

# Maximizer™ 8

**SUCCEED** by Tracking More Contacts

---

and Closing More Sales!



**Maximize** your time

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**Create** satisfied customers

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**Increase** your sales

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**Quick Reference Guide**

**Maximizer™**

# Maximizer™ 8

Maximizer 8 is a contact manager designed to help individuals, home offices, and small businesses succeed by helping them maximize their time, create satisfied customers, and increase sales.

With Maximizer, users can easily manage and profile customers and prospects, track every sale from lead to close, and maintain long-lasting relationships well after the initial sale has been made. Maximizer 8 is a solution that incorporates contact management with sales opportunity management, scheduling, communication, Outlook integration, Palm® synchronization, Crystal Reports®, Accounting Link designed for use with QuickBooks®, a company library, and e-commerce.

## Installing Maximizer

If you have a previous version of Maximizer installed on your system, you should uninstall the older version and then install Maximizer 8. For detailed system requirements information, refer to the “Installing Maximizer” chapter of the *Maximizer User’s Guide*. After installation, the online manuals are also available in Adobe® PDF format from the Maximizer Help menu.

## To install Maximizer

1. Insert the Maximizer CD-ROM into your drive.
2. If the Setup window does not appear automatically, double-click the **Autorun.exe** on the Maximizer CD.
3. The Maximizer Setup window appears. Select **Install Maximizer**.  
The Maximizer Setup program starts.
4. Follow the on-screen instructions to complete the installation.

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

## Getting Started

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

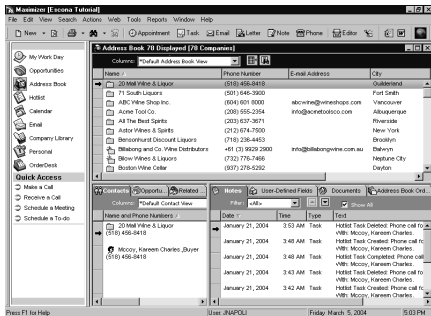
“Address Book” is the term used to describe a Maximizer database. The Address Book contains all of your contacts, opportunities, appointments, tasks, notes, orders, and any other information recorded by the various Maximizer windows. You can set up as many Address Books as you need.

### To open an Address Book

1. Select **Open Address Book** from the **File** menu.
2. Double-click 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. Type a descriptive name and click on the **ellipsis** button beside the **Location of the Address Book** field.
3. Browse to the location of your existing Address Book and click **OK** twice.
4. Maximizer notifies you if Address Book files were found in the location you selected. Click **OK** to open the Address Book.



## Maximizer Components

Maximizer is a powerful software product that provides a wide range of tools to help you manage your business prospects and customers. 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.

There are several other main windows and following windows that comprise your business information. The main windows are known as controlling windows and the following windows contain information related to the selected controlling window.

### My Work Day

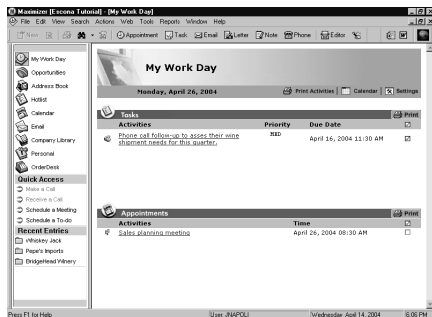
The My Work Day screen is an area where everyone in your company using Maximizer can see Hotlist tasks and appointments.

### Opportunities

Opportunity management helps you and your colleagues manage sales. Opportunities provide you with a way to define and strengthen your selling methodology through effective scheduling and analysis of your sales.

### Hotlist

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



## 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

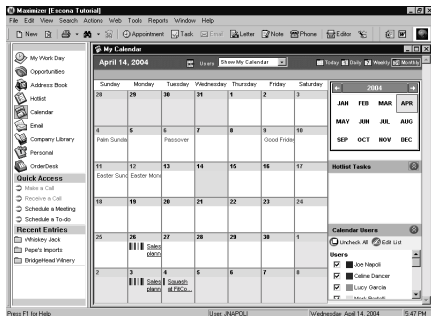
The Email window enables you to send and receive email within Maximizer using your existing email system. The Email window is also used for processing catalog-generated orders and inquiries directly into the OrderDesk.

## Company Library

The Company Library stores vital sales and marketing information, as well as other company collateral for everyone to access. The Company Library allows you to preview and edit notes, documents, and other types of files.

## 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.



## Contacts

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

## Related Entries

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

## Notes

The Notes following window displays the note entries associated with the selected Address Book entry, Hotlist task, or opportunity.

## User-Defined Fields

The User-Defined Fields following window displays custom fields you create, which can be associated with any selected Address Book entry, Hotlist task, or opportunity.

## Documents

The Documents following window displays the document entries associated with the selected Address Book entry, Hotlist task, or opportunity in the main or controlling window. You can insert documents such as invoices, sales sheets, letters, and faxes created with popular desktop products like Microsoft® Word and Excel.



## Administrator Module

Use Administrator to configure and manage the entire Maximizer application. Among other administrative tasks, you can use Administrator to create and manage Maximizer user accounts, apply licensing, and create new databases (or “Address Books”). Some tasks are common to both Maximizer and Administrator, such as backing up data, importing and exporting data, and setting up and managing security groups.

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

## Starting Administrator

To start Administrator, select Start > Program Files > Maximizer > 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”.

The screenshot shows the 'Users' dialog box with the 'Properties for Billie Holly' sub-dialog open. The 'Users' list on the left includes: BHOLLY, CDANCER, COMFAY, DBOROWN, EMAILUSE, JBOUSEP, JNAPOLI, LESAFOW, MASTER, MBERTOL, MCDRELL, and MCDRELL. The 'Properties for Billie Holly' dialog has the following fields and options:

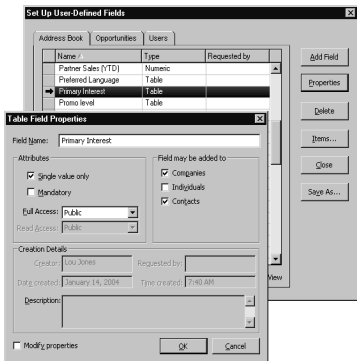
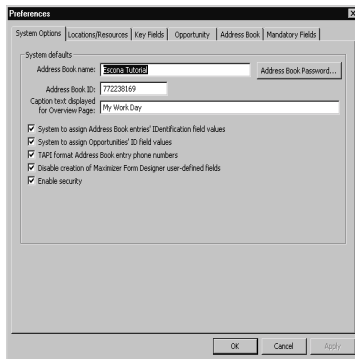
- General** tab selected.
- Name and position:**
  - User ID: BHOLLY
  - MyMs: Mr.
  - First name: Billie
  - Initial: Holly
  - Last name: Holly
  - Display name: Billie Holly
  - Position: Regional Sales Manager
  - Salutation: Dear < >
- Company and main address:**
  - Company: Escona Estate wines
  - Dept.: Sales
  - Division:
  - Address 1: 1344 Eastside Road
  - Address 2:
  - City/Town: Petaluma
  - St/CityProv: CA
  - Zip/Postcode: 94954
  - Country: USA
- Phone numbers and phone extensions:**
  - 1: (555) 775-0999
  - 2: (555) 775-0900
  - 3:
  - 4:
- Maximizer login:**
  - Enabled
  - Disabled
- Security:**
  - Public
  - Private
- Internet information:**
  - Email: bholly@maximizer.com
  - Website: http://www.escona.com

## Address Book Preferences

Use Administrator to specify Address Book preferences, such as the Address Book name and password, locations and resources, key fields, opportunity ratings and completion reasons, duplicate entry checking, and mandatory fields.

## Importing Data

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



## 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, and user accounts. User-defined fields may contain alphanumeric, numeric, date, or table (list of items) values.

## Entering Companies, Individuals, and Contacts

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

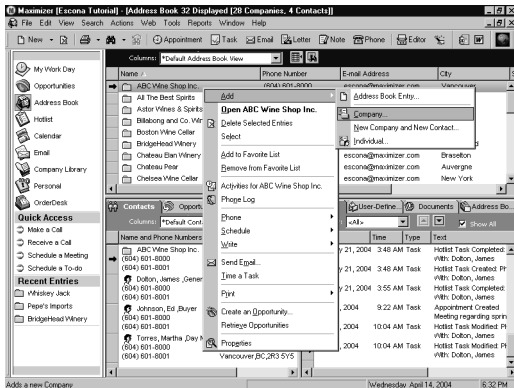
- **Company** – Represents a group of people such as an organization, association, or business. A Company often has associated Contact entries.
- **Individual** – Represents a person who may not be associated with a company or organization. Like a Company entry, an Individual entry can have associated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

## Adding Address Book Entries

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 while the Address Book window is active.
- Click the drop-down button beside the **New** button and select one of the Address Book entry options.

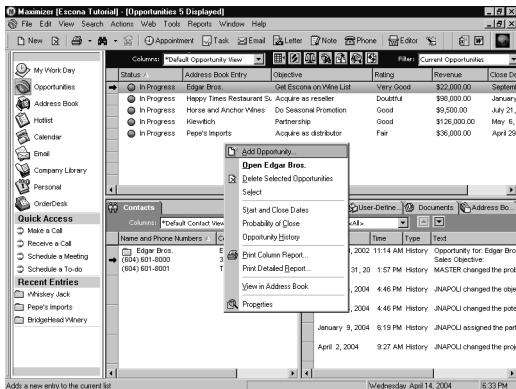
After you create the new Company or Individual entry, you can create additional Contact entries for the Company or Individual entry.



# Working with Opportunities

Opportunity management helps you and your colleagues manage sales. Opportunities provide you with a way to define and strengthen your selling methodology through effective scheduling and analysis of your sales.

You enter new opportunities by selecting an Address Book entry in the Address Book window and then adding the new opportunity in the Opportunities window. All opportunities have an associated Address Book entry.



## 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**. A new opportunity dialog box opens.

You can also select **Add Opportunity** from the **Edit** menu or click **Insert** while the Opportunities window is open.

3. The **objective** and **comment** fields should describe the goal of this opportunity.

## Maximizer Companion Applications

### 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. You can create your own custom, shared or personal reports and save them in a folder where they can be accessed from the Reports menu.

### Palm and Handspring Access Through Maximizer Link

For your mobile sales force, Maximizer Link enables you to easily take the Maximizer 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 to the office.

### MaxFinder

MaxFinder, also a Maximizer companion application, lets you browse or search for entries in a Maximizer Address Book. You'll know if MaxFinder is running because its icon appears in your Windows System Tray, which is in the lower-right corner of your screen.

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Ref No.	Item Name (Item Code)	Shipping Status	Quantity	Unit Price	Amount
0292804	Merlot Reserve (MR-782)	(Payment Not Received Yet, Shipped)	1.00	124.00 Case	124.00
		Subtotal			124.00
		Shipping & Handling			0.00
		Tax			0.00
		Total for this Order			124.00

Ref No.	Item Name (Item Code)	Shipping Status	Quantity	Unit Price	Amount
0292804	Merlot Reserve (MR-782)	(Inquiry To Follow Up.)	1.00	124.00 Case	124.00
		Subtotal			124.00
		Shipping & Handling			0.00
		Tax			0.00
		Total for this Order			124.00

## **MaxAlarm**

MaxAlarm is a Maximizer companion application that automatically monitors appointments for one or more people in any number of Address Books. MaxAlarm automatically starts when you start your computer, and you can leave it running with or without Maximizer open and still be notified of appointments. Like MaxFinder, the MaxAlarm icon appears in your Windows System Tray when the application is running.

## **Maximizer Form Designer**

Maximizer Form Designer allows you to create custom dialog boxes (forms). When adding or modifying Address Book entries, you can then select the form you want to use. To access Maximizer Form Designer from Maximizer's Tools menu, you must choose the Maximizer Form Designer option during a custom installation.

For more information, refer to the online manual installed with Maximizer (Help menu > Maximizer Form Designer Guide). You can also refer to the Maximizer Form Designer's online help for assistance.

## **ecBuilder Pro 6.0 Lite**

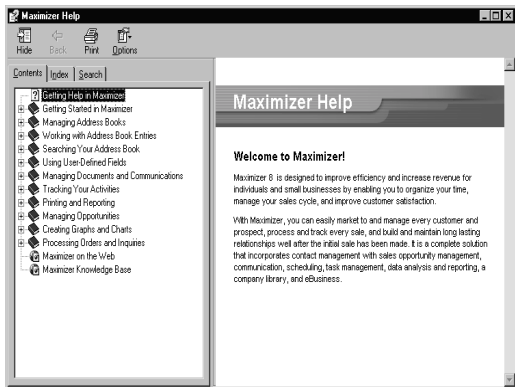
ecBuilder Pro 6.0 Lite is a wizard-driven website and catalog creation tool included with Maximizer 8. Using wizards and templates, you can easily create a professional looking website complete with an online store that is easy to maintain. When your online store is used in conjunction with OrderDesk, you are able to instantly process, track, and recall your customer order and inquiry information.

## Learning More About Maximizer

The *Maximizer Training Guide* uses the Escona Tutorial Address Book to introduce you to the fundamentals of using Maximizer. Using the training guide, you can follow tutorials that take you through real-world examples of how to use the various components of Maximizer. To order the *Maximizer 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.

The following resources are also available to you:

- **Online Help** - includes how-to (Help > Contents) and context sensitive (F1) help



- **Maximizer Knowledge Base** - <http://www.maximizer.com/knowledgebase>
- **Maximizer Website** - <http://www.maximizer.com>

## Notes

## Maximizer Software Inc. Address Information

### Corporate Headquarters Americas

Maximizer Software Inc.  
1090 West Pender Street – 10th Floor  
Vancouver, BC, Canada V6E 2N7

+1 604 601 8000 phone  
+1 604 601 8001 fax  
+1 888 745 4645 support

info@maximizer.com  
www.maximizer.com

knowledge base:  
www.maximizer.com/knowledgebase

### Europe, Middle East, and Africa

Maximizer Software Ltd  
Bridge House, Bridge Avenue  
Maidenhead, Berkshire  
SL6 1RR United Kingdom

+44 (0)1628 587777 phone  
+44 (0)1628 587778 fax  
+44 (0)870 1278 757 support

info@max.co.uk  
www.max.co.uk

### Asia

abc Multiactive (Hong Kong) Limited  
11/F Dina House, Ruttonjee Centre  
11 Duddell Street  
Central, Hong Kong

+(852) 2598 2888 phone  
+(852) 2598 2000 fax

info@maximizer.com.hk  
www.maximizer.com.hk

### Australia

Maximizer Software Pty. Ltd.  
Level 1, 815 Pacific Highway  
Chatswood, New South Wales  
2067, Australia

+61 (0)2 9957 2011 phone  
+61 (0)2 9957 2711 fax

info@maximizer.com.au  
www.maximizer.com.au