Maximizer™

CRM 10.5

Maximizer Software

Simply Successful CRM

Getting Started Guide

Maximizer CRM 10.5 is specifically designed for small and medium-sized businesses and corporate divisions of large companies. By integrating sales, marketing, and customer service tools into one adaptable and affordable solution, Maximizer CRM 10.5 helps organizations realize their primary customer management goal of having many profitable and satisfied customers.

Throughout the customer life cycle, as prospects move from the marketing department to the sales department, and as they are passed onto service departments, Maximizer enables an organization to attract prospects, win new customers, and increase repeat business.

Installing Maximizer CRM

You can install Maximizer on one or more computers. If you have a previous version of Maximizer installed on your system, you should uninstall the older version and then install Maximizer CRM 10.5.

➢ To install Maximizer

1. Insert the Maximizer CRM CD-ROM into your drive. The server and workstation versions are on separate CDs.
2. If the Setup window does not appear automatically, double-click the Autorun.exe on the Maximizer CRM CD.
3. The Maximizer CRM CD Setup window appears. Select “Install Maximizer CRM Server/ Workstation”. The Maximizer CRM Setup program starts.
4. Follow the on-screen instructions to complete the installation.

For detailed instructions on various installation configurations for the different editions of the product, refer to the *Maximizer CRM Administrator’s Guide*. You can access the guide from the Help menu in Maximizer or Administrator (Help > Administrator’s Guide).

Sample Address Book - Escona Tutorial

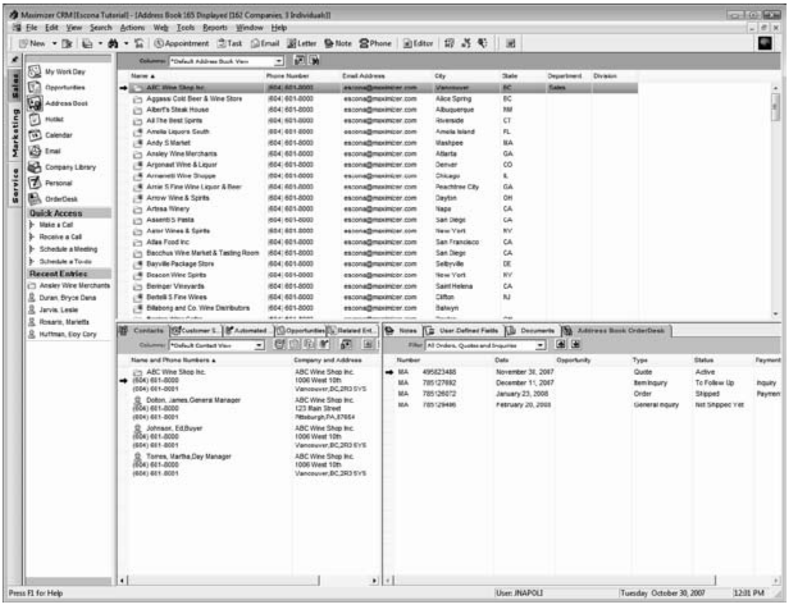
After installing Maximizer, you can run the application from the Windows Start menu (Start > Program Files > Maximizer CRM > Maximizer CRM) or by double-clicking on the desktop icon. You can then explore Maximizer by opening the Escona Tutorial sample Address Book that is installed with the software by default. The Escona Tutorial Address Book includes several different pre-configured users with different security rights. It also includes sample data such as Address Book entries, opportunities, campaigns, customer service cases, user-defined fields, notes, and documents allowing you to see how the software allows you to manage your customer relationships.

To log into the sample Address Book, use one of the following user IDs and passwords:

User ID - **JNAPOLI**
Password - **maximizer**

User ID - **MASTER**
Password - **control**

Note that "control" is the default password for the Master user of all Address Books. You should change this password when you create your own Address Books. Also, "maximizer" is the default password for all sample users in the Escona Tutorial database.



Working with Address Books

"Address Book" is the term used to describe a Maximizer database. The Address Book contains all of your contacts, sales opportunities, appointments, tasks, notes, campaigns, customer service cases, knowledge base articles, orders, and any other information recorded by the various Maximizer windows. You can set up as many Address Books as you need.

➢ To open an Address Book

1. Select **Open Address Book** from the **File** menu.
2. Double-click on an **Address Book** name in the Open Address Book dialog box or select the **Address Book** and click **Open**.

When you are ready to create your own Address Book, you can open the Administrator module and select File > New Address Book.

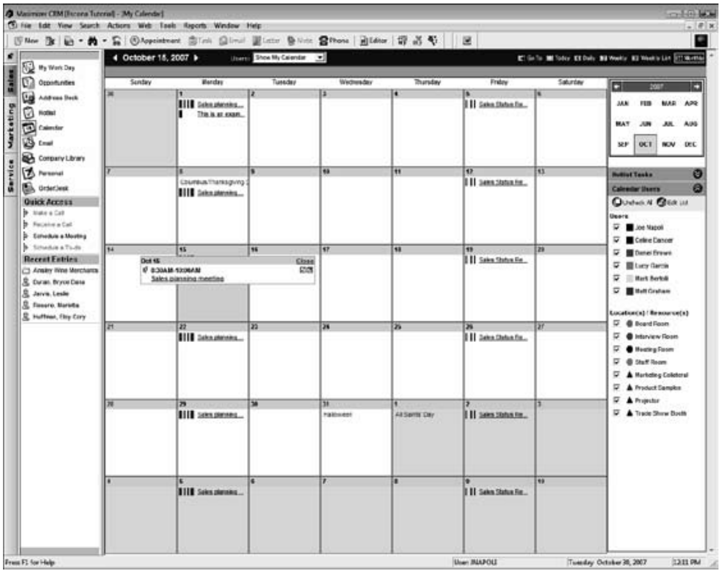
Maximizer CRM Basics

The main component is the Address Book window, which lists the companies and organizations that you have recorded as Address Book entries.

There are several other main windows and following windows that comprise all your sales, marketing, and customer service information. Main windows are known as controlling windows and following windows contain information related to the selected controlling window.

Calendar

The Calendar window allows you to schedule and view your appointments. You can see when others are busy, out of the office, as well as view other users' calendars. Creating appointments is easy—just right-click in the **Calendar** window and choose **Add Appointment**. You can easily create an appointment for an Address Book entry by dragging the entry to the Calendar window icon.



Email

The Email window provides you with the ability to send and receive email within Maximizer using your existing email system. The Email window is also used for processing orders and inquiries. To send an email, click the **Compose** button in the **Email** window. Or, in the **Address Book** window, right-click on an entry and choose **Send Email**. You can also drag an entry from the **Address Book** list to the **Email** window.

Hotlist Tasks

The Hotlist window is a to-do list of tasks and reminders. You can create a Hotlist task in the Hotlist window—which can be associated with an Address Book entry or personal—by right-clicking in the **Hotlist** window and choosing **Add Task**. Hotlist tasks can also be part of an Action Plan for an Address Book entry, an opportunity, a campaign, or a customer service case. You can also assign Hotlist tasks to other users by choosing a user from the **Assigned to** drop-down list in the **Hotlist task** dialog box.

Notes

The Notes following window displays the note entries associated with the selected Address Book entry, customer service case, campaign, or opportunity. To add a note, click the **Note (Write a Note)** button in any of the controlling windows, or right-click and choose **Add Note** in the **Notes** following window.

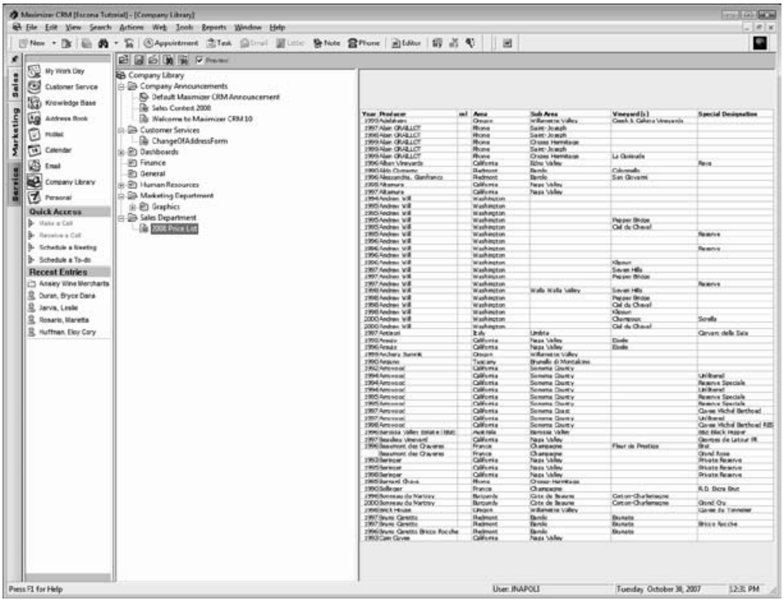
User-Defined Fields

The User-Defined Fields following window displays custom fields you create which can be associated with any selected Address Book entry, customer service case, campaign, opportunity, or user. You can add a user-defined field—provided you have the necessary security rights—by selecting **Set Up User-Defined Fields** from the **File** menu and clicking the **Add Field** button in the **Set Up User-Defined Fields** dialog box.

Documents

The Documents window displays the document entries associated with the selected Address Book entry, customer service case, campaign, or opportunity in the main or controlling window. You can insert documents like invoices, sales sheets, letters, and faxes created with popular desktop products like Microsoft® Word and Excel. To insert a file, right-click in the **Documents** following window and choose **Insert File**. You can then browse to the location of the file to select it. To add a Maximizer Word Processor document, right-click in the **Documents** window and choose **Add Document**.

Company Library



The Company Library stores vital sales and marketing information, as well as other company collateral for everyone to access. The Company Library allows you to preview and edit notes, documents, and other types of files. It is also used as a repository for Company Announcements, which are displayed in the My Work Day window. To add a document or note to the Company Library, right-click on the **folder** in which you want to store the document or note and choose **Add > Document/Note**. Similarly, you can add a new folder to the library by clicking on the root **Company Library** folder or another **folder** and choosing **Add > Folder**.

OrderDesk

The OrderDesk window is used for the creation, processing, and post-order fulfillment of your customer sales orders, quotes, and inquiries. You can enter new orders manually, or select them from your online catalog. You can also directly capture credit card payment information for orders, pre-authorize payments, and issue refunds using one of the integrated payment gateways. To insert an order, a quote, or an inquiry, right-click in the **Address Book OrderDesk** following window and choose **Add > Order/Quote/Item Inquiry/General Inquiry**.

Sales

Creating Companies, Individuals, and Contacts

You can create an Address Book entry as one of these three types:

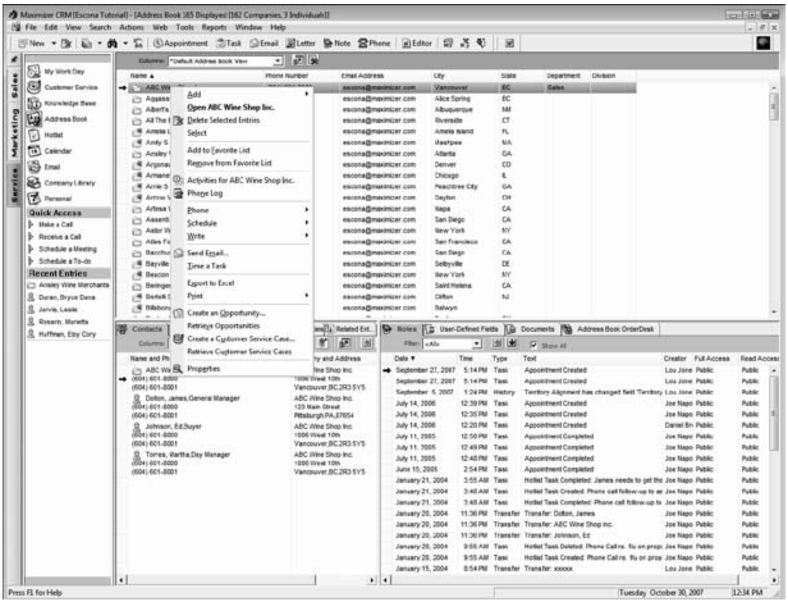
- **Company** – Represents a group of people such as an organization, association, or business. A Company often has associated Contact entries.
- **Individual** – Represents a person who may not be associated with a company or organization. Like a Company entry, an Individual entry can have associated Contact entries.
- **Contact** – Represents people associated with a Company entry or, less frequently, an Individual entry.

To further organize your information, Address Book entries can be designated as sales leads, and then assigned to partners through the Partner field on the basic information tab of the entry. Partners can access their assigned leads in Partner Access.

➢ To create an Address Book entry

Here are a few ways to add a new Address Book entry:

- Right-click, choose **Add**, and select one of the **Address Book** entry options. For example, choose New Company and New Contact.
- Press the Insert key in the Address Book window to add a new Company.
- Click the New button and select one of the **Address Book entry** options.



After you create the new Company or Individual entry, you can create additional Contact entries for the Company or Individual entry.

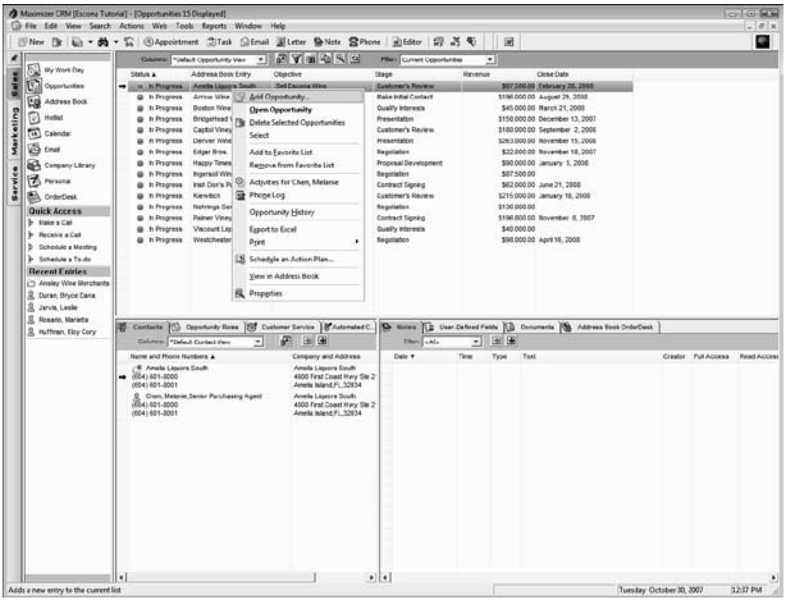
Working with Opportunities

Opportunity management helps you and your colleagues manage complex sales. Complex sales involve the participation of more than one person in the buying decision and require the support of a sales team. Prospects for complex sales can range from single businesses to multiple corporations or governments.

Using opportunities with strategies, you can define and strengthen your sales game plan. Your sales team defines a strategy—what you need to do to close a sale and how to address the issues and obstacles involved—and then the strategy can be applied to opportunities. Strategies are applied on the Sales Plan tab of an opportunity. Refer to the Escona Tutorial sample Address Book for examples of strategies (**File > Libraries > Strategy Library**) and opportunities that use strategies (in the **Opportunities** window). Press the **F1** key for detailed help on each of the fields and dialog boxes associated with the Sales Plan tab. Also refer to the User's Guide for details on how the probability of close for an opportunity is calculated.

➢ To add an opportunity

1. Select the **Address Book entry** to which you want to add an opportunity. If you select a Contact, Maximizer adds the opportunity to the Company.
2. Drag and drop the Address Book entry or Contact to the **Opportunities** icon. You can also select Add Opportunity from the Edit menu or click Insert in the Opportunities window. A new opportunity dialog box opens.

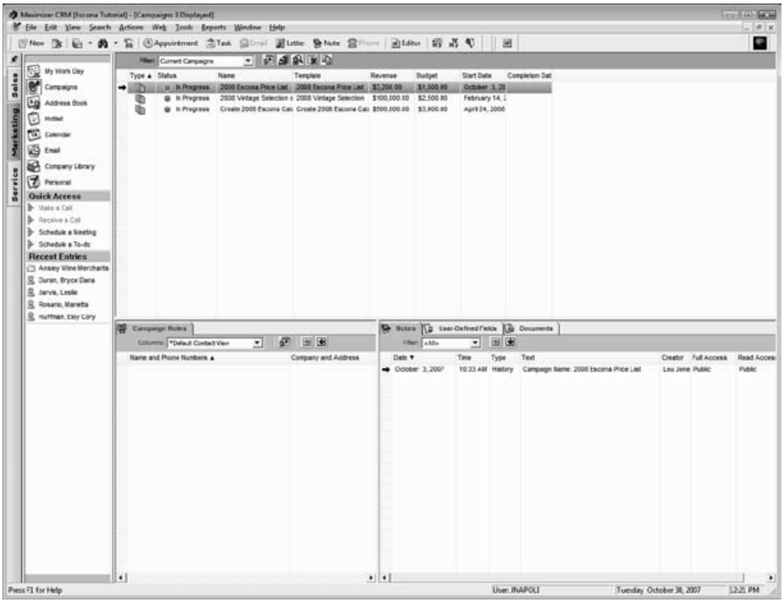


3. Enter the **opportunity details** working through the tabs from left to right. Press F1 in any of the tabs for detailed help on each field and tab.

Marketing

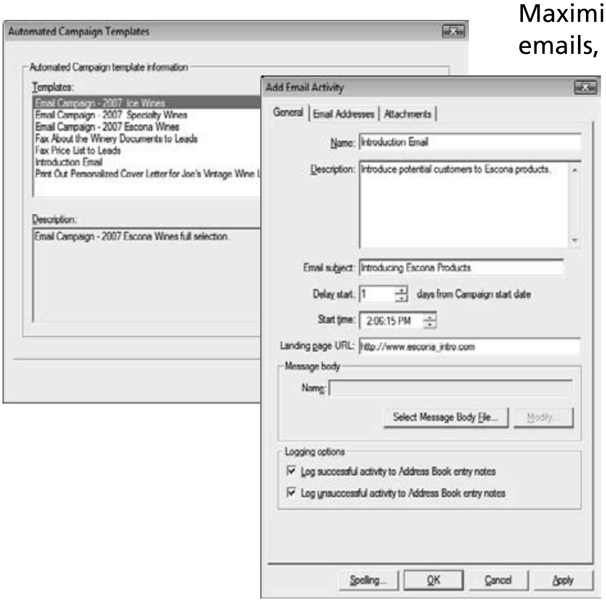
Your marketing team can use the Campaigns module to perform, track, and measure cost-effective marketing campaigns that deliver more qualified leads to your sales people. You can create two types of campaigns—Traditional and Automated.

Traditional marketing efforts require you to coordinate your marketing team to reach a common goal—producing an ad in television, radio, or print, for example. Traditional campaigns help you and your team manage your marketing campaigns through assigned steps and activities.



With Automated campaigns, you can broadcast your marketing message to anyone in your Maximizer Address Book. A campaign can reach out to your entire Address Book or a target list via email, fax, or print.

Once you have a plan defined as an Automated campaign template (**File > Libraries > Automated Campaign Templates**), you can start adding activities. Refer to the Escona Tutorial for examples of campaign templates, but because they are specific to how they were created, you should create your own templates.



Maximizer is capable of sending text and HTML emails, in addition to the regular email template file (.ETF) format created by the Maximizer Word Processor. Use an editor of your choice to create your HTML or text files.

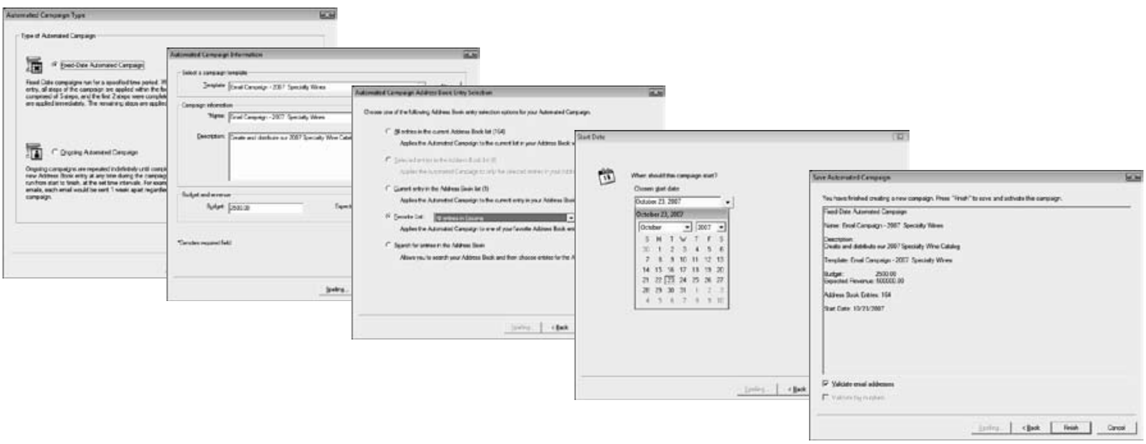
There are specific merge fields that make it simple to set up an Automated campaign. The easiest way to use these merge fields in HTML is to create an email template using the Maximizer Word Processor, inserting the desired merge fields, and then copying the template (with the merge field syntax included) into the HTML file. You can choose the HTML file when you are setting up your activity. There are merge fields available in the Maximizer Word Processor that are specific to automated campaigns. These merge fields can be extremely useful for tracking customer information regarding resulting visits to your website and opened campaign emails.

Refer to the *Maximizer CRM User's Guide* for more information on using these merge fields.

Automated and Traditional campaigns are directly integrated with your Address Book entries so you can track lead sources, responses, and purchases through user-defined fields and the automatic creation of notes. To further analyze campaign results, use the detailed campaign reports.

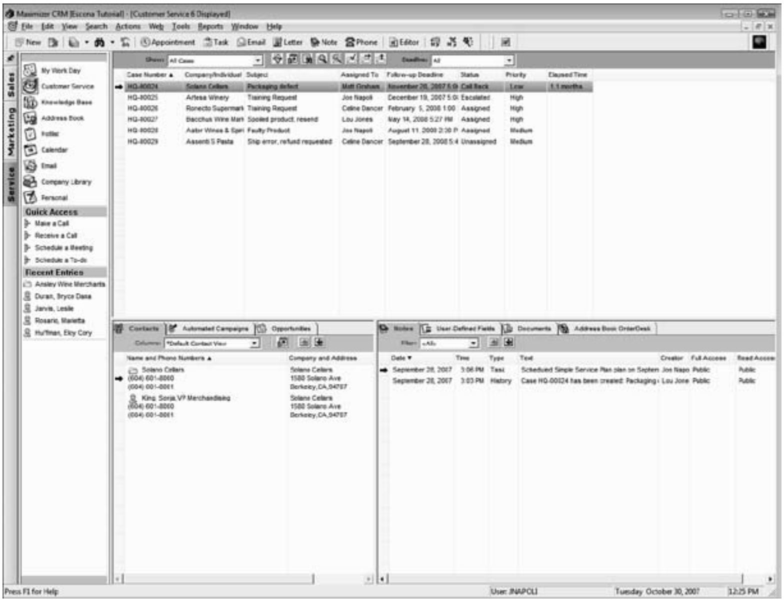
➢ To launch an Automated campaign

1. Choose **Edit > Add Automated Campaign** or right-click in the **Campaigns** window and select **Add Automated Campaign**.
2. Choose the type of campaign you want to create—**Fixed-Date** or **Ongoing**.
3. Choose the **template** on which this campaign is based. Also, enter the **name**, **description**, **budget**, and **expected revenue**.
4. Choose the **Address Book entry campaign recipients**. The Favorite List option is effective for a large number of subscribers.
5. Select the **date** to begin the campaign.
6. Select the **Validate email addresses** option to be notified of any blank email addresses or those missing the @ symbol or choose Validate fax numbers to be notified of invalid fax numbers.
7. Click **Finish** to save and launch the campaign.

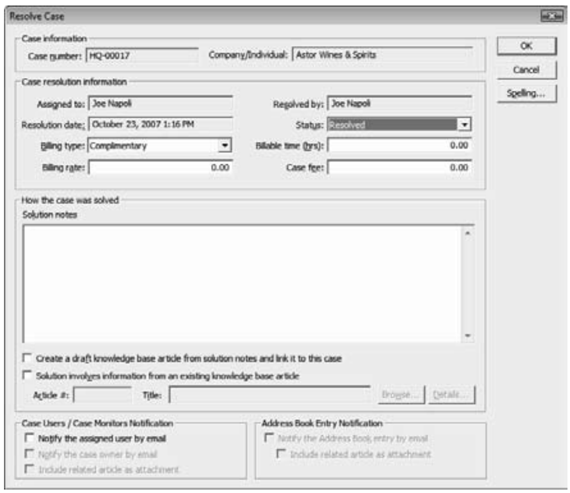


Customer Service & Support

Keeping Customers Satisfied



Maximizer enables customer service representatives to track and respond to service calls relating to matters such as billing inquiries, product issues, and frequently asked questions. When entering the details of a customer service case, enter information such as the assigned representative, follow-up deadline, status, priority, and a description of the issue. Once a case has been created, you can assign and escalate issues to the appropriate expert or manager in the company with the automatic creation of Hotlist tasks, appointments, and email reminders.

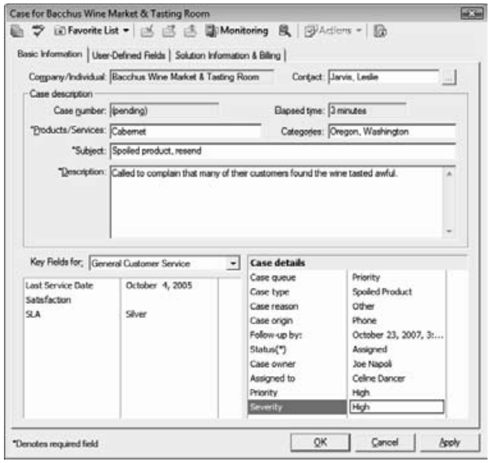


The Customer Service window supports and enhances your existing customer service business processes. All Address Book entry customer service communication can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner.

The Customer Service window is list-based like the other Maximizer windows. For quick access to frequently used options in the Customer Service window, use the View bar or dialog box buttons. For example, to quickly resolve a case, click the Resolve button in the case dialog box.

Increase your staff's efficiency and ensure total customer satisfaction by viewing timely reports and graphs on case status, case workload by representative, or incident details, for example.

➢ To create a customer service case



1. A customer service case is always associated with a customer, so open the **Address Book** window and find the Company, Individual, or Contact who is to be associated with this case.

2. Select the **Company**, **Individual**, or **Contact** entry and drag it to the **Customer Service** icon or the Customer Service following window.

   You can also right-click in the Customer Service following window and select **Add Customer Service Case** from the shortcut menu.

   If you selected a Contact, the Contact field is filled in automatically. If not, you can click the ellipsis button to select a contact to associate with the case.

3. In the **Products/Services** and **Categories** fields, select the **product line(s)** or **service area(s)** and **categories** to which the case pertains.

4. Enter a **Subject** and a **Description** of the case.

5. Select the **Key Fields** list (a group of key user-defined fields specific to the module) and specify values for the Key Fields. These are commonly used fields that are specific to your company.

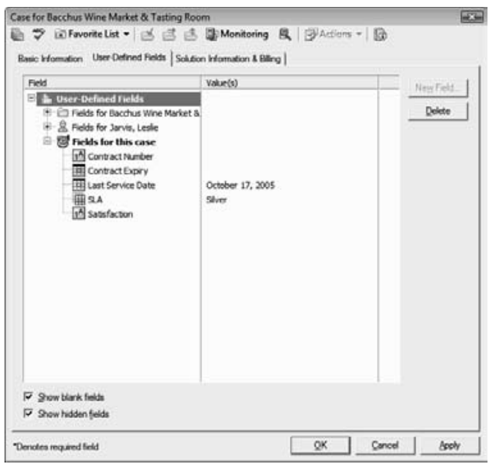
   Key Fields are set up in Administrator—they will not appear in Maximizer unless they have been specified. You can also refer to the Administrator's Guide if applicable.

6. Fill in the remaining **Case details.**

   Maximizer prompts you if you are missing mandatory information.

   A Hotlist task, based on the follow-up deadline, is automatically created for the assigned user when a case is created. The task is automatically modified when the follow-up deadline or assigned user is modified. And when the case is resolved, the task is marked as complete.

   The Case Owner is the person who is ultimately responsible for the closure of the case.



7. Select the **User-Defined Fields** tab. Assign values for the fields related to the case.

8. Click **Apply** to save the case. Once the case has been resolved, the related information will appear in the Solution Information & Billing tab.

Share the Knowledge

Empower your staff and ensure they are armed with accurate information to answer your customer's toughest question. The knowledge base allows everyone to share technical articles, the answers to frequently asked questions, and other important customer service information in the form of knowledge base articles. Information is a click away with fast keyword searching. You can then send the article to a customer to resolve their outstanding issue.

The Knowledge Base window provides you with a library-style tool to manage your customer service solutions; the window is tightly integrated with the Customer Service window. An article is typically created for each case solution, answered question, or guideline relating to your products or services.

Enable every staff member to create articles, complete with links to other documents, spreadsheets, and files, while enforcing management to sign off on publishing articles for internal or external viewing.

Web Access

Maximizer Web Access

Maximizer Web Access is a secure, web-browser interface to a central Maximizer Address Book. You can work with Address Book entry information, notes, calendar appointments, Hotlist tasks, user-defined fields, customer service cases, campaigns, and opportunities. The customizable Maximizer Web Access site also enables you to build a corporate intranet to provide all employees, even those without Maximizer installed, access to critical company information, such as the phone list, documents, and forms. Reporter and Dashboard are also accessible through Maximizer Web Access.

Maximizer Web Access Administrator

System administrators can use this web access site to create and configure Address Books, manage users and security, manage Maximizer application settings, and perform other administrative tasks. See the *Maximizer CRM Administrator's Guide* for more information.

Partner Access

Partner Access creates a two-way flow of information between your organization and your business partners. Organizations with an extended sales force of resellers or dealers need a way to distribute and monitor sales opportunities to these partners. Partner Access allows business partners to access Address Book entries, sales opportunities, customer service cases, and news/events via the web. Partners are provided access to specific entries by assigning a partner value to the entry. For example, to assign a partner to an Address Book entry, you would assign a partner value to the **Partner** field in the **Company details** section of the entry. To assign a partner to an opportunity, you would assign a **partner** on the **Competitors/ Partners** tab.

You can access Partner Access in the Escona Tutorial sample Address Book using **“Paul”** as the user ID and **“password”** as the password.

Customer Access

Customer Access offers customers a number of web-based services. Its functionality is very similar to Partner Access in that Customer Access can be customized to display information essential to your customers. Staff can publish to the site news such as new products or services; news items can be filtered for customers based on their interest areas.

You can access Customer Access in the Escona Tutorial sample Address Book using **“Mary”** as the user ID and **“password”** as the password.

Wireless Access

This site provides access to an Address Book through a wireless Internet-enabled device. Check with Maximizer Software Inc. or your Business Partner (Certified Solution Provider) for compatibility information before deployment. A list of supported browsers is available from the Maximizer supported products page at http://www.maximizer.com/support/products.html.

Administrator Module

Administrator is typically used by a system administrator or other technically proficient staff to configure and manage the entire Maximizer application. To install Administrator on a workstation, you must select the custom option and select Administrator as an installed component.

Microsoft Outlook and Microsoft Exchange Synchronization

Outlook Synchronization mirrors selected calendar appointments, tasks, and contacts 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.

MaxSync for Microsoft Exchange is a Maximizer add-on that mirrors select appointments between a Maximizer Address Book and a Microsoft Exchange Server. You can use Microsoft Outlook and Microsoft Exchange synchronization together in the same Address Book.

Importing and Upgrading Data

You can use Administrator to import Address Book entries from other sources, such as ACT!, GoldMine, or Outlook. You can also import Address Book entries and Knowledge Base articles in XML format or MXI (Maximizer XML Interface) format using the Advanced Import feature, which is available from the **File > Import** menu.

Administrator is also used to upgrade your Address Books from a previous version of Maximizer. You should always perform a backup before upgrading your data.

See the *Maximizer CRM Administrator's Guide* for information on Administrator procedures. The guide is available from the Help menu in Maximizer and in Administrator (**Help > Administrator's Guide/User's Guide**).

Additional Products

Microsoft SQL Server Reporting Service Viewer

Maximizer includes a Microsoft Report Viewer in the installation. Microsoft Reporting Services is a comprehensive reporting tool that integrates with a diverse set of data sources. The full installation for the SQL Server Reporting Services is available from the Microsoft SQL Server CD. For more information on configuring Maximizer for use with Microsoft SQL Server Reporting Services, see the *Maximizer CRM Administrator's Guide*.

MaxExchange Synchronization Server

MaxExchange is a suite of applications that allow you to synchronize Maximizer data between a server and an unlimited number of licensed remote computers. Contact Maximizer or your local business partner for more information.

MaxSync for Microsoft Exchange

MaxSync for Microsoft Exchange is a Maximizer add-on that mirrors select appointments and tasks between a Maximizer Address Book and a Microsoft Exchange Server. MaxSync for Microsoft Exchange can be installed on either the Maximizer server or on a workstation. However, it must be installed on a machine where Maximizer and a MAPI-enabled application, such as Microsoft Outlook, are installed. A trial version of this product is available.

Workflow Automation Powered by KnowledgeSync

Workflow Automation Powered by KnowledgeSync is a separate application that allows you to monitor business data within the Maximizer database and other systems. Potential issues are identified before they create problems so that the people who need to know can act on the information.

Using Workflow Automation, you can send real-time alert messages via email, fax, pager, PDA (through email), and webcast. It's easy to schedule and deliver reports. Lead qualification, lead assignment, and lead tracking can be completely automated. Powerful and flexible, Workflow Automation can be quickly deployed and is simple to use so you can focus on building successful, profitable customer relationships.

Accounting Link

Accounting Link is an add-on application designed for use with QuickBooks® or Microsoft Dynamics™ GP. It enables you to connect to your accounting database from any Maximizer computer and add or update invoices, estimates, or purchase orders. For more information on how to install, configure, and use Accounting Link, refer to the online manual provided on the CD. If Accounting Link is installed, this manual is also available through the Help menu in Maximizer. A trial version of this product is available.

Mobile Access

MaxMobile and MaxLink enable you to easily view, update, and synchronize your Maximizer information while on the road.

Use MaxMobile to access your customer information using a BlackBerry®, Windows Mobile® Pocket PC, or Windows Mobile™ Smartphone device. Use MaxLink to access your customer information using a Palm OS device. Refer to the MaxLink and MaxMobile documentation for more information.

Maximizer CRM Customization Suite

The Maximizer CRM Customization Suite includes additional guides for integrating with Maximizer. Maximizer Customization Suite enables customers and business partners to customize the Maximizer interface and to integrate with other front-office and back-office solutions.

Learn More About Maximizer CRM

- **Maximizer CRM Administrator's Guide & User's Guide** - The Maximizer CRM manuals are available in printed format as well as Adobe® PDF format. You need to have the Adobe Acrobat Reader installed to be able to read the online guides. To download the reader free of charge, go to www.adobe.com and see the Acrobat products section of the website.
- **Online Contents Help** - How-to help is available in both Maximizer and Administrator providing you with step-by-step instructions for all areas of both applications.
- **Context Sensitive Help (F1 Help)** - Detailed help that pertains specifically to each window, dialog box, and tab is available by pressing the F1 key when the window, dialog box, or tab is open.

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