap **Yes** to confirm.

Working with Documents

Your MaxMobile database includes any Address Book documents synchronized from Maximizer, as specified in your synchronization preferences, as well as any documents added manually in MaxMobile.

You can add, modify, and delete documents on MaxMobile. However, if you do not have the required rights for documents, any additions, modifications, or deletions are not synchronized.

Viewing Documents

View documents through the Documents tab in the Address Book entry.

As with the Address Book entry list, you can sort and re-size any of the columns in the Documents tab, and you can select multiple entries in the list.

> To view documents

1. Open the Address Book entry and click on the **Documents** tab.
2. Select the document and tap **Edit > Open**.

Adding Documents

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

All documents added in MaxMobile will be synchronized with Maximizer, regardless of your synchronization preferences.

> To add a document

1. Open an entry.
2. Open the **Documents** tab.
3. Tap **Edit > Insert File**.
4. Enter a name for the document, select a document category if necessary, and browse to its location.
5. Tap **ok** to save the document as part of the entry.

Editing Documents

You can edit any documents that you have permission to edit. If you do not have permission to edit a document in Maximizer, you also cannot edit that document in MaxMobile.

Note that some types of documents cannot be updated once they have been inserted into MaxMobile - e.g., .DOC and .XLS files. If you want to make updates to a document in MaxMobile, you must edit the document, save it using the Save As command, and then re-insert it in the Documents tab.

➤ To edit a document

1. Open the Address Book entry and open the **Documents** tab.
2. Select the document and tap **Edit > Open**.
3. Edit the document.
4. Tap **ok** to save and close the document.

Deleting Documents

If you delete a document in MaxMobile, the document will be deleted in Maximizer when you synchronize.

➤ To delete a document

1. Open the Address Book entry and open the **Documents** tab.
2. Select the document and tap **Edit > Delete**.
3. Tap **Yes** to confirm.

Hotlist Tasks

The MaxMobile Hotlist includes any Hotlist tasks synchronized from Maximizer, as specified in your synchronization preferences, as well as any tasks you added in MaxMobile.

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

Viewing Hotlist Tasks

When you open the Hotlist window, it displays a list of current Hotlist tasks, including their due date, activity description, and a checkbox to mark them as complete.

Click the arrows on the right side of the Hotlist window title bar to display the total number of tasks and incomplete tasks in the list.

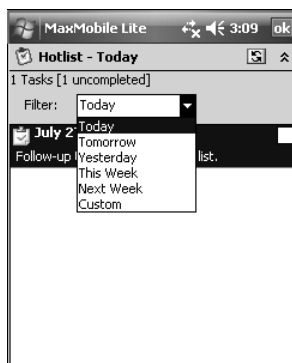
Click the Filter drop-down list to display tasks scheduled for a different date range.

The View menu (at the bottom of the window) includes the following options to filter the list of displayed tasks:

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

➤ To view a task

1. Open the Hotlist window.
2. If necessary, tap the **View** menu to filter the displayed Hotlist.
3. Tap a task in the list to view the task details.



➤ **To view tasks associated with the current Address Book entry only**

1. In the Address Book window, open the Address Book entry.
2. Tap the **Activities** tab.

The Activities tab lists the appointments and Hotlist tasks scheduled with the Address Book entry.

3. Tap a Hotlist task to view the task details.

Adding Hotlist Tasks

You can add a personal task or one associated with an Address Book entry.

When you add a Hotlist task, it fills in the Date automatically with the current date, but you can change it if necessary. The Activities field is mandatory and cannot be left blank.

➤ **To add a task associated with an Address Book entry**

1. In the Address Book window, select or open the Address Book entry.
2. Tap **Actions > Schedule To-do**.
3. Enter the task details.
4. Tap **ok** to save and close the task.

➤ **To add a personal task**

1. In the Hotlist window, tap **Edit > Add**.
2. Enter the task details.
3. Tap **ok** to save and close the task.

MaxMobile Lite 3:09 ok

Add Task

Schedule date and time

Date: July 27, 2006

Time: 2:00 PM

☒ Set alarm 10 minute(s) prior

Details of task

Activity: Send promotions list to ABC Wine Shop.

Priority: LOW

☐ Task is completed

☐ Personal Hotlist task

☒ Hotlist task with ABC Wine Shop

Cancel

Editing Tasks

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

When you open a task that is associated with an Address Book entry, the Address Book entry name at the bottom of the task becomes a link. You can tap the link to open the Address Book entry. Make sure you save any changes before linking to the Address Book entry.

➤ To open a task from the Hotlist window

1. Open the Hotlist window.
2. Tap the task to open.

➤ To open a task from the Address Book window

1. Open the Address Book entry the task is associated with.
2. Open the **Activities** tab.
3. Tap the task to open.

➤ To edit the details of a task

1. Open the Hotlist task.
2. Edit the task details as necessary.
3. Tap **ok** to save and close the task.

➤ To mark a task complete

- In the Hotlist window, tap the checkbox beside the task.
– or –
- In the Edit Task window, tap the **Task is completed** checkbox, and then tap **ok** to save and close the task.

Deleting Tasks

If you delete a task in MaxMobile, the task will be deleted in Maximizer when you synchronize.

➤ To delete a task from the Hotlist window

1. In the Hotlist window, tap and hold on the task until the context menu opens.
2. Select **Delete**.
3. Tap **Yes** to confirm.

➤ To delete a task from the Address Book window

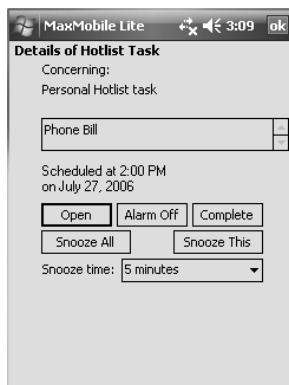
1. Open the Address Book entry the task is associated with.
2. Open the **Activities** tab.
3. Tap and hold on the task until the context menu opens.
4. Select **Delete**.
5. Tap **Yes** to confirm.

Hotlist Task and Appointment Alarms

If you set an alarm for a task or appointment, an alarm window appears at the scheduled alarm time. It displays the details of the task or appointment and enables you to open the task or appointment, turn the alarm off, complete the task or appointment, or snooze the alarm for a specified period of time.

The alarm appears even if MaxMobile is closed or if the device is turned off.

If you tap ok, the alarm will appear again at the next interval as specified in the "Alarm frequency" field in MaxMobile Preferences.






You can disable alarms by clearing the “Enable alarms” checkbox in MaxMobile Preferences.

Calendar Appointments

The MaxMobile calendar includes any appointments synchronized from Maximizer, as specified in your synchronization preferences, as well as any appointments you added in MaxMobile. You can view, add, edit, and delete appointments using the Calendar window.

Viewing Appointments

You can view the calendar in daily, weekly, or monthly view mode. While you are in any of these view modes, you can scroll backward and forward through the days, weeks, or months using the arrow buttons   in the calendar title bar.

You can also jump directly to a specific date using the Go To Date button  in the calendar title bar.

When viewing appointment details, the “Location”, “Resource(s)”, or “Other users to attend” fields are view-only. You cannot use these fields in appointments added in MaxMobile, and you cannot edit these fields in appointments synchronized from Maximizer.

> To change the calendar view mode

1. Open the Calendar window.
2. Tap the **View** menu, and tap **Daily**, **Weekly**, or **Monthly**.

> To change the default calendar view mode

1. Open the Preferences window.
2. Select **Daily**, **Weekly**, or **Monthly** from the **Default Calendar view** list.
3. Tap **ok**.



➤ **To view an appointment**

1. Open the Calendar window.
2. Locate the appointment in the Daily, Weekly, or Monthly view.
3. Select the appointment and tap **Edit > Open** to view the appointment details.

➤ **To view appointments associated with the current Address Book entry**

1. In the Address Book window, open the Address Book entry.
2. Tap the **Activities** tab.

The Activities tab lists the appointments and Hotlist tasks scheduled with the Address Book entry.

3. Tap an appointment to view the appointment details.

Adding Appointments

You can add a personal appointment or one associated with one or more Address Book entries.

When you add an appointment, it fills in the Date, From, and Until fields automatically, but you can change them if necessary. The Subject field is mandatory and cannot be left blank.

You cannot add multi-user or recurring appointments in MaxMobile. Also note that when a multi-user appointment is changed on the device and then synchronized to Maximizer, the changes will synchronize back to only the user who made the change with the exception of categories, products/services, and notes. When a change is made to a recurring appointment, only the specific instance of the appointment is changed.

➤ **To add an appointment associated with an Address Book entry**

1. Open the Address Book window.
2. Select or open the Address Book entry.
3. Tap **Actions > Schedule a Meeting**.
4. Enter the appointment details.
5. Tap **ok** to save and close the appointment.

– or –

1. Open the Address Book window.
2. Open the Address Book entry.
3. Open the **Activities** tab.
4. Tap **Edit > Add Appointment**.
5. Enter the appointment details.
6. Tap **ok** to save and close the appointment.

➤ **To add a personal appointment**

1. Open the Calendar window.
2. Tap **Edit > Add Appointment**.
3. Enter the appointment details. By default, the appointment is personal.
4. Tap **ok** to save and close the appointment.

MaxMobile Lite 3:46 ok

Add Appointment

Appointment with: Dante Adams [Remove Link](#)

Subject: Meeting

Date: January 22, 2008

From: 3:00 PM Until: 4:00 PM

☒ Set alarm 10 minute(s) prior

Priority: ☐ Private ☐ Completed

Products/Services:

Categories:

Appointment Address Book Entries Details

Cancel

Editing Appointments

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

When you open an appointment that is associated with an Address Book entry, the Address Book entry name at the bottom of the appointment becomes a link. You can tap the link to open the Address Book entry.

➤ To open an appointment from the Calendar window

1. Open the Calendar in Daily or Weekly view.
2. Tap the appointment to open.

➤ To open an appointment from the Address Book window

1. Open the Address Book entry the appointment is associated with.
2. Open the **Activities** tab.
3. Tap the appointment to open.

➤ To edit an appointment

1. Open the appointment.
2. Edit the appointment details as necessary.
3. Tap **ok** to save and close the appointment.

Deleting Appointments

If you delete an appointment in MaxMobile, the appointment will be deleted in Maximizer when you synchronize.

➤ To delete an appointment from the Calendar window

1. Open the Calendar window in daily or weekly view mode.
2. Tap and hold on the appointment until the context menu opens.
3. Select **Delete**.
4. Tap **Yes** to confirm.

➤ To delete an appointment from the Address Book window

1. Open the Address Book entry the appointment is associated with.
2. Open the **Activities** tab.
3. Tap and hold on the appointment until the context menu opens.
4. Select **Delete**.
5. Tap **Yes** to confirm.

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