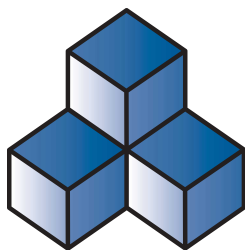


Maximizer™
The CRM Company



CRM Getting Started Guide



Maximizer Enterprise™ 9

Simply Successful CRM v9.5

Maximizer Enterprise 9, Version 9.5 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 Enterprise 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 Enterprise enables an organization to attract prospects, win new customers, and increase repeat business.

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 before installing your new version.

➤ 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 Autorun.exe on the Maximizer Enterprise CD.
3. The Maximizer Enterprise CD Setup window appears. Select "Install Maximizer Enterprise Server/Workstation". The Maximizer Enterprise Setup program starts.
4. Follow the on-screen instructions to complete the installation.

For detailed instructions on various installation configurations such as Client/Server and Workgroup, refer to the Maximizer Enterprise Administrator's Guide. You can access the guide from the Help menu in Maximizer Enterprise or Administrator (Help > Administrator's Guide).

Sample Address Book - Escona Tutorial

After installing Maximizer Enterprise, you can run Maximizer Enterprise from the Windows Start menu (Start > Program Files > Maximizer Enterprise > Maximizer Enterprise) or by double-clicking on the desktop icon. You can then explore Maximizer Enterprise 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

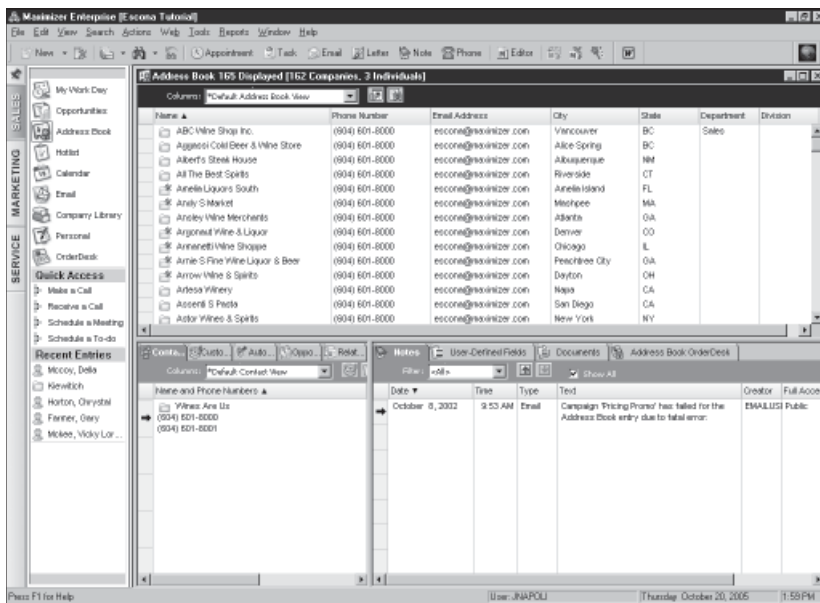
also includes sample data such as Address Book entries, opportunities, campaigns, customer service cases, user-defined fields, notes, and documents allowing you to see how the software allows you to manage your customer relationships.

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 Enterprise 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 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**.

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

➤ To add an existing Address Book to the list

1. In the Administrator module, select **New Address Book** from the **File** menu.
2. Type a descriptive **name** for the Address Book and click the **ellipsis** button beside the **Location of Address Book** field. Typically, Address Books are stored under:
Documents and Settings\All Users\Application Data\Maximizer\AddrBks
3. Browse to the location of your existing Address Book and click **OK** twice.
4. Maximizer Enterprise notifies you if the Address Book files were found in the location you selected. Click **OK** to open the Address Book.

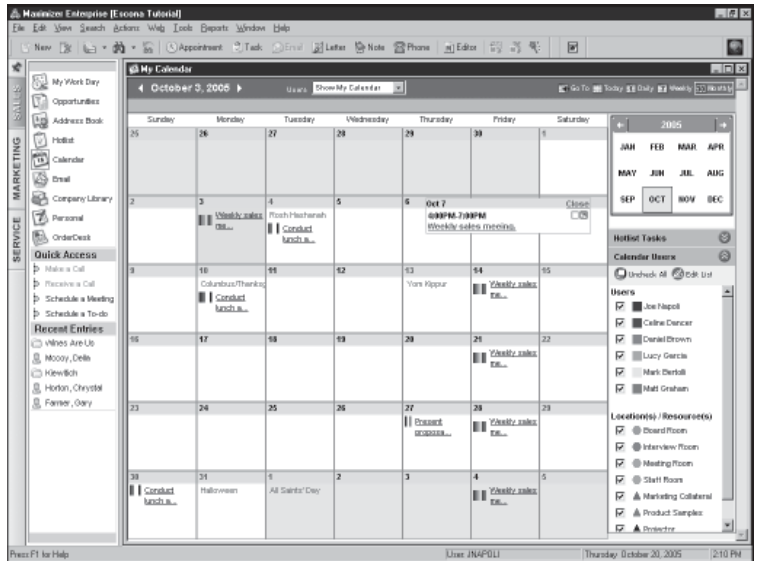
Maximizer Enterprise Basics

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 Enterprise 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. You can also preview email in 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.

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.

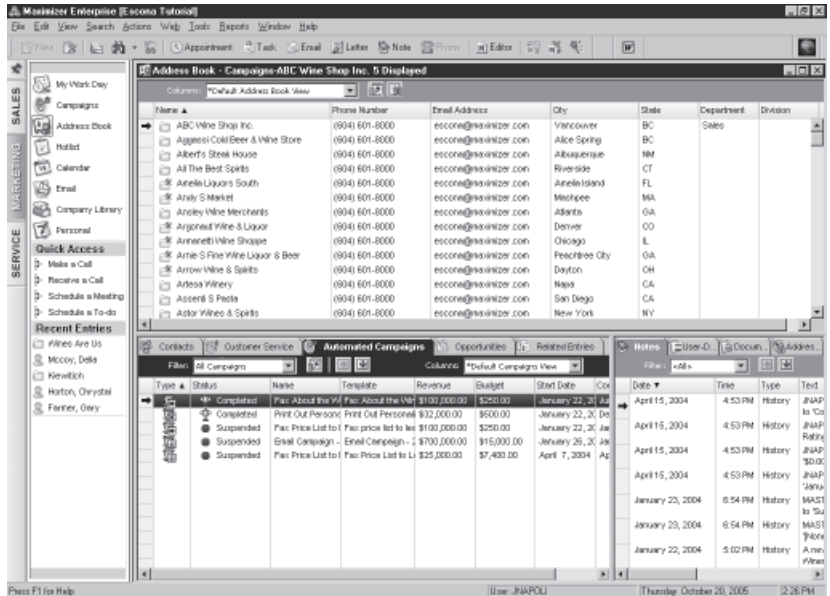
To further organize your information, Address Book entries can be designated as sales leads, and then assigned to partners through the Partner field on the basic information tab of the entry. Partners can access their assigned leads in the Partner Portal.

➤ 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.



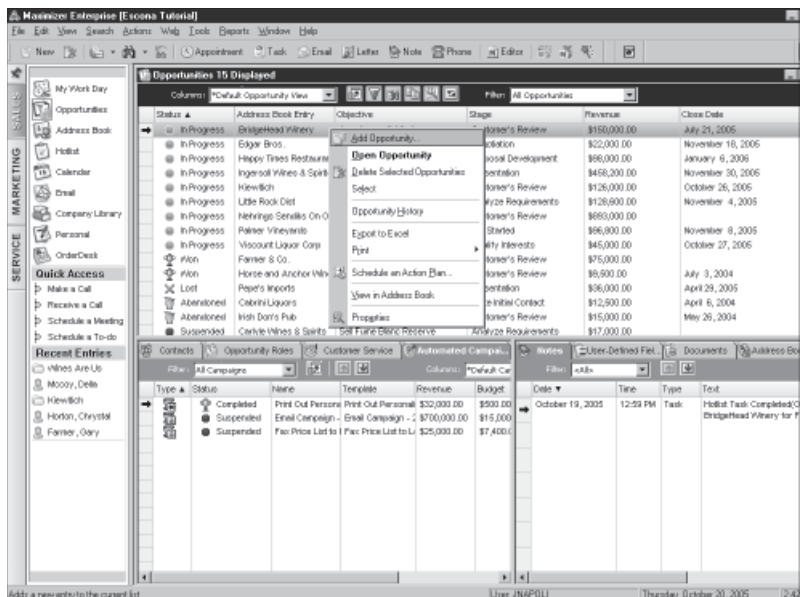
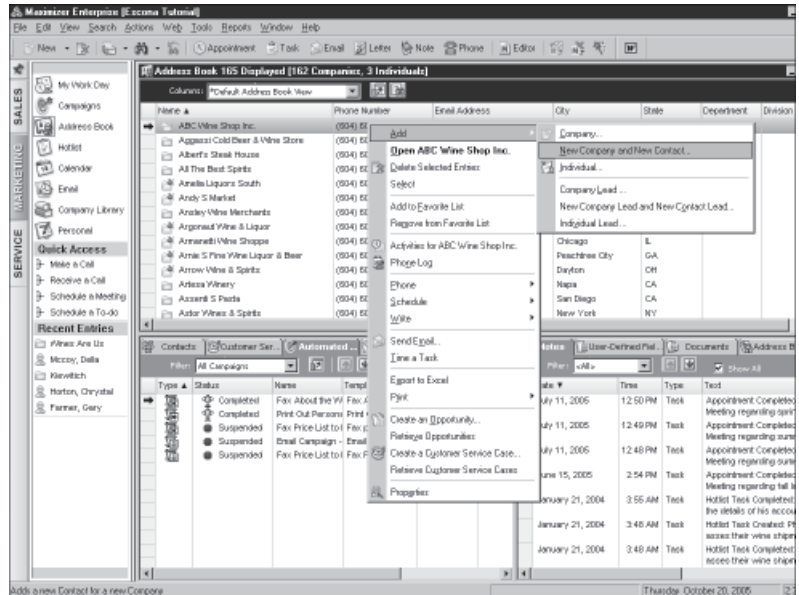
Working with Opportunities

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.



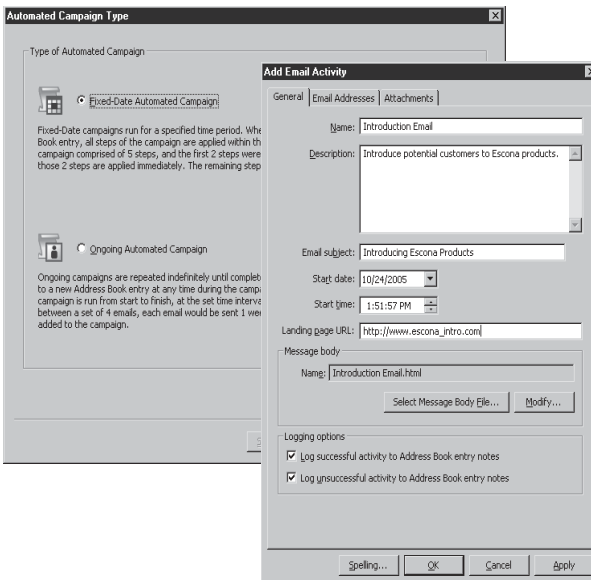
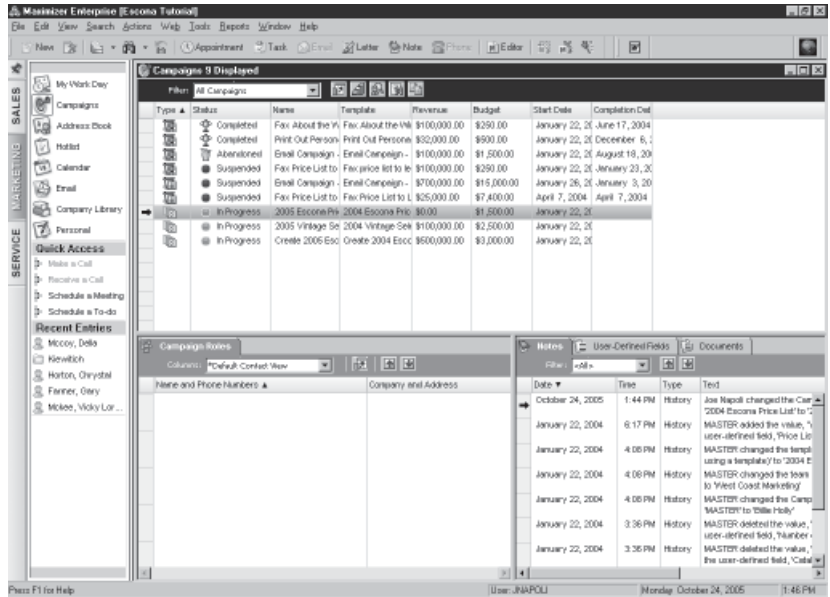
Marketing

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 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.

➤ To launch an Automated campaign

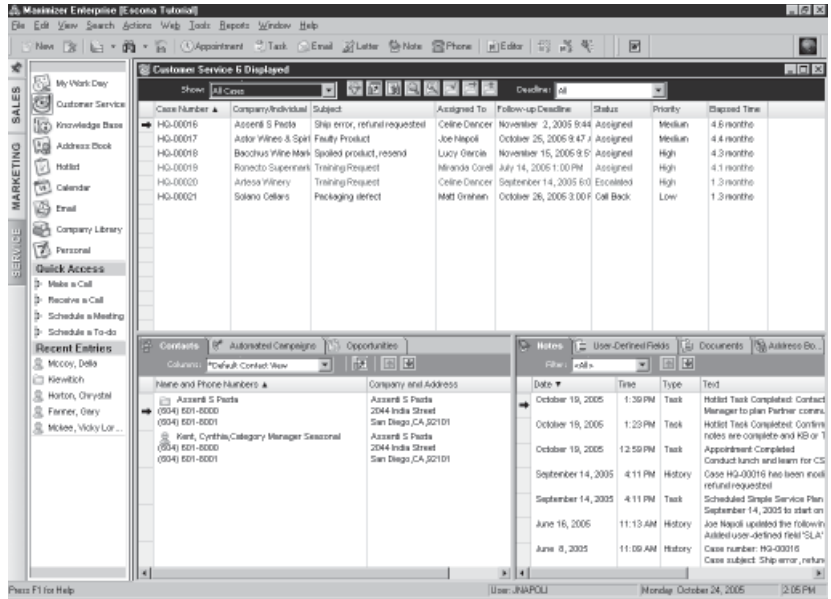
1. Choose **Edit > Add Automated Campaign** or right-click in the **Campaigns** window and select **Add Automated Campaign**.
2. Choose the type of campaign you want to create—**Fixed-Date** or **Ongoing**.
3. Choose the **template** on which this campaign is based. Also, enter the **name**, **description**, **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

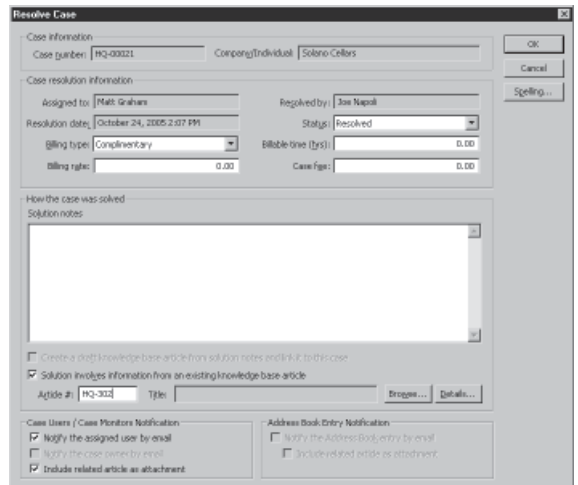
Maximizer Enterprise enables customer service representatives to track and respond to service calls relating to matters such as billing inquiries, product issues, and frequently asked questions. When entering the details of a customer service case, enter information such as the assigned representative, 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.

The Company/Individual field is filled in automatically with the name of the Company or Individual you selected previously. If you selected a Contact, the Contact field is also filled in automatically. If not, you can click the ellipsis button to select a contact to associate with the case.

When assigning a Contact, you can add a new Contact to the associated Company or Individual by clicking the ellipsis button beside the Contact field, and then clicking the New Contact button in the Assign Contact to Case dialog box.

3. In the Products and Categories fields, select the **product line(s)** or **service area(s)** to which the case pertains.
4. Select a **Subject** from the drop-down list.

To add a new Subject to the list, select Edit List and add a new entry.

5. Enter a **Description** of the case.
6. Select the **Key Fields** list (a group of key user-defined fields specific to the module) and specify a value for the Key Fields. These are common used fields that are specific to your company.

Up to 8 Key Fields may be specified for customer service cases. 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.

7. 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.

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

The User-defined fields tab contains Address Book user-defined fields in the Fields for [Address Book entry] folder and Customer Service user-defined fields in the Fields for this case folder.

Maximizer Enterprise Getting Started Guide

If you cannot see one of the user-defined fields you need, click the Show blank fields checkbox to display all of the fields.

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

Note that several customer service merge fields can be included in case resolution email templates (to customers). Specifically, the Solution Notes can be included by using the Case_Solution_Notes merge field and the related knowledge base article can be included by using the Case_Solution merge field. Email notification templates for customer service are set up in Administrator.

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.

Administrator Module

Administrator is typically used by a system administrator or other technically proficient staff to configure and manage the entire Maximizer Enterprise 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 Address Book entries 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 and tasks between a Maximizer Address Book and a Microsoft Exchange Server.

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

Additional Products

Crystal Reports® XI

Maximizer offers Crystal Reports XI (based on Crystal Reports XI Professional) as a separate CD. After installing Crystal Reports, the application is accessible from the Reports menu. Maximizer installs a set of standard Sales, Marketing, and Customer Service reports. 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 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 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 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.

Accounting Link Designed for Use with QuickBooks®

Maximizer offers Accounting Link Designed for Use with QuickBooks. The Accounting Link enables you to create estimates, invoices, and purchase orders from within Maximizer, which automatically creates them in the QuickBooks Company file. For more information on how to install, configure, and use the 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.

Palm® and Windows Mobile™ Access Through MaxLink

For the mobile sales force, MaxLink and MaxMobile enable you to easily access your Maximizer Enterprise information from your desktop PC on a Palm or Pocket PC device. You can then update or add information while you are out of the office. Refer to your MaxLink or MaxMobile online manuals for more information.

Maximizer Enterprise Customization Suites

Maximizer offers three Customization Suites enabling integrators 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 (Microsoft SQL and Pervasive), including references for COM Object Database Access, OLE Automation, DDE, ODBC, complete table and view documentation, 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 information on how to customize the portals including using the Maximizer.Data layer, custom tabs, and portal hooks. A complete reference for integrating a payment processing gateway is also included.

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 the Maximizer Accounting Link API, MaxExchange DCOM API, and MaxExchange Web Service API.

Learn More About Maximizer Enterprise

- **Maximizer Enterprise Administrator's Guide & User's Guide** - The Maximizer Enterprise manuals are available in Adobe® PDF format. You need to have 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 Enterprise 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.
- **Maximizer Enterprise Training Guide & CD** - Using the Escona Tutorial Address Book, the training guide and CD introduce you to the fundamentals of how to use Maximizer Enterprise. To order the Maximizer Enterprise Training Guide, contact your nearest Maximizer office or your local Maximizer Business Partner (Certified Solution Provider).
- **Maximizer Website** - <http://www.maximizer.com>
- **Knowledge Base** - <http://www.maximizer.com/knowledgebase>
- **Online Demonstration** - <http://www.maximizer.com/solutions/maxent/online-demo.html>
- **System Requirements** - <http://www.maximizer.com/solutions/maxent/system.html>
- **Supported PDAs, wireless browsers, and other third-party products** - <http://www.maximizer.com/support/products.html>

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