

# Maximizer™

## Setup Guide

.....



# LICENSE AGREEMENT

**This is a legal agreement between you, the end user, and Multiactive Software, Inc. (“Maximizer”). The enclosed Multiactive Software, Inc. software program (the “SOFTWARE”) is licensed by Multiactive Software, Inc. for use only on the terms set forth herein. Please read this license agreement. If you do not agree to these terms, do not continue to use the software and return the complete product with proof of purchase to the vendor immediately for a full refund. Continuing to use the software constitutes your agreement to the terms of this license.**

## **Grant of License**

Multiactive Software, Inc. grants to you the right to use one copy of the enclosed SOFTWARE on a single terminal connected to a single computer (i.e. single CPU) or to a network server. If you install the SOFTWARE on a network server, you must purchase licenses for each concurrent user (i.e. the maximum number of users who will be accessing or operating the software at the same time). The SOFTWARE is in “use” on a computer when it is loaded into the RAM or installed into the permanent memory (e.g. hard disk, CD-ROM, or other storage device) of that computer. As a multi-user, the number of computers and terminals accessing or operating the SOFTWARE shall not exceed the number of SOFTWARE licenses purchased.

## **Grant of Network License**

If you are acquiring the SOFTWARE for network use, Multiactive Software, Inc. grants to you the right to use the SOFTWARE on a LICENSED COMPUTER NETWORK. A computer network is any combination of two or more terminals that are electronically linked and capable of sharing the use of a single software program. A LICENSED COMPUTER NETWORK is a computer network for which you have acquired one (1) Base Package of the SOFTWARE (which can run stand-alone or on a network server) or a LAN Pack. If more than one user wishes to use the SOFTWARE on a computer network at the same time, then you must add authorized users by acquiring LAN Packs licensed for the number of concurrent users or any combination of Base Packages and LAN Pack user licenses. In no event may the total number of concurrent users on a network exceed one for each Base Package plus the number of users authorized by licenses acquired for the network.

## **Transfer of Software**

You may permanently transfer to another person or company all of your rights to use the SOFTWARE provided that the SOFTWARE includes a Base Package and you transfer to that person or company all the software, CD-ROMs, and documentation provided in this package, and destroy or transfer all copies, including backup copies and copies on any medium, including copies on hard disks. It may then be used only at the single location to which it is transferred and only in accordance with the above copyright laws.

---



## **Other Restrictions**

You may not rent or lease the SOFTWARE. You may not reverse engineer, decompile, disassemble, or create derivative works from the SOFTWARE.

## **Warranty**

Multiactive Software Inc. warrants the physical CD-ROMs and physical documentation enclosed to be free from defects in materials and workmanship for a period of 90 days from the date of purchase. When notified within the warranty period of defects in material or workmanship, Multiactive Software Inc. will replace the defective CD-ROM or documentation. If you need to return a defective product, call Maximizer Technical Support to obtain a return authorization number. The remedy for breach of this warranty shall be limited to replacement and shall not encompass any other damages, including but not limited to loss of product, and special, incidental, consequential, or other similar claims.

Multiactive Software Inc. specifically disclaims all other warranties, expressed or implied, including but not limited to implied warranties of merchantability and fitness for a particular purpose with respect to defects in the CD-ROMs and documentation, and the program license granted herein in particular, and without limiting operation of the program license with respect to any particular application, use, or purpose. In no event shall Multiactive Software Inc. be liable for any loss of profit or any other commercial damage, including but not limited to special, incidental, consequential, or other damages.

If you are not completely satisfied with Maximizer 5.0, return it at any time within one year of date of purchase and Multiactive Software Inc. will refund the purchase price (excluding applicable taxes). Contact Maximizer Technical Support to obtain a return authorization number and further instructions. Must have proof of purchase and postage (shipping) must be prepaid. Guarantee applies only in Canada and the USA. This policy is subject to change.

## **Governing Law**

This statement shall be construed, interpreted, and governed by the laws of the Province of British Columbia, Canada.

## **Notice of Copyright**

This software is protected by both the United States and Canadian copyright laws and international treaty provisions. Multiactive Software Inc. authorizes you to make archival copies of the software for the sole purpose of backing up our software and protecting your investment from loss. Otherwise, it is illegal to make copies of the program without the written permission of Multiactive Software Inc. In particular, it is illegal to give a copy to another person.

Published by  
Multiactive Software Inc.  
Copyright © 1998  
All rights reserved.

Portions of this program Copyright© 1982-1998 Pervasive Software Inc. All rights reserved.

## **Registered Trademarks and Proprietary Names**

Maximizer is a registered trademark of Multiactive Software Inc. Product names mentioned in this document may be trademarks or registered trademarks of Multiactive Software Inc. or other hardware, software, or service providers and are used herein for identification purposes only.

## **Applicability**

This document applies to Maximizer software version 5.0.

## **Printing History**

First release: June 1998

## **Multiactive Software Inc. Address Information**

### **North America (Head Office):**

1090 West Pender Street, 9th Floor  
Vancouver, B.C. V6E 2N7  
CANADA

Phone: (604) 601-8000  
Fax: (604) 601-8001  
Web site <http://www.maximizer.com>  
Support line +1 (604) 601-8100

### **Europe:**

Bridge House, Bridge Avenue  
Maidenhead, Berkshire SL6 1RR  
UNITED KINGDOM

Phone: +44 (0) 1628 587777  
Fax: +44 (0) 1628 587778  
Web site <http://www.multiactive.co.uk>  
Support line +44 (0) 1628 587757

### **Australasia:**

123 Whitehorse Road, Level 1  
Balwyn, 3103  
AUSTRALIA

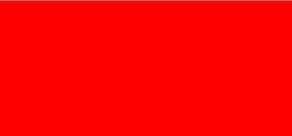
Phone: +61 (3) 9929 2900  
Fax: +61 (3) 9816 9788  
Web site <http://www.multiactive.com.au>  
Support line +61 (3) 9929 2900

## **Maximizer Technical Support**

Due to the variables associated with this product, you may require technical support. Please inquire about support where you purchased the product before contacting Maximizer Technical Support.







# CONTENTS

<b>1</b>	<b>Introduction</b>	<b>1</b>
	Maximizer Overview .....	1
	ODBC Driver .....	3
	Hardware and Software Requirements .....	3
	How This Guide is Organized. ....	4
	Conventions Used in This Guide .....	5
	Related Information .....	6
<b>2</b>	<b>Installation</b>	<b>7</b>
	The Installation Process .....	7
	Installing Maximizer on a Single Computer. ....	8
	Installing Maximizer on a Network .....	9
	Installing Maximizer .....	9
	Installing Maximizer for Network Users .....	10
	Upgrading Maximizer from a Previous Version .....	12
<b>3</b>	<b>Setting up Communications and Security</b>	<b>13</b>
	Adjusting Communications Settings. ....	13
	Setting Up for Faxing .....	15
	Setting up Attended/Unattended Faxing .....	16
	Setting Up Internet and E-Mail Access for Maximizer .....	20
	Setting Up Security .....	22
	Security Considerations .....	23
	Turning On Security .....	24
	Logging in as a Master User. ....	25
	Turning Off Security. ....	25
	Adding and Deleting Users .....	26

Setting Passwords . . . . .	30
<b>4 Tutorials</b>	<b>33</b>
Starting the Tutorial . . . . .	33
What am I looking at? . . . . .	34
How is a Maximizer Address Book folder organized? . . . . .	36
Understanding the Tabbed Windows . . . . .	37
Getting Help. . . . .	38
Tutorial One: Selling . . . . .	39
How do I see my Hotlist of things to do? . . . . .	39
How do I make a phone call? . . . . .	40
How do I change an address? . . . . .	43
How do I make an appointment? . . . . .	44
How do I send a fax? . . . . .	46
How do I search for an Address Book entry? . . . . .	48
How do I attach an external object? . . . . .	49
How do I print a mailing label? . . . . .	50
How do I see a previous Address Book list? . . . . .	51
How do I print a report about what I did today? . . . . .	51
Tutorial Two: Marketing . . . . .	53
How do I update user-defined fields for my Contacts? . . . . .	53
How do I find particular entries for follow-up? . . . . .	55
How do I send a mass mailing? . . . . .	56
How do I print envelopes? . . . . .	57
How do I save a list of entries? . . . . .	58
How do I add new entries? . . . . .	59
How do I search for a company? . . . . .	61
How do I send E-mail? . . . . .	62
How do I log an incoming phone call? . . . . .	63
How do I schedule an appointment months away? . . . . .	64
How do I finish a phone call? . . . . .	65
How do I enter my expenses? . . . . .	66
How do I link to a Web site? . . . . .	68
How do I use Maximizer Wizards? . . . . .	68
Shortcuts You Should Know . . . . .	69
Working with Dates . . . . .	69
Working with Drop-down Lists . . . . .	70
Working with Telephone Numbers . . . . .	71

Copying Fields .....	72
<b>5 Where to Go From Here</b>	<b>75</b>
Opening Maximizer .....	75
Using Your Own Address Book Folder .....	75
Other Resources .....	76
Maximizer Wizards .....	76
Maximizer Smart Tips .....	76
User's Guide .....	76
Online Help .....	77
Help Tours .....	77
Maximizer DirectAccess .....	77
Maximizer Technical Support .....	77
<b>Glossary</b>	<b>81</b>
<b>Index</b>	<b>87</b>



# INTRODUCTION

Welcome to Maximizer—a powerful application that not only helps you track and manage information about Companies, Individuals, and Contacts and the activities you perform for them, but also gives you direct access to electronic commerce on the Internet.

## Maximizer Overview

The Address Book folder is where you keep all the information about your business customers and contacts.

Using Maximizer contact management functions, you can perform tasks such as entering or importing information about Companies, Individuals and Contacts, sending faxes, creating letters, making phone calls, and sending and receiving E-mail.

You do your work in the Maximizer workspace. Depending on your preference, you can work in a Tabbed Windows view — a pre-set arrangement of windows, with your personal arrangement of Maximizer windows, or with individual Maximizer windows.

Maximizer contains the following windows that you use to organize and view information about Companies, Contacts and Individuals, and manage correspondence:

Address Book	A list of address entries with names, addresses, and phone numbers of Companies, Individuals, and Contacts.
Contacts	A list of address entries for people associated with Companies and Individuals.

Related Entries	A list of all address book entries that are related to another entry in your Address Book folder.
User-Defined Fields	A list of categories that you can customize for your business to classify Companies, Individuals and Contacts (by interests, type of business, annual sales, etc.).
Notes	A list of note entries including completed activities and other information, such as phone calls made and appointments.
Documents	A list of documents including memos and letters that you create with the Maximizer Word Processor or other word processor, as well as spreadsheets, presentations, and other documents created with other applications.
Hotlist	A list of tasks, including past, present, and future tasks; your main to-do list.
Calendar	An interactive calendar for scheduling meetings or other events.
Word Processor	A built-in word processor for creating letters, documents, and faxes.
E-mail	A complete messaging center you can use to send E-mail and attachments, including Internet mail. You can also view, compose and delete E-mail.
Personal	A diary of journal entries listing personal activities and information and a table for tracking income and expenses.

You can open some or all of the Maximizer windows at the same time. This gives you maximum flexibility to look at different parts of your Address Book folder, jump back and forth between tasks, or plan multiple activities.

Maximizer contact management tools include: an automatic phone dialer for calling and faxing customers, a print utility for sending out letters and doing mail merges, and a powerful search feature for quickly finding Companies, Individuals, or Contacts by name in your Address Book.

With an Internet connection, use Maximizer DirectAccess for late-breaking news, new products, and answers to any questions you may have. From DirectAccess, you can also link to List Merchant — millions of North

American business listings you can search for sales leads and potential customers.

## ODBC Driver

Maximizer includes an ODBC driver. The ODBC driver lets you open the Maximizer file structure through ODBC-compliant applications for reporting and analysis purposes. The ODBC Driver is a “smart” driver; it will restrict invalid transactions in addition to performing reporting and analysis functions.

## Hardware and Software Requirements

Following is a list of hardware and software required when installing Maximizer on Windows 95 or NT Workstation 4.0 or higher:

- A 386DX or higher (486 recommended) having at least 8 MB of RAM for Windows 95
- A 486-25 having at least 12 MB of RAM for Windows NT 4.0
- One of the following 32-bit messaging applications:
  - A 32-bit MAPI (Messaging Application Programming Interface) E-mail system; for example Microsoft Exchange, Microsoft Outlook, Novell GroupWise, or Eudora Pro 3.0.2
  - A VIM-compliant E-mail system; for example, Lotus Notes or cc:Mail

## Optional Requirements

To use these features in Maximizer, acquire or install the following.

Feature	Requirement
Faxing	One of the following fax applications: <ul style="list-style-type: none"><li>• Microsoft Fax</li><li>• WinFax PRO Version 2.0+</li><li>• WinFax Lite (released February 22, 1993 or later)</li><li>• Eclipse FAX Version 1.2+</li><li>• FaxWorks Version 3.0+</li><li>• FACSys 3.40+</li></ul>
Internet access	One of the following types of Internet access provided by: <ul style="list-style-type: none"><li>• An Internet service</li><li>• A network server directly connected to the Internet</li></ul>
TAPI features	<ul style="list-style-type: none"><li>• A TAPI-compliant modem</li></ul>
Word processing	Maximizer detects whether you have the following versions of Word or WordPerfect installed: <ul style="list-style-type: none"><li>• Microsoft Word, version 6.0a or higher</li><li>• Corel or Novell WordPerfect, version 6.1 or higher</li></ul> You can use Maximizer's custom toolbar to launch your word processor, and use custom Maximizer buttons in your word processor to insert Maximizer fields in mail-merge documents.

## How This Guide is Organized

This *Setup Guide* consists of several chapters which are described below. If you come across any terms you're not familiar with, look in the "Glossary."

### Chapter 2: Installation

This chapter describes how to install Maximizer or Maximizer Corporate Edition on a single workstation or on a network.

### Chapter 3: Setting Up Communications and Security

This chapter outlines how to set up communications and security for Maximizer.

### Chapter 4: Tutorials

This chapter contains tutorials that get you started using Maximizer by taking you step-by-step through many of the features and activities you'll perform with Maximizer.

### Chapter 5: Where to Go From Here

This chapter describes how to access the Maximizer program and lists other resources that provide information about the program.

## Conventions Used in This Guide

This guide uses a number of conventions for typography, special symbols, and key combinations. These are listed in the following table:

Format/Symbol	Definition
<b>Bold</b>	Indicates text you need to type.
<i>Italic</i>	Indicates variable information, such as a Contact name. Also indicates anything you replace with your own information, such as <i>filename</i> . (It is also used for titles of publications.)
“ ”	Used to refer to chapter or procedure headings in a document.
Initial Capitals	Used to indicate menu names, menu items, keyboard keys, command names, button names, and dialog boxes. For example, File menu.
•	Indicates a procedure with only one step. Also used to indicate each item in a list.

## Related Information

The *Maximizer Setup Guide* is part of a suite of documents and online help tools included with your software. The other components are:

- The *Maximizer User's Guide* provides detailed information about the Maximizer program and its features.
- The *Maximizer E-Commerce Guide* provides insightful information about the concepts of electronic commerce and how E-Commerce works with Maximizer.
- *Online Help* includes indexed and context sensitive (F1) help for Maximizer tasks, commands, and dialog boxes.
- *Help Tours* are a set of online tours that visually illustrate quick and easy ways of doing things in Maximizer. They are accessible from related areas of the context sensitive (F1) help and also through the help menu.
- *Tip of the Day* is a series of practical hints for using Maximizer.
- *Smart Tips* are suggestions that appear when you work in a Maximizer window or use a Maximizer command.

With an Internet connection, you can use *Maximizer DirectAccess* to quickly find answers to frequently asked questions, useful technical tips, the latest Wizards and templates, as well as late-breaking Maximizer news and a complete list of Maximizer products and services.

# INSTALLATION

This chapter describes how to install Maximizer on a single remote workstation or on a network.

Presumably, you already have a PC set up with Windows 95 or NT 4.0 software and the necessary peripheral devices. Before installing Maximizer, review the requirements described in Chapter 1 for your computer or network.

If you have a previous version of Maximizer installed on your computer, you can install the current version of Maximizer into the same folder without affecting your program settings or data files. All of your data files and personal preferences are preserved during installation.

---

## NOTE

It is important that there are no applications running when you install Maximizer. If an application is running, an error message may ask you to close it.

---

## The Installation Process

The Maximizer CD-ROM contains:

- **Maximizer:** a 32-bit version of the award-winning contact management program.
- **Diary Companion:** A utility you may optionally install that integrates notable dates and holidays into your Maximizer Calendar for various parts of the world.
- **AT&T WorldNet<sup>®</sup> Service:** An Internet Service Provider that you may use to take advantage of the Maximizer Internet and E-Commerce functionality.

- **AND Route:** An application that you may optionally install that allows you to render a map of the most optimum route to any location in the United States, Canada and Mexico.
- **Online Manual:** The Maximizer User's Guide and Setup Guide in Adobe Acrobat PDF format.
- **Maximizer 5.0 Demo:** A self-running multi-media presentation of the new features and functionality in Maximizer 5.0.
- **Maximizer Enterprise Demo:** A self-running multi-media presentation of the functionality in Maximizer Enterprise 4.0.

## Installing Maximizer on a Single Computer

To install Maximizer on one computer, that computer must be running Windows 95 or Windows NT 4.0 Workstation.

### ► To install Maximizer on a single computer

1. Insert the Maximizer CD-ROM into your CD-ROM drive.
2. In the Maximizer CD Setup window, click Install Maximizer.
3. In the Product Registration dialog box, enter the serial product number and other information; at the minimum enter your name and company name.
4. In the Setup Type dialog box, we recommend that you leave Typical selected.
5. In the Select Starter Data dialog box, select the sample industry data that you want to install. Click the Select All button to install all sample data, or Clear All to skip installation of sample data.
6. When the Btrieve Database Engine Setup dialog box appears, leave the Only This Computer option selected.
7. Continue until installation is complete.
8. Click Exit to exit Setup.

## Installing Maximizer on a Network

Maximizer will run on any Windows 95-compatible local area network that supports DOS Version 3.1 file locking calls. The Base Package authorizes one person to access Maximizer. For additional users, you must acquire License Packs or a LAN Pack for the maximum number of users who will access the software at the same time.

This is best illustrated with an example. Assume you have a network with 10 workstations. You have seven people who will be using Maximizer, but two of them work only at night. So there is a maximum of five people who will access the program at the same time. You would therefore need one Base System and four License Packs, or a LAN Pack for five users.

Once you have acquired the necessary licenses, complete the following installation and setup procedures. To do these steps, you must have full network rights including the right to create directories.

If when installing Maximizer, you select the Multiple Computers on a Peer-to-Peer or Server-based Network option, all processing occurs at the workstation level. This option is ideal for sharing Maximizer data files on a peer-to-peer network such as Windows 95 or LANtastic, or on a server-based network where Btrieve Requester is not installed, such as Windows NT, NetWare, or Banyan Vines.

Client/Server implementation is available for use with Maximizer Enterprise. For more information, inquire where you purchased the product or contact Maximizer Sales directly at 1-800-8040-MAXX (6299).

### Installing Maximizer

Complete the following steps on every computer that you want to be part of the Maximizer system.

You can also set up workstation access to the server in cases where there is limited disk space on a workstation.

➤ **To install Maximizer for multiple users on a network**

1. Follow the instructions until the Btrieve Database Engine Setup dialog box appears.
2. In the Btrieve Database Engine Setup dialog box, select Multiple Computers in a Peer-to-Peer or Server-based Network.
3. Continue until the installation is complete.

➤ **To set up Maximizer server access for a workstation user**

1. Insert the Maximizer CD-ROM into your CD-ROM drive.
2. In the Maximizer CD Setup window, click Install Maximizer.
3. When the Setup Type dialog box appears, select Custom.
4. In the Select Components dialog box, click the Network Setup Files checkbox.
5. When the installation is complete, go to the workstation and map to the drive and folder on the server where you performed the Custom installation.

For example, if you installed Maximizer in the folder F:\Program Files\Maximizer, connect to that folder and run the Setup program from there.

The SETUP program completes a minimal installation of Maximizer on the workstation so that the user can access the application on the server.

## **Installing Maximizer for Network Users**

Enhancements to Maximizer 5.0 have resulted in a change of the Maximizer file structure. If you try to open existing Maximizer data (data created with versions of Maximizer prior to Maximizer 5.0) with Maximizer 5.0, you will be prompted with two warning messages. These will warn you that if you choose to proceed and open the data, the data will be converted to the new file

structure. After the conversion, versions of Maximizer prior to Maximizer 5.0 will not be able to read the data.

---

**NOTE**

This conversion process is password protected and must be performed by the Master user. The default MASTER password is 'control'.

---

If you attempt to read data that has been converted to the Maximizer 5.0 file structure with a version of Maximizer prior to 5.0, you will receive an Error Code of 51. If you get this message, the only way to regain access to your data is to upgrade to Maximizer 5.0, Maximizer Enterprise 4.0, or subsequent releases of either product. Or, you can uninstall Maximizer 5.0, reinstall your previous version of Maximizer, and then restore the data from your backup files.

---

**NOTE**

- If you are using Maximizer with a network database, all users' computers must be upgraded at the same time.
  - Older versions of Maximizer Link for PalmPilot, Maximizer CELink, Maximizer PilotLink, and Pocket Maximizer are incompatible with data you create or access with Maximizer 5.0 or Maximizer Enterprise 4.0. You must upgrade these products to version 4.0 or higher, where applicable.
- 

To avoid any data loss, back up all your existing Maximizer data before installing Maximizer 5.0. Also, install Maximizer in a separate folder from your existing Maximizer software. This will allow you to restore your data using your old version of the software.

Ensure that each user has the necessary rights to use the Maximizer program and Address Book folders. See your network user guide for more information.

When Maximizer is properly installed for network use, the system will lock (that is, prevent simultaneous editing) at the item level. So, for example, if a user is editing a note for an Address Book entry, that particular note can't be accessed by another user. Another user can, however, still access other notes, documents, or other information for that Address Book entry.

## Upgrading Maximizer from a Previous Version

If you are upgrading from previous versions of Maximizer, your data is automatically converted the first time you open an Address Book folder if you respond Yes to two warning messages and enter the password of the Master user. Data created in previous versions of Maximizer can be read by Maximizer 5.0.

For versions prior to Version 3.0, see “Converting Files from Maximizer for Windows 1.x” and “Converting a Maximizer DOS Database” in online Help.

# SETTING UP COMMUNICATIONS AND SECURITY

This chapter describes how to set up Maximizer for communications and security.

## Adjusting Communications Settings

Your modem preferences tell Maximizer where your computer's modem is connected and how it performs. Some of these settings are more critical than others. For example, if you set up your port incorrectly, your modem will not work at all; but if you set up your baud rate incorrectly, the modem will operate, but perhaps at a slower speed. You can also set up a TAPI-compliant modem or card to take advantage of advanced features such as Calling Card dialing and Call Waiting.

TAPI lets you use your Telephony Application Programming Interface modem or card to identify and direct signals received by your communications port to the appropriate application.

---

### NOTE

For more information about communications settings and options, refer to your modem manual. You can quickly check that you've selected the appropriate options: count even and odd parity as one bit, and then check that the stop bits, data bits, and parity bits add up to at least nine.

---

➤ **To adjust modem preferences**

1. Select Preferences from the File menu.

2. In the Preferences dialog box, click the Dialing tab.

3. Under Method, click the Modem radio button.

Leave the default option of None if you have no modem. This disables Maximizer's auto-dial feature. (If you select Modem, Maximizer dials using the modem settings when you drag an Address Book or Contact entry to the Phone button.)

4. Under Dialing, select Pulse if you have rotary dial service.

5. Adjust the settings in the Long Distance Settings group box.

When you travel, you can change the number in the Current Area Code field to the area code where you are currently located. If the Current Area Code and Local Area Code are different, Maximizer modifies the numbers you dial accordingly.

6. Under Modem Settings, select the Port, Baud Rate, Data Bits, Parity, and Stop Bits settings from the appropriate list. (The most common settings are: 8 Data Bits, Parity None, and 1 Stop Bit.)

These settings determine the stream of bits that your modem sends to other computers.

7. Adjust the settings in the Phone Number Prefix and Suffix group boxes.

A prefix is any digit you need to dial before a number, such "9". A suffix is any digit that follows a number, such as an account number. Enter a Primary and Alternate prefix and suffix, if required, then select the Active Prefix and Active Suffix from the list.

Adjust the fields in the Modem Strings group box.

By default, Maximizer uses Hayes modem settings.

Use this group box if you need to use any special initialization strings. To indicate a carriage return, type a vertical bar (|); to indicate a one-second delay, use a tilde (~).

8. When you are finished, click OK.

➤ **To adjust TAPI preferences**

1. Select Preferences from the File menu.

2. In the Preferences dialog box, click the Dialing tab.

3. Under Method, click the TAPI radio button.
4. To set up your modem or card, click the Device button.
5. In the Connect Using dialog box, select your TAPI device from the Line list. Then select the address or IRQ setting from the Address list.
6. When you are finished, click OK.
7. To set up dialing properties, click the Properties button.

Setting	Action
Where I Am	Modify the Default Location, Area Code Is and I Am In text boxes if required. Use the drop-down lists to change the default location or country.
How I Dial From This Location	Enter the local and long distance prefixes for accessing an outside line.
Dial Using Calling Card	To use calling card dialing, click the checkbox.
This Location Has Call Waiting	If you have call waiting service, click the checkbox.
To Disable It Dial	To disable call waiting, select the prefix that disables the service from the list.

8. Click the Pulse Dialing checkbox if you have rotary dialing service.
9. When you are finished, click OK.

## Setting Up for Faxing

You can set up Maximizer for faxing anytime after you've installed your fax application. Maximizer supports the following fax software:

- WinFax PRO Version 2.0+
- WinFax Lite (released February 22, 1993 or later)
- Eclipse FAX Version 1.2+
- FaxWorks Version 3.0+
- FACSys 3.40+
- Microsoft Fax

## Setting up Attended/Unattended Faxing

There are different procedures for setting up Maximizer for attended and unattended faxing depending on the fax software you've installed.

If you have Windows fax software such as WinFax PRO, you can set up Maximizer to perform unattended (broadcast) faxing to your Companies, Individuals and Contacts.

---

### NOTE

You can use dialing preferences that you set in Maximizer for unattended faxing. For example, when you are travelling you can change the current location to the location where you are currently situated. If the location fields are different, Maximizer adjusts the fax numbers accordingly.

If you are upgrading from a previous version of Maximizer and using WinFax Pro 4.0, follow the instructions in 'To setup WinFax PRO 4.0' below. Also, note that if your previous version of Maximizer is version 3.0 or earlier (16-bit), the settings contained in your MAXEDIT.INI file are automatically written to the Registry during the Maximizer installation process.

If this is your first installation of Maximizer 5.0 software, or if you have just installed new fax software, follow the instructions in 'To set up other fax software'.

---

## Setting up Winfax PRO or WinFax Lite for Faxing with Maximizer

Use the following instruction to set up Maximizer so that you can send faxes using WinFax PRO 4.0 or WinFax Lite.

### ► To set up WinFax PRO 4.0 or WinFax Lite for faxing

1. Include the folder where WinFax is installed in the PATH statement in your AUTOEXEC.BAT file.
2. Disable the background spooling of your WinFax printer. To do this:
  - In Control Panel, open Printers.
  - Select the WinFax printer and then select Properties from the File menu.
  - In the WinFax Properties dialog, click on the Details tab.
  - In the Details tab, click on the Spool Settings button.

- Select the option Print Directly To The Printer.
  - Click on OK.
3. Start and then minimize WinFax before printing from the Maximizer Word Processor.
  4. Set WinFax as the Windows default printer.

### Setting up Microsoft Fax for Faxing with Maximizer

When you set up Microsoft Fax to work with Windows 95 or NT 4.0, it will automatically work with Maximizer. With Microsoft Fax and Maximizer, you can fax individual and broadcast documents directly.

The Microsoft Fax service must be installed and added in your mail profile under Microsoft Exchange. For instructions on how to set up a mail profile, see your Windows 95 or NT documentation.

### Setting up Other Fax Software for Faxing with Maximizer

If you upgraded from 16-bit Maximizer 3.0, the settings contained in your MAXEDIT.INI file, including those for your fax software, were automatically written to the Windows Registry during the Maximizer installation process. (The Registry contains information about how your computer runs.)

If this is your first installation of Maximizer, or if you've just installed the following fax software:

- Eclipse FAX Version 1.2+
- FaxWorks Version 3.0+
- FACSys 3.40+



#### **WARNING**

**Be extremely careful when updating the Windows Registry. Modifying the wrong entry can seriously affect your system. If in doubt, seek help from an experienced Windows 95 or NT user or your system administrator.**

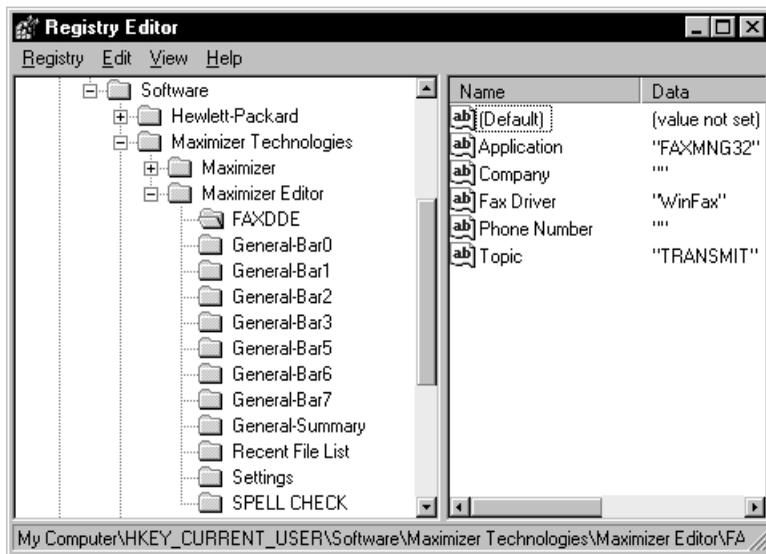
---

You must do the following before you can fax using Maximizer:

1. Open the Windows Registry Editor. The Registry Editor is an advanced tool that enables you to change settings in your system Registry.

To do this:

- Click on the Windows Start button to display the Start menu.
  - Select Run and then enter REGEDIT.
2. Go to HKEY\_CURRENT\_USER\SOFTWARE\MAXIMIZER TECHNOLOGIES\MAXIMIZER EDITOR.



3. Select (highlight) FAXDDE.
4. Use the following table to modify each of the string values exactly as shown for your fax software. The settings are case sensitive, and must be entered exactly as shown.

To add a new value name, select New String Value from the Edit menu. Type the name. Double-click the Name and type the Value Data. Then click OK.

To modify value data, double-click the Name, type the Value Data and then click OK.

<b>Fax Software</b>	<b>Name</b>	<b>Value Data</b>
<b>Eclipse Fax</b>	Application	Eclipse Fax Manager
	Company	
	Fax Driver	E-FAX
	Phone Number	SEND
	Topic	SEND
<b>FACSys</b>	Fax Driver	FXHPPCL
	Application	FAXMNG
	Topic	TRANSMIT
	Phone Number	Sendfax
	Company	
<b>FaxWorks</b>	Recipient	
	Application	FAXWORKS
	Company	
	Fax Driver	FX-WORKS
	Phone Number	SEND
<b>WinFax</b>	Topic	SEND
	Application	FAXMNG32
	Company	
	Fax Driver	WINFAX
	Phone Number	
	Topic	TRANSMIT

**NOTE**

This table assumes that the name of the fax driver is the default name as supplied by the fax driver manufacturer. If the name of the fax driver installed on your system has changed (this is unlikely), then you must change the Fax Driver data so that it matches the name of the fax driver.

For example, if during installation of Eclipse Fax, you named the fax printer "Eclipse Fax Driver" instead of accepting the default of "E-FAX", then you need to change the data of the entry "Fax Driver" from "E-FAX" to "Eclipse Fax Driver".

---

5. Select Exit from the Registry menu.

The Maximizer Word Processor is now ready to perform unattended faxing.

## Setting Up Internet and E-Mail Access for Maximizer

Maximizer contains a powerful new set of Internet Tools you use to communicate with your clients. Through various Web sites you can monitor the business activities of any company or subject, easily create maps directing you to a client's location, find a client's Web site and verify company information. It also provides you access to other Maximizer products such as Maximizer MARKETbuilder, List Merchant and DirectAccess — offered free of charge — allowing you to do business on the Web.

Maximizer provides built-in support for sending E-mail to your Address Book folder entries over the Internet. This includes both E-mail you send directly and E-mail sent in a mail-merge. In addition, Maximizer can automatically decompress and transfer Address Book information retrieved from Maximizer DirectAccess using your Internet connection. Maximizer also automatically decodes the most common E-mail document attachment formats.

To use these features, you must have a Messaging Application Programming Interface (MAPI) or VIM (Vendor Independent Messaging) E-mail connection to the Internet. You can set up your computer to:

- Directly use the service offered by an Internet provider. Although it is possible to set up an Internet connection using the instructions from your service provider, you will find it much easier if you install the

Microsoft Plus! Internet tools provided in Microsoft Plus Companion for Windows 95.

- As of the release the of Maximizer 5.0 (and Maximizer Enterprise 4.0), E-mail clients that should work with Maximizer — when properly configured — include:

<b>E-mail Program</b>	<b>Vendor</b>
cc:Mail	Lotus
Eudora Pro	Qualcomm
Exchange	Microsoft
GroupWise	Novell
Notes/Domino	Lotus
Outlook	Microsoft
Outlook Express	Microsoft
Windows Messaging	Microsoft
Lotus Mail	Lotus

- Use your company's network server that is directly connected to the Internet. For instructions about accessing this service, contact your system administrator.

---

**NOTE**

If you are deleting a MAPI E-mail profile from your system, make sure you shut all E-mail clients first.

---

- Use the gateway to the Internet provided by your company's E-mail system. For instructions about addressing your customers and prospects, using this service, contact your system administrator.

---

**NOTE**

Before using these features in Maximizer or if you encounter problems, test your Internet connection. You should be able to send and receive mail messages with your E-mail system (for example, Microsoft Exchange or Lotus Notes). If you plan to use the Web features included with Maximizer 5.0, also check to see if you can link to a Web site using your browser. If you encounter problems sending E-mail from your mail system or in browsing the World Wide Web, contact your Internet provider, or your E-mail software manufacturer before requesting help from Maximizer Technical Support.

---

## Setting Up Security

When you install Maximizer for a multi-user configuration, you need to turn on the security option and set up users as well as passwords. You need to add every person in your organization that uses Maximizer as a user and assign access rights for contact management. By enabling security, you can control the use and sharing of Maximizer data. When you first display Preferences, they are set up for the MASTER user.

You can restrict access to information in a Maximizer Address Book folder to specific users in your organization. For example, you can allow one user full read/write access to all Address Book entries as well as their associated notes, documents and user-defined fields (UDFs), while you grant another user read-only rights to the same information.

As the MASTER user, you enter users into an Address Book folder and specify what rights those particular users have. When an individual user wants to restrict access to a specific entry, he or she simply assigns his or her User IDentification to that entry. Others will then not be able to view or modify the entry, unless the ability to open other users private entries is made available to a user in Preferences > Security.

The following procedures only apply to the system administrator or Master user. One exception is the procedure “To change your own password,” which applies to all users.

---

**NOTES**

- A Company or Individual Address Book entry that is assigned Public security (ownership) can have associated Contacts that are restricted by private security. Conversely, a Company or Individual Address Book entry that is restricted by private security, can have Contacts that have unlimited access (Public).
  - When transferring entries to another Maximizer Address Book folder, you can transfer ownership to a target user. Only the target user and those with Open Other User’s Private Entries checkbox marked on the Security tab of Preferences in the destination Maximizer Address Book folder can see those entries.
  - After Users have been added into Maximizer, you can generate the ‘User ID List’ report to obtain a list of all Users. This report is available to only the Master user.
- 

## Security Considerations

Security affects various parts of the Maximizer Address Book.

### Public and Private Options

Network users can select a private option (by choosing their User ID or selecting the Private radio button) when adding data such as an Address Book entry, a document, or expenses. This option also applies to elements such as macros, saved workspaces, column setups, saved lists and saved searches. The private option allows only the user who creates the information to view or modify it. The data is not available to any other user, unless the user is granted rights to open other users private entries in Preferences > Security. As the MASTER user, you set this option (Open Other Users’ Private Entries) when you assign user access rights.

### Notes

Notes created in a multi-user configuration are stamped with the name of the user as the Creator. The Creator may be modified only by the MASTER user.

As the MASTER user, you can set user access rights so that a user can't modify or delete another users notes.

### **Calendar**

Generally, appointments made by a user can't be viewed by other users. There are two exceptions. Appointments with other users can be made and viewed by all users. In Preferences on the Calendar tab, the MASTER user can specify that a user can Add or Modify Multi-user Appointments. Users may also specify to allow other users to view their calendars in Preferences on the Calendar tab.

### **Journal**

Journal entries are not shared; they can be viewed and modified only by the user who created them.

## **Turning On Security**

You can ensure that only authorized users open your Address Book folder by turning security on. This means that users must log into the Address Book folder by providing a User Name and Password that you set.

---

### **NOTE**

Only the Master user can change the security settings for Maximizer.

---

#### **► To turn on security**

1. Select Preferences from the File menu, then click the Security tab.
2. In the Preferences dialog box, click the Security is Off button.  
This toggles the button to Security is On.
3. Click OK.

## Logging in as a Master User

When Security is on, you can log in as the Master user.

### ► To log in as the Master user

1. Start Maximizer and select Login from the File menu.
2. In the Login dialog box, type MASTER in the User ID field.
3. Type a password in the Password field.  
The default password is “control”.
4. Click OK.

## Turning Off Security

Only the Master user can change the security settings for Maximizer.

### ► To turn off security

1. In the Security tab of the Preferences dialog box, click the Security is On button.



This toggles the button to Security is Off.

2. Click OK.

## Adding and Deleting Users

Before adding a new user, be sure that all the preferences for the Master user are adjusted the way you want them. The preferences you set for the last user are used as defaults for the next user you add.

As the Master user, you can also delete users. If the user has Address Book entries that are designated as the user's private entries (owned by that user), others won't be able to access the information once the user is deleted unless you have selected the Open other users' private entries flag in your own user Preferences setup. Ensure the user re-sets the information to 'public' or assigns them group ownership before you remove their access privileges.

## Adding a User

If you are the Master user, you can grant others the privilege of accessing your Address Book folder by adding them as users. You can also print a system report that provides you with a list of all users in the current Address Book folder. This report is available only to the Master user.

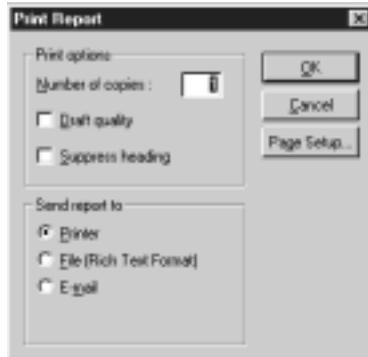
### ➤ To add a user

1. As the MASTER user, select Preferences from the File menu.
2. In the Preferences dialog box, click the Security tab and then click the Add User button.
3. In the Add New User dialog box, type a name in the User ID field.
4. Click OK.

### ➤ To print a User ID List

1. From the File menu, select System Reports > User ID List.

The Print Report dialog box appears.



2. Fill in the Print Options and the Send Report To group box as desired. Suppress Heading prints the report without a title, page number, or date and time on each page.
3. When you are finished, click OK. Maximizer prints the User ID List.

## Adjusting User Rights

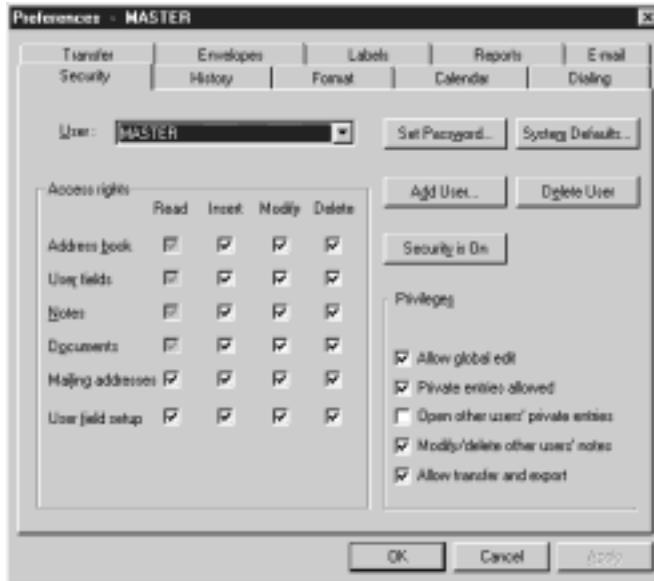
As the Master user, you determine whether a user or is able to read, add, modify, and delete information in the Address Book folder. For example, you can permit a user to read and add information, but not to delete or modify it.

You can also grant or remove the right to create private entries and open and/or view private entries created by other users.

### ► To adjust user rights

1. As the MASTER user, select Preferences from the File menu.

- In the Preferences dialog box, click the Security tab, and then select a user from the User list.



- Under Access Rights, adjust the checkboxes as desired.
- Under Privileges, adjust the checkboxes as indicated in the following table.

Option	Action
Allow Global Edit	Grants or removes the right to edit selected multiple entries or all Address Book entries
Private Entries Allowed	Grants or removes the right to create Private entries by specifying a User or Group ID
Open Other Users' Private Entries	Grants or removes a user's right to open other users' private Address Book entries
Modify/Delete Other Users' Notes	Grants or removes a user's right to modify notes owned by other users.
Allow Transfer and Export	Grants or removes a user's right to transfer and export Address Book entries.

5. When you are finished, click OK to exit the dialog, or Apply to save changes and continue.

## Deleting a User

As the Master user, you can remove a user's access to your Address Book folder.

---

### NOTE

If the user has Address Book information set to their User ID, you won't be able to access the information once the user is deleted. Ensure the user re-sets the information to Public before you remove the user's access privileges. Or, login as Master, change your user's password, and remove the private information yourself.

---

### ► To delete a user

1. Select Preferences from the File menu.
2. In the Preferences dialog box, select a user from the User list.
3. Click the Delete User button.
4. In the Maximizer dialog box, click OK to confirm the deletion.  
The Transfer Notes to Another Owner dialog box appears.
5. Select a user in the Transfer Notes to field and click the Yes button.  
This transfers any notes from the user being deleted to another user.  
—or—  
Click the No button to discard the notes or the Cancel button to cancel deletion.
6. When you are finished, click Close.

## Setting Passwords

Passwords are initially set by the Master user. Once a password is created, the Master can change any or all of them. Users can also change their own passwords.

### Changing Your Own Password

As a user, you can change your own password.

➤ **To change your own password**

1. Select Preferences from the File menu.
2. In the Preferences dialog box, click the Set Password button.
3. In the New Password dialog box, type the new password and click OK.
4. In the Retype Password dialog box, re-type the same password to confirm it and click OK.

### Creating or Changing a User Password

If you are the Master user, you can set a password for a user. This increases the security of the data in your Address Book folders. When you set a user's password, you can change it whenever required. Users can also change their own passwords.

➤ **To create or change a user's password**

1. As the MASTER user, select Preferences from the File menu.
2. In the Preferences dialog box, select a user from the User list.
3. Click the Set Password button.
4. In the New Password dialog box, type the new password and click OK.
5. In the Retype Password dialog box, re-type the same password to confirm it and click OK.
6. Click OK.





# TUTORIALS

You can start using Maximizer right away by doing the two tutorials in this chapter. In the first tutorial, you play the role of a salesperson for a company that makes hand-held computers. You have customers and other contacts in North America. In the second tutorial, you're the marketing director of the same company, so you have contacts all around the world.

Even if you don't work for a high-tech company or in sales or marketing, you should still do the tutorials to find out how Maximizer works. You'll also learn many ways in which Maximizer can help you and your business.

Before you start, you should be familiar with your computer's operating system (either Windows 95 or Windows NT 4.0) and know how to use a mouse, open and close windows, run applications, and use menus and the Windows taskbar. If you need help, use your Windows 95 or NT documentation and Windows online Help.

Allow yourself about 5 minutes for the introduction and about 25 minutes for each of the three tutorials.

## Starting the Tutorial

In this tutorial, you'll work with a special Address Book in a folder named Tutorial that was copied to your hard drive when you installed Maximizer. To start Maximizer and open the Tutorial Address Book folder, follow these steps:

1. On your Windows taskbar, click Start.
2. From the Start menu, select Programs > Maximizer.
3. From the Maximizer menu, click the Tutorial icon.

The Maximizer workspace and the Tip of the Day appear.

---

**NOTE**

If you chose not to install the Tutorial Address Book folder (for example, you chose a Compact installation of Maximizer), you may need to run Maximizer Setup again to install the folder now.

---

**What am I looking at?**

Displayed in front of the Maximizer workspace, the Tip of the Day gives you helpful information about Maximizer every time you start the program.

- To see the full workspace, click the Close button on the Tip of the Day dialog box.



The Maximizer workspace is a customizable display of the contents of your Address Book and is made up of the following parts:



- The title bar at the top of the screen displays the name of the program and the tutorial Address Book folder. Directly below it is the menu bar.
- Below the menu bar are Maximizer's Standard toolbar, Action toolbar, and Smart Tip toolbar. You use the menus and toolbars to do most of your work in Maximizer. The tip displayed in the Smart Tip toolbar changes depending on the task you are performing. As you go through the tutorial, notice the different tips in the Smart Tip toolbar.
- Below the Standard toolbar is the Status Indicator, which animates when Maximizer is searching the Address Book or performing other activities.
- Along the left edge of the screen is the Icon bar, which lets you display any of Maximizer's windows and perform other common functions.
- The central part of the screen contains the tabbed windows which display the contents of your Address Book folder. At the top of each window is a View bar which allows you to easily change the window's contents.

- At the bottom of the workspace is the Status bar. When you place the mouse pointer over any of Maximizer’s buttons, the Status bar displays help about that button. The Status bar also displays the progress of searches and, optionally, the date and time. In multi-user installations of Maximizer, the Status bar displays the name of the current user.

When you finish the tutorials, you can check the *User’s Guide* and Maximizer’s online Help to learn how to customize the Maximizer workspace. For example, you can change the fonts and colors, and even turn the workspace into several separate, independent windows instead of the tabbed windows you see now.

## How is a Maximizer Address Book folder organized?

Maximizer stores information about the people and companies you need to keep track of in a group of files on your hard disk, and lets you manipulate that information in many ways. This group of files makes up an *Address Book folder*, which is similar to a paper address book or organizer, but much more flexible. Although you can have several Address Book folders, many Maximizer users keep all the information they need to manage their Contacts in one Address Book folder.

A Maximizer Address Book folder contains three types of *Address Book entries*. Understanding these three types of entries and how they relate to each other will help you unleash the full power of Maximizer.

**Companies.** A *Company entry* can be a corporation, business, association or other type of organization. People associated with a Company are stored as *Contacts*. Any organization where you deal with more than one person is usually stored as a Company.

**Individuals.** An *Individual entry* is much like a Company entry, but also includes the name of a single key person. Typical examples include self-employed professionals, entrepreneurs, and friends. You can also associate Contacts with an Individual (such as a self-employed person’s spouse or children).

**Contacts.** *Contact entries* are the “second layer” of information in your Address Book folder. A Contact is a person associated with a Company or Individual entry. Every Contact must belong to either a single Company or Individual – there is no way to have an “orphan” Contact entry or a

Contact that is associated with more than one Company or Individual. For example, when you create a Company entry in your Address Book, you can then create its Contacts, the president of that Company, the salesperson you deal with, the receptionist, the accountant, and anyone else you talk to at the Company. In Maximizer, there is no limit to the number of Companies or Individuals you can have in your Address Book. And each Company or Individual can also have an unlimited number of Contacts.

Almost every other type of entry in your Maximizer Address Book is connected to either a Company, Individual, or Contact entry. All *documents*, *notes*, *user-defined fields*, and most *appointments* and *Hotlist tasks* (“to-do’s”) belong to Address Book entries. There are some entries that do not belong to any Address Book entries because they are personal and belong to you, the user. These include *personal appointments* and *to-do’s*, *expenses*, and *Journal entries*.

## Understanding the Tabbed Windows

The workspace on your screen displays Address Book information in three windows:

- The Address Book window across the top.
- The Contacts window at the lower left.
- The Notes window at the lower right.

At the bottom of the Notes window, there are tabs for two other windows: User-Defined Fields and Documents. At the bottom of the Contacts window there is also a tab for Related Entries.

Now take a little time to familiarize yourself with the Maximizer workspace.

1. Click the horizontal splitter bar between the Address Book window and the Contacts/Notes windows, and drag the bar up slightly. Then drag the bar back down to its previous position.
2. Click either of the splitter bars between the three windows and move the bar to increase or decrease the size of a window in the workspace.
3. Click the Address Book entry for Baker, Baker and Campbell Ltd. to select it.

Notice that the Contacts and Notes windows change to display information about the Company or Individual you select in the Address Book.

4. By default, the list in the Address Book window is sorted by name. Try sorting the list by another column. For example, click the Company and Address column header to sort alphabetically by company name instead. Click the same column header again to sort in reverse alphabetical order.
5. Click the Contacts window. Notice that the View bar is highlighted to tell you that the Contacts window is now active. The commands in the menus have also changed.

It's important to remember that menu and toolbar commands always apply to the currently active window.

6. Click the Address Book window again. Notice that its View bar now changes color and the commands change again.
7. Click the right mouse button. A floating menu of commands called the *shortcut menu* appears. This menu displays a subset of commands from the main menu bar. Like the menus and toolbars, the shortcut menu changes when you change windows. To close the shortcut menu, click the left mouse button with the pointer outside the shortcut menu.
8. Click the User-Defined Fields tab at the lower right. Click the right mouse button to see the different commands in the shortcut menu. Then click the Documents tab and view the shortcut commands available there.
9. You can display many types of information in the Address Book window. For example, click the Address Book window. Select All Address Book Entries from the View menu. The Address Book list now displays not only Companies and Individuals, but also all the Contacts associated with them.
10. Select All Companies and Individuals from the View menu to return to the list of Companies and Individuals only.

## Getting Help

Any time you need more detailed information about an active window or the fields in a dialog box, you can press the F1 key to access Maximizer's powerful online Help.

1. Click the Address Book window to make it active.
2. Press F1.  
Maximizer displays Help on working in the Address Book window.
3. To close the Help window, click the Close button on the title bar.

You can also get help on how to perform specific tasks in Maximizer. For example, you can use Help to learn how to add a new Contact to your Address Book.

1. Select Help Topics from the Help menu.
2. Double-click Working with Your Address Book.  
A list of tasks appears.
3. Double-click Managing Contact Information, then Adding a Contact Entry.  
You'll see step-by-step help on adding a Contact entry to your Address Book.

You can also use the Help Topics window to select topics from an index.

Now that you've tried a few general tasks, you can go on to the tutorials.

## Tutorial One: Selling

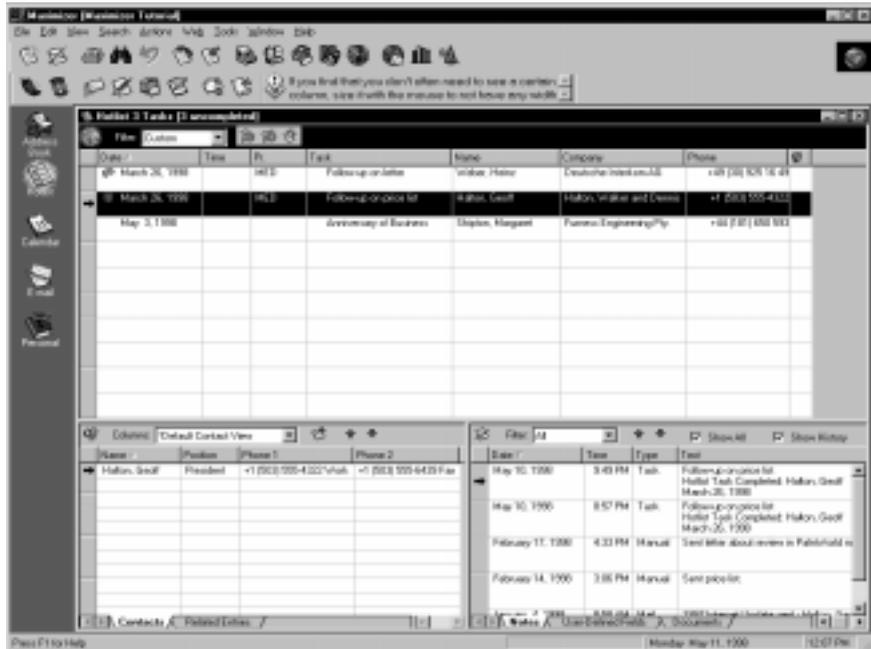
In this tutorial, you're Terry Lee, a sales representative with Flash Technologies, the maker of a hand-held computer called The Flash. Like most salespeople, you have lots to do: making and receiving phone calls, scheduling appointments and answering requests for product literature. Ultimately, you'd like to spend less time doing paperwork and administration and more time convincing people to buy your product. And you now have Maximizer to help you.

### How do I see my Hotlist of things to do?

Your first step is to check your list of things to do for the day. You'll find this information in the Hotlist window.

1. On the Icon bar along the left side of your screen, click the Hotlist button.

The Hotlist replaces the Address Book window in the Tabbed Window view, and the Hotlist button is highlighted on the Icon bar.



Notice that your Hotlist is automatically sorted by date. Older dates are tasks which you haven't completed yet, so have been carried forward to today. Maximizer automatically keeps track of all your unfinished to-do's.

2. To re-sort the Hotlist, click the column labeled Pr (Priority).
3. Scroll through the Hotlist to see what activities are listed, and how important each activity is.

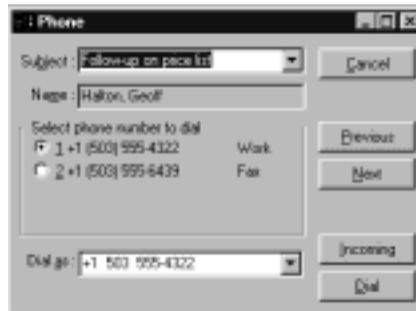
## How do I make a phone call?

You now want to make your first phone call of the day. You can call right from your Hotlist window.

1. In the Hotlist, select the entry for Geoff Halton.
2. In the Action toolbar, click the Phone button.

The phone button has an image that looks like a cellular phone.

The Phone dialog box appears, with Geoff's name, the subject of the call, and the phone number automatically inserted.



3. To change the Subject field, click  and choose Follow up on Report from the drop-down list. You can also type additional text at the end of the subject.
4. Click at the end of the line and type **sent in Feb.**
5. Click the Dial button.

The Phone Call dialog box appears.

6. In the Phone Call dialog box, you're asked to dial the number manually. If you had a modem installed and configured properly, Maximizer would dial the number for you.
7. Click the Answered button.

The Phone dialog box appears with a timer running.

You talk to someone else at Geoff's company and find out that Geoff is away until next Tuesday.

1. In the text box, type **Away till Tuesday.**
2. Click the Hang Up button.

The Phone Call Result dialog box appears.

3. In the Phone Call Result dialog box, double click Away from office. Maximizer asks you if you want to schedule a follow-up activity.
4. Click Yes.

The Add Hotlist Task dialog appears.



5. In the Date field, click  or double-click and choose next Tuesday for your follow-up call.
6. Click in the Activity field.
7. Click  and choose Follow-Up On Letter.
8. Click at the end of the text and type **Tried to reach Geoff on [today's date] but he was away until next Tuesday.**
9. If you want, choose a priority and an icon, and then click OK.
10. In the Phone dialog box, click Cancel.
11. Finally, double-click the check-mark column to the right of Geoff Halton's entry in the Hotlist, and then click No to scheduling another follow-up.

You've now marked the phone call as completed.

Notice that the phone call is automatically logged in your Notes window. You also have a new Hotlist task for next Tuesday to try reaching Geoff again. If you open this Address Book folder next Tuesday or later, this new task will appear in your Hotlist.

You can also display the Filter list in the Hotlist window and select Next Week to see the task you just created. Notice that when the Hotlist is refreshed, the completed phone call disappears from the list.

## How do I change an address?

Now you make another phone call.

1. In the Hotlist window, select the entry for Mary Campbell.
2. Select Make a Call from the Actions menu.

Choosing Make a Call from the Actions menu is like clicking the Phone button. You can perform many Maximizer commands in more than one way, giving you the option of using your favorite or most convenient method.

3. In the Phone Call dialog box, click Answered.

The Phone dialog appears and the timer starts again.

4. Minimize the Phone dialog box by clicking the Minimize button in the title bar. Notice that you can still see the timer running in a small title bar at the bottom of your screen.

You are planning to send Mary a price list and she's mentioned that she's moving at the end of the month. You want to update Mary's entry to send the price list to the correct address.

1. Select View Campbell, Mary in Address Book from the Search menu.

This command looks up Mary's entry and displays it by switching to the Address Book window.

2. Double-click the entry for Campbell, Mary.

The data entry screen for Mary's entry appears.

3. Select the Address 1 field and type Mary's new address **3182 Fremont St. East**.
4. Change the City to **Scarborough** and Zip/Postal to **M5M 9X6**.
5. To close the dialog box, click OK.

Mary's entry is now updated.

## How do I make an appointment?

Mary is coming to town next week and would like to see you for a demo of The Flash, which she is considering buying for the supervisors at her aircraft plant. Using Maximizer, you can enter the appointment while you're still on the phone.

1. On the Icon bar, click the Calendar button.

The Calendar window appears on top of the Maximizer workspace with the current day selected.

2. Because Mary wants to meet next Wednesday morning, double-click next Wednesday. If next Wednesday is in the following month, click  in the View bar to go to that month.

The Calendar switches to the daily view.

3. Double-click the 11:00 am time slot.

The Add Appointment dialog box appears with the date and time already selected.

The default length for a new appointment is half an hour, but you need at least two hours to meet with Mary. To do this:

1. Select the Until field and type **1 pm**.
2. To give yourself enough time to get to the meeting, select the Set Alarm option and specify **30** minutes prior to the appointment.  
An alarm will notify you next Wednesday at 10:30.
3. Click in the Activity field, and then click .
4. From the drop-down list, choose Demo, then add **at the Central Hotel** after it in the Activity text box.
5. Click in the Priority field, click , and then choose Hi for high priority.
6. To indicate that Mary will be flying into town for the meeting, click the airplane icon.
7. Select the Appointment with Campbell, Mary option, then click OK to enter the appointment in the Calendar for Wednesday.

The appointment will appear in next Wednesday's Hotlist.

You now want to complete your phone call and log it in the Notes window:

1. Double-click the Phone timer at the bottom of the screen to maximize it.
2. Click Hang Up.
3. In the Phone Call Result dialog box, select Arranged Meeting, then click OK.
4. Click No for scheduling a follow-up activity.

The call is logged to the Notes window.

You can now close your Calendar window and view your appointment with Mary:

1. Close the Calendar window.
2. From the Filter list in the Hotlist window, select Next Week.

Maximizer displays your appointment with Mary.

## How do I send a fax?

Next you want to send Mary a fax to confirm the appointment.

1. In the Hotlist window, click Mary's name.
2. Drag the entry to the Documents tab in the lower-right window.

The Documents window becomes active.

3. Release the mouse button.

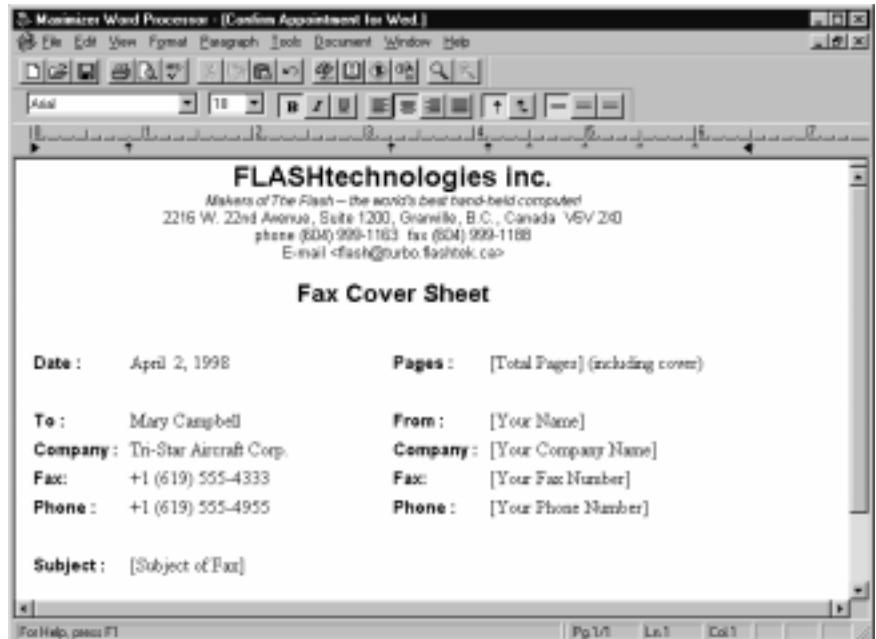
The Add Document dialog box appears

4. In the Name field, type **Confirm Appointment for Wed.**

You can now choose a document template to help you format your fax.

1. In the Use Template list, select \*Fax Form, then click OK.

The Maximizer Word Processor window appears, with Mary's name, fax and phone numbers already filled in on a fax cover sheet.



2. Fill in the information on the right side of the window:
  - For the number of pages, type **1**.
  - In the From field, type **Terry Lee**.
  - In the Company field, type **Flash Technologies**.
  - In the Fax and Phone fields, type your own fax and phone numbers.
3. Next to Subject, type **Confirming our meeting next Wednesday**.
4. Replace [Body of Fax] with details of the meeting, such as the time, location, and what you'll do:

**Mary, this is to confirm our meeting next Wednesday at 11:00 at the Central Hotel here in town, where I will demonstrate The Flash to you. I'll see you then.**

You are now ready to send the fax. To do this, you need to configure your computer to print to a fax driver instead of to a printer. If you don't have a fax modem, you can print the fax and send the copy using a standard fax machine.

1. From the File menu in the Maximizer Word Processor, select Page Setup. The Page Setup dialog box appears.
2. Click Printer, select the appropriate fax (or printer), then click OK.
3. Select Print from the File menu.  
If you were actually sending the fax, you would now click OK.
4. For now, click Cancel because the number in the tutorial isn't real and you can't send this fax.
5. Select Close from the File menu.
6. To save your fax document, click Yes.  
The Save As dialog box appears.
7. To save the fax as a document for Mary, click OK.
8. Select Exit from the File menu to close the Word Processor window.

Note that the fax now appears in the Documents window for Mary Campbell.

## How do I search for an Address Book entry?

After you send your fax to Mary Campbell, Michelle Franklin calls. You recently sent Michelle a letter about The Flash, and she wants more information. You need to find Michelle's entry so you can brush up on what you have sent her so far.

1. From the Search menu, select Last Name.

The Search by Last Name dialog box appears.



2. In the Last Name field, type **fran**.

When you search for a name or other information in Maximizer, you can enter the first few characters to quickly find a match.

3. Click **Replace List With Search Results**, which switches to the Address Book window, clears the list there, and displays only entries that match your search.
4. To start the search, click **OK**.
5. Select the entry for Michelle.

The Documents window displays what you have sent her.

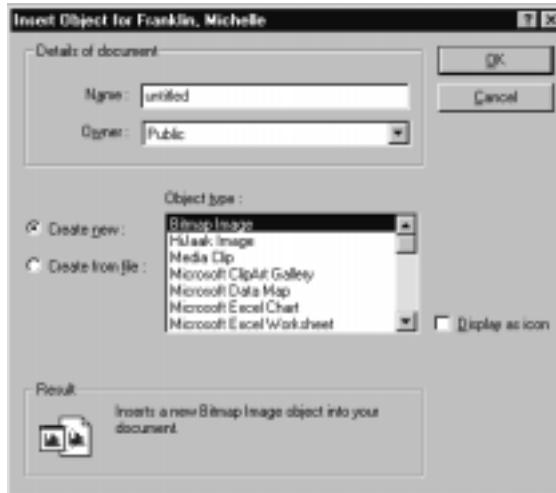
You discover that you haven't sent Michelle your latest comparative brochure showing why The Flash is the best hand-held computer available. You're sure that Michelle would like a copy.

### **How do I attach an external object?**

Your promotional brochure was prepared using an external spreadsheet application such as Lotus 1-2-3, Microsoft Excel, or Corel Quattro Pro. You can use Maximizer to retrieve the spreadsheet file, attach it to Michelle's Address Book entry, then print it.

1. Select **Insert Object** from the Edit menu.

The Insert Object dialog box appears.



2. In the Name field, type **Comparative Table**.

3. Click Create From File.

4. To find a spreadsheet file on your hard disk, click the Browse button.

You can use any spreadsheet file for this example, or substitute any file from another application if you have no spreadsheet files.

5. When you locate a spreadsheet file to use, click Insert, and then OK.

The file you selected appears in the Documents window.

6. Double-click the spreadsheet file to launch the original application and open the object document.

In the original application, you can now print the spreadsheet and send it to Michelle.

## How do I print a mailing label?

You now want to print a mailing label so you can send the spreadsheet to Michelle in a large manila envelope which doesn't fit in your printer.

1. Select Page Setup from the File menu.

2. Click the Labels tab.

3. If necessary, change the label settings, then click OK.

Make sure your printer is loaded with the proper mailing labels.

1. In the Address Book window, select the entry for Michelle Franklin.
2. On the Action toolbar, click the Print a Label button.

The Print Label dialog appears.



3. In the Message to log to notes field, type **Label for brochure. Very interested.**

This message will appear as a note for Michelle.

4. In the Print Labels To box, click Preview, then click OK.
- Maximizer displays a preview of the sheet of labels.
5. If the preview looks good, click Print to print the label.
  6. If not, click Close, adjust the label settings, and try again.

### How do I see a previous Address Book list?

The Address Book still displays only the two Franklin entries from your search. You can go back to your previous display very easily by undoing the search. You can undo up to eight previous searches.

- Select Undo Search from the Search menu. The Address Book window returns to the list it last displayed.

### How do I print a report about what I did today?

Maximizer makes it very easy to print a report of your activities.

1. Click in the Address Book window to make it active.
2. Select All Companies and Individuals from the View menu.
3. On the Standard toolbar, click the Print button,
4. From the drop down menu, choose Note Report.

The Print Note Report dialog box appears. Notice that today's date is already chosen.



5. Select the Print Summary Statistics checkbox.  
If you'd like, you can choose to preview the report as well.
6. Click OK.  
The Printing dialog box appears.
7. In the Printing dialog box, click All Entries, then click OK.  
Maximizer prints a summary of what you did today.

You've finished the first tutorial. If you want, you can take a break now and do the second tutorial later. Tutorial Two shows you how to do more complex searches, do a mass mailing, print envelopes, add new entries, keep track of your expenses, and use E-mail and the World Wide Web directly from Maximizer. It also introduces you to Maximizer Wizards, which take you step by step through some of Maximizer's powerful features.

You can choose to close the tutorial by selecting Exit from the File menu or move on to Tutorial Two.

## Tutorial Two: Marketing

In this tutorial you're Alex Timms, marketing director with Flash Technologies. You've been working on a publicity campaign for the company which includes a booth at the upcoming GlobalEx computer show in Sao Paulo, Brazil. You've sent out promotional information about your display there, and interested people can get vouchers from you for discount tickets to the show.

Your Contacts have responded: some are definitely going to GlobalEx, some are not, and some aren't sure. You've entered these responses in Maximizer and sent out vouchers to Contacts who want to go to the show.

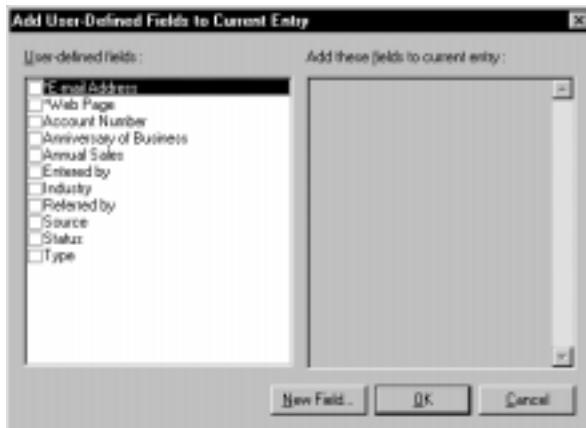
Before beginning this second tutorial, make sure the Tabbed Windows view is active. If Maximizer is already running, click the Address Book button on the Icon bar. If you closed Maximizer after you finished Tutorial One, choose the Tutorial icon from the Start > Programs > Maximizer folder from the Windows taskbar.

### How do I update user-defined fields for my Contacts?

Today's mail includes two more responses to your letters: a "yes" from Heinz Weber and a "maybe" from Thomas Hendrickson. You want to update the Address Book entries for these two Contacts with this new information.

1. In the Address Book window, select the entry for Deutsche Interkom AG.
2. In the Contacts window, click the entry for Heinz Weber.
3. Drag the entry to the User-Defined Fields tab in the lower right window.  
The User-Defined Fields window becomes the active window.
4. Release the mouse button.

The Add User-Defined Fields To Current Entry dialog box appears.



5. In the User-Defined fields list, select the Will Attend GlobalEx? checkbox.

A check mark appears in the box to show that it's selected.

6. Click OK.
7. In the Table Field Values dialog box, select Yes, then click OK.

Notice that the field now appears in the User-Defined Fields window.

Now you'll update the second entry. This time you'll learn a different way of updating a user-defined field (UDF) in Maximizer.

1. In the Address Book window, find the entry for Thomas Hendrickson, and then double-click it.

The Hendrickson, Thomas M. entry dialog box appears.

2. In the dialog box, click the User-Defined Fields tab.
3. Scroll down to the bottom of the User-Defined fields list.
4. Click in the Will Attend GlobalEx? field, then click the Items button indicated by an ellipsis (...).
5. In the Table Field Values dialog box, select the Maybe checkbox, then click OK.
6. To close the entry screen, click OK again.

The new field appears in the User-Defined Fields window.

## How do I find particular entries for follow-up?

You received a few “maybe” responses recently, but haven’t yet sent a follow-up letter. You need to find those “maybe” entries in your Address Book.

1. Select All Fields from the Search menu. The Search by All Fields dialog box appears.



2. Click the Add button to display the Select Fields for Search dialog box.
3. Select the Show User-Defined Fields Only checkbox.

The list of Available Fields now shows only user-defined fields (UDFs).

4. Select the Will Attend GlobalEx? checkbox, then click OK.
5. In the Select Table Field Values dialog, select the Maybe checkbox, then click OK.
6. In the Search by All Fields dialog box, click OK to start the search.

Maximizer searches the Address Book folder and displays the results in the Address Book window. Notice that Thomas Hendrickson, whose entry you just updated, appears in the list.

## How do I send a mass mailing?

Maximizer can use this follow-up list for a mail-merge. There are only a few entries in this list, but you can just as easily send personalized letters to 30 or 300 people.

To print the letters, you need to have a printer installed and connected to your computer or to a network. The printer should be turned on and ready to print.

1. Click the Maximizer Word Processor button on the Standard toolbar. The Word Processor button has an image that looks like a typewriter.

The Maximizer Word Processor window opens.

2. From the Word Processor File menu, select Open.
3. In the Open Template dialog box, double-click GlobalEx Maybe Letter. Maximizer opens a Flash Technologies mail-merge template.
4. Select Merge > To Printer from the Word Processor's File menu.

The Merge Options dialog box appears.



5. In Print Options, click All Entries, then click OK. Maximizer displays the first merged letter.
6. The letter looks fine, so click the Print All button to skip previewing the other letters in the list. Maximizer sends all the letters to the printer.
7. When all your letters are printed, select Exit from the File menu.
8. If you're asked to save changes, click No.

## How do I print envelopes?

Now that your letters are done, you'll need to print envelopes for them.

1. Select Print > Envelopes from the File menu.

The Print Envelopes dialog box appears.

2. Click the Page Setup button.
3. In the Page Setup dialog box, indicate the settings for the envelopes you use, then click OK.

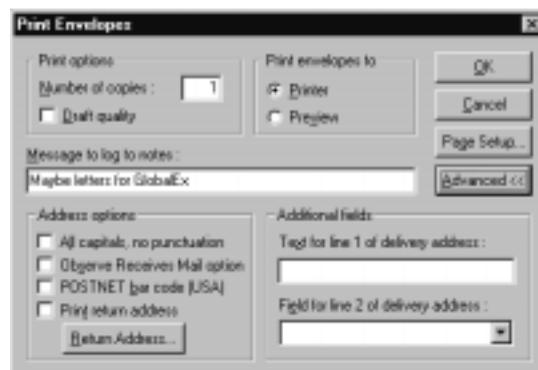
You return to the Print Envelopes dialog box.

4. In the Message to Log to Notes field, type **Maybe letters for GlobalEx**.

This message will appear as a note for each entry in your list.

5. Click the Advanced button.

The Print Envelopes dialog box expands to display advanced options.



6. Select the Print Return Address checkbox, then click the Return Address button.
7. In the Enter Your Name and Address field, type the return address as you want it to appear on each envelope:

**Flash Technologies Inc.**  
**2216 W. 22nd Avenue**  
**Suite 1200**  
**Granville, BC**  
**Canada V6V 2X0**

8. Click OK to accept the return address.

9. Make sure your printer is loaded with the correct envelopes.
10. To print your envelopes now:
  - a. Accept the default Print Envelopes to Printer, and click OK.
  - b. In the Printing dialog box, click All Entries, then click OK.  
Maximizer prints your envelopes.

To preview the envelopes before you print them:

- a. Click Preview.
- b. Click All Entries, then click OK.  
Maximizer displays each envelope on a page.
- c. Check the envelope positioning, then click Print to print the envelopes or Close to return to the Address Book folder.

## How do I save a list of entries?

You'll want to save your list of "maybes" to look at later.

1. With the Address Book window active, select Select All from the Edit menu.
2. Select Favorite Lists from the View menu.

The Favorite Lists dialog box appears.



3. Click Add.  
The Address Book List Properties dialog box appears.

4. In the Name field, type **Maybes for GlobalEx**, then click OK.

The list is now saved.

You can retrieve the list any time by choosing Favorite Lists from the View menu, selecting Maybes for GlobalEx, then clicking the Retrieve button.

---

**NOTE**

Favorite lists are not dynamic. If you add entries to your Address Book folder that match your original search, the Maybes for GlobalEx list does not change. You can, however, perform the search again and save the updated results under the Maybes for Global Ex name.

---

## How do I add new entries?

You now get an unexpected call from Mike Egan, a freelance technology writer from Australia. He saw an ad about The Flash in a computer trade magazine and noticed that the ad mentioned GlobalEx.

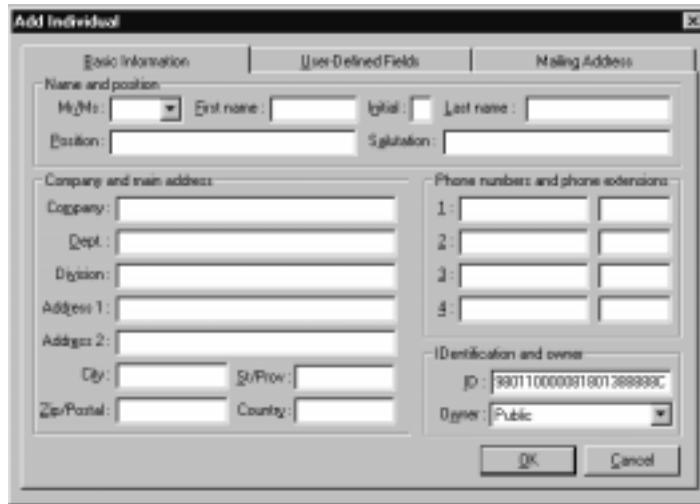
You discuss your booth. Because he's also planning to attend GlobalEx, Mike would like two discount vouchers. You get Mike's address, cellular phone number, and E-mail address. You can add this information to your Maximizer Address Book while you're still on the phone with Mike.

1. Click anywhere in the Address Book window.
2. Click the right mouse button.

The shortcut menu appears

3. From the shortcut menu, select Add > Individual.

The Add Individual dialog box appears.



You can now fill in the new information for Mike.

4. The insertion point is located in the Mr/Ms field, so type **mr**, then press Tab.

Notice that Maximizer automatically adds the period and capitalizes the field entry. This is an example of Auto-Fill and Auto-Capitalization.

5. Next type **mike**, then press Tab twice.
6. Type **egan**, and press Tab again.

Maximizer capitalizes both the first and last name for you.

7. In the Position field, type only the letter **w**.

Maximizer automatically supplies “Writer” for you, but you decide that just Writer is not descriptive enough.

8. Click at the beginning of the word “Writer”, type **Freelance**, then press Tab.

9. Click  in the Salutation field, and choose Dear <: from the list.

The < sign inserts the contents of the first name field. “Dear Mike:” will now appear in any letters you send him.

10. Click in the Address 1 field, and type **35 Addison Rd.**
11. Click  in the City field and choose [Edit List...].
12. In the Edit List dialog box, click Add and type **Melbourne.**
13. Click OK, then Close.

Melbourne will now appear for any future entries that you find a quick match for by typing the first few letters (in this case “mel”).

14. Fill in the State/Prov, Zip/Postal, and Country fields:

**Vic** (for Victoria),  
**3118**  
**Australia**

Notice that Maximizer completes the country name for you.

15. Press Tab to move to the Phone Number 1 field and type **+18 (3) 866-251-033.**
16. Press Tab to move to the Extensions field.
17. In the Extensions field, click  and select Cell.

You can now update Mike’s user-defined fields, including his E-mail address, and add the fact that he will be coming to GlobalEx.

1. Click the User-Defined Fields tab.
2. In the \*E-mail Address field, type **mikee@unix.melbnet.au.**
3. Scroll down to and click the Will Attend GlobalEx? field.
4. Click the Items button (...).
5. In the Table Field Values dialog box, select Yes, then click OK.
6. In the Add Individual dialog box, click OK to complete Mike’s entry.

## How do I search for a company?

After Mike’s call you decide to get in touch with a local paper in Sao Paulo, Brazil. They will be covering the GlobalEx show and might want to feature The Flash in one of their articles. You don’t remember the name of your Contact there, but you know the paper’s name begins with “O Jornal” in Portuguese. Maximizer can find that entry for you.

1. Click anywhere in the Address Book window, then select Company from the Search menu.

The Search By Company dialog box appears.

2. In the Company field, type **O Jornal**.
3. To start the search, click OK.

Maximizer finds O Jornal de Sao Paulo and displays the entry for you in the Address Book window.

There are two Contacts in the Contacts window: the editor and the technology reporter who will be attending the show.

## How do I send E-mail?

You have the E-mail address for Sebastiao Pena – the technology reporter – stored in his \*E-mail Address user-defined field, and would like to send him E-mail with information about the industrial design award that Flash Technologies will receive at GlobalEx. You can send E-mail directly from Maximizer.

If you don't have E-mail access, skip to the next section, "How do I answer a phone call?"

1. In the Contacts window, select the Sebastiao Pena entry.
2. If you had to dial in or connect your computer to your E-mail system, you would do so now.

You will not actually send an E-mail message now, so you don't need to complete this step for this tutorial.

3. Select Send E-mail from the File menu. Click Continue when the Maximizer E-mail Requirements dialog box appears.
4. In the Send E-mail dialog box, click OK.

You may be asked to choose an E-mail system or profile to log in to your E-mail. If necessary, indicate your profile name, then click OK.

The Compose E-mail Message dialog box appears.

5. In the Subject field, type **Flash Technologies receives award**.

6. Click in the Message Body text box and type:  
**Flash Technologies will be receiving the Innovation of the Year Award from the Industrial Designers of Europe at GlobalEx.**  
**Would you be interested in doing a story on us?**  
**Please contact me at <timms@turbo.flashtek.ca> or +1 (604) 999-1125 for more information.**  
**Alex Timms**  
**Marketing Director**
7. In the Message to Log to Notes field, type **Interested in GlobalEx story?**
8. If this were an actual E-mail message, you would now click Send.  
Because the E-mail address in this tutorial is not valid, click Cancel instead.
9. If necessary, disconnect from your E-mail system as you normally do.

## How do I log an incoming phone call?

Sebastiao Pena is at his desk in Sao Paulo and gets your E-mail immediately. He has heard about The Flash and would like to do a story about it, so he calls you right back. You can log the call in Maximizer while you're speaking to him.

1. In the Contacts window, select Sebastiao's entry.
2. On the Action toolbar, click the Phone button. The phone button looks like a cellular phone.

The Phone dialog box appears.



3. Because Sebastiao has called you, click Incoming.
4. In the Subject field, click  and select Arrange Meeting.
5. In the dialog box title bar, click the Minimize button.

At the bottom of your screen you can still see the timer running.

## How do I schedule an appointment months away?

Sebastiao wants to interview you when you arrive in Sao Paulo in January, next year.

1. On the Icon bar, click the Calendar button.  
The Calendar window appears.
2. In the Calendar's View bar, click Go to Calendar Date, type **Jan 20, 98**, then click OK.

If you are doing this tutorial in 1998 or later, type **99** or a later year.

The Calendar changes to Day view for that date.

3. Because Sebastiao suggests a 2 o'clock meeting at your hotel, click the 2:00 pm time slot.
4. Select Schedule a Meeting from the Actions menu.

The Add Appointment dialog box appears, with some information already filled in.



5. Click the Until field and type **4 pm**, then click in the Activity field.
6. Click  on the lower right of the text box, then choose Interview from the drop-down list.
7. Click at the end of the word Interview and type **at the hotel restaurant**.
8. Click in the Priority field.
9. Click  and choose Hi from the drop-down priority list.
10. Ensure that the Appointment With Pena, Sebastiao checkbox is selected; otherwise you will create a personal appointment.
11. Click OK to close the dialog box.

The interview now appears in your Calendar for the date you chose.

## How do I finish a phone call?

You finish your call with Sebastiao, but want to jot down one more note.

1. Double-click the Phone title bar at the bottom of your screen to restore the Phone dialog box.

2. Click Pause.
3. Click in the large text box and type  
**Called in after receiving E-mail. Quite interested.  
Meet 2 pm in hotel restaurant first day at GlobalEx.**
4. Click Hang Up.
5. In the Phone Call Result dialog box, double click Arranged Interview.
6. Click No to scheduling a follow-up activity.
7. In the Phone dialog, click Cancel.
8. Close the Calendar window.
9. Click the Notes tab in the Tabbed Windows view to see the note for your phone call.
10. To see the details of the phone call, double-click the note.

### How do I enter my expenses?

You want to update your expenses because the accounting department will soon be printing this month's expense checks. You just attended a conference in a nearby city and have your receipts for food and airfare.

1. On the Icon bar, click the Personal button. In the Journal window, click the Expenses tab.  
The Expenses window opens.
2. Scroll down the list of accounts and double-click Work-Airfare.

The Account Name - WAirfare dialog box appears.

- Amount per day:	
Daily summary:	
April 1, 1998	\$0.00
April 2, 1998	\$0.00
April 3, 1998	\$0.00
April 4, 1998	\$0.00
April 5, 1998	\$0.00
April 6, 1998	\$0.00
April 7, 1998	\$0.00
April 8, 1998	\$0.00
April 9, 1998	\$0.00

Account:

Add Subtract Replace

Details of account

Description:

Type:  Income  Expense

Security:  Public  Private

OK Cancel

3. In the Daily Summary field, select a previous day.
4. Click in the Amount field, and type **285.60**.
5. Click the Add button, then click OK to close the dialog box.
6. Next, select Work-Meals.
7. Click the right mouse button and choose Open Account.

The Account Name - WMeals dialog box appears.

8. In the Daily Summary field, select a previous day.
9. Click in the Amount field, and type **35.00**.
10. Click the Add button, then click OK to close the dialog box.

Maximizer adds the expenses and displays the total at the bottom of the Expenses list. You can now close the Expenses window. Maximizer has recorded your expenses.

## How do I link to a Web site?

Before you leave the office to talk to the advertising department, you want to check the latest information on the Maximizer Web site. If you have access to the Internet and a Web browser such as Netscape, Internet Explorer, or Mosaic installed on your computer, you can link to an entry's Web site directly from Maximizer. If you don't have access to the Internet, skip to the Maximizer Wizards section below.

1. If you need to dial in by modem or otherwise connect to an Internet service, do so now.
2. In the Address Book window, select All Companies and Individuals from the View menu.
3. Select the Maximizer Technologies entry.

You can also do this by clicking anywhere in the Name and Phone Numbers column and pressing the M key to find Maximizer in the list.

4. On the Standard toolbar, click the Web Page button. The Web Page button looks like a world with a file card in front of it.

Maximizer launches your Web browser and links to the Maximizer home page on the Web.

The address of the Web page is stored in the \*Web Page user-defined field for that Address Book entry.

5. When you're finished browsing the Web site, select Exit or Close from your browser's File menu to return to Maximizer.

## How do I use Maximizer Wizards?

After visiting the Maximizer Web site, you want to learn more about how the program works. Maximizer has Wizards which can guide you through tasks step by step. Maximizer already has several Wizards installed. You can also download new Wizards by selecting the Web menu, then choosing DirectAccess.

1. On the Standard toolbar, click the Wizard button. The Wizard button has an image that looks like a wizard's hat with a wand.

The Wizards menu box appears.

2. Click the Info button at the bottom of the menu box.

The box expands.

3. To view some Wizard settings, click the Wizard Options button.
4. To see a description of each Wizard available, highlight each topic.



5. Choose a topic you want to know more about, then click it to run the Wizard.
6. Follow the directions the Wizard gives you.
7. When you are finished with the Wizards, click Close in the Wizards menu box.

## Shortcuts You Should Know

Before you finish the tutorial and start working with Maximizer, there are some useful shortcuts you should keep in mind.

### Working with Dates

You can type a date or select it from a drop-down calendar. After you have specified a date, you can change it if necessary.

To select a date using the calendar:

1. In any date field, click .

The calendar appears.



2. Select the year and month.
3. To select the desired date, click the date.

## Working with Drop-down Lists

You can save time and standardize entries by adding items to drop-down lists for certain fields in Maximizer. As you've already learned, Maximizer automatically capitalizes Contacts' names and other fields on the Basic Information tab of the Address Book entry if you do not use the Shift key while entering the name.

To select a drop-down item:

1. In the field press Insert or click .

The drop-down list appears.

2. Select the desired item. Click the item or press the down or up arrow to move to the item, and then press Enter.

—or—

Type the first few characters of the entry and Maximizer fills in the rest.

To add a drop-down item:

1. Click the box where you want to add the item.
2. Press Insert, or click  and scroll to select the item [Edit List]. [Edit List] is the first item in the list.
3. In the Edit List dialog, click the Add button.
4. In the Add Item field, type the text for the item to appear in the drop-down list. Then click OK.

- In the Edit List dialog, click the Close button.

## Working with Telephone Numbers

You can specify telephone numbers for local, long distance, and fax calls. You can also set an option to adjust the dialing sequence if you are using Maximizer when traveling outside your normal local calling area.

- If you are using your modem to dial calls, receive and send faxes, or both, be sure to set the local and current area code as well as the long distance prefix for the modem.
- If you are using a TAPI connection, be sure to use the international telephone format. All phone numbers must be entered in the following format:

Format: *+country code (area code) local number*

North American Example: +1 (901) 555-1234

Australian Example: +61 (3) 555-1368

### ► To enter a telephone number

- In the phone number field, type the telephone number. Maximizer automatically inserts dashes for you. Remember to include the area code if the number is long distance.

Call	Type	Maximizer Display
Local	666999	666-9999
Long distance	12226669999	1-222-666-9999

The display above is for a modem connection. If you're using a TAPI connection the display may differ, but Maximizer will dial the number correctly.

- In the extension field, do one of the following:
  - Type the extension number for the telephone.
  - Select or type a label to identify the type of telephone.

➤ **To enter a fax number**

1. In the phone number field, type the telephone number. Maximizer automatically inserts dashes for you. Remember to include the area code if the call is long distance.

Call	Type	Maximizer Display
Local	666999	666-9999
Long distance	2226669999	222-666-9999

2. In the extension field, type FAX.
  - You can type either FAX or FACS. Capitalization is ignored, but do not type additional characters. For example, Fax\_ or FACS(space) are not considered a fax number by Maximizer.
  - FAX specifies that this is a valid fax number when you fax Maximizer correspondence using your modem.

➤ **To make calls when traveling**

1. Under File, select the Preferences command.
2. In the Preferences window, select the Dialing tab.
3. Under Long Distance Settings or TAPI Properties, change the Current Area Code to the area code from which you are calling.
4. Click the OK button.

## Copying Fields

Finally there is one more shortcut that you might find helpful. It allows you to copy text from one field to another.

➤ **To copy the contents of a field into another field**

1. Select a dialog box field.
2. Highlight the text you want to copy.

3. Press Ctrl+C.
4. Select another dialog box field where you want the text copied.
5. Press Ctrl+V.

## **Congratulations!**

You've finished the tutorials. Before you quit Maximizer or start to create your own Address Book folder, reset the workspace:

1. Select Reset Default Workspace from the Window menu.

Maximizer displays an information message saying that current window positions and other settings will be erased.

2. Click OK.

The workspace rearranges itself to the default setting.

To close the tutorial and continue using Maximizer

- Select Close Address Book Folder from the File menu.

To quit Maximizer

- Select Exit from the File menu.



# WHERE TO GO FROM HERE

This chapter describes how to start Maximizer and open your own Address Book folder. It also refers you to other sources of information if you need help with the program.

## Opening Maximizer

You open Maximizer in the same way you started the tutorial. Complete the following step.

- On the Windows taskbar, click Start and choose Programs > Maximizer.

If you are on a network, or you are using a multi-user configuration, you may also have to log in. Complete the following step.

- In the Sign-On Security dialog box, type your user name in the User ID field. Type your password in the Password field and then click OK.

## Using Your Own Address Book Folder

When you first start Maximizer, the program automatically opens an empty Address Book folder called My Address Book, which is placed in the folder C:\Program Files\Maximizer\Data. Once this Address Book folder is opened, you can start to add your Address Book entries.

1. To add an address, click in the Address Book window and select Add from the Edit menu. Then, fill in the dialog box fields. You can find more detailed information in your *Maximizer User's Guide*.

If you are running Maximizer from a network, or if you are using a multi-user configuration, you may have access to existing Address Book folders. Check

with your system administrator to find out if there are Address Book folders available and their names.

1. Select Open Address Book from the File menu. Then double-click a folder name in the Open Address Book dialog box or select the Address Book folder and click Open.
2. To see the Address Book entries, select All Address Book Entries from the View menu. You can find more detailed information in your *Maximizer User's Guide*.

## Other Resources

Maximizer includes several resources which provide more information about the program.

## Maximizer Wizards

Maximizer Wizards make entering data easy; secondly are a good way to become familiar with Maximizer features and functions. When you want to perform an activity such as adding an Address Book entry, or adding a strategy, simply select Maximizer Wizards from the Tools menu and choose the task you want to complete.

New Wizards are posted on Maximizer DirectAccess as they become available. If you have Internet access, you can easily download the Wizards you want to your computer.

## Maximizer Smart Tips

A Maximizer Smart Tip is information Maximizer presents when you performing a specific task in Maximizer. It offers you helpful hints and suggestions about your task and related tasks.

## User's Guide

Your *Maximizer User's Guide* provides detailed information about all the Maximizer features and functions. The guide includes a comprehensive table

of contents and an index to help you find the information you need as quickly as possible.

## Online Help

Online Help provides information about the Maximizer commands, menus, windows, dialog boxes and procedures. You can access the Help feature anywhere in Maximizer by pressing F1.

You can also use the Help menu to find information. To use Help, select Help Topics from the Help menu. You can also search for a topic by selecting the Index or Find tab in the Help Topics window.

## Help Tours

Help Tours are a set of online tours that visually illustrate quick and easy ways to do things in Maximizer. They are accessible from related areas of the context sensitive (F1) help and also through the help menu.

## Maximizer DirectAccess

Check Maximizer DirectAccess for up-to-date information. With an Internet connection, you can also quickly find answers to frequently asked questions, useful technical tips and late-breaking Maximizer news, as well as a complete list of Maximizer products and services.

To access Maximizer DirectAccess, select the Maximizer DirectAccess command from the Web menu.

## Maximizer Technical Support

Due to the variables associated with the use of this product, you may require technical support. Please inquire about support where you purchased the product before contacting Maximizer Technical Support.

Maximizer support line (604) 601-8100

Web site <http://www.maximizer.com>

## Before You Call

Take a moment to check the following items before you call Technical Support. They may help to resolve your problem.

- Check that you've entered any password, folder, or Address Book folder name correctly.
- Check the Status bar below the Maximizer workspace for helpful information.
- Check the title bar for the name of your current Address Book folder.
- Check which is the active window; it has a highlighted title and View bar.
- Check which is the current item; it is shown in reverse type and has an arrow to the left of it.
- Press F1 for Online Help.
- Look up the task you were trying to do in the *Maximizer User's Guide*.

If you still have the problem, call the Technical Support line. Before you call, please do the following:

- Back up your Address Book folder. To minimize the risk of losing data, for each Address Book folder you should have a current backup on a *new* set of disks, a remote folder, or on removable media, such as a Zip disk.
- Think about how best to describe the problem and what you were doing when it happened. The easier you can explain it, the faster we can help resolve it.
- Note down any error messages.
- Note down the version of Maximizer you are using, the type of hardware, and the operating system version number.
- Note other software you are using with Maximizer, such as a spreadsheet or word processor.
- Have your Maximizer Product Serial Number ready. To locate your Product Serial Number number, select About Maximizer from the Help menu. It is displayed in the About Maximizer dialog box under Registration and Program Information.
- Have Maximizer running on your computer, and call from a phone near your computer if possible.







# GLOSSARY

16-bit	16-bit applications access your computer memory in 16-bit chunks (2 bytes). Most Windows applications released before Windows 95 are 16-bit.
32-bit	32-bit applications access your computer memory in 32-bit chunks. Applications written specifically for Windows 95 and Windows NT are 32-bit.
Address Book folder	A database where you store address and telephone information about your prospects, customers, and suppliers. In addition to address information, you can also maintain information about activities, documents, and notes for the Companies, Individuals and Contacts you add.
Application	A program or software package.
Calendar	In Maximizer, an electronic appointment book where you schedule meetings, appointments, and activities.
Business Net	An online trade show exhibiting various North American products and services, where you can establish contact with present or potential customers.
Cascade	A way to arrange windows in Maximizer so they overlap with only the title bars showing.
Click	To quickly press and release the mouse button. Clicking selects the item you are currently pointing at, such as a menu.

Company	A type of Address Book entry that represents a group of people such as an organization, association or business you deal with. A Company address type often has associated Contact address entries. Also see <i>Individual</i> and <i>Contact</i> .
Contact	A type of address entry that typically represents people associated with a Company address entry, or less frequently an Individual address entry. Also see <i>Company</i> and <i>Individual</i> .
Default	A setting that is used unless you tell the system otherwise.
Dialog box	A temporary window where you can enter information. A menu option followed by three dots (...) leads to a dialog box.
Dialog box tab	A section of a dialog box, which is accessed by a tab.
Double-click	Quickly pressing and releasing the mouse button twice. Double-clicking performs a certain action, such as starting a program.
Drag and Drop	A way to quickly move information from one window to another. It consists of selecting an item, holding down the mouse button, moving the mouse, and then releasing the button.
Drop-down list or calendar	A table that is accessed from a dialog box field using the down arrow button or Insert key.
E-mail	A message that you send or receive over a computer network or the Internet.
Expenses	A spreadsheet of income and expense accounts.
Hotlist	A list of reminders and tasks to do.
Icon	A small graphic that represents an element of your computer system, such as a disk drive or an application.
Individual	A type of Address Book entry that represents an Individual such as a doctor, lawyer, or accountant. An Individual Address Book entry can have Contact address entries associated with it. Also see <i>Company</i> and <i>Contact</i> .

Internet	A “network of networks.” It is composed of high speed computer networks linked together around the world that contain vast amounts of information that you can access.
List Merchant	A database containing North American business and residential listings, accessible over the Internet through Maximizer.
Internet Provider	A company that provides access to some or all types of Internet information.
Journal	A log or diary of personal references, ideas, and other information.
LAN	Local Area Network. A type of network that links personal and other computers by cable in a limited area. LAN users can share files, computer devices such as printers and CD-ROM drives, and access information and programs located in a dedicated computer called a server. Also see <i>WAN</i> and <i>Network</i> .
Log in	To access a program by entering a user ID and password.
Maximize	To change an icon into a window or change a window to its full size. This is done by selecting the Maximize command from the shortcut menu or clicking the Maximize button (an open square) at the right of the title bar.
Maximizer DirectAccess	A site where you can find answers to questions, tips, new Wizards and templates, add-on products and more. To use Maximizer DirectAccess, you need an Internet connection.
Microsoft Exchange	A program that comes with Windows 95. It is an advanced application that retrieves messages into one Inbox from many kinds of messaging services, including your MAPI-compliant mail system, Internet service provider, and fax.
Minimize	To reduce a window to an icon. This is done using the Minimize icon (⏏) at the right end of the title bar.
Menu	A list of available commands. A menu is opened by clicking on it with the mouse.
Menu bar	The horizontal bar just below the title bar that contains command menus.

Merge	To join a list of addresses with a form letter or fax.
Network	A hardware and software configuration that allows more than one computer user to share the same programs and data. Also see <i>LAN</i> and <i>WAN</i> .
Notes	A log of contact management activities. You can set up Maximizer to automatically log activities such as creating letters and faxes, phoning, and appointments. You can also add notes for information such as personal impressions, company profile information, and summarize Contacts.
Object	An item—such as a spreadsheet, diagram, or document—from another application.
Preferences	Setup options for Maximizer that a computer user or administrator can change.
Peg Board	An electronic method of notifying other Maximizer users when you are in or out of the office or otherwise unavailable.
Start menu	The menu that appears when you click the Start button on the Windows 95 desktop.
Template	A formatted document used for preparing standard letters and mail-merges.
Tile	To arrange your workspace so each window fills up an equal part of the screen with no overlap.
Title bar	The horizontal bar at the top of a window or workspace that indicates the name of the window or Address Book folder.
Toolbar	A group of command buttons that you can place in a convenient location. In Maximizer, there are nine types of toolbars: Icon, Standard, Formatting, Actions, View, Status, Smart Tip, and Status Indicator, as well as Custom toolbars that you can create.
User-Defined Field (UDF)	A tag used to classify a Company, Individual or Contact Address Book entry (such as by interest or type of business). These classifications are useful for sorting or grouping Address Book entries.

---

WAN	Wide Area Network. A type of network that uses high-speed, long distance communications to connect computers over great distances. Also see <i>LAN</i> and <i>Network</i> .
Workspace	The main screen in Maximizer where you use the windows and command bars.
WWW	World Wide Web. See <i>Internet</i> .
WWW Browser	A program used to find, display, and retrieve information from World Wide Web sites (home pages) on the Internet. Examples of Web browsers include Netscape Navigator, Netscape Communicator, Microsoft Internet Explorer, and Mosaic.



# INDEX

## A

- Activity report 51
- Address Book
  - description 36
  - previous list 51
- Address Book entries
  - adding 59
  - Company 36
  - Contact 36
  - Individual 36
  - relationship among 37
  - saving lists 58
  - searching 48
  - types 36
- Address Book folder
  - using 75
- Address Book folders, upgrading 12
- Address, changing 43
- Appointment, scheduling 44, 64

## C

- Calendar, selecting dates 69
- Communications
  - setting up 13–22
- Communications, setting up 13
- Company address entry 36
- Company, searching for 61
- Contact address entry 36
- Copying field contents 72
- Customized drop-down lists 70

## D

- Dates, selecting from calendar 69
- Drop-down list
  - adding an item 70
  - changing an item 70
  - customizing 70
  - deleting an item 70

## E

- E-mail
  - displaying the address 59
  - sending 62
- E-mail access
  - setting up Internet for Maximizer 20
- Envelopes, printing 57
- Expenses, entering 66
- External object, attaching 49

## F

- Fax
  - creating 46
  - other fax software 17
  - setting up Microsoft Fax 17
  - setting up unattended in Windows 95
    - or NT 16–20
  - setup 15
  - WinFax Lite 16
  - WinFax Pro 16
- Fax numbers 71
  - adding to address entry 72
- Field contents, copying 72

## H

- Hardware required 3
- Help Tours 6
- Help, online 77
- Hotlist, using 39

## I

- Icon bar 35
- Individual address entry 36
- Installing Maximizer 7, 12
  - on a network 9–11

## L

- Label, printing 50
- Last name, searching by 48
- List Merchant 2
- Lists
  - Address Book 51
    - saving 58
- Logging in
  - as a Master user 25
  - as a network user 75
  - as a single user 75
- Logging incoming phone calls 63

## M

- Mailing label, printing 50
- Mail-merge, creating 56
- Marketing tutorial 53
- Mass mailing, creating 56
- Maximizer 1
  - converting data from previous versions 10
  - installing 7–12
  - online help 77
  - starting 75
  - turning off security for 25
  - user's guide 76
  - wizards 76
- Maximizer, DirectAccess 2, 77

- Microsoft Fax, setting up 17
- Modem, setting up 13

## N

- Network
  - installing Maximizer 9–11
- Network drive, installing Maximizer 10
- Numbers
  - fax 71
  - pager 71
  - phone 71

## O

- Object, attaching 49
- ODBC Driver 3
- Online help 77
  - getting 38

## P

- Pager numbers 71
- Password
  - adding for user 30
  - changing 30
  - specifying 75
- Phone calls
  - adding a note 65
  - incoming 63
  - making 40
  - making when traveling 72
- Phone numbers
  - adding to address entry 71
  - fax 72
  - TAPI format 71
- Printing
  - envelopes 57
  - mailing labels 50

## R

- Relationship among Maximizer entries 37

- Report
  - User ID List 26
- Reports, activity 51
- Resources
  - Maximizer DirectAccess 77
  - online help 77
  - user's guide 76
  - wizards 76
- S**
- Scheduling, appointments 44, 64
- Searching Address Book entries
  - by company 61
  - by last name 48
  - by user-defined fields 55
- Security
  - adding passwords 30
  - adjusting access rights 27
  - changing passwords 30
  - considerations 22
  - Master user 25
  - setting up 22, 30
  - turning off 25
  - turning on 24
  - user 26, 29
- Setting up
  - communications 13, 22
  - fax 15
  - Maximizer server access for workstation user 10
  - security 22–30
- SETUP program 10
- Shortcuts 69
  - copying fields 72
  - entering dates 69
  - entering drop-down list items 70
  - entering phone numbers 71
- Single computer, installing Maximizer 8
- Software required 3
- Standard toolbar 35
- Starting Maximizer 75
- Status bar 36
- Status indicator 35
- T**
- Tabbed Window view, description 37
- TAPI format for phone numbers 71
- Telephone applications, setting up 13
- Title bar 35
- Toolbar
  - Icon 35
  - Standard 35
- Tutorial
  - marketing 53
  - selling 39
  - starting 33
- U**
- Upgrading Maximizer Address Book folders 12
- User ID List report 26
- User's guide 76
- User-defined fields
  - searching 55
  - updating 53, 61
- Users
  - adding 26
  - deleting 29
  - modifying rights 27
- users
  - adding to central Address Book folder 22
- W**
- Web site, linking to 68
- Web site, Maximizer 77
- Windows 95
  - Maximizer hardware/software requirements 3
- Windows 95 or NT users
  - setting up unattended faxing 16–20
- Windows NT Workstation 4.0

- Maximizer hardware/software requirements 3
- WinFax
  - setting up PRO 4.0 for unattended faxing 16
  - setup 16
- Wizards
  - description 76
  - using 68
- Workspace, description 35, 37
- Workstation user, Maximizer setup for server access 10