

TABLE OF CONTENTS – MAXIMIZER 9.5, LEVEL 1

1 USING THIS MANUAL	6
Tips, Cautions & Notes	6
2 OBJECTIVES	7
3 INTRODUCTION	8
4 THE MAXIMIZER SCREEN	9
The Title Bar	9
The Menu Bar	9
Toolbars	11
<i>The Standard Toolbar</i>	11
<i>The Advanced Toolbar</i>	12
<i>The View Toolbar</i>	14
<i>The Icon Bar</i>	17
Active Windows in Maximizer	18
5 THE ADDRESS BOOK	19
What is the Address Book?	19
Global vs Local Address Book	20
<i>Opening an Address Book</i>	20
The Address Book Window	21
Address Book Entries	22
<i>Company vs. Individual vs. Contact</i>	22
Leads	27
6 CREATING NEW ADDRESS BOOK ENTRIES	28
<i>Adding a New Address Book Entry</i>	28
<i>Adding a New Company</i>	32
<i>Adding a New Contact for an Existing Company</i>	33
<i>Adding a New Individual</i>	34
Short Cuts & Hints for Data Entry	35
<i>Salutations</i>	38
<i>Phone Numbers</i>	39
Alternate Mailing Addresses	41
Editing an Address Book Entry	43
Toolbar in Address Book Entry	43
7 DISPLAYING YOUR DATA	45
View Menu	45
<i>View Address Book Entries</i>	46
Column Setups (View Toolbar)	47
<i>Choose a different Column Setup:</i>	48
<i>Adjust Columns widths:</i>	48
Leads	49
<i>View Leads</i>	49
8 SORTING & SEARCHING	50
Sorting	50
<i>Sorting Order</i>	50
<i>Multiple Sorts</i>	51
<i>Moving around quickly in a Sorted Column</i>	51
Keyboard Search	52
<i>Using Keyboard Searches</i>	52
9 USER-DEFINED FIELDS (UDF'S)	53

What are User-Defined Fields?	53
Why use User-Defined Fields?	53
Viewing User-Defined Field Data	54
The Four Types of User-Defined Fields	56
Examples of Tables	57
Entering Data into User-Defined Fields	58
<i>Entering Data into a Table Field</i>	60
<i>Entering Data into a Date Field</i>	61
Deleting UDF Data from a Company, Individual or Contact	62
Creating User-Defined Fields	63
<i>Creating a Table Field</i>	63
<i>Adding New Items to a Table Field</i>	63
<i>Creating a Date Field:</i>	64
Creating a Folder for UDFs	65
Changing a User-Defined Field	66
Move a User-Defined Field or Folder	68
Deleting a User-Defined Field	69
<i>Deleting Items in a Table Field</i>	69
10 COLUMN SETUPS	70
Using a Different Column Setup	70
Creating a New Column Setup	71
Modifying an Existing Column Setup	73
Printing a Column Report	74
<i>Creating an Address List for Printing</i>	75
11 PRINTING LABELS & ENVELOPES	76
Labels	76
Envelopes	78
12 SEARCHING	81
Performing a Search for a User-Defined Field	82
Performing a Second Search	83
UNDO the Search	83
13 NOTES	84
Add a Manual Note	85
Managing your Notes	86
14 PHONE CALLS	87
To Record a Phone Call	87
Phone Call Log	89
15 MY WORK DAY	90
16 HOTLIST	91
What is the Hotlist?	91
Create a Hotlist Task	91
Create a Personal Hotlist Task	93
Hotlist Window & View Toolbar	95
Mark Tasks as Completed	96
17 ACTION PLANS	97
Create an Action Plan	97
Use the Action Plan	98
18 CALENDAR	100
Create an Appointment with an Individual or Contact:	101




Create a Personal Appointment:	103
Sharing Calendars or Hotlists	104
19 THE ACTIVITY LOG	105
To View Customer-Related Activities:	105
20 E-MAIL	107
The E-mail Window Toolbar	108
Sending E-mail Messages	109
<i>Saving an E-mail Messages</i>	111
<i>Saving an Email Message that you received</i>	112
Creating a new Address Book Entry from an Email	113
<i>One Email Message</i>	114
Viewing all the Emails for One Address Book Entry	115
Sending a Document via Email	116
<i>Maximizer Editor</i>	116
<i>Word</i>	117
21 CREATING DOCUMENTS IN MAXIMIZER	118
Create a document from the Documents Window	118
Creating Templates	120
22 RELATED ENTRIES	121
23 DEFAULT ENTRIES	124
24 WINDOW LAYOUT	125
25 COMPANY LIBRARY	128
26 PERSONAL NOTES	129
27 OPPORTUNITY MANAGER	130
28 MAXIMIZER ENTERPRISE FEATURES	132

Address Book Entries

In order to keep a permanent record of a person or company, you will need to add it to your Address Book.

Company vs. Individual vs. Contact

There are three (3) different types of Address Book entries you can have:

- Company (displayed in the address book using following icon: )
- Individual (displayed in the address book using following icon: )
- Contact (displayed in the address book using following icon: )





Company

Use these records to store information about a company that you do business with.

The people that you talk to at the company will be entered as Contacts (discussed later).

Use this when you are doing business with the company - i.e. It is not the individual (person's) business you are after, you want the company to buy from you or sell to you. It is the company that will pay the bill.

List examples of Companies that you would enter into your Address Book	
Suppliers	
Customers (if your business sells to other businesses)	

 Maximizer	Maximizer	1090 West Pender St.	Vancouver	BC
 Mission Computers Inc.	Mission Computers Inc.	Box 148	St. Albert	AB
 Mom's Bakery	Mom's Bakery	101 Main Street	Edmonton	AB
 Smith Kay Engineering	Smith Kay Engineering	111 Jasper Ave.	Edmonton	AB

Companies as listed in the address book.

Adding a New Company

1. **Activate** the Address Book window (Click once anywhere in the address book window)
2. **Right-click** anywhere in the address book window.
3. From the quick menu, select **Add → Company**.

The address book entry form opens with the first name and last name area greyed out; you cannot add a person's name at this time.

4. Starting at the Company field, **fill** in the blanks (as accurately and completely as possible).


Use the Tab key to move from one blank field to another, or use the mouse to select the blank fields.

Once you have finished adding all the information, press **Enter** on the keyboard, or click the **OK** button at the bottom.

This company will now appear in your Address Book.



You may also add a company using **Edit → Add** from the menu bar or the **"New" Drop-down**

Toolbar . (You must first activate the address book window)

Try it


1. Add in a new company with this information:
 - a. Chocolate Factory
 - b. 1000 Pender Street
 - c. Vancouver, BC V8Y 9G8
 - d. Phone: 604-454-6889
 - e. Website: www.chocolate.com
 - f. Category: Supplier
2. Click on OK.

14 PHONE CALLS

Maximizer has a great system for recording phone calls and planning a follow-up activity.

Even though you do not have a phone line attached to your computer you can still use the Phone option in Maximizer!

To Record a Phone Call

1. Select the **Contact** that you wish to phone (clicking the contact once).
2. Click on **Phone**  icon in Standard Toolbar.



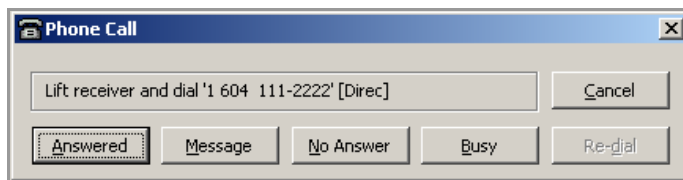
Alternatively, you may also record a phone call using one of the following methods:
- **Right-click** the company, individual or contact and click **Phone → Make a Call**
- Click **Actions → Make a Call** from the menu bar

3. Type a **Subject** for the phone call or pick from the drop down list.

Choosing a subject from the drop down list keeps your data consistent, and easily searchable.

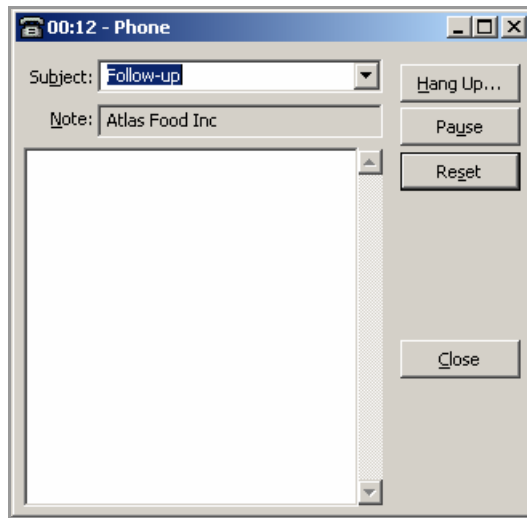
4. Click the **Dial** button.

The following window lets you choose the outcome of dialing the contact.



If you leave a message, get no answer, or the line is busy, the Phone call wizard enters an automated note and doesn't go any further. It is especially handy to have a subject typed in, so that you can remember what you called them about, when they return your call.

5. Click the **Answered**, and the following window will be displayed.



6. Copy the Subject from the Subject field, to the Notes field.

Placing the subject at the beginning of your note makes searching for the call much easier at a later date.

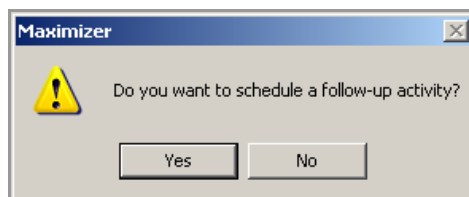
7. Click **Hang Up**, then **Save**.

*It is **very** important to click Hang up. If you click close instead, the call note is not saved.*

8. Choose a **Phone Call Result** from the list given (remember you can edit any pop list).

9. Click OK.

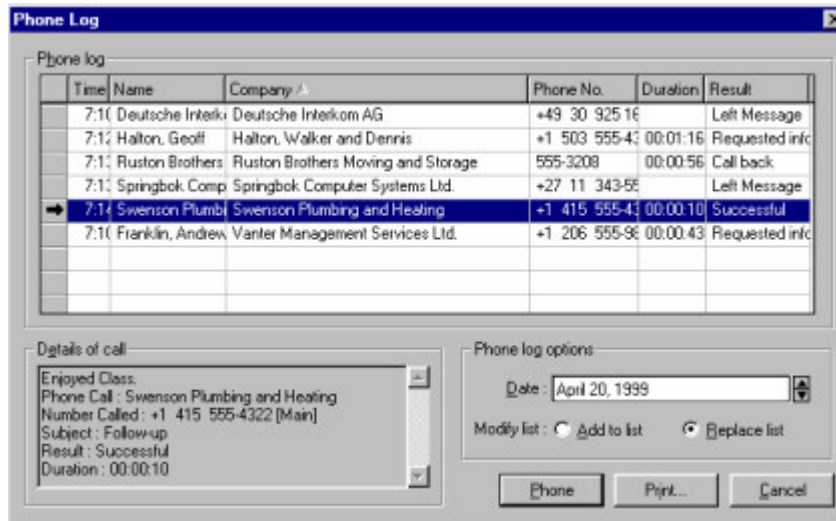
The following window prompts you for follow-up activity.



If you choose YES you will be taken into the Hotlist where you can create a reminder for anything you need to do for this customer in the future.

Phone Call Log

Maximizer creates a **Phone Log** each day to keep track of all the phones call you have made. To quickly view any phone calls you have made today or in the past, click on the **Phone Log** icon in the advanced toolbar.

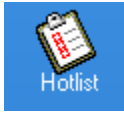


From this window, you can also:

- Directly access the phone wizard.
- Print the phone log.

16 HOTLIST

What is the Hotlist?



When you click on the Hotlist Icon (above) you will move to the Hotlist window. In the Hotlist window you will see a list of all the tasks you need to do today. These tasks can be due today or overdue from yesterday, last week, last month, etc. It may also see appointments you have scheduled (each day).

If you enter a Task into the Hotlist and do not complete it on the scheduled date, it will keep appearing on your Hotlist until you Mark it as Completed. I.e. all your overdue tasks will remain in your Hotlist with your current tasks of the day.

You can create a Personal Hotlist Task or link a Hotlist Task to any Company, Individual or Contact.

Create a Hotlist Task


Create a task or reminder and attach that task to the individual or contact it is regarding. When you need to make a phone call or send information to someone you will need to link this task to that contact or individual.

1. Activate the Address Book Window
2. Click once on the Company, Contact or Individual that you want to schedule a task for.
3. **Click and drag this entry to the Hotlist** icon on the left in the Icon Bar.

The mouse will have a plus [+] sign attached to it.



Alternatively, you can also create hotlist tasks for address book entries using one of the following methods (make sure the entry is highlighted first):

- **Right-click** the company, individual or contact and choose **Schedule → To-do**
- Use the  Task (task toolbar button)
- Select **Actions → Schedule a To-do...** from the menu bar

4. Type in the **Date** the Hotlist Task is scheduled for or due.
5. Indicate a time and alarm if you want to be reminded.
6. Type in a description of the **Activity**, or pick one from the drop down list.
7. *Assign a **Priority** and use a **picture** (icon) if you wish.*


At the bottom of this dialog box you should see the name of your address book entry selected.

Example: 'Hotlist task with Connie Clark of Mission Computers'

8. Click **OK** to save this task.

If for some reason you do not see your Hotlist task in the Hotlist window **refresh** the screen by pressing [F5] or close the Hotlist window and then open the Hotlist window again.

19 THE ACTIVITY LOG

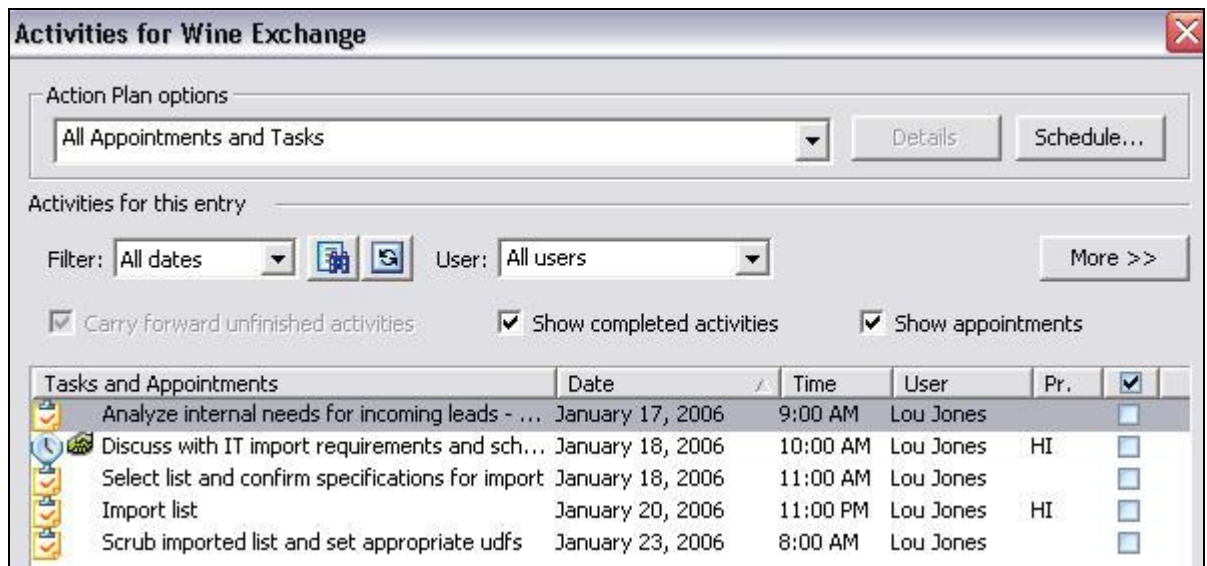
To see what activities you have with the customer, in the past or the future, you can use the Activity button  Activities on the Advanced Toolbar. This screen will show appointments or tasks scheduled (or completed) with specific contacts, individuals or companies.

This is a great way of remembering whether you scheduled a follow-up or appointment with a contact.

To View Customer-Related Activities:

1. Click on a **contact** in the Address Book window or the Contacts window.
2. Click on the **Activity** Log button. OR Double-Click on the entry & view the **Activity Tab**

Figure 13



The activities window (Figure 13) will show you all the appointments and tasks with that Contact in the future as well as in the past.

Within this Activity window, you can:

- **Add** a Hotlist task.
- **Modify** an existing task or appointment.
- **Delete** an existing task or appointment.