Maximizer™ **CRM** 10·⁵

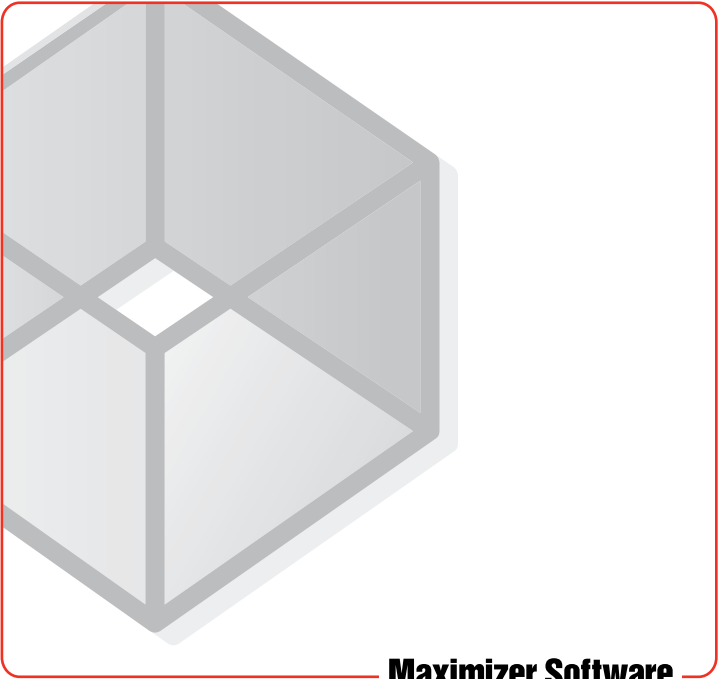## MaxMobile *for Windows Mobile® Pocket PC*

Getting Started Guide

Maximizer Software
Simply Successful **CRM**

Welcome to MaxMobile

Introduction

MaxMobile 10.5 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 10.5 and Microsoft ActiveSync 4.5 or higher (if your computer is running an operating system other than Windows Vista or Windows 2008 Server), or Windows Mobile Device Center 6.1 or higher (if your computer is running Windows Vista or Windows 2008 Server).

Mobile Powered Pocket PC and Mobile Powered Pocket PC Phone Edition devices running Windows Mobile 5, Windows Mobile 6, or Windows Mobile 6.1 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.

In order to use wireless synchronization, you must have MaxMobile Wireless Synchronization Server installed. See the *MaxMobile Wireless Synchronization Server Getting Started Guide* for more information.

Installing MaxMobile

The MaxMobile installation also installs Microsoft SQL Mobile 2005 and Microsoft .NET Compact Framework 2.0 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 using the typical method**

1. Close any Maximizer applications running on the computer.

2. If you have a previous version of MaxMobile installed, it is important to uninstall it from the desktop and the device before proceeding with the installation. Refer to **Uninstalling MaxMobile** for more information.

3. Connect your Windows Mobile device to the computer.

4. 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**.

5. Click **Install Software** under the **MaxMobile for Windows Mobile Pocket PC** section of the autorun screen.

6. Follow the installation wizard on-screen instructions. Do not disconnect the device at any time during the installation.

7. 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 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.

8. Tap **ok** to finish the installation on the device and restart if necessary.

9. 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 **Configuring MaxMobile Synchronization Settings** for more information.

If you have previously synchronized data with this device, you must perform a reset (**Tools** > **Reset MaxMobile**). Also note that if you install the MaxMobile database on a storage card and later remove it, the database is no longer accessible. You are prompted with a message and if you choose to create a new database, you must perform a reset. See the **Using the Reset MaxMobile Option** for more information.

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

1. From the MaxMobile program item on the Start menu, choose the **MaxMobile 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, tap **ok** 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, tap **ok** on the device, and click **OK** on the desktop computer.

Uninstalling MaxMobile

➢ **To uninstall MaxMobile from your device**

1. Choose **Start > Settings**.

2. Open **Remove Programs**.

3. Select **Maximizer MaxMobile**.

4. Tap the **Remove** button.

Quick Start to Configuring MaxMobile

Before you can use MaxMobile, you must perform a series of tasks as a user with the Maximizer Administrator role or the MASTER user.

➢ **To configure MaxMobile**

1. Launch **Administrator** and open the Address Book you are synchronizing with your device.

2. Select **Reports** > **Current Users**. Note the users licensed for MaxMobile. By default, MaxMobile has one licensed user. If you have installed additional licenses, the corresponding number of applied licenses is displayed. If the license count is not shown, contact Maximizer Customer Support.

3. Close the **Current Users** dialog box and select **File** > **Users**.

4. For each user synchronizing with MaxMobile, select the **user**, click the **Properties** button, and select **Enabled** for the **Mobile** field under the **Module Login** section. This enables you to use Maximizer Wireless Access as well as MaxMobile.

You must also enable the **Allow Sync Contacts with External Clients** access right for each user on the **Access Rights** tab. This allows users to synchronize Address Book entries, opportunities, cases, user-defined fields, documents, and notes. Without this access right, users are able to synchronize only appointments and Hotlist tasks.

Quick Start to Using MaxMobile

1. Log in to Maximizer as an enabled MaxMobile user.

2. Create a **Favorite List** for each type of entry you are synchronizing—Address Book, opportunity, and/or case entries.

3. Select **File** > **Preferences** > **MaxMobile Settings** tab.

4. Specify your **MaxMobile Synchronization Settings**.

   For more information on creating a Favorite List, see the *Maximizer CRM User's Guide*. For more information on MaxMobile preferences and settings, see the **Entry Synchronization** and **Configuring MaxMobile Synchronization Settings** topics in this guide.

5. Connect your device to the desktop computer. Note that **USB synchronization** is necessary the first time you synchronize with MaxMobile.

6. In Maximizer, click the **Synchronize with MaxMobile** button. Alternatively, you can select **Synchronize with MaxMobile** from the **Tools** menu.

7. After the synchronization is complete, open MaxMobile on your device.

Synchronization

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

Entry Synchronization

To synchronize Address Book, opportunity, and customer service case entries, create Favorite Lists of those entries and specify the Favorite List in your MaxMobile synchronization settings by choosing **File > Preferences > MaxMobile Settings**. In most cases, only the entries you have added to the Favorite List identified for synchronization will synchronize from Maximizer to MaxMobile.

When synchronizing Address Book entries, 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. Similarly, if an opportunity, a case, an appointment, or a task is synchronized and its associated Address Book entry does not belong to the Favorite List for Address Book entries, it is added to the list and synchronized.

All entries in MaxMobile automatically synchronize to Maximizer from the device. Address Book, opportunity, and case entries that are present on the device and not in Maximizer are also added to the corresponding Favorite List.

➢ **To mark entries for synchronization**

1. In Maximizer, create Favorite Lists of the Address Book, opportunity, and case entries to synchronize with MaxMobile. For example, create a Favorite List called "MaxMobile Sync Opportunities" for your opportunities. For instructions on creating a Favorite List, refer to your Maximizer documentation.

2. In Maximizer, select **File > Preferences**, and click the **MaxMobile Settings** tab.
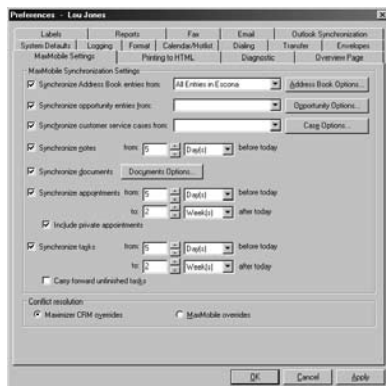
3. Select the type of entries you are synchronizing by clicking the associated checkbox. For example, to synchronize Address Book entries, select the **Synchronize Address Book entries from** option.

4. For each type of entry you choose to synchronize, click the options buttons and select the Favorite List for synchronization. For example, if you choose to synchronize Address Book entries, click the **Address Book Options** button. For more information, refer to the **Configuring MaxMobile Synchronization Settings** topic later in this section.

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 Address Book, 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 in situations where you want to clean up your data on the device or switch to a different device when you have previously been synchronizing data with MaxMobile. (A reset is not necessary when synchronizing data to MaxMobile for the first time.)

User-Defined Field Synchronization

When you configure MaxMobile synchronization settings in Maximizer, you can specify which user-defined fields to synchronize for Address Book, opportunity, and case entries. You can select up to eight user-defined fields for each type of entry. 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 Address Book Options, Opportunity Options, and Case Options buttons. 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, opportunity, and case 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, opportunities, cases, user-defined fields, notes, appointments, and Hotlist tasks are synchronized between a Maximizer Address Book on your PC and MaxMobile on your 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 settings, click inside the tab and press **F1**.

2. Specify your **MaxMobile Synchronization Settings** for Address Book entries, opportunities, cases, user-defined fields, notes, documents, 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**.

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 MaxMobile device. On subsequent synchronizations, only new or changed records will be synchronized.

You have the option of synchronizing while your device is connected to your computer or using wireless synchronization.

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

USB Synchronization

The following procedure outlines the steps for synchronization using a USB connection to your desktop computer.

➣ **To synchronize with a USB connection**

1. Configure your MaxMobile synchronization settings.

2. Connect the MaxMobile device to the computer.

3. In Maximizer, select **Tools** > **Synchronize with MaxMobile** from the menu. Alternatively, click the **Synchronize with MaxMobile** button on the toolbar.

After a USB synchronization session, the results are displayed. If any transaction has failed, it is shown in red. For more information about why a transaction has failed, refer to the Synchronization and MaAccess (MACC) module logs. You can set the level of detail for logging in Maximizer or Administrator (File > Preferences > Diagnostic tab).
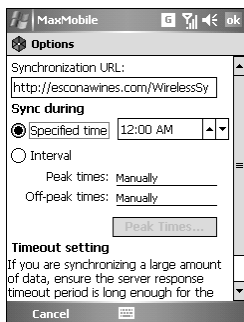
Wireless Synchronization

Your system administrator must also configure your wireless synchronization settings in Maximizer or Administrator. See the *MaxMobile Wireless Synchronization Server Getting Started Guide* for more information.

Before you can use wireless synchronization, you must first synchronize from the desktop as described in the previous procedure.

In addition to configuring your MaxMobile synchronization settings, you must set your wireless synchronization settings on the device when using the wireless synchronization method. Follow the instructions below for configuring wireless synchronization.

➢ **To configure wireless synchronization settings on the device**

1. From the MaxMobile Home screen, tap the **Wireless Synchronization** icon.

2. Tap the **Options** button and enter the **URL** for the web server that will be used for synchronizing between the desktop and the device. Note that if you have already done this in the MaxMobile Synchronization Settings dialog box in Administrator, this step is not necessary.

3. If you are using scheduled wireless synchronization, set your scheduled synchronization session options in the **Sync During** section of the screen.

   Users can schedule a specific time for synchronization by choosing the **Specified time** option and choosing a synchronization time. Users also have a choice of scheduling synchronization during off-peak times or peak times by selecting the **Interval** option, specifying a **synchronization interval**, and specifying the **peak/off-peak times**.

4. When prompted, tap **ok** to save your wireless synchronization settings.

➢ **To synchronize using wireless synchronization**

1. From the MaxMobile Home screen, tap the **Wireless Synchronization** icon.

2. In the Wireless Synchronization screen, select the **Synchronize MaxMobile** option.

3. Tap **Start**.

   You can also use the **Reset MaxMobile** option to do a complete refresh of the data on the device from Maximizer.

During the synchronization, a progress indicator and message appears on the device indicating the status of your synchronization session. Once the synchronization session is complete, a synchronization summary is displayed. 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 insufficient rights for deleting an entry in Maximizer. Address Book, opportunity, and case entries are never deleted from Maximizer if they are deleted on the device—these entries are removed from the Favorite List.

If a synchronization session is cancelled or has failed, MaxMobile displays the status with an message explaining the status.

You can view Address Book, case, and opportunity entries during synchronization. Edits cannot be made to entries. Also note that a scheduled wireless synchronization process cannot be started or resumed if you are in the Wireless Synchronization screen, Preferences screen, or view/edit mode of an entry.

MaxMobile and Wireless Access Integration

Wireless Access integration with MaxMobile provides you with access to Address Book information through the web. This allows you to see real-time information from your Address Book without synchronizing. Wireless Access also allows you to see larger sub-sets of information. For example, in Wireless Access, you can see all user-defined fields in an Address Book.

➢ **To use Wireless Access integration**

1. In Administrator, specify the URL for the Wireless Access site and synchronize your data to MaxMobile. See the *Maximizer CRM Administrator's Guide* for more information.

2. On the device, go to the Address Book or Opportunities window.

3. Tap **Windows** > **View in Wireless Access**. This retrieves the selected entry in Wireless Access.

You can also search for entries for retrieval. In the Address Book, Opportunities, Calendar, or Hotlist window, tap **Windows** > **Search in Wireless Access**. This retrieves a list of entries based on your current search criteria from MaxMobile in Wireless Access.

Because a MaxMobile Address Book is only a sub-set of the Wireless Access Address Book, the search results on Wireless Access may exceed the maximum number of allowed number of returned entries. If this occurs, you are prompted by a message. Change your search criteria on MaxMobile to retrieve a number of entries within the Wireless Access limit.

You can view and modify MaxMobile synchronization settings in Wireless Access.

➢ **To view/modify MaxMobile synchronization settings in Wireless Access**

• In the MaxMobile Preferences page, tap the **View synchronization settings in Wireless Access** option.

Starting MaxMobile

➢ **To start MaxMobile on your Windows Mobile device**

Before you start MaxMobile, you must first configure your synchronization settings, as mentioned in the previous section, as well as synchronize your data to the device from Maximizer.

1. Tap **Start** > **Programs**.

2. Tap **MaxMobile**.

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.

Logging Out of MaxMobile

➣ To log out of MaxMobile

1. From one of the main windows in MaxMobile, tap **Close**.

2. From the MaxMobile Home screen, tap **Close**.

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 one of the windows. When you have a 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.

Phone dialing settings

Country code appends phone numbers with a default country code.

Area Code appends phone numbers with a default area code.

Show phone dialing settings when making a call opens a popup window where your default country code and area code are displayed. These settings can be modified in this window. You must have this option enabled to be able to edit these settings.

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.


Phone log settings

Enable phone log creates a note for the current entry after an outgoing call is made. This setting also enables the Insert Phone Note menu for incoming missed and received calls. See Phoning Address Book entries for more information.

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

Startup

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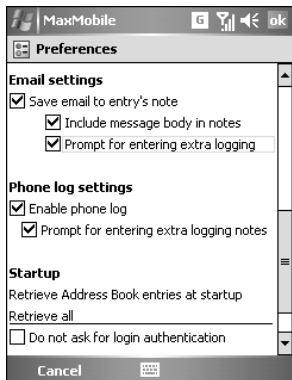
Retrieve all displays all Address Book entries when you open the Address Book window.

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

To change to a different startup list, tap one of the options.

Do not ask for login authentication goes directly to the Home page rather than prompting for login credentials after starting MaxMobile.

View Synchronization Settings in Wireless Access

This option allows you to view and modify MaxMobile synchronization settings in Wireless Access.

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.

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, create an opportunity or a case, and email or phone the entry directly from the Address Book list or from the open Address Book entry.
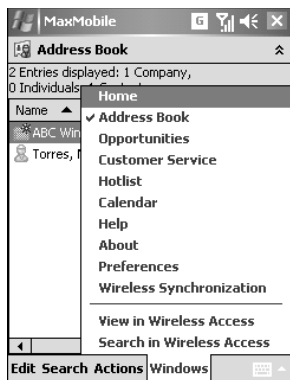
Viewing a List of Address Book Entries

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 tap 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, and whether it is a lead.

Company   Individual   Contact

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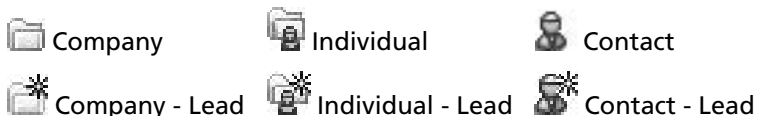
The Address Book list includes columns for the Company name (for Companies) or full name (for Individuals and Contacts), primary phone number, and city or town. You can sort by any column, either ascending or descending, by tapping the column title, and you can re-size any column by dragging the divider.

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, documents, 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.

Typing the first few letters of an entry's name in the Address Book window also highlights the first matching entry. You can do this in the Opportunities and Customer Service windows as well.

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.

You can also search for Address Book entries based on your recent calls—incoming, dialed, and missed calls.
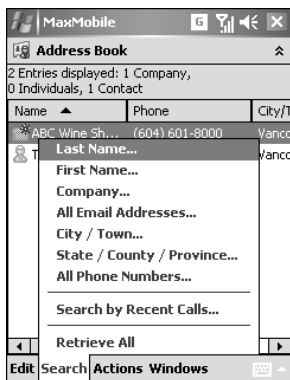
➣ **To display all entries**

• 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, tap 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 (Email 1) 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.

➢ **To make a call**

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

- or -

• While an entry is selected, press the **Phone** key and tap on the phone number.

- or -

• Open an entry and tap on any phone number.

- or -

• From a Hotlist task or appointment alarm screen, tap the **Make a Call** button or press the **Phone** key. If the alarm is for a multi-contact appointment, select the contact from the contacts list first.

You can set up your MaxMobile preferences to have a note logged each time an outgoing call is made to an Address Book entry. You can also set your phone dialing preferences to automatically use a common country code and/or area code. See Setting MaxMobile Preferences for more information.

When using the Search by Recent Calls menu item to search for Address Book entries, you have the option of inserting a phone note manually.

➢ **To search by recent calls**

1. In the Address Book window, tap **Search**.

2. Select **Search by Recent Calls**. Information for the last ten phone calls for dialed (from MaxMobile) and also missed/received incoming calls is retrieved.

3. Select a call and tap **ok**. Address Book entries associated with the phone number are retrieved.

➢ **To insert a phone note manually**

- Choose **Insert Phone Note** from the menu while an Address Book entry that was retrieved from a search by recent calls is selected.

Note that this menu item appears only if a note does not exist for the associated phone call and if you have phone logging enabled in your MaxMobile preferences.

Drawing Maps for Entries

You can draw a map for an Address Book entry's location in the Address Book, Opportunities, or Customer Service windows.

➢ **To draw a map**

1. While an entry is selected, click the **Actions** menu and select **Draw a Map**.

2. Select an online map site and click **Go**.

Opportunities

The MaxMobile Opportunities window includes any opportunities synchronized from Maximizer, as specified in your synchronization preferences, as well as any opportunities you added in MaxMobile.

You can view, add, edit, and delete opportunities using the Opportunities window. You can also view the Address Book entry associated with an opportunity by tapping the View in Address Book window button in the upper-right corner of the Opportunities window.

Viewing Opportunities

When you open the Opportunities window, a list of current opportunities is displayed including information such as the associated Address Book entries, opportunity objectives, revenue, and close dates.

Tap the Filter drop-down list to display all opportunities in MaxMobile.

➢ **To view an opportunity**

1. Open the Opportunities window.

2. If necessary, tap the **Search** menu to search for opportunities based on specific criteria or the **Filter** menu to filter opportunities.

3. Tap an opportunity in the list to view the opportunity details.

Adding Opportunities

You can add an opportunity associated with an Address Book entry.

When you add an opportunity, it fills in the Company/Individual field automatically with the name of the entry associated with the opportunity selected in the Opportunities window.

➢ **To add an opportunity in the Opportunities window**

1. In the Opportunities window, select an opportunity associated with the Company/Individual with which the new opportunity is to be associated.

2. Tap **Edit > Add**.

3. Enter the opportunity details.

4. Tap **ok** to save and close the opportunity.

➢ **To add an opportunity in the Address Book window**

1. Open the Address Book window.

2. Select or open the Address Book entry with which the new opportunity will be associated.

3. Tap **Actions > Create an Opportunity**.

4. Enter the opportunity details.

5. Tap **ok** to save and close the opportunity.

Editing Opportunities

When you open an opportunity, you are in view mode. You must tap the Edit menu to switch to edit mode.

➢ **To edit an opportunity**

1. Open the opportunity.

2. Tap the **Edit** menu. The opportunity is now in edit mode.

3. Edit the opportunity details as necessary.

Deleting Opportunities

If you delete an opportunity in MaxMobile, the opportunity is removed from the Favorite List in Maximizer when you synchronize.
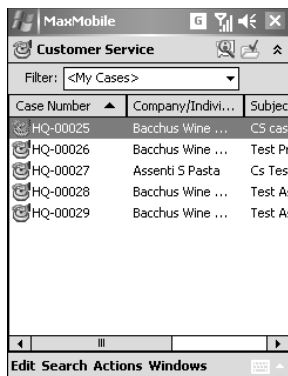
➢ **To delete an opportunity**

1. In the Opportunities window, tap and hold on the opportunity until the context menu opens.

2. Select **Delete**.

    – or –

    Choose **Delete** from the **Edit** menu.

Customer Service Cases

The MaxMobile Customer Service window includes any customer service cases synchronized from Maximizer, as specified in your synchronization preferences, as well as any cases you added in MaxMobile.

You can view, add, edit, and delete cases using the Customer Service window. You can also view the Address Book entry associated with a case by tapping the View in Address Book window button.

MaxMobile	G 📶 ◀€ ✕
Customer Service	🔍 📝 ≈

Filter: `<My Cases>` ▼

Case Number ▲	Company/Indivi...	Subjec
HQ-00025	Bacchus Wine ...	CS cas
HQ-00026	Bacchus Wine ...	Test Pr
HQ-00027	Assenti S Pasta	Cs Tes
HQ-00028	Bacchus Wine ...	Test As
HQ-00029	Bacchus Wine ...	Test As

Edit Search Actions Windows

Viewing Cases

When you open the Customer Service window, a list of all cases in the Address Book is displayed including information such as the case numbers, associated Address Book entries, case statuses, and case subjects.

Tap the Filter drop-down list to filter cases (based on case queue) in MaxMobile.

➢ **To view a case**

1. Open the Customer Service window.

2. If necessary, tap the **Search** menu to search for cases based on specific criteria or **Filter** menu to filter cases.

3. Tap a case in the list to view the case details.

Adding Cases

You can add a case associated with an Address Book entry.

When you add a case, it fills in the Company/Individual field automatically with the name of the entry associated with the case selected in the Customer Service window.

➢ To add a case in the Customer Service window

1. In the Customer Service window, select a case associated with the Company/Individual with which the new case is to be associated.

2. Tap **Edit > Add**.

3. Enter the case details.

4. Tap **ok** to save and close the case.

➢ To add a case in the Address Book window

1. Open the Address Book window.

2. Select or open the Address Book entry with which the new case will be associated.

3. Tap **Actions > Create a Case**.

4. Enter the case details.

5. Tap **ok** to save and close the case.

Editing Cases

When you open a case, you are in view mode. You must tap the Edit menu to switch to edit mode.

➢ To edit a case

1. Open the case.

2. Tap the **Edit** menu and tap **Edit Case**. The case is now in edit mode.

3. Edit the case details as necessary.

Resolving Cases

You can quickly resolve a case in MaxMobile.

➣ **To resolve a case**

1. Select or open the case in the Customer Service window.

2. Tap **Edit > Resolve Case**.

   – or –

   Tap the **Resolve Case** button in the upper-right corner of the Customer Service window.

Deleting Cases

If you delete a case in MaxMobile, the case is removed from the Favorite List in Maximizer when you synchronize.

➣ **To delete a case**

1. In the Customer Service window, tap and hold on the case until the context menu opens.

2. Select **Delete**.

   – or –

   Choose **Delete** from the **Edit** menu.

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, opportunity, and case 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 modify only the values of those user-defined fields.

Specify which user-defined fields to synchronize in the MaxMobile Settings tab of the Maximizer Preferences window by clicking the button for the associated type of entry.

Viewing User-Defined Fields

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

➢ **To view user-defined fields**

1. Open the Address Book, opportunity, or case 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 fields**

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.

   Following is a brief explanation of how to edit each type of user-defined field:

Date user-defined fields - Tap **Edit** to set the date and then use the navigation controls to toggle from month, day, and year. Enter the appropriate numeric values with the number keys. To clear a value, tap inside the field and tap **None**.

Single-value table user-defined fields - Use the navigation controls to toggle from value to value. To view a list of all values for a field, tap inside the field and tap the drop-down list arrow. To clear a value, select the blank item (the first item) in the list of available field values.

Multiple-value table user-defined fields - Use the navigation controls to toggle from value to value. To view a list of all values for a field, tap inside the field and tap the drop-down list arrow. To clear a value, clear the selection in the list of available field values.

Numeric and alphanumeric user-defined fields - Use the number/alphabetic keys to manipulate values. To clear a value, select it and tap **Delete**.

Working with Notes

Your MaxMobile database includes any Address Book, opportunity, or case entry 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.

You can view, add, edit, and delete Address Book entry notes in MaxMobile. However, if you do not have the required rights for notes, any additions, modifications, or deletions are not synchronized.

Viewing Notes

View notes through the Notes tab in the Address Book, opportunity, or case entry. If you tap 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.

In the Address Book window, 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 entry only.

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

➢ **To view notes**

1. Open the Address Book, opportunity, or case entry and tap on the **Notes** tab.

2. Select the note and tap **Edit** > **Open**.

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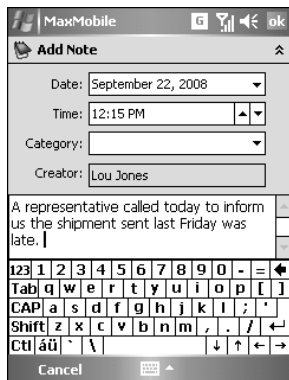
Adding Notes

Notes are always associated with an Address Book, opportunity, or case entry, so you must open or select an 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 a note**

1. In the Address Book, Opportunities, or Customer Service window, select an entry.

2. Tap **Actions** > **Write a Note**.

3. Enter the note.

4. Tap **ok** to save and close the note.

– or –

1. Open an 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 a note**

1. Open the Address Book, opportunity, or case 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 a note**

1. Open the Address Book, opportunity, or case 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, opportunity, or case entry documents synchronized from Maximizer, as specified in your synchronization preferences, as well as any documents added manually in MaxMobile.

You can view, add, edit, and delete Address Book entry documents in 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, opportunity, or case 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, opportunity, or case entry and tap on the **Documents** tab.

2. Select the document and tap **Edit** > **Open**.
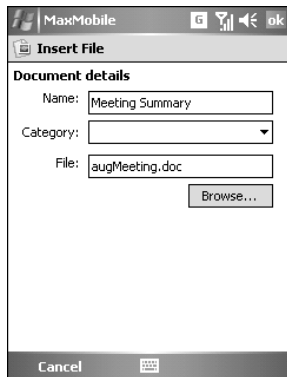
Adding Documents

Documents are always associated with an Address Book, opportunity, or case 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.

Emailing Documents

You can email a document from the Documents tab.

➢ **To email a document**

1. Open the Address Book, opportunity, or case entry and open the **Documents** tab.

2. Select the document and tap **Edit** > **Email Document**.

3. Enter the email address of the recipient.

4. Tap **ok**.

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, opportunity, or case 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, opportunity, or case 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 information such as due dates, activity descriptions, and checkboxes to mark the tasks as complete.

Tap 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.

Tap 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.
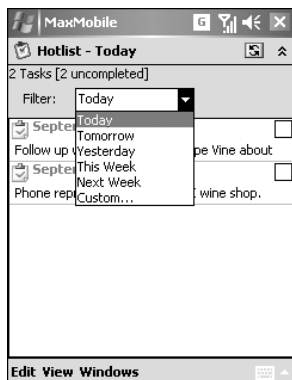
➢ **To view a task**

1. Open the Hotlist window.

2. If necessary, tap the **View** menu to filter the displayed Hotlist.

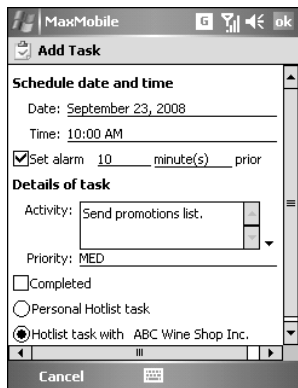3. Tap a task in the list to view the task details.

➢ **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 Activity 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.

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 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, snooze the alarm for a specified period of time, or make a call to a related Address Book entry.

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 Maximizer 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 an Address Book entry or 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. When a change is made to a recurring appointment, only the specific instance of the appointment is changed.

Values for Products/Services and Categories are automatically populated in new appointments with the values for the related opportunity or case. These values can be modified if necessary.

➢ **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. If you are including multiple Address Book entries in your appointment, tap **Menu** > **Address Book Entries**.

   You can perform a search to find an Address Book entry or entries by tapping **Menu**, tapping the **Add** button, entering your search criteria, tapping **Menu**, and tapping the **Search** button.

   Select the entries and tap **ok**.

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, if no Address Book entries are selected for the appointment, the appointment is personal.

4. Tap **ok** to save and close the appointment.

You can also link the appointment to an entry selected in the Address Book window when you create an appointment in the Calendar window by tapping the Link with current entry option.

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 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.

MaxMobile Best Practices

Synchronizing data is a memory-intensive operation. Consider the following when determining your synchronization settings.

When to synchronize - Synchronization should take place when your device is not in use. This includes when you are making or receiving phone calls.

How much data to synchronize - Synchronization sessions take longer if you synchronize a large amount of data. If you are synchronizing a large amount of data, you should synchronize less often. Available storage space on your device should also be considered when determining how much data to synchronize. If your device supports the use of a storage card, this option should be considered if you are synchronizing large amounts of data.

Cost of synchronizing data - The amount of data you synchronize and how often you synchronize correlates to the cost of synchronizing data. You should consider only synchronizing the data you need on your device.

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Applicability

This document applies to MaxMobile 10.5 for Windows Mobile Pocket PC.

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