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# Introduction

What is Max Action?

Who should use Max Action?

## **What is Max Action?**

Max Action is an add-on to Maximizer Technologies' popular contact manager, Maximizer. Max Action's unique "float-on-top" design offers Maximizer users:

- a forms-based approach for viewing, editing, and adding Address Book entries.
- a convenient way to access Maximizer's most powerful and frequently used features together on a single screen, all easily accessible by clicking buttons.
- a powerful action planner for scheduling marketing or sales campaigns involving date-oriented activities at pre-defined times.
- a comprehensive loan analysis program for individuals in real estate or other professions who require analysis of potential or actual loan arrangements.

## Who should use Max Action?

Max Action's form-based approach complements Maximizer's powerful list-based approach. For example, after performing a search in Maximizer you can quickly flip through each of the Address Book entries comparing their addresses using Max Action.

Perhaps, you don't use all of Maximizer's address fields and would prefer a quick data entry screen that also includes your ten most frequently used user-defined fields. Max Action's entry screen lets you add the basics quickly.

Max Action brings together many of Maximizer's most frequently used features (making phone calls, adding appointments and to-dos, printing envelopes and labels, writing letters and more) together in one screen. However, Max Action was designed for individual tasks for your currently selected record. If you need to perform a mass mailing of letters, labels or envelopes then you must use Maximizer's regular print options.

If you thought Maximizer's Hotlist was great but always wanted a group of tasks to be automatically scheduled for you, then Max Action's Action Planner is the answer. The Action Planner module lets you easily schedule a sales campaign which may include for example, an introduction letter, followed up with a phone call in seven days, then a follow-up fax in two weeks and another follow-up call in a month. Enter the Action Plan once and use it for any of your Maximizer Address Book entries. The Action Planner will automatically enter the Hotlist activities for you.

### **Related Topics:**

[Prerequisites](#)

## ***Prerequisites***

To use Max Action, you should be comfortable using Maximizer. If you are a little uncertain as to how you use Maximizer's basic features, such as its Hotlist, Notes, or User-Defined fields, then you'll probably want to take one or both of Maximizer's tutorials, which can be found in your Maximizer *QuickStart* manual before proceeding.

# Running Max Action

## *To Run Max Action*

1. Click the Max Action button that has been added to your Maximizer Toolbar.



Click on this button to run Max Action, or select Maximizer's **Tools** menu and choose **Max Action**.

2. Max Action will appear.

## **Related Topics:**

[Moving Around Max Action](#)

## Moving Around Max Action

Max Action has been designed to "float" on top of Maximizer. You can click on Maximizer and select a menu, window, click on a button on the tool bar or review a dialog box. However, Max Action will remain on top of your Maximizer window. If you minimize Maximizer, Max Action will be hidden. If you restore Maximizer, Max Action will re-appear. Max Action will appear to be another window, just like your Address Book.

When Max Action is launched it will be positioned in the center of the screen. Although Max Action cannot be sized, you can move it or minimize it by clicking the minimize button (the arrow pointing down beside the Max Action caption).

### Related Topics:

[Max Action Basics](#)

## **Max Action Basics**

A new menu option called **Max Action** is added to Maximizer's main menu each time Max Action is launched. This menu is used to setup your user-defined fields, adjust printing preferences, access on-line help and display program information about Max Action.

The white edit box in the top left corner of your Max Action screen shows the name and address of your currently selected Maximizer Address Book entry. If you double-click in this area or select **Edit Address Book Entry**, you will see the Company, Individual or Contact's detailed profile screen along with the 10 user-defined fields you have setup through the **Max Action** menu, **User-Field Setup** option. For more information, see [Editing Address Book Entries](#).

The **Previous** and **Next** buttons allow you to move up and down your Maximizer Address Book, Contacts, or Hotlist window.

The **Action Planner** button opens up the Action Planner module, used to setup marketing and sales campaigns. For more information, see [Overview](#).

The **Loan Analysis** button opens up the Loan Analysis module, used to calculate potential or actual loan arrangements. For more information, see [Overview](#).

The remaining buttons are used to open various Maximizer windows and access common Maximizer features such as writing letters, making phone calls, adding to-dos, appointments, notes, etc. For more information, see [Overview](#).

To exit Max Action, click the **Exit** button or double click Max Action's [control menu box](#).



# Overview

One of the advantages of using Max Action to view, edit, and add your Companies, Individuals and Contacts is that you can include up to 10 User-Defined Fields, to appear in the same dialog box as their name and address. You may prefer Max Action's approach of adding Companies, Individuals or Contacts than jumping between Maximizer's different tabs and windows.

When Max Action is run you'll notice that a Max Action menu is added to Maximizer's main menu. It is from the **Max Action** menu that you choose which user-defined fields you would like to see on Max Action's screen.

## Related Topics:

[To Setup your User-Defined Fields](#)

## To Setup your User-Defined Fields

1. Select the **Max Action** menu with your mouse and select **User-Field Setup**.
2. The User-Field Setup dialog box will appear as shown below.



3. Select one of your Maximizer User-Defined Fields as your first Max Action User Field by highlighting a Category in the left list box and click the **Add>>** button.
4. Repeat this procedure to select up to 10 fields.
5. If you make a mistake you can delete an unwanted field from your list of user fields by highlighting the field in the right list box and click **<<Remove**.
6. Click OK when complete.

## Viewing Address Book Entries

With an active list of Address Book entries in Maximizer's Address Book , Contacts, or Hotlist windows you can quickly move up and down through your list by clicking the **Previous** and **Next** buttons in Max Action's main screen.

In the top left corner of Max Action's dialog box, you will see the formatted name and address of your current entry. Beside the Address Book entry's name you will see up to four telephone numbers and their extensions as well as their E-mail and web page address.

### **Related Topics:**

[To Review the Address Information for an Address Book Entry  
Companies, Contacts, and Individuals](#)

## To Review the Address Information for an Address Book Entry

1. Double-click the formatted name and address box in the upper left hand corner of Max Action's main screen or click the **Edit Address Book Entry** button. The following screen will appear as shown below.

The screenshot shows a window titled "Client" with a blue title bar. The window is divided into several sections:

- Name:** Mr/Ms:  +; First Name:  Initial: ; Last Name: ; Position:  +; Salutation:  +
- Address:** Company: ; Address 1: ; Address 2: ; City:  + State:  +; Zip Code:  Country:  +
- Phone Numbers:** Phone 1:  Work +; Phone 2:  Fax +; Phone 3:  +; Phone 4:  +
- User Fields:** Annual Sales: ; Current Methods:  +; Industry:  +; Personal Interests:  +; Where they heard about us:  +; Will attend '92 SOS rally?:  +; User Field 7: ; User Field 8: ; User Field 9: ; User Field 10:

At the bottom of the window are four buttons: **OK**, **Previous**, **Next**, and **Cancel**.

2. On the left hand side you will see the Address Book entry's Name, Address and Telephone Numbers. On the right hand side are the 10 User Fields you have setup through Max Action's Max Action - User-Field Setup option. For more information on setting up your User Fields, see [To Setup your User-Defined Fields](#).
3. Fields with a plus sign beside them indicate that they are pop-up fields. You can access the pop-up field either by clicking the + button or by pressing the **Insert** key while highlighted in the field. You can add new items to the following pop-up tables: Mr/Ms, Position, Salutation, City, State/Province, Country, and Phone Extensions 1-4.
4. You can move to the preceding or following record in your Maximizer Address Book window by clicking the **Previous** and **Next** Buttons.

## **Companies, Contacts, and Individuals**

One of Maximizer's most flexible features is the ability to setup either Company or Individual records, each with an unlimited number of Contacts.

Max Action uses the same dialog box to display Companies, Individuals, and Contacts. The only difference is that if the record is a Company, then all the information in the Name group box will be empty.

# Editing Address Book Entries

Any changes you make while in the dialog box will be permanently changed and saved in your Maximizer database.

## Related Topics:

[To Edit your Current Address Book Entry](#)

### ***To Edit your Current Address Book Entry***

1. Double-click the formatted name and address box in the upper left hand corner of the Max Action main screen or click the **Edit Address Book Entry** button.
2. To move forward between each of the fields press the **Tab** key. To move backwards between each of the fields, press **Shift+Tab**. To move quickly to a specific field within the dialog box, press and hold the **Alt** key while pressing the underlined letter of the field you wish to move to. For example pressing **Alt+T** will move you to the City field.
3. Make any necessary changes to the Name, Address, Phone Numbers or User Fields and click **OK** to save your changes and exit, or click **Next** to move the next record in your Address Book.

# Adding Address Book Entries

New Address Book entries can be added directly from Max Action. Max Action offers you a quick way of adding new Companies, Contacts, Individuals and User-Defined Fields without having to flip between different tabs or windows.

For this reason, you will not see the following Maximizer fields in Max Action's main dialog box: Department, Division, IDentification, or Security.

If any of these fields is critical for you when entering new Address Book entries, you should add them through Maximizer, not Max Action.

## **Related Topics:**

[To Add an Address Book Entry](#)



## ***To Add an Address Book Entry***

1. From Max Action's main screen click the **Add an Address Book Entry** button.
2. Fill in each field as you prefer. If you are creating a Company record, do not fill in any information in the Name group box.
3. You can move forward between each of the fields by pressing the **Tab** key or move backwards between fields by pressing **Shift+Tab**. To move quickly to a specific field within the dialog box, press and hold the **Alt** key while pressing the underlined letter of the field you wish to move to. For example pressing **Alt+T** will move you to the City field.
4. Click **OK** when complete.

If you fill in both a Last Name and a Company name, you will be asked whether you wish to create a new Company with an associated Contact record or an Individual.

If you fill in a Last Name but do not specify a Company name, the record will be saved as an Individual.

# Overview

Maximizer is a very powerful contact manager with a number of features. Max Action has taken some of Maximizer's most commonly used features and placed them on a single screen, each easily accessible by clicking a button. This includes:

- Finding Address Book Entries
- Printing a Label or Envelope
- Printing an Action Planner Report
- Adding To-dos and Appointments
- Adding User Fields and Notes
- Auto-dialing Address Book Entries
- Printing Letters
- Viewing your Address Book, Contacts, To-do List (Hotlist), Notes, User Fields and Letters (Documents) Windows.

# Searching for Address Book Entries

Max Action allows you to perform the following Maximizer searches: Last Name, Company/Organization, City, State/Province, Zip/Postal Code, Client ID, Phone Number 1, User-Defined Fields and Notes.

When you perform a search from Max Action it does not matter where you currently are in Maximizer, as focus will always be set to your Address Book window.

## **Related Topics:**

[To Perform a Search](#)

### ***To Perform a Search***

- Click the **Find Address Book Entries** button
- A menu listing Maximizer's most common search options appears.
- Select what you would like to search for.
- Fill in the resulting dialog box and click **OK**.

# Printing Labels and Envelopes

Max Action allows you to quickly print a label or envelope for your currently selected Company, Individual or Contact record. If you need to print labels or envelopes for more than just the entry you have selected, please use Maximizer.

## Related Topics:

[To Print a Single Label](#)

[To Print a Single Envelope](#)

### ***To Print a Single Label***

1. Make sure that you have setup your label preferences in Maximizer's **File - Preferences - Labels** setup screen.
2. With your current Address Book entry displayed, click the **Print a Label** button.
3. If you want to log a message to the note file of your current entry, type in an appropriate message and click **OK**.

### ***To Print a Single Envelope***

1. Make sure that you have setup your envelope preferences in Maximizer's **File - Preferences - Envelopes** setup screen.
2. With your current Address Book entry displayed, click the **Print Envelope** button.
3. If you want to log a message to the note file of your current entry, type in an appropriate message and click **OK**.

# Printing a Report

Max Action includes a report which produces a detailed profile of your currently selected Address Book entry's name and address, User Fields and Action Plans that have been assigned. For more information on Action Plans see [Overview](#).

## Related Topics:

[To Select and Setup your Printer](#)

[To Print a Report](#)



### ***To Select and Setup your Printer***

1. Use your mouse to select the **Max Action** menu from Maximizer's main menu and choose **Printer Setup**.
2. The Print Setup dialog box will appear. The available options will depend on the printer you select. Choose a printer, set your options and click **OK**.

### ***To Print a Report***

1. With a current Address Book entry selected, click **Print a Report** from Max Action's main screen.
2. The Print dialog box will appear. Make sure your printer is turned on and has paper. Click **OK** to continue.

# Adding Appointments and To-dos

Max Action offers a convenient method of adding appointments and to-dos for your currently selected Address Book entry. Personal appointments and to-dos must be added through Maximizer. Max Action can only be used to add tasks and meetings which are scheduled for the current Address Book entry you are viewing.

## Related Topics:

[To Add an Appointment](#)

[To Add a To-do \(Hotlist Task\)](#)

## To Add an Appointment

1. With your current Address Book entry displayed, click the **Add Appointment** button. The following dialog box will appear.

**Add Appointment for Anderson, William R.**

**Scheduled Date**  
08 / 08 / 1994

**Scheduled Time**  
From : 11 : 00 : AM  
Until : 11 : 00 : AM

**Details of Task**  
Activity :  +  
Priority :  +  Task is Done  
 Set Alarm 10 Minutes Prior to Appointment

OK Cancel

2. Enter the month, day and year for the appointment. Use the scroll buttons to quickly select a date if you prefer.
3. Enter a start and end time for your appointment. Use the scroll buttons to quickly select a time if you prefer.
4. Enter the text for the appointment.
5. If you like, enter a priority of up to three characters. If the appointment has already been completed select the **Task is Done** checkbox.
6. If you wish to be notified of the appointment with an audible alarm, make sure that you select the **Set Alarm** checkbox.
7. Click **OK**.

## To Add a To-do (Hotlist Task)

1. With your current Address Book entry displayed, click the **Add a To-do** button. The following dialog box will appear.

**Add To-do for Anderson, William R.**

**Scheduled Date**  
08 / 08 / 1994

**Scheduled Time**  
11 : 00 : AM

**Details of Task**  
**Activity :**  +

**Priority :**  +  **Task is Done**

**OK** **Cancel**

2. Enter the month, day and year for the Hotlist task. Use the scroll buttons to quickly select a date if you prefer.
3. Enter a time for the task. Use the scroll buttons to quickly select a time if you prefer. If you want to schedule a task that has no specific time associated with it, delete both the hours and minutes values.
4. Enter the text for the task.
5. If you like, enter a priority of up to three characters. If the to-do has already been completed select the **Task is Done** checkbox.
6. Click **OK**.

## Adding Notes and User Fields

Max Action allows you to easily add new Notes and User Fields directly from its main screen. Max Action will automatically open Maximizer's Notes or User-Defined Fields window and press the Insert key for you. All you have to do is enter the text of the note or select the User-Defined Fields you wish to add to your current Address Book entry.

### Related Topics:

[To Add a Note](#)

[To Add User Fields](#)

### ***To Add a Note***

1. With a current Address Book entry selected, click the **Add a Note** button.
2. The Notes window will be activated and Maximizer's Add Note dialog box will appear.
3. Enter the text of the note and click **OK**.

### ***To Add User Fields***

1. With a current Address Book entry selected, click the **Add User Fields** button.
2. The User-Defined Fields window will be activated and Maximizer's Add User-Defined Fields dialog box will appear.
3. Select the fields you wish to add and click **OK**.
4. If you marked multiple fields, enter the text or select the items for each table.



# Making Phone Calls

Max Action provides two convenient methods for making phone calls. You may click the **Phone Address Book Entry** button to dial a Company, Individual, or Contact as you would from within Maximizer. You may also use Max Action simply as an auto-dialer by double clicking one of the four phone numbers in Max Action's main screen. This method does not open a phone note and begin logging the elapsed time of the call as Maximizer does. It is simply an auto-dialer.

## Related Topics:

[To Phone an Address Book Entry](#)

### ***To Phone an Address Book Entry***

1. If you have a modem, make sure you have setup Maximizer's modem preferences in **File - Preferences - Dialing**.
2. With a current Address Book entry selected, click the **Phone Address Book Entry** button. Or to simply auto-dial the entry, double click one of the four phone numbers you wish to dial.
3. If you are auto-dialing an entry, lift your telephone receiver and click **OK** when the number has been dialed and begins ringing.

# Writing Letters

Maximizer's Editor is a powerful built-in word processor that allows you to produce attractive letters and faxes. Max Action allows you to launch Maximizer's Editor from its main screen to write a letter or send a fax to your current Address Book entry.

## Related Topics:

[To Write a Letter/Fax](#)

### ***To Write a Letter/Fax***

1. With a current Address Book entry selected, click the **Write a Letter** button.
2. Maximizer's Editor will be launched and the Create New Document dialog will appear.
3. Enter a Name for your document.
4. Select an appropriate template (\* **Letter** for letters, \* **Fax Form** for faxes) and click **OK**.
5. Go on to write, edit and format your document. When you are done select Maximizer Editor's **File** menu and choose **Save**.
6. Select Maximizer Editor's **File** menu and choose **Exit** to return to Max Action.

## Viewing Windows

If you need to open or view a Maximizer window, you may find it more convenient to do so from Max Action, rather than clicking on the appropriate button on Maximizer's Icon bar.

For example, you may find it quicker to click the Address Book button on Max Action's main screen then to click the Address Book Icon in Maximizer.

<b>Click on Max Action's...</b>	<b>To activate Maximizer's...</b>
<b>Address Book</b> button	Address Book window
<b>Contacts</b> button	Contacts Window
<b>To-do List</b> button	Hotlist window
<b>Notes</b> button	Notes window
<b>User Fields</b> button	User-Defined Fields window
<b>Letters</b> button	Documents window

## Overview

The Action Planner module bring a tremendous amount of additional power and flexibility to Maximizer's Hotlist. This module allows you to set up a series of tasks which comprise a plan that can be assigned to an Address Book entry. The tasks can be any of the following (making a phone call, sending a letter, sending a fax, scheduling a to-do, or other).

You decide how many days, weeks, months, or years before/after the date of the plan each task should occur, and Action Planner will automatically schedule the entire plan for you, even skipping weekends.

Plans can occur once or can be a regular recurring event. This allows you to schedule flexible one-time only sales or marketing campaigns or regular quarterly activities with your "best" clients.

Using the Action Planner module is a simple two-step process. Create your Action Plans then apply them to your Address Book entries.

# Creating an Action Plan

You can create an unlimited number of Action Plans and assign them to one, some or all of your Address Book entries. Creating an Action Plan is a straight forward process but is best illustrated with an example.

## Related Topics:

[Example](#)

## **Example**

You would like to schedule the following tasks each time you receive a new lead:

- 1 day after receiving the lead you send out a brochure,
- 2 weeks after receiving the lead you make your initial phone call,
- 1 month after receiving the lead you send a follow-up letter,
- 6 weeks after receiving the lead you place your second phone call, and
- 3 months after receiving the lead you evaluate the prospect and decide whether any additional follow-up should be scheduled.

### **Related Topics:**

[To Create an Action Plan](#)

## To Create an Action Plan

1. From Max Action's main screen, click the **Action Planner** button.
2. From the Available Action Plans dialog box, click the **Create Plan** button. The following dialog box will be displayed.

The screenshot shows a dialog box titled "Create/Change an Action Plan". It features a "Plan Name" text input field at the top. Below it is a section labeled "Dates for Plan" containing a large empty list box. At the bottom of the dialog, there are several controls: a spinner box with the number "1", a dropdown menu labeled "Day(s)", another dropdown menu labeled "After", and a dropdown menu labeled "Date" with "Make Phone Call" selected. To the right of these controls are buttons for "OK", "Cancel", "Remove", "Add", and "Change". At the bottom left, there is a "Description of Task" text input field with a "+" button to its right.

3. For our example, type in **Lead Tracking Plan** as a Plan Name.
4. Click on the **Make Phone Call** combo-box and change this to **Schedule a To-do**.
5. Press **Tab** and enter **Send Brochure** as a Description for your first task.
6. Click **Add** to add this task as your first date for your Lead Tracking Plan.
7. Click in the edit box which contains the number 1. Change this to a **2** by the clicking the up arrow scroll button.
8. Press **Tab** to move to the field which says **Day(s)**, click the down arrow to display the other options and select **Week(s)**.
9. Change the task from **Schedule a To-do** to **Make Phone Call**.
10. Press **Tab** and enter **Initial Call** as a Description of this Task.
11. Click **Add** to add this task as your second date for your Lead Tracking Plan.
12. Schedule the remaining three tasks which are described Example. When you are finished, your Action Plan should appear as follows.



**Create/Change an Action Plan**

Plan Name :

Dates for Plan :

1	Day(s)	After	(Date)	Schedule a To-do	Send Brochure
2	Week(s)	After	(Date)	Make Phone Call	Initial Call
1	Month(s)	After	(Date)	Send Letter	Follow-up
6	Week(s)	After	(Date)	Make Phone Call	Second Call
3	Month(s)	After	(Date)	Other	Evaluate Prospe

Description of Task :

13. If you made any mistakes, you can delete a task by selecting it and clicking the **Remove** button. Changes to a task can be made by first selecting the date in the list box, making your editing changes and then click **Change**.
14. The (Date) field in the Dates for Plan list box will be assigned when you apply this plan to an Address Book entry. Click **OK** to save your changes and exit the Create Action Plan dialog box.

# Applying an Action Plan to an Address Book Entry

After setting up each of your Action Plans, you can now begin assigning them to particular Address Book entries. When you assign a plan to an entry you can:

- enter the date the plan should begin,
- decide whether to skip weekends and have Action Planner automatically reschedule tasks on Friday or Monday,
- decide whether the plan is a one-time only plan such as a special marketing campaign, or whether the plan is recurring, such as regular quarterly follow-ups with your "best" clients.

When you apply a plan to an Address Book entry, Max Action creates a Date User-Defined Field for your Address Book entry with the Name of the Plan and the Date it was started. The individual tasks of the plan such as the dates of your phone calls, letters, faxes, and to-dos are created as individual Hotlist tasks for your Address Book entry. As these tasks arise, you will see them appear in your daily Hotlist.

In addition, when a plan is assigned to an Address Book entry, a note is created which shows the Name of the Plan, the Date it was started, who it was created for, and all of the dates of the tasks which make up the plan. This can serve as a valuable history record.

Any plans which have been assigned to an Address Book entry are also displayed in the drop down combo-box which can be found on Max Action's main screen, right below the Action Planner button.

## **Related Topics:**

[To Apply an Action Plan to an Address Book Entry](#)

## To Apply an Action Plan to an Address Book Entry

1. With an Address Book entry selected, click the **Action Planner** button from Max Action's main screen.
2. Select the Action Plan you would like to assign in the Available Action Plan list box.
3. Click the **Apply Plan to...** button. The following dialog box will be displayed.

The screenshot shows a dialog box titled "Apply Action Plan". It features a date field "Start Plan on" set to "08 / 09 / 1994". Underneath, there are two radio button options for "Type of Plan": "One-time Only" (which is selected) and "Recurring". A checkbox labeled "Skip Weekends" is checked. A section titled "Recurring Plan" contains two rows of input fields: "Apply Plan for" with a value of "1" and a "Day(s)" dropdown menu, and "Recurring every" with a value of "1" and another "Day(s)" dropdown menu. At the bottom of the dialog are "OK" and "Cancel" buttons.

4. Select the date you wish the plan to begin. Today's date will be displayed by default. You can use the up and down scroll buttons to select a different date if you prefer.
5. Choose whether the plan should be scheduled just once by clicking **One-time Only** or **Recurring**, if it is a recurring plan that should start over again after a certain period of time.
6. If you are applying a recurring plan, enter the total length of time the plan should be scheduled for as well as the frequency of recurrence. For example, if you wish to schedule a plan over the next 5 years and you would like the individual tasks which make up the plan to be scheduled every six months, enter Apply Plan for 5 Year(s), Recurring every 6 Month(s).
7. If you would like any dates which fall on a Saturday to be re-scheduled to Friday and Sunday tasks to be rescheduled to Monday, leave the **Skip Weekends** checkbox selected.
8. Click **OK**. Each of the tasks that comprise the plan will be added to your Maximizer's Hotlist data file. If you have a complex recurring plan over a long period of time, this may take several moments to complete.
9. Click **Close** to exit the Action Planner dialog box. From Max Action's main screen you can review the Action Plan that you have just scheduled by clicking the **Notes** button. An entire record of the plan is posted as a history record in your Address Book entry's Notes list.

# Changing an Action Plan

You may find that in reviewing a plan that you would like to create additional tasks or perhaps make changes to the individual tasks that make up the plan.

## **Related Topics:**

[To Change an Existing Action Plan](#)

### ***To Change an Existing Action Plan***

1. From Max Action's main screen, click the **Action Planner** button.
2. Select the Action Plan you would like to edit and click **Change Plan**.
3. In the Create/Change an Action Plan dialog box, select the date you wish to edit, make any necessary changes and click **Change**.
4. Click **OK** to save your changes and exit the dialog box.

# Deleting an Action Plan

Occasionally, you may find that you no longer need an Action Plan. An Action Plan can be deleted as described below. The only way to delete plans and tasks that have been assigned to a particular Address Book entry is by deleting the specific task from Maximizer's Hotlist or from the entry's User-Defined Fields window.

## Related Topics:

[To Delete an Action Plan](#)

### ***To Delete an Action Plan***

1. From Max Action's main screen, click the **Action Planner** button.
2. Select the Action Plan you would like to delete and click the **Delete Plan** button.
3. Confirm the deletion by clicking **OK**.

# Overview

The Loan Analysis option of Max Action provides five options for the analysis of potential or actual loan arrangements. Using Loan Analysis you can:

- Calculate payments
- Create and print payment schedules
- Perform creative financing techniques
- Evaluate maximum purchase prices
- Compute outstanding balances

If a payment schedule or maximum purchase price calculation is performed for your currently selected Address Book entry , you can save the details of the loan to their Notes file and save the maximum purchase price fields as User-Defined Fields. This can be a valuable asset for Realtors and other sales professionals who need to analyze loan arrangements.



# Payment Calculations

To Calculate the Payment Amount on a Loan

## To Calculate the Payment Amount on a Loan

1. From Max Action's main screen, click the **Loan Analysis** button. The Loan Analysis program appears as shown below.

The screenshot shows a window titled "Loan Analysis" with a menu bar containing "File" and "Help". The main area contains several input fields and buttons:

- Loan Amount :**
- Interest Rate :**
- Amortization Period :**
- Compound Period :**
- Payment Frequency :**
- Payment Amount :**

Below these fields is a section titled "Payment Schedule" with:

- Start Month :**
- Start Year :**

At the bottom, there is a table header with four columns: "Date", "Interest Paid", "Principal Paid", and "Balance Due". The table body is currently empty.

2. Enter the Loan Amount, the original amount of money borrowed (the loan principal). Press **Tab**.
3. Enter the **Interest Rate**. Press **Tab**.
4. Enter the Amortization Period, the number of years necessary to pay back the loan principal in constant periodic payments. Press **Tab**.
5. Enter the Compound Period, the number of times per year the interest is compounded or payable (**12** for the United States, **2** for Canada). Press **Tab**.
6. Enter the Payment Frequency, the number of loan payments per year. This value is often 12 since many loans have monthly payments. Press **Tab**.
7. The **Payment Amount** is automatically calculated for you.
8. Click the **Save Loan Details to Notes** button to create a Note for your currently selected Address Book entry with the details of the loan.

# Payment Schedule

The Payment Schedule option of Loan Analysis provides a schedule of the interest and principal portions of each loan payment.

## Related Topics:

[To Calculate a Payment Schedule](#)

[To Print a Payment Schedule](#)

### ***To Calculate a Payment Schedule***

1. From Max Action's main screen, click the **Loan Analysis** button.
2. Enter a Loan Amount, **Interest Rate**, Amortization Period, Compound Period, and Payment Frequency. For more information, see Payment Calculations.
3. Select the **Start Month** and **Start Year** for the date of the first payment.
4. Click **Calculate Table** to display a schedule for the duration of the loan.

This payment schedule can be printed.

## To Print a Payment Schedule

1. Select Loan Analysis' **File** menu and choose **Printer Setup**.
2. The Print Setup dialog box will appear. The available options will depend on the printer you select. Choose a printer, set your options and click **OK**.
3. Select Loan Analysis' **File** menu and choose **Print Payments**. The Print Schedule dialog box appears as shown below.

**Print Schedule**

Print From : **SEP**    Until End of : **1994**

Prepared By : **Sea Ranch Group**

**Mr. William R. Anderson**  
President  
Anderson & Associates  
7221 - 1st Street NW  
Tacoma, WA 98112

**Print**                      **Cancel**

4. Select a starting month and ending year for the schedule.
5. Enter your name in the **Prepared by** field. Your currently selected Address Book entry's name and address is also shown. This information will be printed at the top of the schedule.
6. Click **Print** to begin printing.

# Creative Financing

Loan Analysis' Creative Financing option allows you to find the value of any loan with an interest rate not equal to the existing market rate. It can be used to evaluate such arrangements as where the seller agrees to "buy down" the interest rate on the purchaser's existing loan, or where a purchaser assumes a mortgage with a below-market interest rate.

## Related Topics:

[To Perform Creative Financing](#)

## **To Perform Creative Financing**

1. From Max Action's main screen, click the **Loan Analysis** button.
2. Enter a Loan Amount, **Interest Rate**, Amortization Period, Compound Period, and Payment Frequency. For more information, see Payment Calculations.
3. Click the **Creative Financing** button.
4. Enter the Market Interest Rate, the prevailing rate offered by lenders. Press **Tab**.
5. Enter the Term, the life of the loan, or the number of years until the load interest rate is renewed. Press **Tab**.
6. Click the **Calculate** button. This displays the Loan Value, the present value of the loan based on the prevailing market interest rate for the specified term.

# Maximum Purchase Price

The Maximum Purchase Price option of Loan Analysis allows you to find the highest loan borrowers can afford given their incomes, available down payments, and lending guidelines concerning loan-to-value and debt service ratios.

## Related Topics:

[To Calculate Maximum Purchase Price](#)



## **To Calculate Maximum Purchase Price**

1. From Max Action's main screen, click the **Loan Analysis** button.
2. Enter a Loan Amount, **Interest Rate**, Amortization Period, Compound Period, and Payment Frequency. For more information, see Payment Calculations.
3. Click the **Maximum Purchase Price** button.
4. Enter the Annual Income, the total gross income of the borrower. Press **Tab**.
5. Enter the Maximum Down Payment, the highest amount of money that the borrower can initially invest in the loan. Press **Tab**.
6. Enter Annual Taxes/Other Debt, the estimated annual payments on other debts by the borrower. Press **Tab**.
7. Enter the Maximum Loan-to-Value Ratio, the highest amount the lender is willing to lend relative to the market value or purchase price of the item for which the loan is being secured. A Maximum Loan-to-Value Ratio of 75 is common. Press **Tab**.
8. Enter the Required Debt Service Ratio, the loan payment divided by the borrower's gross income. Add annual taxes/other debt to the payment before dividing it by the gross income. A debt service ratio of 30 is common. Press **Tab**.
9. Click the **Calculate** button. This displays the maximum purchase price for the prospective borrower.
10. Click the **Save to Categories** button to add **Annual Income**, **Maximum Down Payment**, **Annual Taxes/Other Debt** and **Maximum Purchase Price** as User-Defined Fields for your currently selected Address Book entry.

# Outstanding Balance

The Outstanding Balance option of Loan Analysis calculates the amount of money still owed by the borrower on a specified date.

## Related Topics:

[To Calculate an Outstanding Balance](#)

### ***To Calculate an Outstanding Balance***

1. From Max Action's main screen, click the **Loan Analysis** button.
2. Enter a Loan Amount, **Interest Rate**, Amortization Period, Compound Period, and Payment Frequency. For more information, see Payment Calculations.
3. Click the **Outstanding Balance** button.
4. Select the Month and Year of the last payment.
5. Click the Calculate button. This will display the outstanding balance on the specified date.

# Glossary of Terms

Amortization Period

Annual Income

Annual Taxes/Other Debt

Auto-dial

Compound Period

Control menu box

IDentification

Loan Amount

Loan Value

Market Interest Rate

Maximum Down Payment

Maximum Loan-to-Value Ratio

Minimize button

Payment Frequency

Pop-up

Required Debt Service Ratio

Term

Tool bar

## **Amortization Period**

The number of years necessary to pay back the loan principal in constant periodic payments.

## **Annual Income**

The total gross income of the borrower.

## **Annual Taxes/Other Debt**

The estimated annual payments on other debts by the borrower.

## **Auto-dial**

Using a modem, allows you to automatically dial a phone number.



## **Compound Period**

The number of times per year the interest is compounded or payable (12 for the United States, 2 for Canada).

## **Control menu box**

Area in top left hand corner of some windows that, if double-clicked, closes the application or window.

## **IDentification**

A unique number which Maximizer assigns to each Company or Individual record.

## **Loan Amount**

The original amount of money borrowed (the loan principal).

## **Loan Value**

The present value of the loan based on the prevailing market interest rate for the specified term.

## **Market Interest Rate**

The prevailing rate offered by lenders.

## **Maximum Down Payment**


The highest amount of money that the borrower can initially invest in the loan.

## **Maximum Loan-to-Value Ratio**

The highest amount the lender is willing to lend relative to the market value or purchase price of the item for which the loan is being secured.



## **Minimize button**

The button (  ) in the top right corner of an application that is used to minimize the program to an icon.

## **Payment Frequency**

The number of loan payments per year.

## **Pop-up**

A field which brings up a pop-up list box of items that may be selected. Helps reduce keystrokes and maintain data consistency.

## **Required Debt Service Ratio**

The loan payment divided by the borrower's gross income.

**Term**

The life of the loan, or the number of years until the load interest rate is renewed.

## **Tool bar**

A row of buttons in Maximizer which perform certain tasks or open particular windows.

