Maximizer™
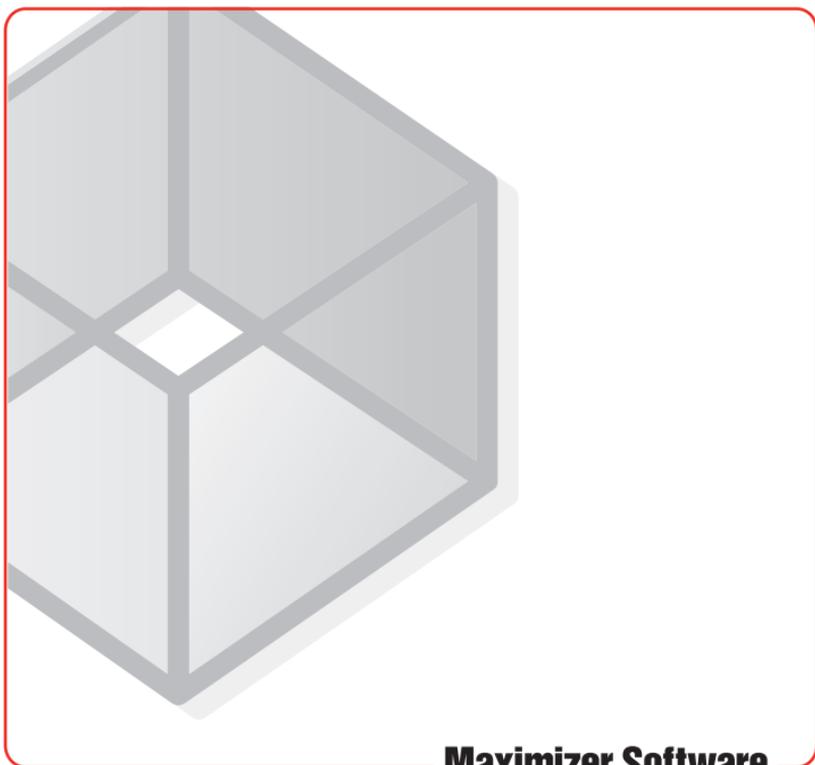## *Entrepreneur* **CRM**10

Getting Started Guide

Maximizer Software
Simply Successful **CRM**

Welcome to Maximizer CRM 10

Maximizer CRM 10 is a contact manager designed to help small businesses and home offices maximize their time, create satisfied customers, and increase sales.

With Maximizer, you can easily manage and profile customers and prospects, track sales from lead to close, and maintain long-lasting relationships with your customers. **Maximizer is a solution** that incorporates contact management with sales opportunity management, scheduling, communication, Microsoft Outlook® synchronization, a company library, eCommerce, and reporting.

Installing Maximizer

If you have a previous version of Maximizer installed on your system, uninstall it before installing the new version of Maximizer. For detailed system requirements, refer to the Maximizer User's Guide or the Maximizer web site. After installation, the manuals are available in PDF format from the Maximizer help menu.

➢ **To install Maximizer**

1. Insert the Maximizer CD into your drive.

2. If the Setup window does not appear automatically, double-click the **Autorun.exe** on the Maximizer CD.

   The Maximizer CD Setup window opens.

3. Select **Install Maximizer CRM Entrepreneur Edition**. The Maximizer setup program starts.

4. Follow the on-screen instructions to complete the installation.

For more information about installation options, refer to the *Maximizer CRM User's Guide*. You can access the guide from the Help menu in Maximizer or Administrator (Help > User's Guide).

Starting Maximizer

- Run Maximizer from the **Windows Start** menu
  (Start > All Programs > Maximizer CRM > Maximizer CRM).

  – or –

- Double-click the desktop icon.

Escona Tutorial Sample Address Book

You can explore Maximizer by opening the Escona Tutorial sample Address Book, which is installed with the software by default. The Escona Tutorial Address Book includes several pre-configured users with different security rights. It also includes sample data such as Address Book entries, opportunities, user-defined fields, notes, and documents to demonstrate how the software enables you to manage your contacts, sales opportunities, and more.

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

User ID	Password
JNAPOLI	maximizer
MASTER	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. The default password for all other users in the Escona Tutorial Address Book is **"maximizer"**.

Working with Address Books

"Address Book" is the term for a Maximizer database. The Address Book contains your contacts, opportunities, appointments, tasks, notes, and other information recorded in Maximizer. You can set up as many Address Books as you need.

You can also connect to an Address Book on any computer. The Address Book then appears the in Open Address Book dialog box.

➤ **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**.

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

➤ **To connect to an Address Book**

1. In Administrator or Maximizer, select **Connect to Address Book** from the File menu.

2. In the **Connect to Address Book** dialog box, select the computer that hosts the Address Book to which you would like to connect.

3. Choose the Address Book from the **Available Address Books** list and click **Open**.

4. Click **OK** when you are prompted with a message saying if the connection was successful or not.
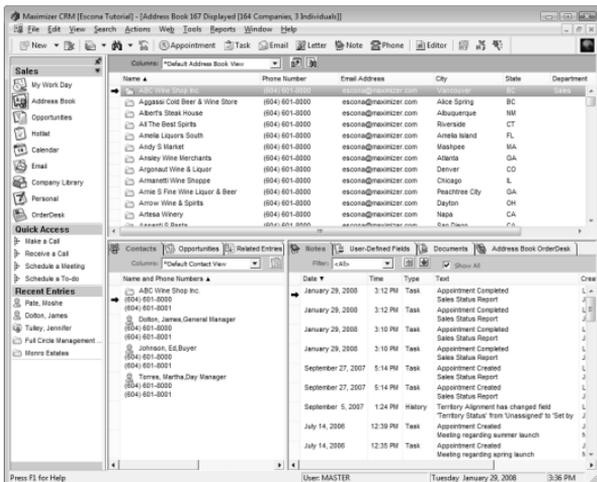
Maximizer CRM Basics

The main Maximizer window is the Address Book window. It lists the companies, organizations, and individuals you have recorded as Address Book entries. There are several other windows in Maximizer that contain your Address Book information. The main windows, such as the Address Book and Opportunities windows, are known as controlling windows. The Contacts, Notes, and User-Defined Fields tabs contain information related to the selected main window, and these are known as following windows.

Address Book

You can create an Address Book entry as one of the three following types.

Entry Type	Description
Company	Represents a group of people such as a business, organization, or association. 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 create an Address Book entry**

- Right-click in the Address Book window, select **Add**, and select one of the menu options.

    – or –

- Click the **New** button and select one of the menu options.

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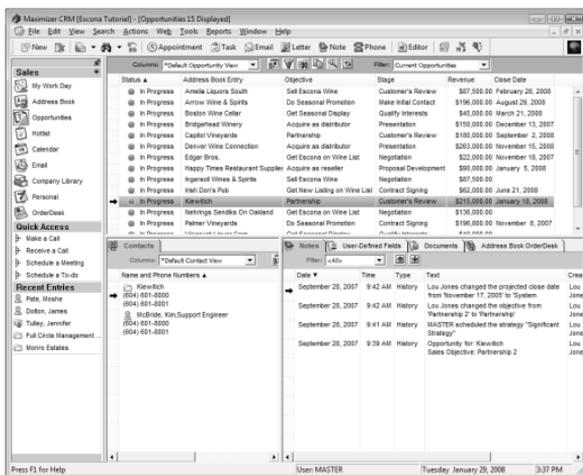
Opportunities

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

➢ To add an opportunity

1. Select the Address Book entry for 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 on the **Opportunities** icon.

    – or –

    Right-click and select **Create an Opportunity** from the shortcut menu.

    – or –

    Select **Edit > Add Opportunity** from the menu while the **Opportunities** window is open.

    – or –

    Click **Insert** while the **Opportunities** window is open.

3. Enter the opportunity details in the **Basic Information** and **User-Defined Fields** tabs. Fields in the **Status** tab are updated automatically based on the progress of the opportunity, but these values can also be updated manually.

    Press **F1** in any of the tabs for detailed help on each field and tab.

My Work Day

The My Work Day window in Maximizer displays your current and overdue appointments and Hotlist tasks. You can edit an appointment or a Hotlist task by opening it in the My Work Day window. You can also mark appointments and Hotlist tasks as complete in the My Work Day window.
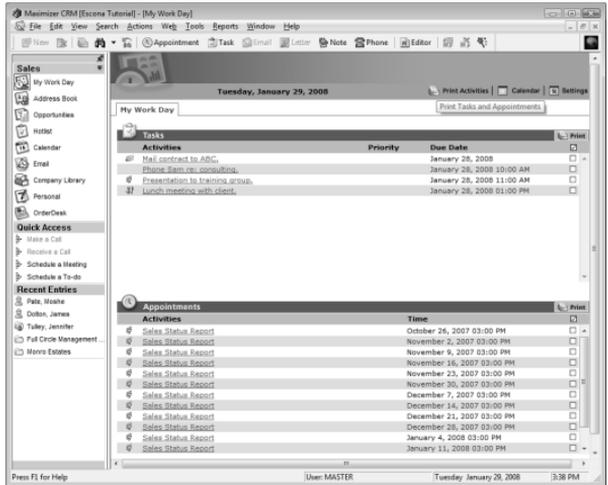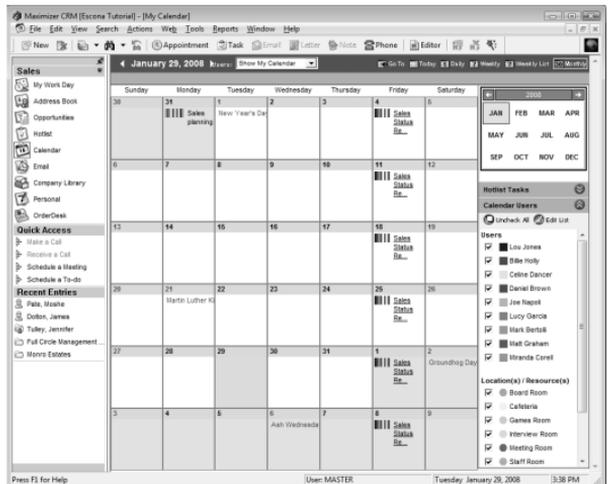

Calendar

The Calendar window enables you to schedule and view your appointments. You can view other users' calendars and see when they are busy or out of the office.

➢ **To create an appointment**

• Right-click in the Calendar window and select **Add Appointment**.

   – or –

• Drag and drop an Address Book entry on the **Calendar** icon.

Hotlist

The Hotlist window is a to-do list of tasks and reminders. Hotlist tasks can be personal or associated with an Address Book entry. Hotlist tasks can also be part of an Action Plan for an Address Book entry or an opportunity.

➢ **To add a Hotlist task**

- Right-click in the Hotlist window and select **Add Task**.

➢ **To assign a Hotlist task to another user**

- Select a user from the **Assigned to** drop-down list in the **Hotlist task** dialog box.
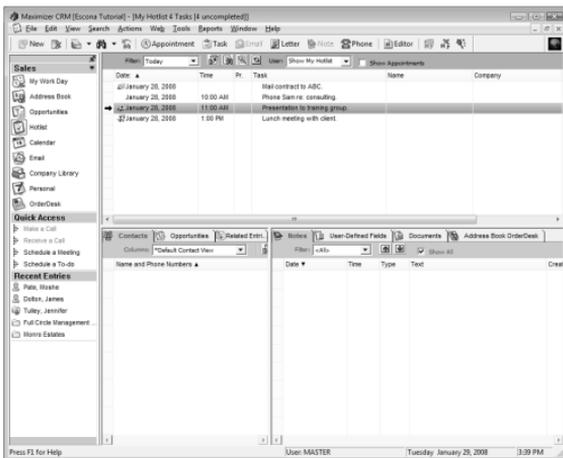
Email

The Email window enables you to send and receive email within Maximizer using your existing email system.

➢ **To send an email**

- Click the **Compose** button in the **Email** window.

    – or –

- Right-click an Address Book entry and select **Send Email**.

    – or –

- Drag and drop an Address Book entry on the **Email** toolbar button.

Company Library

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

➢ **To add a document or note to the Company Library**

1. Right-click on the folder where you are adding the document or note.
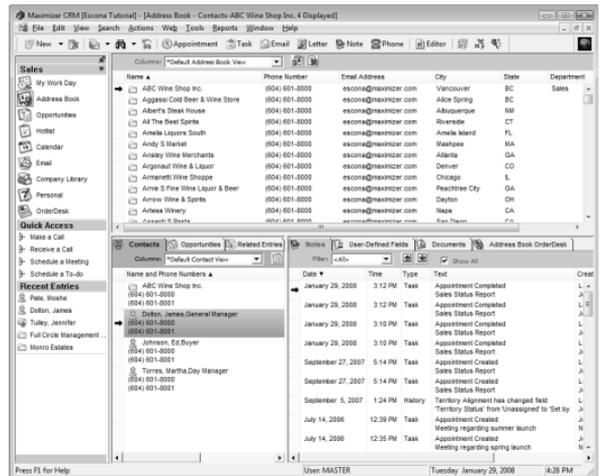
2. Select **Add > Document** or **Add > Note**.
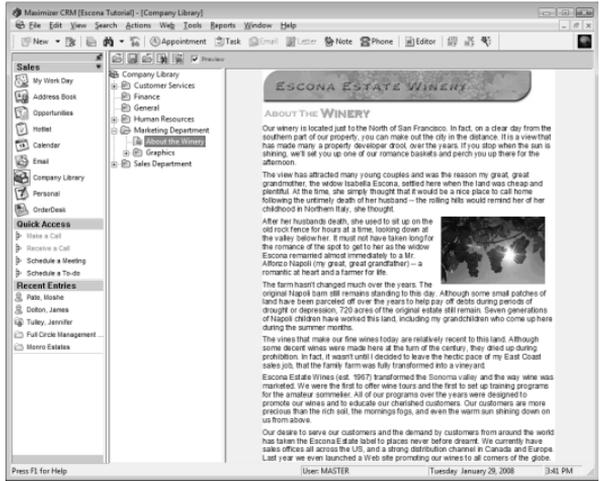
➢ **To add a new folder to the library**

• Click on the root Company Library folder or another folder and select **Add > Folder**.

Contacts

The Contacts tab displays the Contacts for the Company or Individual currently selected in the Address Book window.
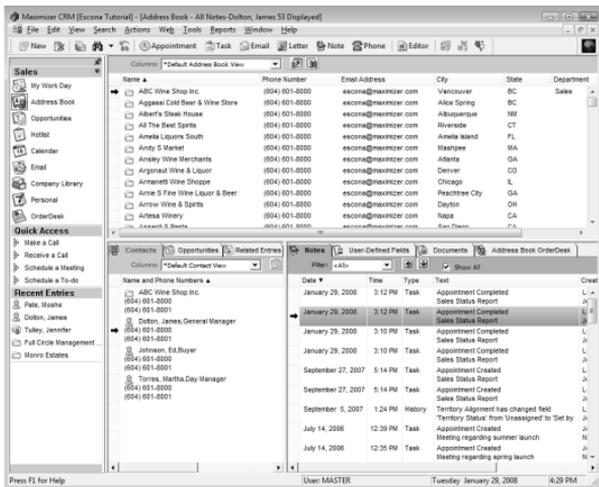
Notes

The Notes tab displays the notes associated with the selected Address Book entry or opportunity.

➢ **To add a note**

• Click the **Note** button.

  – or –

• Right-click in the **Notes** tab and select **Add Note**.

User-Defined Fields

The User-Defined Fields tab displays custom fields, which can be associated with any selected Address Book entry, opportunity, or user. You can assign values to user-defined fields from this tab. You can create new user-defined fields in Administrator (as the Master user) or in Maximizer if you have the necessary user access rights.

➢ **To create a new user-defined field**

1. Select **File > Set Up User-Defined Fields** from the menu.

2. Click the **Add Field** button.
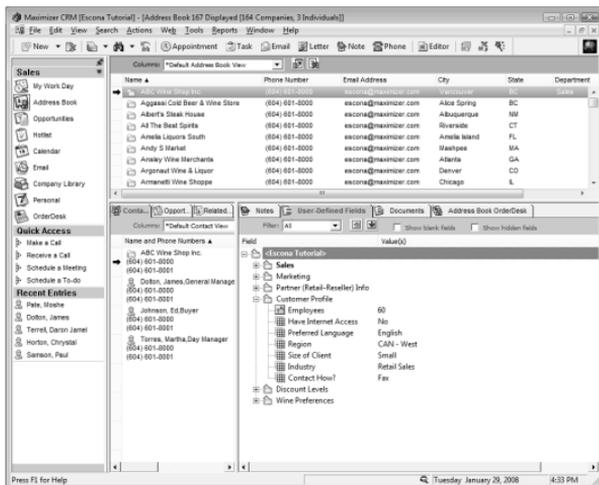
Documents

The Documents tab displays the documents associated with the selected Address Book entry or opportunity. You can insert many types of documents, such as invoices, sales sheets, letters, and faxes, including Microsoft Word or Excel and PDF files.

➢ To insert a file

1. Right-click in the **Documents** tab and select **Insert File**.

2. Browse to the location of the file to select it and click **OK**.
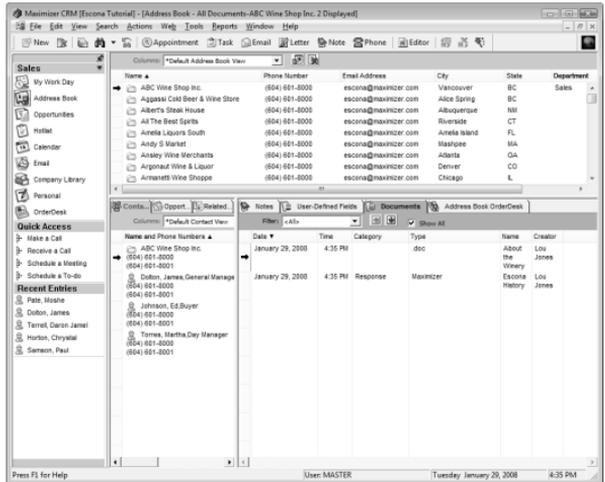
➢ To add a Maximizer Word Processor document

- Right-click in the **Documents** tab and select **Add Document**.

Address Book OrderDesk

The OrderDesk tab is used for 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.

➢ To insert an order or inquiry

- Right-click in the Address Book OrderDesk tab and select **Add > Order/Item Inquiry/General Inquiry**.

Administrator

Use Administrator to configure and manage your Address Books, including creating and managing user accounts and security groups, applying licenses, creating new Address Books, backing up Address Book data, importing data, and setting other preferences.

For detailed information about Administrator, refer to the *Maximizer CRM User's Guide* (Help > User's Guide), online help (Help > Contents), or context sensitive help (press F1 while a dialog box is open) in Administrator.

➢ **To start Administrator**

• Run Administrator from the **Windows Start** menu (Start > Programs > Maximizer > Administrator).

User Accounts

To log into Maximizer, each user must have a user ID and password.

➢ **To create a new user account**

1. Select **File > Users**.

2. Click **Add**.

3. Select **Yes** to copy user properties from the selected user or **No** to create a new, empty user account.

4. Enter at least a **User ID**, **First name**, **Last name**, and **Display name**.


5. Assign user access rights on the **Access Rights** tab.

   The default password for new user accounts is **"maximizer"**. New users should change their password the first time they log into Maximizer.

Address Book Preferences

Use Administrator to specify
Address Book preferences,
such as the system options,
Live Update options, values
for system fields, locations and
resources for appointments, Key
Fields lists, opportunity settings,
logging diagnostics, duplicate
Address Book entry handling, and
mandatory fields.

These preferences are available
through the **File > Preferences** menu item in Administrator.
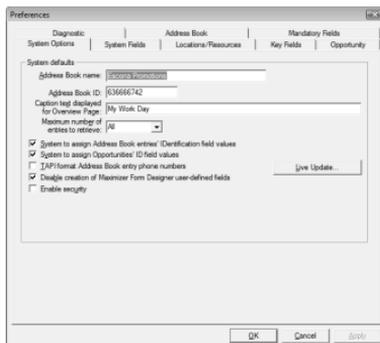
User's Guide

In addition to this Getting Started Guide, get a more
comprehensive guide to maximizing your productivity with
Maximizer CRM.

- **Electronic User's Guide:** Go to the Help menu in Maximizer
  or Administrator to view and print a PDF copy

- **Printed User's Guide:** Purchase a copy at www.maximizer.
  com/v10usersguide

Additional Products

BlackBerry and Windows Mobile device users:

- With MaxMobile, view and update customer information,
  follow-up on leads, and make notes to synchronize back to
  Maximizer

- Define a pre-set list of contacts, fields, appointments and
  tasks to synchronize

- Accurate two-way synchronization ensures that information
  on your device and your desktop is always the most current

- Go to www.maximizer.com/webstore

Palm OS users:

- Get a free copy of MaxLink to synchronize Maximizer with your Palm OS device

- Simply press the Hotsync button and work with modules already installed on your device

- Register at www.maximizer.com/register

Accounting Link:

- Link Maximizer with your QuickBooks records

- See critical customer financial information (invoices, credit limits, balances) directly from Maximizer

- Go to www.maximizer.com/quickbooks

Software Support

- Ensure your software is registered in order to receive technical support. Go to www.maximizer.com/register

- Search for answers to technical and other FAQ in the Online Knowledge Base at www.maximizer.com/knowledgebase

- Support policies: http://www.maximizer.com/support/cs/policies.html

- Tips for your call: http://www.maximizer.com/support/cs/tips.html

- Call: 1-888-745-4645 (7:00 am to 4:00 pm Pacific)

Complimentary Telephone Support:

- Covers installation of product

- Valid for 3 months following product purchase for a total of 30 minutes

Product Installation Support:

- Recommended for workgroup installations

- Valid within first 30 days after product purchase

Training Options

- Online on-demand training: www.maximizer.com/ondemandtraining

- Training Kits with a guide and CD: www.maximizer.com/trainingkits

Links and Contact Information

Customer Support: 1-888-745-4645 (7:00 am to 4:00 pm Pacific)

Sales: 1-800-804-6299 (6:00 am to 5:00 pm Pacific)

Other Contact Information: www.maximizer.com/contact

Customer Support Online: www.maximizer.com/support

Knowledge Base: www.maximizer.com/knowledgebase

Register software: www.maximizer.com/register

Request manual: www.maximizer.com/manual

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Applicability

This document applies to Maximizer CRM 10 Entrepreneur Edition.

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