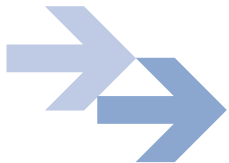


Maximizer Enterprise™ 8

Simply Successful CRM



Maximizer Enterprise eCRM Quick Reference Guide

Maximizer Enterprise™ 8

Simply Successful CRM

Maximizer Enterprise 8 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 affordable solution, Maximizer Enterprise 8 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 customers are passed onto service departments, Maximizer Enterprise 8 enables an organization to communicate with its customers through multiple channels, to share information, and to organize individual and team efforts.

Maximizer Enterprise 8 is a complete software solution that brings together elements of CRM, enterprise sales automation, marketing automation, eCommerce, web access, and other related applications to meet the sales, marketing, and customer service challenges of modern businesses.

Installing Maximizer Enterprise

You can install Maximizer Enterprise on one or more computers. If you have a previous version of Maximizer Enterprise installed on your system, you should uninstall the older version and then install Maximizer Enterprise 8. For detailed system requirements information, refer to the Introduction of the *Maximizer Enterprise Administrator's Guide*. After installation, the online manuals are also available from the Maximizer Enterprise Help menu.

To install Maximizer Enterprise

1. Insert the Maximizer Enterprise 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 Enterprise CD.
3. The Maximizer Enterprise CD Setup window appears. Select “Install Maximizer Enterprise 8 Server/Workstation”. The Maximizer Enterprise Setup program starts.
4. Follow the on-screen instructions to complete the installation.

Maximizer Enterprise’s installation is flexible, and there are several options to choose from as you install. For more information on these options, see the *Maximizer Enterprise Administrator’s Guide*, which is accessible from the Maximizer Enterprise CD Setup screen in Adobe® PDF format.

Getting Started

After installing Maximizer Enterprise, you can run Maximizer Enterprise from the Windows Start menu (Start > Program Files > Maximizer Enterprise > Maximizer Enterprise). You can then open the sample Address Book (also called a database) titled Escona Tutorial, which is created by default when you install Maximizer Enterprise. You may practice with this sample Address Book before creating your own Address Book. The *Maximizer Enterprise Training Guide* uses the Escona Tutorial Address Book to introduce you to the fundamentals of using Maximizer Enterprise. For more information, refer to the “Learning More About Maximizer Enterprise” section at the end of this guide.

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

What is an Address Book?

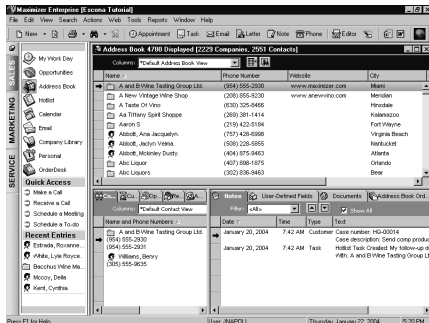
“Address Book” is the term used to describe a Maximizer Enterprise database. The Address Book contains all of your contacts, sales opportunities, appointments, tasks, notes, campaigns, appointments, tasks, notes, campaigns, customer service cases, knowledge base articles, orders, and any other information recorded by the various Maximizer Enterprise 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.

To add an existing Address Book to the list

1. In the Administrator module, select New Address Book from the File menu.
2. Select the server where the target Address Book is stored and click Next.
3. Select the Employ an existing Address Book option, enter an Address Book name if necessary, choose the database, and click Next.
4. Click Start. A progress indicator shows the process time for employing the database.
5. Click Close when the process is finished. Your new Address Book is now accessible from the Open Address Book list.



Maximizer Enterprise Components

Maximizer Enterprise is a powerful software product that uses a wide range of tools to help you manage every aspect of your sales, marketing, and customer service. The main component is the Address Book window, which lists the companies and organizations that you have recorded as Company entries and the people you have entered as Individuals and Contacts. Sales Leads are also created in the Address Book window.

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

Calendar

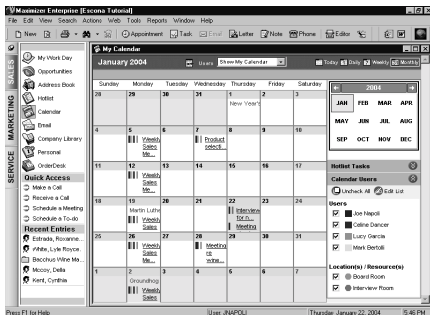
The Calendar window allows you to schedule, print, and view your appointments. You can see when others are busy or out of the office, as well as view other users' calendars when permission is granted.

Email

The Email window provides you with the ability to send and receive email within Maximizer Enterprise using your existing email system. The Email window is also used for processing catalog-generated orders and inquiries directly into the OrderDesk.

Hotlist

The Hotlist is a to-do list of tasks and reminders that are usually timeless.



Contacts

The Contacts window displays the Contacts for the current Company or Individual you selected in the Address Book window.

Related Entries

The Related Entries window displays Address Book entries that are linked, or related, to other Address Book entries.

Notes

The Notes window displays the note entries associated with the selected Address Book entry, customer service case, campaign, or opportunity.

User-Defined Fields

The User-Defined Fields window displays custom fields you create which can be associated with any selected Address Book entry, customer service case, campaign, or opportunity.

Company Library

The Company Library is used to store 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.

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.

Opportunities

The Opportunities window allows sales teams to track, record, and project revenues based on complex sales cycles. Activities for an opportunity are automatically scheduled in the sales team members' Hotlists. As activities are marked as complete, the opportunity and probability of close are updated. You can also assign opportunities to partners in the Opportunities window (Partners tab of an opportunity).

Customer Service

The Customer Service window allows users to track and resolve customer service cases, share information to reduce overall waiting time, and increase customer satisfaction. Each case can be classified by its priority and severity, assigned to the appropriate personnel, and then tracked from creation to close.

Knowledge Base

The Knowledge Base window is used to create and maintain a collection of knowledge base articles. Each article represents the resolution to one or more customer service cases. All staff members can have the ability to create draft articles, with only selected users possessing the ability to publish the articles for public access.

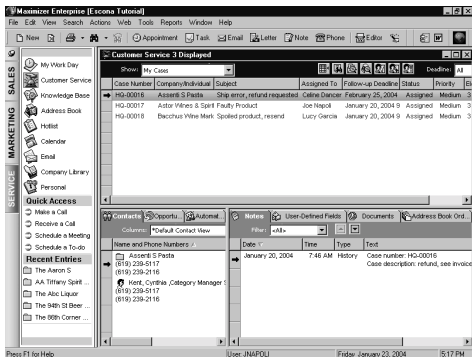
Campaigns

The Campaigns window allows you to create and manage both Traditional and Automated campaigns. Marketing efforts are easily coordinated amongst your marketing teams. And, through the use of campaign templates, you can create campaigns quickly by modifying the campaign elements.

The Automated Campaigns following window displays all automated campaigns for the current entry in the Address Book window.

OrderDesk

The OrderDesk window is used for the creation, processing, and post-order fulfillment of your customer sales orders 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.



Administrator Module

Administrator is typically used by a system administrator or other technically-proficient staff to configure and manage the entire Maximizer Enterprise application. Among other administrative tasks, Administrator is used to create and manage Maximizer users, apply licensing, and create new databases (or "Address Books"). You can also do tasks that are common to both Maximizer and Administrator such as back up data, import and export data, produce system reports, and set up and manage sales/marketing teams and security groups.

Administrator is installed by default as part of the Maximizer Enterprise Server installation. In the Workstation installation, it is not part of the typical installation, but it is available as a Custom option.

For detailed information about Administrator, see the *Maximizer Enterprise Administrator's Guide*. You can also use the online help (Help > Contents) and F1 help.

Starting Administrator

To start Administrator, select Start > Program Files > Maximizer Enterprise > Administrator. You can log into Administrator as the MASTER user only. The default password is control.

User Accounts

To log into Maximizer, each user must have a user ID and password. You can create user accounts in Administrator by selecting File > Users and clicking the Add button. Enter at least a user ID, First name, Last name, and Display name, and then assign user access rights on the Security tab. The default password for new users is password.

User ID	Display Name	First Name	Last Name	Phone #1	Ext	Email Address	Maximized	Port
134110	Billie Holly	Billie	Holly	(555) 775-0000		billie.holly@escona.com	Control	

COMPANY: ESCONA ESTATE WINES

DBROWN ENAMUSE IRVINGSER JNAPOLI LGARCIA MASTER MBERTOL MCFIBEL

General | User-Defined Fields | Security | Groups / Teams | Windows Authentication

Name and position

User ID: [134110] Mr/Ms: [] First name: [] Initial: [] Last name: []
Title: []
Display name: [Billie Holly] Position: [Regional Sales Manager] Solution: []
[Clear < >]

Company and main address

Company: [Escona Estate Wines] Phone numbers and phone extensions
Dept.: [Sales] Division: [] 1: [(555) 775-0999] Enabled
Address 1: [1344 Eastside Road] 2: [(555) 775-0900] Fax
Address 2: [] 3: []
City/Town: [] Postal code: [] State: [CA] 4: []
Zip/Postcode: [94954] Country: [USA]

Maximizer login: Enabled Disabled
Portal login: Enabled Disabled

Internet information:
Email: [billie@maximizer.com]
Website: [http://www.escona.com]

Security: Public Private

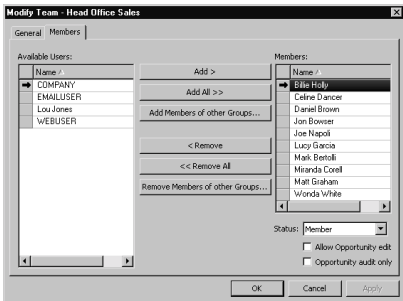
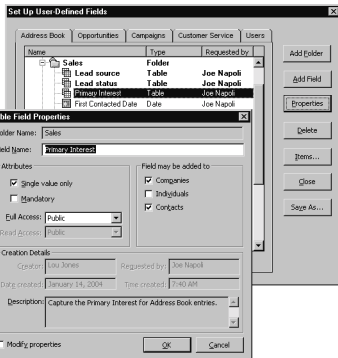
OK Cancel Apply

User-Defined Fields

You can create user-defined fields in Administrator, and in Maximizer if the user account has the required permissions. User-defined fields are unique fields created specifically for your Address Book. You can create user-defined fields for Address Book entries, opportunities, campaigns, customer service cases, and user accounts. User-defined fields may contain alphanumeric, numeric, date, or table (list of items) values.

Importing 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 new Advanced Import feature, which is available from the File > Import menu.



Sales and Marketing Teams

If your organization is using opportunity or campaign management, use the File > Security Groups and Teams dialog box to set up sales and marketing teams. Sales teams are used for sales opportunities in Maximizer, and marketing teams are used for traditional marketing campaigns.

Sales

Entering Companies, Individuals, and Contacts

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

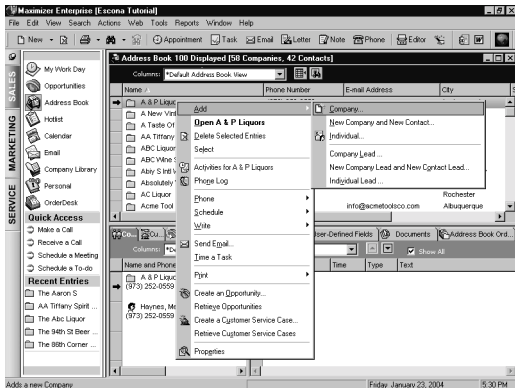
- **Company** – Represents a group of people such as an organization, association, or business. A Company often has associated Contact entries.
- **Individual** – Represents a person who may not be associated with a company or organization. Like a Company entry, an Individual entry can have associated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

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.
- Press the Insert key in the Address Book window.
- 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 strategies with opportunities, you can define and strengthen your selling methodology. 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. Refer to the Escona Tutorial sample Address Book for examples of strategies (File > Libraries > Strategy Library).

To add an opportunity

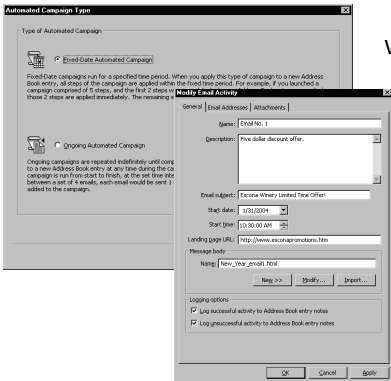
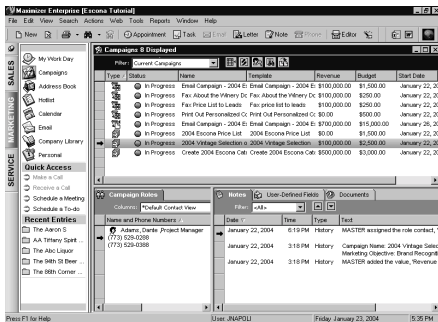
1. Select the Address Book entry to which you want to add an opportunity. If you select a Contact, Maximizer adds the opportunity to the Company.
2. Drag and drop the Address Book entry or Contact to the Opportunities icon. You can also select Add Opportunity from the Edit menu or click Insert in the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



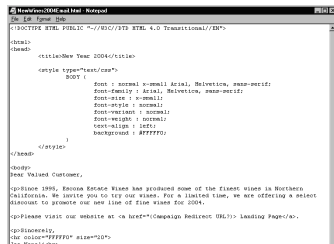
With Automated campaigns, you can broadcast your marketing message to anyone in your Maximizer Address Book. A campaign can reach out to your entire Address Book or to a single person via email, fax, or print.

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 and activities, but because their settings are specific to where they were created, you should create your own samples.

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.

The easiest way to use 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. The main campaign merge fields are described as follows:

- **Campaign Opened Email Tracking URL** – used to track the number of customers that have opened an automated campaign email.
- **Campaign Redirect URL** – used to track how many customers visited your website as a result of an automated campaign email. The redirect URL calls an ASP page, which is installed and configured at the time of installing Maximizer.
- **Campaign Remove Subscriber URL** – used to unsubscribe customers from an automated email campaign.



```
!DOCTYPE HTML PUBLIC "-//EC//DTD HTML 4.0 Transitional//EN"
<html>
<head>
<title>New Year 2004</title>
<style type="text/css">
BODY
{
font-family: Arial, Helvetica, sans-serif;
font-size: 9pt;
font-style: normal;
font-weight: normal;
text-align: center;
background: #FFFFFF;
}
</style>
</head>
<body>
Dear Valued Customer,

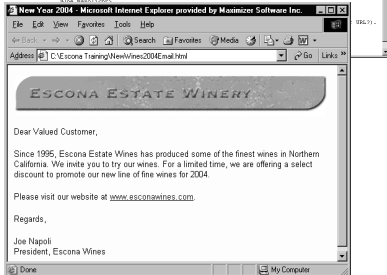
Since 1996, Escosa Estate Wines has produced some of the finest wines in Northern California. We invite you to try our wines. For a limited time, we are offering a select discount to promote our new line of fine wines for 2004.

Please visit our website at <a href="Campaign Redirect URL"> Landing Page</a>.

Sincerely,
Joe Napoli</body>
</html>
```

Refer to the *Maximizer Enterprise 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.



Customer Service & Support

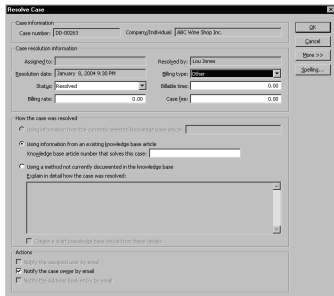
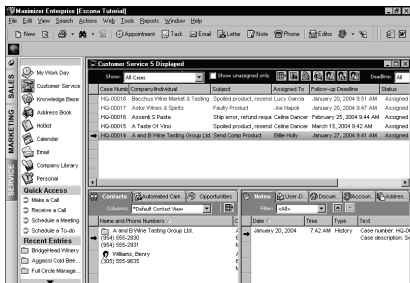
Keeping Customers Satisfied

Maximizer Enterprise 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, you 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.

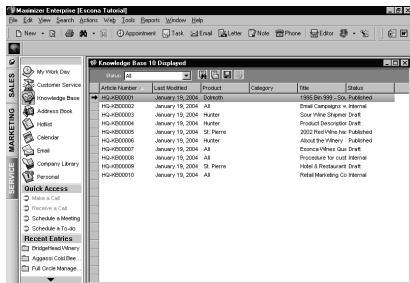
The Customer Service window supports and enhances your existing customer service business processes. All Address Book entry customer service communication can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner.

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.

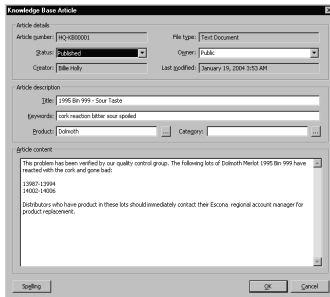
Share the Knowledge



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.

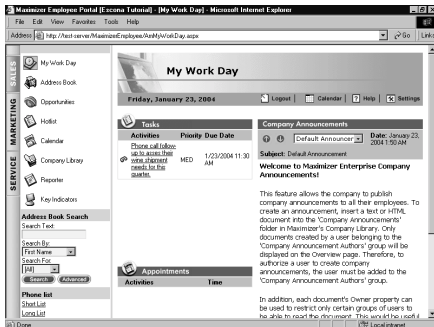
Enable every staff member to create articles, complete with links to other documents, spreadsheets, and files, while enforcing management sign-off on publishing articles for internal or external viewing.



Internet Access through the Web Portals

Employee Portal

Employee Portal 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 Employee Portal also enables you to build a corporate intranet to provide all employees, even those without Maximizer Enterprise installed, access to critical company information, such as the phone list, documents, and forms. Reporter and Key Indicators are also accessible through Employee Portal.



Customer Portal

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

Customers may follow the progress of their customer service cases. The knowledge base may also be searched for related articles. As with Partner Portal, customers access Customer Portal using the URL and setup PIN emailed by the portal administrator. They then set up their own login information. See the *Administrator's Guide* for more information about setting up Customer Portal.

Partner Portal

Partner Portal is a web application that creates a two-way flow of information between your organization and its business partners. Organizations with an extended sales force of resellers or dealers need a way to monitor sales leads and opportunities for partners. Partner Portal allows business partners to view sales leads and opportunities via the web, and to update them as needed.

Partner Portal - Opportunities - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://test-server/Maximize/Partner/Opportunity.aspx

Partner: Mr. Paul Samson Logout Personalize Help

Opportunities

Found 3 Opportunities

Address Book	Objective	Rating	Revenue	Close Date	Strategy
<input type="checkbox"/> Cabins Liquors	Set Fieds (Cabernet & Merlot)	Not Started	12500		(not using a strategy)
<input type="checkbox"/> Cagle Wines & Spirits	Set Fune Blanc Reserve	Not Started	17000		(not using a strategy)
<input type="checkbox"/> Friendly Neighborhood Advertising	Partnership	Good	18000	2004-02-25	(not using a strategy)

Quick Info

Revenue
YTD (\$) - 82,000.00

Links

- OHC
- Maximize

Done Local intranet

Staff can publish news to the portal. News items can be filtered for partners based on their interest areas.

Customer service cases may be associated with a Contact of a Company or an Individual. Partners (the Contact associated with the case) can then follow the progress of the case. The knowledge base may also be searched for related articles.

Partners access Partner Portal using the URL and setup PIN emailed by the portal administrator. See the *Administrator's Guide* for more information about setting up Partner Portal.

Wireless Employee Portal

This portal provides access to an Address Book through a wireless Internet-enabled device. Check with Maximizer Software Inc. or your Business Partner for compatibility information before deployment.

Crystal Reports® 9 Embedded Designer and Viewer

Maximizer includes the Crystal Reports 9 Embedded Designer and Viewer. The Crystal Reports Embedded Designer and Viewer is installed automatically with Maximizer and is accessible from the Reports menu. Maximizer installs a set of standard Sales and Customer Service reports, but you can also create your own custom, shared reports and save them in the Maximizer Reports folder where they can be accessed from the Reports menu.

MaxExchange

MaxExchange is a separate Maximizer application that is opened from the Start menu. It allows you to synchronize Maximizer data between a server and as many remote computers as you wish. Please refer to the *MaxExchange Administrator's Guide* and the *Maximizer Enterprise User's Guide* for more information.

Palm and Handspring Access Through Maximizer Link

For your mobile sales force, Maximizer Link enables you to easily take the Maximizer Enterprise information from your desktop PC with you on your Palm OS® or Handspring device, and then update the information on your PDA and synchronize it when you return the office.

Workflow Automation Powered by KnowledgeSync

Workflow Automation Powered by KnowledgeSync is a separate Maximizer 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.

Extend Maximizer Enterprise™ to Fit Your Needs

Three new Customization Suites have replaced the former Integrator's Toolkit and Business Partner Integrator's Toolkit. These Customization Suites enable customers and business partners to customize the Maximizer Enterprise interface, and to integrate with other front- and back-office applications.

CRM Customization Suite – customization and integration for Maximizer Enterprise CRM (SQL and Pervasive), including references for COM Object Database Access, MaAccess, OLE Automation, DDE, ODBC, and code samples for customizing Maximizer Enterprise.

eCRM Customization Suite – customization and integration for Maximizer Enterprise eCRM, containing all the functionality of the CRM Customization Suite in addition to references for the web portals.

Advanced Customization Suite – full-featured customization and integration for Maximizer Enterprise eCRM containing all the functionality of the eCRM Customization Suite in addition to references for One to One Designer and Accounting Integration.

Learning More About Maximizer Enterprise

The *Maximizer Enterprise Training Guide* uses the Escona Tutorial Address Book to introduce you to the fundamentals of using Maximizer Enterprise. Using the training guide, you can follow tutorials that take you through real-world examples of how to use the various components of Maximizer Enterprise. To order the *Maximizer Enterprise Training Guide*, contact your nearest Maximizer office or your local Maximizer Business Partner. The guide is also available for purchase in PDF format through the Maximizer website.

- **Online Help** - includes how-to (Help > Contents) and context sensitive (F1) help
- **Knowledge Base** - visit <http://www.maximizer.com/knowledgebase>
- **Maximizer Website** - <http://www.maximizer.com>

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