Maximizer™

User's Guide

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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

Chapter

1 INTRODUCTION

The greatest advances in Maximizer 5.0 are in its unparalleled E-Commerce and Internet integration. Maximizer is the only contact manager to include an integrated professional Web site creation wizard, and it requires no HTML knowledge. Create a customized Web site for your business, get it online on the free Web server provided with Maximizer (or your own Internet provider's), and be taking orders and inquiries online, in less than an hour! Maximizer's E-mail Center automatically logs incoming orders and inquiries to your notes, so you can work with them using all of Maximizer's contact management muscle. You can also use the Inquisit online business intelligence service to monitor information about any Address Book entry, customer, or competitor, as well as download sales leads from the List Merchant online database of over 100 million individuals and businesses.

The new E-mail Center window is so well harmonized with advanced E-mail software such as Microsoft Outlook, Exchange, and Eudora Pro that you can work with your E-mail all day without leaving Maximizer (it works with Lotus Notes, cc:Mail and GroupWise too). A full tree-style view of all your mail folders, plus separate message folders for Incoming, Sent and Deleted mail for your current Address Book entry, make tracking your electronic correspondence easy. Show only unread messages if you want, filter by date or subject, add a customized signature to your mail, and drag and drop E-mail messages to create new Companies, Individuals, and Contacts, as well as Hotlist tasks – automatically.

After many requests from users, Maximizer 5.0 now includes a full-featured, built-in report generator, ReportSmith Explorer for Maximizer; new administrative reports with Address Book statistics and usage summaries; a Peg Board to find out whether other users on your network are in or out; the integrated MaxAction Campaign Planner to schedule complex and recurring tasks; and graphical North American travel route planning with ANDRoute and MapsOnUs.

There is a central Company Library to store vital sales and marketing information for everyone to access; a Diary Companion to schedule world-wide holidays and hundreds of events; a World Clock to help you work more easily with contacts in other time zones; easier integration for programmers with the included open database connectivity (ODBC) driver and enhanced OLE automation; and the ability to create groups of Related Entries in a new window – great for when many of your contacts work together on a project.

You can use Maximizer 5.0's intuitive lists of information, blazing-fast searches, unique company-contact links, and unlimited notes, documents, and user-defined fields to work the way you want to. Many of Maximizer's award-winning features have been improved and simplified. Unlike upgrades to other applications, you don't have to re-learn the whole program – just keep working as you always have, and discover the improvements as you go.

Save multiple workspace views for different tasks. Use broader drag-and-drop support throughout the program. Include more options in column views and edit them more easily. Find free times for groups of users to schedule meetings. Have the Hotlist show you a count of pending and completed tasks. User-defined field graphing has been enhanced, and date and table fields are easier to work with. You can perform global edits in the Contacts and new Related Entries windows. Security has been enhanced for notes, user-defined-fields, and Contacts. There are more searching options, and they are quicker to access. You can even spell-check your notes and E-mail!

The table below describes Maximizer's ten windows.

Maximizer Window	Definition
Address Book	A list of names, addresses, and phone numbers.
Contacts	A list of people associated with your Address Book entries.
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 used to classify your Address Book entries (by interests, type of business, annual sales, and so on).
Notes	A log of business notes and completed activities, such as phone calls made, appointments completed, etc.
Documents	A list of correspondence with your Address Book entries, such as letters, faxes, E-mail messages and objects from other applications.
Hotlist	A to-do list of tasks and activities.
Calendar	An electronic calendar for scheduling meetings or phone calls.
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.

There are two ways to view the Maximizer workspace: the tabbed windows view or the standard windows view. The tabbed windows view groups the windows you work with most often in a single frame and lets you tab between Notes, Documents and User-Defined Fields windows. A controlling window controls what appears in the Contacts, Notes, User-Defined Fields and

Documents windows. In Maximizer, the controlling windows are the Address Book, Contacts, Related Entries and Hotlist windows.

You can open each Maximizer window individually using the standard windows view. Either view gives you maximum flexibility to monitor different work items, jump back and forth between tasks, or plan multiple activities. There's also a powerful search feature to help you quickly find information in your Address Book folders.

As well as the multi-window and search features, Maximizer provides a group of tools for managing your business activities. These include a phone tool for calling or faxing your Address Book entries, a print tool for printing everything from letters and reports to mail-merges, and an E-mail window.

The tool set also includes Internet access tools that you can use to instantly connect to your customers' Web sites and to Maximizer DirectAccess. Check Maximizer DirectAccess to find answers to frequently asked questions, useful technical tips and late-breaking Maximizer news, as well as a complete list of Multiactive Software's products and services. You can also use List Merchant to search an extensive database of business information.

How To Use This Guide

The tutorials in the *Setup* guide step you through all the basic concepts and techniques you need to know about to make the most of using Maximizer. Before you look for additional information in this guide, read the *Setup* guide and complete the tutorials. Then use this guide as a reference when you want more information about specific topics.

When you are more experienced with Maximizer, you should read through the other sections in the guide. They provide information about managing and fine-tuning the program to make it work better for you.

How This Guide is Organized

This User's Guide has been divided into nine chapters that follow this Introduction.

Chapter 2: Working With Your Address Book Folder

This chapter describes how to enter information about your business prospects and customers and how to manage notes, user-defined fields and documents associated with each Company, Individual, or Contact. It also covers searching for information and creating custom Address Book lists and default entries.

Chapter 3: Performing and Tracking Activities

In this chapter, you will learn how to record and track all your to-do lists, tasks and activities. You will also learn how to make appointments and set alarms for tasks and meetings.

Chapter 4: Communicating with People

This chapter introduces Maximizer's communication features, including fax, E-mail and Internet connectivity, and document creation and management.

Chapter 5: Using Maximizer's Internet Tools

In this chapter, you learn about Maximizer's built-in Internet features. These are tools you can use to help you do business on the Internet, visit the Maximizer Web site, build your own Web site, and draw maps that show the route to Company, Individual and Contact locations.

Chapter 6: Using the Maximizer Word Processor

This chapter shows you how to work with Maximizer's built-in word processor.

Chapter 7: Keeping Personal Records

This chapter shows you how to make Journal entries and record income and expenses.

Chapter 8: Printing Reports and Books

This chapter shows you how to print the various reports Maximizer can produce as well as the various Personal Organizer and Calendar Book options.

Chapter 9: Customizing Maximizer

This chapter shows you how to modify the Maximizer workspace to suit your own tastes and interests. You can do things like create buttons to launch macros or applications, move the toolbar, change colors or fonts in a window, and create a different setup for the columns in a window.

Chapter 10: Administering Maximizer

This chapter describes how to manage Maximizer Address Book folders. It includes such topics as opening an Address Book folder, backup and recovery, data exchange, and importing Address Book folders.

You'll also find a glossary of the terms used in this guide, and a comprehensive index.

Conventions Used in This Guide

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

Format/Symbol	Definition
Bold	Indicates text you need to type.
Italic	Indicates variable information, such as a Contact name. Also indicates anything you replace with your own information, such as *filename*. (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 the beginning of a procedure.
•	Indicates a procedure with only one step. Also used to indicate each item in a list.

A Word About Commands

Maximizer provides many different command options to suit different users. If you are using a mouse, you can select a command from the menu bar, toolbar, ribbon bar, or shortcut (right-mouse) menu. In many cases, you can even double-click on an entry to initiate a command.

Because of space limitations, we have not included all these options in every procedure. So, when you see a command, experiment a little; you’ll probably find you can use your preferred method, even if it isn’t described.

Chapter

2 WORKING WITH YOUR ADDRESS BOOK FOLDER

Your Address Book folder contains all the information about your prospects, customers, business and professional associates, or any other group of people you deal with on a regular basis. The Address Book window is the main Maximizer window. It links you to related information about each Company and Individual, such as Contacts, notes, documents, and user-defined fields that you create to classify Address Book entries. The Address Book and the Hotlist, which you can switch to as the main window, work in tandem to give you instant access to business records, correspondence, and activities.

HINT

Looking for new prospects? Try List Merchant. For more information, see “Using Maximizer List Merchant” on page 160.

Managing Address Book Entries

Your Address Book folder contains names, addresses, telephone and fax numbers, and related information such as the position of company contacts and the salutation for correspondence. By creating user-defined fields for your Address Book entries, you can categorize your customers and prospects by budget, income, interests, or any other criteria. You can then search for matching entries and save the resulting custom list as a Favorite List. You can print a Personal Organizer that contains all your Address Book entries. For more information, see “Printing a Personal Organizer” on page 216.

Opening the Address Book Window

Maximizer opens the Address Book window when you start Maximizer and open an Address Book folder. Use the Address Book window to maintain a list of Companies — and Contacts for them — as well as Individuals not associated with a particular company. To open the window, complete one of these steps.

NOTE

In the Maximizer workspace, the Address Book window is the main controlling window. As you scroll in this window, information for the selected entry is updated in the Contacts, Related Entries, User-Defined Fields, Documents, and Notes windows.

➤ To open the Address Book window

- Click the Address Book button on the Icon bar.

  —or—

- Select Address Book from the Window menu.

Adding Address Book Entries

To record information about a Company and its Contact people, or about an Individual, you add an Address Book entry. For example, you can add names, addresses, and phone and fax numbers. You may also specify user-defined fields for an Address Book entry to keep track of information that pertains only to the specific entry, such as an E-mail address or a company anniversary.

➤ To add an Address Book entry

1. Click the Address Book window to make it active.
2. Select Add > Address Book Entry from the Edit menu or shortcut menu.

   —or—

   Double-click in a blank Address Book window cell.

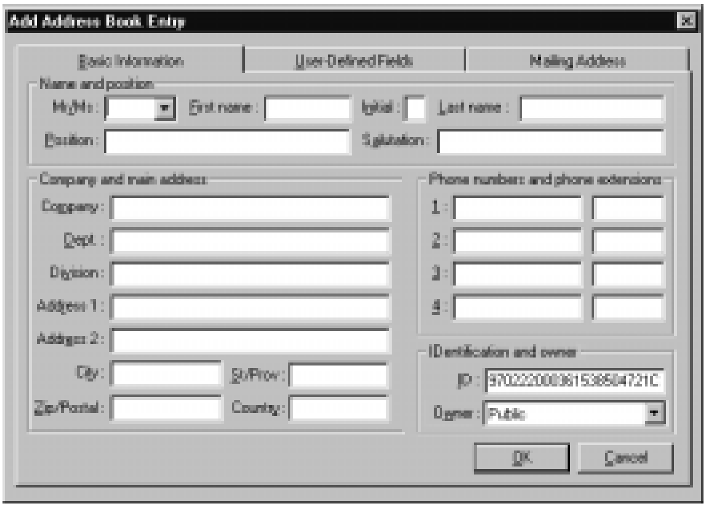
   —or—

   Press the Insert key.

   —or—

   Click the New button on the toolbar and select the type of Address Book entry you would like to add.

   The Add Address Book Entry dialog box appears.



3. Fill in the Name and Position group box unless you are creating a company entry, in which case, proceed to step 4.

   Use the Salutation field to provide a greeting for letters and faxes. Use the chevron (<) to indicate First Name and (>) to indicate Last Name. For example, a salutation of 'Dear Mr. < >' would appear in a letter as 'Dear Mr. Fred Smith.' Drop-down lists are available for the Mr/Ms, Position, and Salutation fields.

4. Fill in the Company and Main Address group box.

   Drop-down lists are available for the Company, Dept., Division, City, State, and Country fields.

   Maximizer automatically capitalizes any letters you type in the Zip/Postal field.

5. Fill in the Phone Numbers and Phone Extensions group box.

   You can enter phone numbers without dashes; Maximizer adds these for you. Include the area code for long distance numbers. If you are using TAPI dialing, make sure you use the proper phone number format. For more information, see "Working with Telephone Numbers" in the online Help.

   Use the Extension field for an extension number or a label such as HOME or FAX. A drop-down list is available for the Extension field.

   NOTE

   If you are using fax software and an internal modem/card to send faxes from Maximizer, enter the word FAX or FACS after the fax number in the Extension field. This tells Maximizer which phone number to pick up and use with your fax software. For more information on setting up Maximizer for faxing, see "Setting Up for Faxing" in the *Setup* guide.

6. Fill in the IDentification and Owner group box.

   If you are working in a multi-user configuration, select your User ID from the Owner list if you don't want to share the Address Book entry with other users.

   By default, Maximizer assigns ID numbers to each Address Book entry. This ID may be changed when you are creating the entry, if necessary. However, you can set up the system so you can assign these numbers manually. For more information on assigning numbers manually, see “Setting System Defaults” on page 245.

The following table shows the breakdown of the Maximizer-assigned ID number.

Digits	Description
971216	yy/mm/dd
00019	5-digit number that increases by 1 for each insert.
1458277753	ID number used to synchronize Maximizer Address Book folders

7. When you are finished, click OK.

   If you added information in both the Name and Position and Company and Main Address group boxes, Maximizer asks if you want to add a Contact for a new Company or an Individual.

   - Select Contact.

     —or—

   - Select Individual.

NOTE

If you select Contact, Maximizer creates a Company using the Company Name and Address information. The information you provide in the Name and Position group box is used to create a Contact at that Company.

   To bypass this question when you add entries, you can choose the type of entry immediately by selecting from the New button’s Add menu or the Edit and shortcut Add sub-menus.

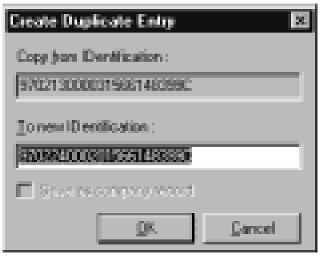
8. Click OK.

Copying an Address Book Entry

You may find it easier to modify a copied Address Book entry than to create a new one, or you might want to change the Owner field of a Company or Individual.

➤ To copy an Address Book entry

1. In the Address Book window, select the entry you want to copy.
2. Select Create Duplicate Entry from the Edit menu.



3. In the Create Duplicate Entry dialog box, change the default IDentification if you want.
4. Click OK.

   Maximizer creates a duplicate entry using the specified IDentification number.

Modifying an Address Book Entry

When Company or Individual information changes such as an address or a phone number change, you can easily update your Maximizer Address Book folder to reflect the changes.

HINT

If you are using an existing Address Book folder or if you have several entries, select All Companies and Individuals from the View menu to display the entries so you can easily find the one you want to modify. Or, if you are looking for specific Address Book entries, perform a search to include only those entries in your current list.

➤ To modify an Address Book entry

1. In the Address Book window, select the entry you want to modify.
2. Double-click the entry, or select Open Entry Name from the shortcut menu.

   The dialog box for that entry appears.

3. Modify the fields you want to change.
4. When you are finished, click OK.

Deleting an Address Book Entry

You may sometimes need to delete an Address Book entry. This can occur if the Company or Individual has gone out of business or is no longer your customer.

NOTE

Deletions are permanent and cannot be undone. You may want to back up your Address Book folder first. For more information about backing up Address Book folders, see “Backing Up a Maximizer Address Book Folder” on page 281.

➤ To delete an Address Book entry

1. In the Address Book window, select the entry, or entries, you want to delete.
2. Select Delete Selected Entries from the Edit menu or shortcut menu.

   The Delete Address Book Entry Information dialog box appears.
3. If you are sure you want to delete the selected entry, click OK.
4. Click OK to confirm the deletion.

   Maximizer deletes the Address Book entry and all associated entries, including Contacts, notes, and documents, from your Address Book folder.

Relating Address Book Entries

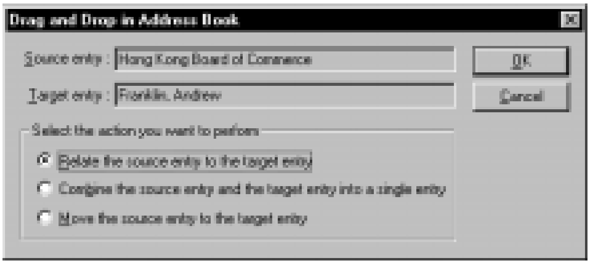
You can relate an Address Book entry to another. For example, you can relate a Contact to an Address Book window entry (Company or Individual) or relate a Company to another Company. All notes, user-defined fields and documents associated with a related entry are then linked to the relationship.

➤ To relate an entry

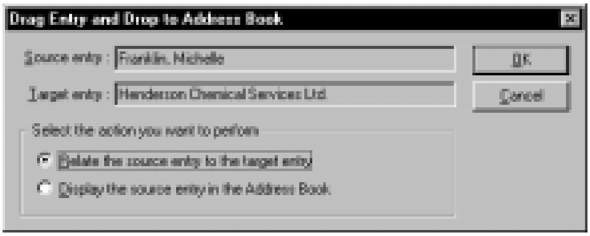
1. In the Contacts or Address Book window, click the entry you want to relate to another Address Book entry and drag it to the target entry.

   You can drag entries from the Contacts window to the Address Book window or drag and drop entries within the Address Book window itself.

   The Drag and Drop Type dialog appears.

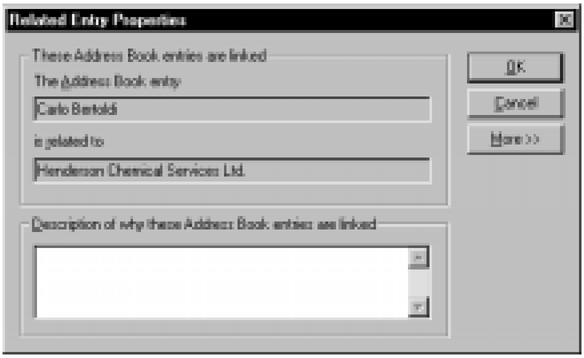


   If you have dragged a Contact to the Address Book window, the dialog looks slightly different than the dialog that appears when dragging and dropping entries in the Address Book window itself; you do not have the option to move the entry.



2. Select the Relate These Entries option.
3. Click OK.

The entries are now linked and the related entry is displayed in the Related Entries window.



If you wish, add a note about the relationship in the Description Of Why These Entries Are Linked text box.

4. Click OK.

NOTE

To view the properties of a related entry, select it in the Related Entries window and choose Related Entry Properties from the shortcut menu. You can also add or edit a relationship description in the Related Entry Properties dialog.

Unlinking Related Entries

You can un-link relationships between Address Book and Contacts window entries.

➤ To un-link an entry relationship

1. In the Related Entries window, click on the entry you want to un-link from the relationship.
2. From the Edit menu, choose Unlink Selected Entries.

   – or –

   Choose the Unlink Selected Entries option from the shortcut menu in the Related Entries window.

3. A message appears asking to confirm the deletion of the relationship. Click OK. The entries are no longer linked in the Address Book folder.

Moving Address Book Entries

You can easily move one Address Book entry into another Address Book entry to produce a single entry.

➤ To move an Address Book entry

1. From the Address Book window, drag the Address Book entry you would like to move and drop in another Address Book entry.

   The Drag and Drop in Address Book dialog appears.

2. Select Move the Source Entry to the Target Entry and click OK.

   A message appears asking you to confirm that you are combining the Address Book entries.

3. Click OK.

   Another message appears warning you that the source Address Book entry will be permanently deleted from your Address Book folder.

4. Click OK and then click OK again to confirm the deletion of the Address Book entry.

5. The Address Book entries are now combined into one entry. The target Address Book entry includes all notes, documents and user-defined fields that were associated with the source Address Book entry.

Converting an Individual Entry to a Company Entry

If you originally created an entry as an Individual and now decide the entry would be more appropriate as a Company with Contacts, you can convert the entry. The Individual's Contacts are copied to the new Company entry.

➤ To convert an Individual entry to a Company entry

1. In the Address Book window, select the Individual entry you want to change.

2. Select Create Duplicate Entry from the Edit menu.
3. In the Create Duplicate Entry dialog box, select Save As Company Record.
4. Change the IDentification number if necessary.
5. Click OK.

   Maximizer creates a Company entry from the Individual entry. All the original Individual information, such as appointments and notes, is copied to the duplicate entry. The Individual's Contacts are also copied to the new Company entry. You can now delete the original Individual entry if you want.

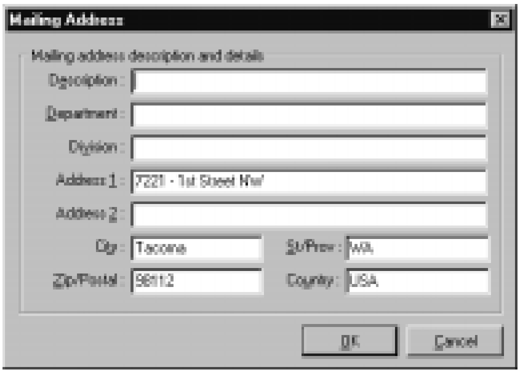
Adding a Mailing Address

Some of your Address Book entries may use more than one mailing address. For example, a Company might have different shipping and billing destinations. You can include as many mailing addresses as you need for each Address Book entry.

➤ To add a mailing address

1. In the Address Book window, double-click the Company, Contact, or Individual entry to which you are adding a mailing address.
2. In the Company/Individual dialog box, click the Mailing Address tab.
3. Click the Add button.

   The Mailing Address dialog box appears.



4. In the Description field, type a short description of the address. For example, you could describe a shipping address as ‘Ship to.’
5. Fill in the information fields.

   Drop-down lists are available for the Department, Division, City, St/Prov, and Country fields.
6. Click OK when you have finished entering the mailing address details. If you want mail that is sent to the Company or Individual also sent to a Contact entry, select the Receives Mail Sent to Company/Individual checkbox. Similarly, if you want a Company or Individual name used in the mailing address of a Contact, select the Use Company’s Name or Use Individual’s Name in the Address checkbox. Note that both of these options apply only to Contact entries.
7. When you are finished, click OK.

Modifying a Mailing Address

If a Company or Individual changes one of their mailing addresses, make sure to update the address in Maximizer.

➤ To modify a mailing address

1. In the Address Book window, open the entry you want to modify.
2. In the Contact, Company or Individual dialog box, click the Mailing Address tab.
3. In the Descriptions of All Available Mailing Addresses list, select the Description of the address you want to modify.
4. Click the Modify button.
5. In the Mailing Address dialog box, modify the fields you want to change.
6. When you are finished, click OK.

Deleting a Mailing Address

If mailing address information for an address book entry is no longer valid, be sure to remove it from the Address Book folder.

NOTE

You cannot delete the Main Address using this procedure. If you want to change the Main Address, click the Basic Information tab and modify the address there.

➤ To delete a mailing address

1. In the Address Book window, double-click the entry, or entries you want to modify.
2. In the Contact/Company or Individual dialog box, click the Mailing Address tab.
3. In the Descriptions of All Available Mailing Addresses list, select the Description of the address you want to delete.
4. Click the Delete button.
5. Click OK to confirm the delete.

Setting an Address Book Entry’s Default Address

If a Company, Individual, or Contact has a number of mailing addresses, you can specify which address is to be used as the default mailing address.

➤ To set the default mailing address

1. In the Address Book window, open the entry you want to modify.
2. In the Contact/Company or Individual dialog box, click the Mailing Address tab.
3. In the Descriptions of All Available Mailing Addresses list, select the Description of the address you want to set as the default.
4. Click the Select button.
5. Click OK.

Showing all Companies and Individuals

When you want to display all the Address Book entries in your Address Book folder, Maximizer provides three types of lists to choose from.

NOTE

If your Address Book folder is large, it may take some time to build the list. At any time, you can press Esc to stop the build and display a partial list.

➤ **To show all Companies and Individuals, all Contacts, or a combination of both**

1. Click the Address Book window to make it active.
2. From the View menu, select one of the following:
   - All Companies and Individuals
   - All Contacts
   - All Address Book Entries

   Maximizer displays a list of Companies and Individuals, Contacts, or both, depending on your selection.

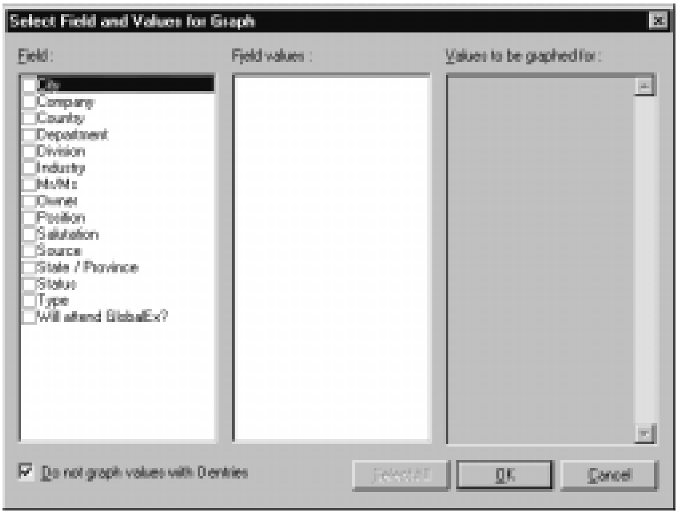
Graphing Address Book Entries

You can create graphs that show the distribution of your Address Book entries by categories such as state or province, age range, source, type, position, industry, purchase statistics, or by status such as Active, Inactive, or Pending. You can build charts that show where to concentrate your sales or prospecting efforts and what promotions have been successful.

➤ **To graph your Address Book entries**

1. Click in the Address Book window.
2. Select Graph Address Book Folder from the Tools menu, or click the Standard toolbar Graphing button.

The Select Field and Values for Graph dialog box appears.



3. Under Field, select the field you want to use to create the graph. For example, to create a graph based on city, you would select City.
4. Under Field Values, select the field values you want to include in the graph. For example, select the particular industries or types of advertising, such as periodical, flyer, other customer, and so on. Click the Select All button to include all values in the graph.

   Maximizer displays the values that it will graph under Values To Be Graphed For.

   Maximizer does not normally graph fields that do not contain values. For example, if an item in a user-defined field does not contain a value for a particular prospect, Maximizer does not include that data in the graph. However, you can de-select the Do Not Graph Values with 0 Entries checkbox if you want.
5. Click OK.
6. Click the 2D or 3D radio button, select a chart type, and then click Next.
7. Select a chart style, then click Next.
8. Select layout options, then click Next.
   - Enter the Chart Title text.
   - Enter footnote text, if desired.

- Select a position for the chart legend.

9. Enter titles for the X and Y axes, or pie segments, and then click Finish.

   Maximizer displays the graph.

   To return to the Chart Wizard and modify the chart, right-click in the graph and select Wizard.

   To close the graph, click the Close button, or Print to print the graph.

For more information about the graphing feature, see “Using the Graph Program” in online Help.

Managing Contact Information

Contacts are people associated with Companies and Individuals. They are the ‘second layer’ of information in your Address Book folders. Contacts who work in a particular organization are always attached to a Company. An Individual might also have Contacts. For example, your accountant’s bookkeeper or your dentist’s assistant may be Contacts associated with those Individuals.

Opening the Contacts Window

The Contacts window lists the Contacts associated with each of your Company and Individual entries. If you need to open the Contacts window, complete one of the following steps.

NOTE

The Contacts window is a controlling window. When you select a Contact, the User-Defined Fields, Documents, and Notes windows show the information associated with that Contact.

➤ **To open the Contacts window**

- Click the Contacts button on the icon bar, or the Contacts tab in the tabbed window workspace.

  —or—

- Select Contacts from the Window menu.

Adding a Contact Entry

Add a Contact from either the Contacts window or using drag and drop. You can add an unlimited number of Contacts for a Company.

HINT

The title bar of the Contacts window in the non-tabbed view shows the currently highlighted Company or Individual. If you select a different Company in your Address Book window, Maximizer displays the Contacts for that Company in the Contacts window.

➤ To add a Contact from the Contacts window

1. In the Address Book window, select the entry where you want to add a Contact.
2. Click the Contacts window to make it active.
3. Select Add Contact from the Edit menu or shortcut menu.

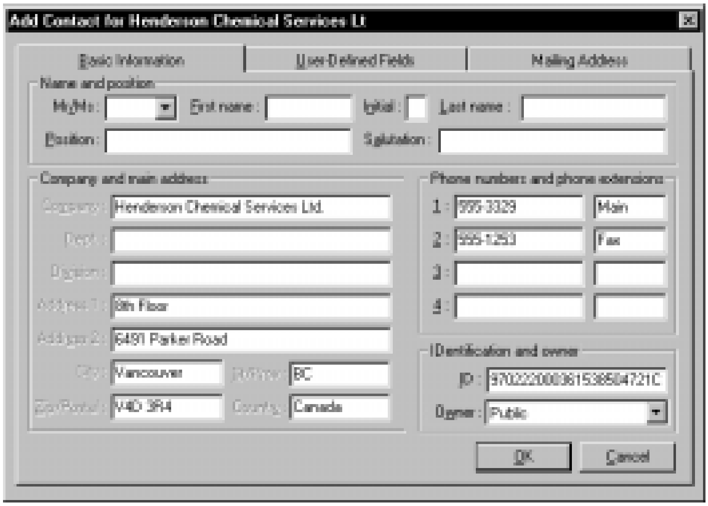
   —or—

   Click the New button on the toolbar.

   —or—

   Press the Insert key.

The Add Contact for Company Name dialog box appears.



4. Fill in the Name and Position and Phone Numbers and Phone Extensions group boxes.

NOTE

You cannot modify information in the Company and Main Address group boxes or the IDentification field. To add or change information in these fields, open the Company dialog box from the Address Book window.

5. To make this Contact available only for your use, select your User ID from the Owner drop-down list.
6. When you are finished, click OK.

➤ To add a Contact using drag and drop

1. In the Address Book window, select the entry where you want to add a Contact.
2. Drag the entry to the Contacts window, or to the Contacts button on the Icon bar.
3. In the Add Contact for Company Name dialog box, fill in the Name and Position and Phone Numbers and Phone Extensions group boxes.

4. To make this Contact available only for your use, select your User ID from the Owner drop-down list.
5. When you are finished, click OK.

Copying a Contact Entry to Another Company or Individual

If a Contact moves to another Company that is in your Address Book, you can easily copy the information to that Company.

➤ To copy a Contact to another Company

1. In the Address Book window, select the Contact you want to copy.

HINT

Select All Companies and Individuals from the View menu to see the entire list.

2. Choose Select Entry from the Edit menu or Select from the shortcut menu.
3. Select the Company to which you want to copy the Contact.
4. Select Combine Selected Entries from the Edit menu.
5. Click OK to confirm the copy.

   Maximizer copies the Contact and all its associated notes, documents and user-defined fields to the selected Company.
6. Select De-select All from the Edit menu.

Adding a Mailing Address for a Contact

If you have Contacts in different offices in the same city or in various cities, you can add this information to your Address Book folder.

➤ To add a mailing address

1. In the Contacts window, double-click the Contact you want to modify.
2. In the Contact Name dialog box, click the Mailing Address tab.

3. De-select the Receives Mail Sent to Company checkbox if you don't want a Contact to receive mail that is sent to the company. This option applies only when you select a mailing address and print labels, envelopes, or letters from the Address Book or Hotlist windows. If you print from the Contacts window, all Contacts may be included.

   De-select the Use Company's Name or Use Individual's Name in the Address checkbox if you want only the Contact name in the mailing address.
4. In the Mailing Address tab, click the Add button.
5. In the Mailing Address dialog box, fill in the information fields.
6. When you are finished, click OK.

Modifying a Contact Entry

Contact information can sometimes change: a person may get a new phone number or shipping address. You can easily modify a Contact entry.

➤ To modify a Contact entry

1. In the Contacts window, double-click the Contact you want to modify.
2. In the Contact Name dialog box, modify the fields in the Name and Position and Phone Numbers and Phone Extensions group boxes. Change the Owner access if you wish.
3. When you are finished, click OK.

Deleting a Contact Entry

You may sometimes need to delete a Contact. This can occur if a person leaves a company.

NOTE

Be sure you want to delete the Contact entry; in Maximizer, deletions are permanent and cannot be undone.

➤ **To delete a Contact entry**

1. In the Contacts window, select the Contact you want to delete.
2. Select Delete Selected Entries from the Edit menu or shortcut menu, or press the Delete key.

   The Delete Address Book Entry Information dialog box appears.
3. If you are sure you want to delete the selected Contact, click OK.
4. In the Maximizer message box, click OK to confirm the deletion.

   Maximizer deletes the Contact and all its associated entries from your Address Book folder.

HINT

To quickly locate a Contact, perform a search.

Managing User-Defined Fields

User-Defined Fields (UDFs) are categories you use to “classify” your Address Book entries. They allow you to combine and group Companies, Individuals, and Contacts in many different ways such as occupation, hobby, income level, or any other criteria you want to use.

A stock broker, for example, might create a user-defined field for the type of stock each of his/her clients is interested in (Gold, Blue Chip, High Tech, Transportation) and their investment approach (Conservative, Speculative, High Risk). This would allow his/her to, say, pull together all the Speculative investors interested in High Tech stocks from his/her Address Book. (You’ll find other examples in your *Setup* guide.)

Opening the User-Defined Fields Window

User-defined fields (UDFs) are categories you use to classify your Address Book entries. Open the User-Defined Fields window to maintain the list of fields for a specific Company, Contact, or Individual. If you need to open the User-Defined Fields window, complete one of the following steps.

➤ **To open the User-Defined Fields window**

- Click the User-Defined Fields button on the Icon bar, or the User-Defined Fields tab in the tabbed windows view.

  —or—

- Select User-Defined Fields from the Window menu.

NOTE

The user-defined field button does not appear on the Icon bar if you are using the tabbed windows view. Select the User-Defined Field tab instead.

Adding a User-Defined Field

You can access commands for creating user-defined fields using the File menu, the Address Book window, or drag and drop. For table user-defined fields, you first add the field itself, and then add items to the field as described page 33.

➤ **To add a new user-defined field using the File menu**

1. Select Setup User-Defined Fields from the File menu.

   The Setup User-Defined Fields dialog box appears.

2. Click the Add button.

The Add User-Defined Field dialog box appears.

3. Type a descriptive name in the User-Defined Field box.

HINT

You can control the sort order of your user-defined fields by using an initial sorting letter or number, such as ‘A. product ordered’ or ‘1. preferred courier.’

4. Select an item from the Type group box.
5. De-select any of the check boxes in the Field May be Added to group box.

   These options limit where the field appears. For example, if you de-select Contacts, the current user-defined field won’t appear when you add a Contact. It will appear only when you add a Company or Individual.

6. Select or specify options in the Attributes group box.

   For date fields, select Include in Hotlist if you want the event to appear in your hotlist. Select Annually Recurring Event to add the event to your hotlist each year.

   For alphanumeric fields, you can enter a Maximum Field Length.

   For numeric fields, you can indicate the Number of Decimal Places if you want. The default is 0 decimal places. Comma delimiters are added automatically. For example, if you enter the value 200000, with the selected number of decimal places as 2, the number is displayed as 200,000.00.

7. Select your User ID from the Owner drop-down list if you don't want to share the user-defined field with other users.
8. When you are finished, click OK.
9. Click the Close button.

➤ To add a new user-defined field from an Address Book entry

1. In the Address Book window, double-click the entry where you want to add a user-defined field.
2. In the Company, Individual, or Contact Name dialog box, click the User-Defined Fields tab.

   The User-Defined Fields tab moves to the front.
3. Click the New Field button.
4. In the Add User-Defined Field dialog box, type a descriptive name.
5. Select an item from the Type group box.
6. De-select any of the check boxes in the Field May be Added to group box.
7. Select or specify options in the Attributes group box.
8. When you are finished, click OK, and then click OK again.

   The new user-defined field appears in the User-Defined Fields tab.

NOTE

You can also add a user-defined field from the Contacts or Related Entries window. Double-click an entry to bring up the Company, Individual, or Contact Name dialog box. Then follow steps 2-8 above.

➤ To add a new user-defined field using drag and drop

1. In the Address Book, Contacts or Related Entries window, drag an entry to the User-Defined Fields window or button.
2. In the Add User-Defined Fields dialog box, click the New Field button.
3. In the Add User-Defined Field dialog box, type a descriptive name.

4. Select an item from the Type group box.
5. De-select any of the checkboxes in the Field May be Added to group box.
6. Select or specify options in the Attributes group box.
7. When you are finished, click OK.

Adding an Item to a User-Defined Field List

When you create a table user-defined field (UDF), you create a selection list of items for the table. You can add items to a table user-defined field using the Setup User-Defined Fields command on the File menu or from an Address Book entry. You can then select items to add to an Address Book entry.

➤ To add an item to a table user-defined field from the File menu

1. If you have not already done so, select Setup User-Defined Fields from the File menu.
2. In the Setup User-Defined Fields dialog box, select a table user-defined field where you want to add an item.
3. Click the Items button.

   —or—

   Double-click the selected user-defined field.

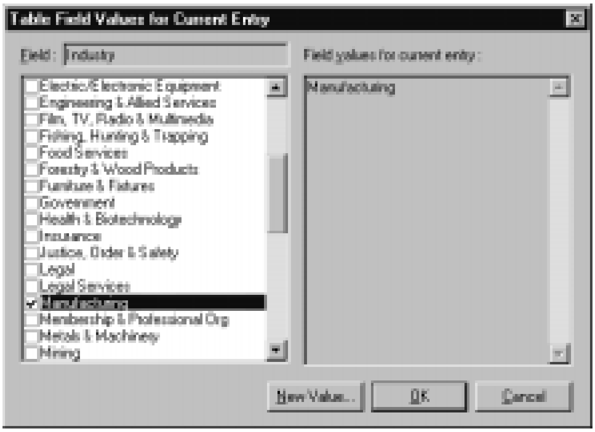
   The Setup Items dialog box appears.
4. In the Setup Items dialog box, click the Add button.
5. In the Add Item dialog box, type an item description. You may later choose this item as a value for a field in an Address Book entry.
6. When you are finished, click OK.
7. Click the Close button, and then click Close again.

➤ To add an item to a table user-defined field from an Address Book entry

1. If you have not already done so, add or modify an Address Book window entry.
2. In the User-Defined Fields tab, select a table-type user-defined field.

3. Click the right mouse button or .

   The Table Field Values For Current Entry dialog box appears.



4. Click the New Value button.
5. In the Add Item dialog box, type an item.
6. Click Close, and then click OK.

Assigning a User-Defined Field to an Address Book Entry

After you set up a user-defined field (UDF), you can assign it to Companies, Individuals and Contacts. Assign user-defined fields using drag and drop or the User-Defined Fields tab in the Add Address Book entry screen.

➤ **To assign a user-defined field to an Address Book entry using drag and drop**

1. In the Address Book, Contacts or Related Entries window, drag an entry to the User-Defined Fields window or Icon bar button.

   The Add User-Defined Fields to Address Book Entry dialog box appears.
2. In the User-Defined Fields list, select a user-defined field, and then click OK.
3. For date user-defined fields, click and select a date, and then click OK.

   —or—

For alphanumeric or numeric user-defined fields, type an entry. Then click OK.

—or—

For table user-defined fields, select an item or items. Then click OK.

➤ To assign a user-defined field to an Address Book entry

1. In the Address Book, Contacts or Related Entries window, double-click the entry where you want to add a user-defined field.

   The Company, Individual or Contact Name dialog box appears.

2. Click the User-Defined Fields tab.

3. Select the user-defined field you would like to assign to the Address Book entry, then take one of the following actions.

   For date user-defined fields, click ▾ and select a date.

   —or—

   For alphanumeric or numeric user-defined fields, type an entry. Then click OK.

   —or—

   For table user-defined fields, click the right mouse button or .... Select an item or items and then click OK.

Modifying a User-Defined Field Properties

When necessary, you can modify the properties of a user-defined field.

NOTE

You cannot change the user-defined field type. For example, you cannot change a table type to an alphanumeric type.

➤ To modify the properties of a user-defined field

1. Select Setup User-Defined Fields from the File menu.
2. In the Setup User-Defined Fields dialog box, select a user-defined field to modify.

3. To change the name, attributes, ownership, or assignment of the field to Companies, Individuals, or Contacts, click the Properties button.

   To change item descriptions in table fields, click the Items button. Modify the items, and then click Close.
4. Modify the user-defined field properties, and then click OK.
5. Click the Close button.

Modifying an Item in a User-Defined Field List

If an item in a table user-defined field (UDF) requires updating, you can modify it.

➤ To modify a table user-defined field item

1. If you have not already done so, select Setup User-Defined Fields from the File menu.
2. In the Setup User-Defined Fields dialog box, select a table field to modify.
3. Click the Items button.
4. In the Setup Items dialog box, select an item to modify.
5. Click the Modify button.
6. In the Modify Item dialog box, modify the Item name.
7. When you are finished, click OK.
8. Click the Close button, and then click Close again.

NOTE

Modifying an item affects all values that have been previously assigned to any Address Book entries. For example, if you have a user-defined field named Industry and the value Computers changes to High-Tech, all Address Book entries with the assigned Industry value as Computers will change to High-Tech.

Deleting a User-Defined Field

You can remove a user-defined field (UDF) from the Address Book folder.

NOTE

Deletions are permanent and cannot be undone. They affect all occurrences of the user-defined field in your entire Address Book folder.

➤ To delete a user-defined field

1. Select Setup User-Defined Fields from the File menu.
2. In the Setup User-Defined Fields dialog box, select a user-defined field to delete.
3. Click the Delete button.
4. Click OK to confirm the deletion.

   Maximizer deletes the user-defined field from your Address Book folder.

Deleting an Item from a User-Defined Field List

If an item in a table user-defined field (UDF) is no longer required, you can remove it from the table. This removes all instances of the item in the table user-defined field throughout the Address Book folder.

➤ To delete a table user-defined field item

1. If you have not already done so, select Setup User-Defined Fields from the File menu.
2. In the Setup User-Defined Fields dialog box, select a table user-defined field.
3. Click the Items button.
4. In the Name of Item dialog box, select an item to delete.
5. Click the Delete button.
6. Click OK to confirm the delete, and then click Close.

Maximizer deletes the user-defined field item from your Address Book folder.

Detaching a User-Defined Field Value from an Address Book Entry

You can detach a value of a user-defined field (UDF) so it is no longer assigned to a particular Address Book entry.

➤ **To detach a user-defined field value from an Address Book entry or Contact**

1. In the Address Book, Contacts or Related Entries window, select the entry with the user-defined field value you want to detach.
2. In the user-defined field window, select the user-defined field from which you are detaching the value.
3. Click the Delete button on the toolbar or select Delete Selected User-Defined Fields from the shortcut menu.
4. Click OK to confirm the delete.

   Maximizer detaches the user-defined field value from the selected Address Book entry or Contact.

NOTE

This procedure does not entirely delete the user-defined field from your Address Book folder, only from the selected entry. Effectively, this deletes only the value of the user-defined field, not the user-defined field itself.

Managing Notes

Use notes to record your contact management activities. By default, Maximizer automatically logs all your phone calls, letters, faxes, and completed appointments in the Notes window.

You can also use notes to jot down your ideas and impressions about a customer. Some people use them for short company profiles or to summarize contracts and business agreements.

HINT

If you want to create a personal note that is not connected to an Address Book entry, use the Journal window. For more information, see “Making Entries in Your Journal” on page 201.

Opening the Notes Window

Use notes to record your contact management activities. If you need to open the Notes window, complete one of the following steps.

➤ To open the Notes window

- Click the Notes button on the Icon bar, or the Notes tab in the tabbed windows view.

  —or—

- Select Notes from the Window menu.

Adding a Note

You can add an unlimited number of notes to a Company, Individual or Contact. Each note you add is tagged with the time and date that it was created. This is useful when you want to search for notes that fall within a particular date range. Here are a few simple ways to add a note.

➤ To add a note

1. In the Address Book, Contacts or Related Entries window, select an entry to the Notes window or to the Write a Note button on the Actions toolbar.

   —or—

   From the Notes window while your address book is selected, select Add Note from the shortcut menu.

   —or—

Double-click a blank note cell.

2. In the Add Note dialog box, type your note.

   You can check the spelling in your note by using the Maximizer Spell Checker. Click the Spelling button to initiate the process.

3. Adjust the Date and Time if you want.

   A drop-down calendar is available for the Date field.

   Adjust the User Information; Creator and Owner fields. These fields appear only if there is more than one user in the Address Book folder and security is turned on. Note that you must be the Master user to change the Creator.

4. When you are finished, click OK.

HINTS

If you always want a note to appear at the top of the list in the Notes window, type or select a date that is a few years in the future. For example, January 1, 2050.

Modifying a Note

You can update or correct information in a note or alter the time and date. The note can be a note you created or a note logged by Maximizer (such as a record of a phone call).

NOTE

If you are using a multi-user configuration, you may not be able to modify or delete other users' notes. (The author of a note is always indicated in the Creator by field.) Check with the Master user for more information.

➤ To modify a note

1. In the Address Book, Contacts or Related Entries window, select the entry to which the note is attached.
2. In the Notes window, select the note to modify.
3. Select Open Note from the Edit menu or the shortcut menu.

4. In the Note dialog box, modify your note.
5. When you are finished, click OK.

   Using the above steps, you can also modify any notes created by automatic logging (such as a record of a phone call).

NOTE

Once security is enabled, notes can be flagged as Public, so they are visible to all users or you can select your user name as the Owner so they are visible to only yourself.

Deleting a Note

You can delete a note at any time. Remember, deletions are permanent and cannot be undone.

➤ To delete a note

1. In the Address Book, Contacts or Related Entries window, select the entry to which the note is attached.
2. In the Notes window, select the note you want to delete.
3. Select Delete Selected Notes from the Edit menu or the shortcut menu, or press the Delete key.
4. Click OK to confirm the deletion.

   Maximizer deletes the note, or notes, from the Address Book folder.

Purging Outdated Notes

After several months of activity, you may want to delete your outdated notes.

When you perform a purge, you must specify the type of note to delete. The six types you can choose from are described on the next page.

Type	Description
All Notes	Includes your own notes and those logged by the program.

Mail-Outs	Notes logged when you print a label, an envelope, or a letter, or send an E-mail message.
Phone Calls	Notes logged when you dial a phone number.
Timed Note	Notes logged when you use the Maximizer Timer.
Transfer Log	Notes logged when you use Maximizer Transfer.
Tasks	Notes logged for a completed and scheduled appointment or hotlist task.

➤ To purge notes

1. Select Purge > Notes from the File menu.

   The Purge Notes dialog box appears.
2. Indicate a calendar period in the Date Range to Delete group box.

   Drop-down calendars are available for the From and Until fields.
3. Select one of the listed items in the Type of Note to Delete group box.
4. When you are finished, click OK.
5. Click OK to confirm the deletion.

   Maximizer deletes all notes within the specified date range.

NOTE

This command deletes all notes, with the exception of other user's private notes, in the specified date range for all Address Book entries, not just those in your current Address Book list. You should back up your Address Book folder before purging notes.

Managing Documents

Documents you create and send to your customers and prospects are displayed in the Documents window. Maximizer also lets you insert objects from many other applications, such as spreadsheets or graphics, in the Documents window. You can use your word processor or the Maximizer Word Processor to handle all your correspondence requirements. For more information about all the document-handling features in Maximizer, see the following sections of this guide.

To	See	Page
Write documents from the Documents window	“Writing Documents”	133
Insert objects in the Documents window	“Working with Objects”	142
Print documents, envelopes and labels	“Printing Documents, Envelopes and Labels”	148
Create documents in the Maximizer Word Processor	“Using the Maximizer Word Processor”	165
Create documents in your word processor	“Using Your Favorite Word Processing Program”	133

Searching for Information

Maximizer provides a powerful set of searching tools that you can use to quickly find any information in your Address Book folders. For maximum flexibility, the program allows you to search Address Book entries, notes, documents, user-defined fields, and journal entries in several ways.

NOTE

You have three options for displaying search results: you can add the results to the Address Book list, narrow the list to display only matching entries, or replace the list with the search results. If you choose to add the results to the list, Maximizer displays the results at the bottom of the Address Book list. To re-sort the list, click the column heading by which you want to sort.

Searching for Address Book Entries

There are two levels of Company, Individual, and Contact information that you can search: main and secondary information. The search function is virtually the same for both, though you may find that searching by main Address Book information is slightly faster in a very large Address Book folder. You can also search for multiple fields at once. For more information about searching all fields, including user-defined fields, see "Searching for Address Book Entries by Any Field" on page 47.

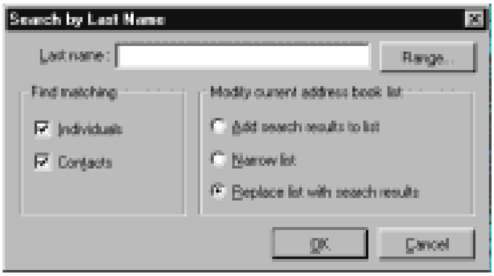
The search fields correspond to the Address Book entry fields, such as Last Name and City.

➤ **To search by main Address Book information**

1. Open the Address Book, Contacts, User-Defined Fields, Notes, Documents, Hotlist, or Calendar window.
2. From the Search menu, select one of the following:
   - Last Name
   - Company
   - City
   - State/Province

- Zip/Postal Code
- IDentification
- Phone Number 1

The Search By... dialog box appears.



3. In the field description box, type your search criteria text. You may type only the first few letters of the text and all entries containing those characters will be retrieved by the search. For example, typing ‘Smi’ will find Smiley, Smith, Smits and, in this case, any other Address Book entries with their last name beginning with ‘Smi’.

NOTE

You can use wildcards in your search. Use a question mark (?) in place of a character. For example, ‘4?? Main Street’ finds address numbers from 400 to 499 Main Street. Use an asterisk (*) in place of a word or phrase. For example, typing ‘*.org’ will find all E-mail addresses in the ORG top level Internet domain.

4. Select the appropriate items in the Find Matching group box.

   Use this group box to determine whether to search for Companies, Individuals, Contacts, or a combination of all three.

5. Select one of the listed items in the Modify Current Address Book List group box to narrow or expand the search.

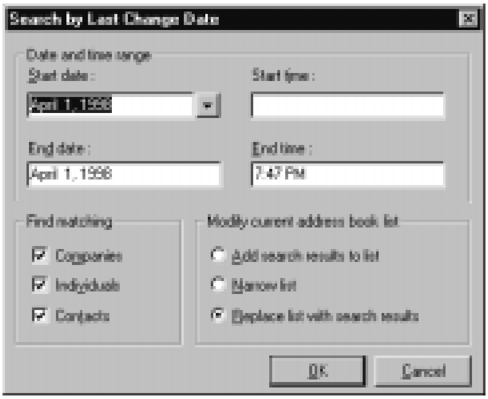
6. When you are finished, click OK.

   Maximizer searches for the specified entries and displays a list of matching Companies, Individuals and Contacts in the Address Book window.

➤ To search by secondary Address Book information

1. Open the Address Book, Contacts, User-Defined Fields, Notes, Documents, Hotlist, or Calendar window.
2. Select Other from the Search menu.
3. In the Other sub-menu, select one of the following:
   - Owner
   - First Name
   - Position
   - Department
   - Division
   - Address Line 1 or 2
   - Country
   - Phone Number 2-4
   - All Phone Numbers
   - Last Change Date

   The Search by... dialog box appears.



4. In the search field, type your search criteria text. You may type only the first few letters of the text and all entries containing those characters will be retrieved by the search. For example, typing Au will find all records containing Australia and Austria.
5. Select the appropriate items in the Find Matching group box.

6. Select one of the listed items in the Modify Current Address Book List group box to narrow or expand the search.
7. When you are finished, click OK.

   Maximizer searches for the specified criteria and displays a list of matching Company, Individual and Contact entries in the Address Book window.

Searching by a Range

You can search by a range of values depending on the search criteria.

➤ To search using a range

1. If you haven't already done so, start a search by selecting one of the options on the Search menu.
2. In the Search by... dialog box, click the Range button.

   The Range dialog box appears.
3. Type the search data in the range fields.

   For example, if you are searching by last names, 'aa'and 'bz' in these fields would find all people whose surnames begin with A or B.
4. When you are finished, click OK.

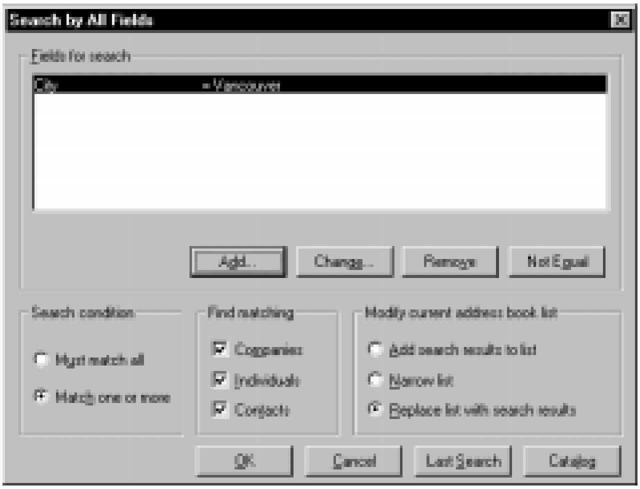
   In the Search by... dialog box, Maximizer displays the range information in the search field.
5. Click OK again to start the search.

Searching for Address Book Entries by Any Field

If you want to find Companies, Individuals or Contacts based on information in any Maximizer field or user-defined field, you can search by that field.

➤ To search by any field

1. Select All Fields from the Search menu.



2. In the Search by All Fields dialog box, click the Add button.
3. To show only user-defined fields, click the Show User-Defined Fields Only checkbox. To show both user-defined fields and basic fields, leave the checkbox clear.
4. Select the field or fields for which you are searching and then click OK.

   A From/To dialog box appears if you select a Date, Alphanumeric, or Numeric field.

   - Type the lowest value to search for in the From field.

NOTE

If you want to search for an annually recurring date, don't enter any year in the From or To boxes.

   - Type the highest value to search for in the To field. This is optional, if you don't specify a value for the High field the current date will be used for Date fields and for Alphanumeric and Numeric fields the highest possible value is used. For example, the limit for an Alphabetic character is Z and 999,999,999,999,999 is the highest numeric value you may enter.

- Click OK.

A Select Table Values for Search dialog box appears if you select a table-type user-defined field.

- Click the table values you want to search for, and then click OK.

5. Select either Must Match All if you want the results to be true for all selected fields, or select Match One or More to find results that are true for one or more fields.

   For example, if the two search criteria are ‘Industry = High-Tech’ and ‘State = CA’, Must Match All will return only high-tech entries in the state of California. If Match One or More is selected, all Address Book entries in California and all high-tech entries are found.

6. Select the appropriate items in the Find Matching group box.
7. Select one of the listed items in the Modify Current Address Book List group box to narrow or expand the search.
8. In the Fields for Search group box, click any of the buttons to modify the search criteria.
9. When you are finished, click OK.

   Maximizer searches the Address Book folder and displays a list of matching Company, Individual and Contact entries in the Address Book window.

NOTE

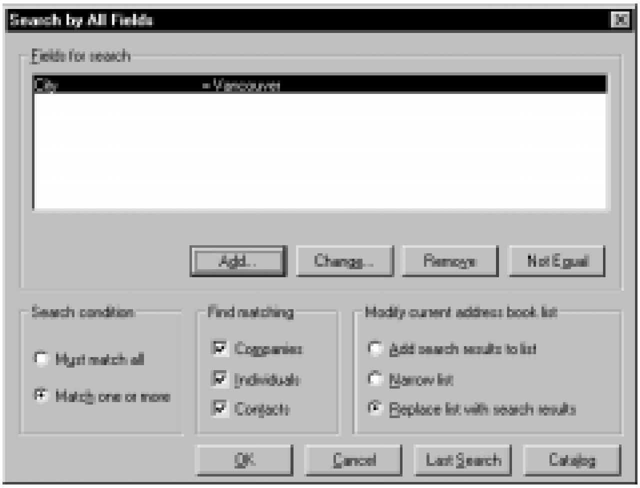
Your selections in the Search Conditions and Modify Current Address Book List group boxes are saved and displayed the next time you do a search for All Fields. This is also so for the Show User-Defined Fields Only checkbox on the Select Fields for Search dialog box.

Saving Searches in a Catalog

You can save the search criteria in a catalog. Saving the search means you can then retrieve it later if you have to do the same kind of search again without reconstructing the search from scratch.

➤ To save a search

1. Select All Fields from the Search menu.
2. In the Search All Fields dialog box, click the Add button.



3. In the Select Fields for Search dialog box, click the Show User-Defined Fields Only checkbox.
4. Select one or more user-defined field items and click OK.

   A From/To dialog box appears if you select a Date, Alphanumeric, or Numeric user-defined field.

   - Type the lowest value to search for in the From field.

   NOTE

   If you want to search for an annually recurring date, don't enter any year in the From or To boxes.

   - Type the highest value to search for in the To field.
   - Click OK.
5. Select either Must Match All or select Match One or More.
6. Select the appropriate items in the Find Matching group box.
7. Select one of the listed items in the Modify Current Address Book List group box to narrow or expand the search.

8. Click any of the buttons in the Fields for Search group box to modify or change the search criteria for a selected field in the Fields for Search list.
9. Click the Catalog button.

10. In the Search Catalog dialog box, click the Add button.
11. In the Saved Search Properties dialog box, type a name for the saved search.
12. If you want to select the values for fields included in a search each time you retrieve the search, click the Prompt for Values When Search is Retrieved checkbox. If you want the values to remain the same every time you retrieve the search, clear the checkbox.
13. Select Private if you don't want to share the saved search with other users.

    This option applies only in multi-user configurations.
14. Click OK.
15. Click the Close button, and then click OK.

    Once you save a search, you can retrieve it by clicking on the Retrieve button in the Search Catalog dialog box. This displays the search criteria in the Search by All Fields dialog box.

Retrieving Address Book Entries for Your Current List

If your search results are not in your current Address Book list, you may retrieve them using the Search > Retrieve Companies and Individuals or the Search > Retrieve Contacts commands.

➤ **To retrieve Address Book or Contact entries associated with a search**

1. Complete the steps to search for a list of Address Book entries or Contacts. See "Searching for Address Book Entries" on page 44.
2. To view only the Contacts, select Retrieve Contacts from the Search menu.

   —or—

   To view only the Companies and Individuals, select Retrieve Companies and Individuals from the Search menu.

   Maximizer displays all Contacts or all Companies and Individuals associated with the search list.

Finding and Combining Duplicate Address Book Entries

When working with large lists or shared Address Book folders, it's fairly easy to add a duplicate entry that already exists. Duplicate entries can be costly, especially if you are doing large mailings.

Maximizer lets you check for duplicates quickly and easily. If any are found, you can combine them into one up-to-date entry. Maximizer locates duplicate entries by checking the currently sorted column in the Address Book list. To change the sort order, select a column by clicking on the header.

➤ **To find and combine duplicate Address Book entries**

1. Sort the column you would like to check for duplicate entries by clicking on its header.
2. Choose Search > Check for Duplicates. The Search > Check for Duplicates menu command is applied to the column by which you are currently sorting. To check for duplicates using another column, select that column's heading for sorting, then choose the Check for Duplicates command again.
3. Select the duplicate entries. You may select all entries at once by using the Select All command on the Edit menu.
4. Click on the entry you would like to remain in the Address Book folder. To determine when the entry was created, refer to the Address Book Entry

ID on the Basic Information tab of the Company, Individual or Contact entry. The date the record was created is shown in the first 6 numbers of the ID (YY/MM/DD).

5. Select Combine Selected Entries from the Edit menu. Maximizer combines the entries into the selected entry.
6. In the Maximizer message box, click OK.
7. After you have combined the selected Address Book entries, delete the entries you no longer need.

   Deletions are permanent and cannot be undone.

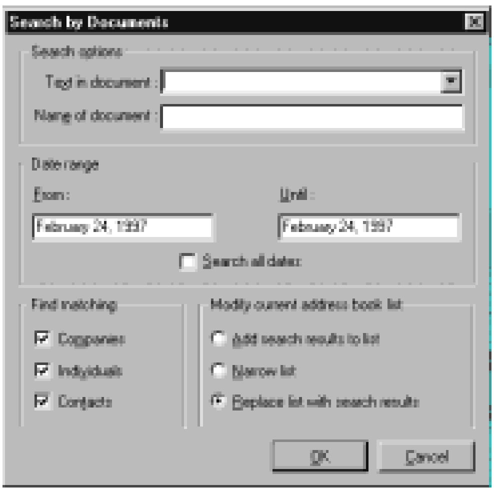
Searching for a Document

You can search for your documents to find those with a matching string of text or name. If you just need to find the documents you wrote at a particular time, you can specify a date range.

➤ To search for a document

1. Select Documents from the Search menu.

   The Search by Documents dialog box appears.



2. In the Search Options group box, type a text string or name in one or both of the Text in Document and Name of Document fields.

A drop-down list is available for the Text in Document field.

3. In the Date Range group box, indicate a calendar period, or select Search All Dates.

   Drop-down calendars are available for the From and Until fields.

4. Select the appropriate items in the Find Matching group box.

5. Select one of the listed items in the Modify Current Address Book List group box to narrow or expand the search.

6. When you are finished, click OK.

   Maximizer searches the Address Book folder and displays a list of matching entries in the Address Book window.

   As well, a list of matching documents is displayed in the Documents window. To view all documents again, select All from the Filter list on the View bar.

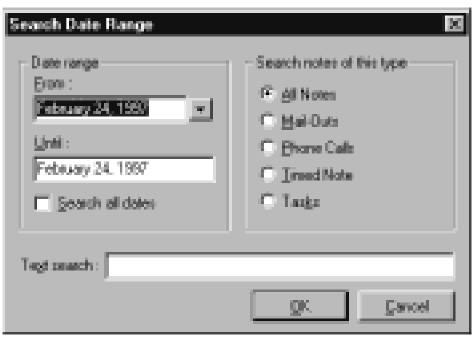
Searching for a Journal Entry

You may want to search through your journal entries. This is an especially useful option if you have specified to log activities in the Journal as one of your History preferences. You can search the Journal window in two ways: by date range and by a string of text.

➤ **To search in the Journal window by date range**

1. In the Journal window, select Date Range from the Search menu.

   The Search Date Range dialog box appears.



2. In the Date Range group box, indicate a calendar period, or select Search All Dates.

   Drop-down calendars are available for the From and Until fields.

3. To search all notes, select All Notes.

   —or—

   To narrow the search by type or by text string:

   - In the Search Notes of This Type group box, select one of the listed items.
   - Type a text string in the Text Search field.

4. When you are finished, click OK.

   Maximizer searches the Journal entries and displays a list of matching journal entries in the Journal window.

➤ To search in the Journal window by text

1. In the Journal window, select Text in Note from the Search menu.

   The Search for Text in Note dialog box appears.

2. In the Text Search field, type a string of text to search for.

   A drop-down list is available for this field.

3. In the Type of Note group box, select one of the listed items.

4. When you are finished, click OK.

   Maximizer searches the Journal entries and displays a list of matching entries in the Journal window.

Searching for a Note

You can search through all your notes and find those that match a particular string of text. You can also find all the notes you created within a specified time period.

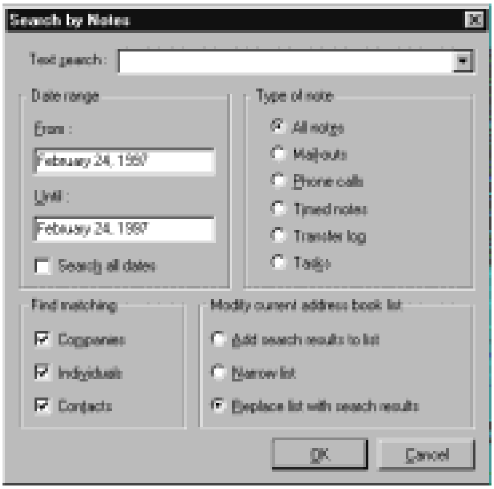
When you do a search, you need to specify the type of Note to look for. There are six types to choose from:

Type	Description
All Notes	Includes your own notes and those logged by Maximizer.
Mail-Outs	Notes logged when you print a label, an envelope, or a letter, or send an E-mail message.
Phone Calls	Notes logged when you dial a phone number.
Timed Note	Notes logged when you use the Maximizer Timer.
Transfer Log	Notes logged when you use Maximizer Transfer.
Tasks	Notes logged for a completed or scheduled appointment or hotlist task.

➤ To search for a note

1. While the Notes window is open, select Notes from the Search menu.

   The Search by Notes dialog box appears.



2. In the Text Search field, type a string of text to search for.

   A drop-down list is available for this field. If you are searching for a particular type of note or a note within a specific time range and the contents of the note are not important, you may leave this field blank.

3. In the Date Range group box, indicate a calendar period, or select Search All Dates.
4. In the Type of Note group box, select one of the listed items.
5. Select the appropriate items in the Find Matching group box.
6. Select one of the listed items in the Modify Current Address Book List group box to narrow or expand the search.
7. When you are finished, click OK.

   Maximizer searches the Address Book folder and displays a list of matching Address Book entries.

   As well, a list of matching notes is displayed in the Notes window. To view all notes again, select All from the Filter list in the View bar.

Undoing a Search

Maximizer lets you undo any of your searches. When you undo a search, the search list is replaced by the previously displayed list. You can undo up to eight previous searches.

➤ To undo a search

- Select Undo Search from the Search menu or Standard toolbar.

  Maximizer replaces the list of search items in the Address Book window with the previously displayed list.

Creating Favorite Lists and Default Entries

You can create and save your own Address Book lists, called Favorite Lists. This gives you the ability to, for example, create special lists for mailers or promotions that contain only some of the entries in your Address Book. You can also create a default Address Book entry that saves you typing in or selecting the same information each time you add a Company, Individual, or Contact.

Creating a Favorite Address Book List

You can create and save a custom-made list, so you can retrieve it whenever you need it. You can also retrieve the last list you created.

➤ To display a new Address Book list

1. In the Address Book window, select the entries that you want to appear in a single list.
2. Select Make Selected List Current from the Edit menu.

   Maximizer displays the selected list in the Address Book window.

➤ To create a favorite Address Book list

1. In the Address Book window, create a selected list.
2. Select Favorite Lists from the View menu.
3. In the Favorite Lists dialog box, click the Add button.
4. In the Address Book List Properties dialog box, type a descriptive name for the list.
5. Select your User ID if you don't want to share the list with other users.

   This option applies only in multi-user configurations.
6. When you are finished, click OK.

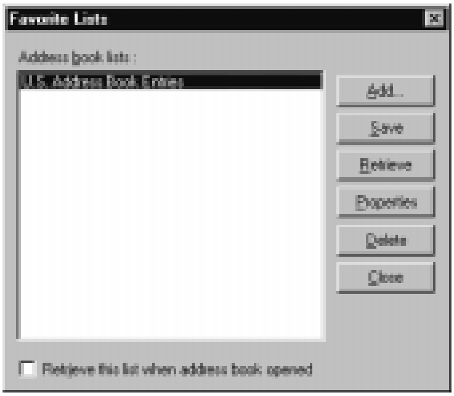
Displaying a Favorite Address Book List

You can retrieve a favorite list at any time during a Maximizer session. A Favorite List may optionally be used as a list that is always displayed when you first open the Address Book window.

➤ To retrieve an Address Book list

1. In the Address Book window, select Favorite Lists from the View menu.

2. In the Favorite Lists dialog box, select the list you want to retrieve from the Address Book Lists list.



3. Click the Retrieve button.

   Maximizer displays the selected list.

➤ **To retrieve a favorite list when you first open the Address Book window**

1. In the Address Book window, select Favorite Lists from the View menu.
2. Select the list you want to make the startup list.
3. In the Favorite Lists dialog box, click the Retrieve This List When Address Book Opened checkbox.
4. Click Close.

   The selected list is displayed when you first open the Address Book window.

Modifying a Favorite Address Book List

If you decide that you need to change a custom-made list you previously created and saved, you can retrieve it to add or remove entries, modify its name, and update it to match the current Address Book list.

➤ **To retrieve a favorite Address Book list**

1. In the Address Book window, select Favorite Lists from the View menu.

2. In the Favorite Lists dialog box, select the list you want to retrieve from the Address Book Lists display.
3. Click the Retrieve button.

   Maximizer displays the selected list.

➤ To modify the name of a favorite Address Book list

1. In the Address Book window, select the entries that you want to appear in your updated list.
2. Select Make Selected List Current from the Edit menu.

   Maximizer displays the selected list in the Address Book window.
3. In the Favorite Lists dialog box, select the list you want to modify.
4. Click the Properties button.
5. Type a new name.
6. Click OK, and then click Close.

➤ To update a favorite Address Book list

1. In the Favorite Lists dialog box, select the existing list in the Favorite Lists display.
2. Click the Save button.
3. Click OK to confirm that you want to update the list.

   Maximizer replaces the Favorite List with the entries in the current Address Book list.

Deleting a Favorite Address Book List

When a custom-made list is no longer required, you can delete it.

➤ To delete a favorite Address Book list

1. In the Address Book window, select Favorite Lists from the View menu.
2. In the Favorite Lists dialog box, select the list you want to delete.
3. Click the Delete button.

4. In the Maximizer message box, click OK to confirm the deletion.

   Maximizer deletes the list.

Clearing an Address Book List

You can clear a list at any time. This removes all the Company, Contact, and Individual entries from the Address Book window. However, it doesn't mean the entries are deleted. They still reside in the Address Book folder. You can retrieve them again by building another list. You might want to clear a list to print a one-time envelope for an Individual not included in your Address Book.

➤ To clear a list

- In the Address Book window, select Clear List from the View menu.

  Maximizer clears the list that is currently displayed in the Address Book window.

Creating a Default Address Book Entry

You can set up a default Company or Individual entry. This is useful if you often enter many fields in common, such as the same city or country. When you use a default entry, each new Company, Contact, or Individual you add appears with the default fields already filled in.

➤ To create a default Address Book entry

1. In the Address Book window, select Default Entry from the Edit menu.

   The Default Entry dialog box appears.

2. Fill in the fields for which you want to include default information.

   Click the Mailing Rules tab to modify any mailing information.

3. When you are finished, click OK.

   Now, when you create a new Company or Individual Address Book entry, the entry screen appears with all of your default fields already filled in.

The default entry affects all the new Companies and Individuals you create. When you no longer want to use default information, you should delete the default entry.

Modifying a Default Address Book Entry

If information you previously entered for a default Address Book entry changes or no longer applies, you can modify the default Address Book entry.

➤ To modify a default Address Book entry

1. In the Address Book or Contacts window, select Default Entry from the Edit menu.
2. In the Default Entry dialog box, modify the fields you want to change.
3. When you are finished, click OK.

Deleting a Default Address Book Entry

If you no longer require a default Address Book entry, you can remove it from the Address Book folder.

NOTE

If the default entry is not currently in the Address Book window, select Default Entry from the Edit menu, and then close the dialog box. This adds the default entry to the Address Book window.

➤ To delete a default Address Book entry

1. In the Address Book window, select the default entry.

   The default displays as Default Entry.
2. Select Delete Selected Entries from the Edit menu or shortcut menu, or press the Delete key.
3. In the Delete Address Book Entry Information dialog box, click OK.
4. In the Maximizer message box, click OK to confirm the deletion.

Displaying a Column Setup

When you want to display one of Maximizers's column setups or a view you previously created, you can select the column setup from a list. Maximizer then reformats the window according to the column setup.

NOTE

For more information about creating your own column setups, see "Creating a Column Setup" on page 255.

➤ To select a column setup

1. In the Address Book, Contacts or Related Entries window, click the Column Setup button on the View bar or select Column Setup from the View menu.
2. Select the setup you want to use, then click the Use Now button.
3. Click the Use Now button.

   Maximizer displays the currently active window using the selected column setup.

Chapter

3 Performing and Tracking Activities

Use the Hotlist window to schedule tasks and follow-up activities. Use the Calendar window to schedule all your meetings and appointments. You can also view and manage Hotlist tasks for the currently selected Address Book entry or Contact in the Activity Log.

Monitoring Your Hotlist

The Hotlist is a to-do list of tasks and reminders. Tasks include calling, writing to, and meeting with people. The Hotlist is where you record actions and follow-up activities related to your interactions with Contacts, Companies and Individuals. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

Because the Hotlist is a controlling window, all your other windows update with it so that you have instant access to all the information about the person or organization with which you are dealing. You can go instantly to the associated entry in the Address Book and quickly handle all your communications, from phone calls to E-mail, and record the results directly from the Hotlist. For more information about using the Calendar, see “Making and Tracking Appointments” on page 76.

Opening the Hotlist Window

Use the Hotlist window to maintain a list of your ongoing tasks. To open the Hotlist window, complete one of the following steps.

➤ To open the Hotlist window

- Click the Hotlist button on the Icon bar.

—or—

- Select Hotlist from the Window menu.

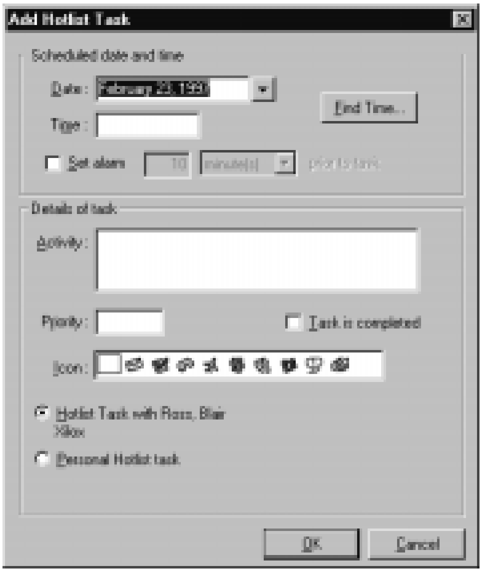
Adding a Task to the Hotlist

You can add a Hotlist task for a particular Company, Individual or Contact. You can also add personal tasks, such as a reminder to pick up groceries.

➤ To add a Hotlist task from the Address Book or Contacts window

1. In the Address Book, Contacts or Related Entries window, drag a name to the Hotlist button on the Icon bar.

The Add Hotlist Task dialog box appears.



2. Fill in or modify information in the Scheduled Date and Time group box.

   A drop-down calendar is available for the Date field.

3. Fill in the Details of Task group box.

   Drop-down lists are available for the Activity and Priority fields.

   If you want to add a small graphic to the Hotlist task, select an icon in the Icon list.

   Select the appropriate radio button to indicate whether this is a Company or Individual-related task.

4. Click the Find Time button if you would like to view a display of your available time based on your scheduled tasks and appointments.

   - In the Find Free Time dialog box, click the time you prefer. Click the right or left arrow buttons to select a different week.
   - Click the Go To button to select a specific date. In the Go to Calendar Date dialog box, indicate a date and click OK.
   - Click OK.

5. When you are finished, click OK.

   Maximizer adds the task to the Hotlist.

➤ To add a Hotlist task from the Actions Menu

1. In the Address Book, Contacts or Related Entries window, select an entry.
2. From the Actions menu:

   Select Schedule a To-do.

   —or—

   Select Schedule a Call.

   Maximizer fills in an appropriate activity name.
3. In the Add Hotlist Task dialog box, fill in the details.
4. When you are finished, click OK.

➤ To add a Hotlist task for the current entry from the Hotlist window

1. In the Hotlist window, select Add Task from the Edit menu or shortcut menu.

   —or—

   Double-click in a blank Hotlist cell.

   —or—

   Click the New button on the Standard toolbar.

   —or—

   Press the Insert key.
2. In the Add Hotlist Task dialog box, fill in the details.
3. When you are finished, click OK.

Assigning a Priority to a Task

You may want to assign a priority to a task. This allows you to view the priority items in your Hotlist so you can deal with the most important items first.

➤ To assign a priority to a task

1. In the Hotlist window, select a task where you want to assign a priority.

2. Double-click the task.

   —or—

   Select Open Task from the Edit menu or shortcut menu.
3. In the Hotlist Task dialog box, click the Priority field.
4. Type a priority (up to 3 characters) or select one from the drop-down list.
5. When you are finished, click OK.

   The priority information appears in the Hotlist window.

Changing the Hotlist View

Using the Filter list, you can view different time periods in the Hotlist window, including all Hotlist tasks, today's tasks, tomorrow's and yesterday's tasks, and this and last week's tasks.

➤ To change the view

- In the Hotlist window, select one of the following items from the Filter list on the View bar.
  - Today
  - Tomorrow
  - Yesterday
  - This Week
  - Next Week
  - Custom (based on a user-defined date range)

  Maximizer builds a list of Hotlist tasks based on your selection.

Building the Hotlist Task List

By default, the Hotlist window always displays the tasks for today. You can change the view by selecting a time period from the Filter list on the View bar. You can also build a different Hotlist range which lets you see tasks within a date range you specify. You can even build a Hotlist of only items that contain certain text. For example, you can build a Hotlist that includes all the items that have the text "Follow-up". The new Hotlist build is in effect until you regenerate it or until you exit Maximizer. When you re-start the program, the default (today's tasks) is once again displayed.

➤ To build a new Hotlist

1. In the Hotlist window, select Build Hotlist from the View menu.

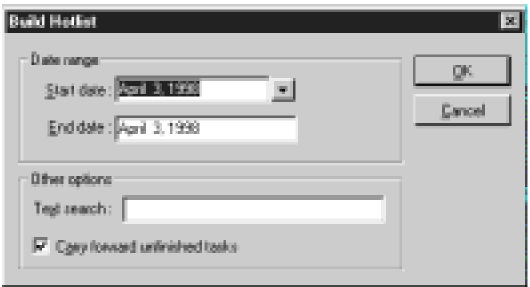
   —or—

   Select Custom from the Filter drop-down list on the View bar.

   —or—

   Click the Build Hotlist button on the View bar.

   The Build Hotlist dialog box appears.



2. In the Date Range group box, indicate a Start Date and End Date. Drop-down calendars are available for these fields.
3. In the Other Options group box, in the Text Search field, type a text string that Maximizer will use to search the Activity field for tasks that contain that text. You need to type a text string; you cannot use wildcard searches.
4. De-select Carry Forward Unfinished Tasks if you do not want to include unfinished tasks from earlier dates.
5. When you are finished, click OK.

   Maximizer creates a Hotlist including all tasks that match the criteria you have specified.

Modifying a Hotlist Task

If you have to update a Hotlist task or change the date, you may do so in the Hotlist Task dialog.

➤ To modify a Hotlist task

1. In the Hotlist window, select the task you want to modify.
2. Select Open Task from the Edit menu or shortcut menu.
3. In the Hotlist Task dialog box, modify the task.
4. When you are finished, click OK.

Marking or Unmarking a Task as Complete

Check off your Hotlist tasks as they are completed.

NOTE

When you check off a task, it is not immediately removed from the current Hotlist list. To remove it from the list, select Refresh from the View menu. Completed tasks are removed from the Hotlist window the next time you open the Address Book folder.

➤ To mark a task as complete

1. In the Hotlist window, select the task you have completed.
2. Double-click in the check mark column.

   —or—

   Select Mark As Completed from the Edit menu or shortcut menu.

   Maximizer displays a dialog box that asks if you want to schedule a follow-up activity.

- Click the Yes button to open the Add Hotlist Task dialog box.

—or—

- Click the No button.

—or—

- Click the No to All button, if you have marked more than one task as complete.

  A check mark appears in the completed column.

➤ To unmark a task as complete

1. In the Hotlist window, double-click the check-marked task.
2. In the Hotlist Task dialog box, de-select the Task is Completed checkbox.
3. Click OK.

   Maximizer removes the check mark from the task. This is a useful feature if you inadvertently mark a task as complete.

Refreshing the Hotlist Task List

The Hotlist doesn't automatically update your view of the tasks when you modify or complete tasks. Use the Refresh command to update your view.

➤ To refresh the Hotlist

- In the Hotlist window, select Refresh from the View menu.

—or—

- In the Hotlist window, click the Refresh Hotlist button on the View toolbar.

  Maximizer rebuilds the Hotlist to reflect recent changes or additions.

Deleting a Task from the Hotlist

If a Hotlist task is no longer required because it has been completed or is no longer useful, you can delete the task from the Address Book folder.

➤ To delete a Hotlist task

1. In the Hotlist window, select the task you want to delete.
2. Select Delete Selected Tasks from the Edit menu or shortcut menu.
3. In the Delete Selected Activities dialog box, select an option.
   - To permanently delete the task from the Address Book folder, click OK.
   - To remove the task only from the current Hotlist, select Delete Only From Current List, and then click OK. The task will appear again if you rebuild the Hotlist.

Setting and Responding to Task Alarms

You can set alarms for your Hotlist tasks. These alarms will sound audibly at a prescribed time, reminding you to attend a meeting or make a call. To hear the alarm, your computer must be on with Maximizer running.

You can set your Hotlist alarms to go off up to several weeks ahead of time. When the alarm goes off, you hear a sound. Once the alarm sounds, Maximizer offers several options for responding to it. One option is to ‘snooze’ the alarm for a period of time; which means after the time interval, the alarm sounds again.

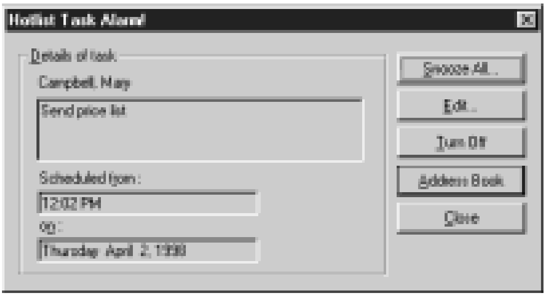
➤ To set an alarm

1. In the Hotlist window, select a task for which you want to set an alarm.
2. Double-click the task.
3. In the Hotlist Task dialog box, select the Set Alarm checkbox.
4. Modify the alarm lead time in the Prior to Task field.
5. When you are finished, click OK.

   A bell icon appears beside the task to indicate that an alarm is set.

➤ To respond to an alarm

When an alarm goes off, the Hotlist Task Alarm dialog box appears. Choose one of the following options:



- Click the Snooze All button. This turns off all alarms for a period you select.
  - In the Snooze Time dialog box, select a time option.
  - Click OK. After the allotted time, the alarm sounds again.
- Click the Edit button.
  - In the Hotlist Task dialog box, modify the task.
  - When you are finished, click OK.
- Click the Turn Off button to turn off the alarm and permanently remove the alarm icon.
- Click the Address Book button.

  This option locates the associated entry in the Address Book window. It is inaccessible if it is a personal task or a private Address Book entry that belongs to another user or group. It is also inaccessible if you are working in a dialog box at the time of the alarm.

Timing Tasks

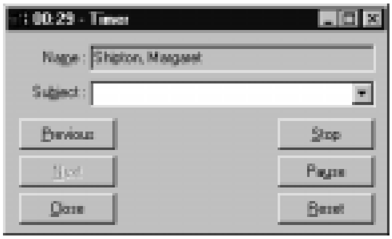
With the timer, you start a stopwatch running when you begin a task and turn it off when the task is finished. You can time one activity or a series of activities.

➤ To use the timer

1. In the Address Book, Contacts, Related Entries or Hotlist window, select an entry.
2. Select Time a Task from the Actions menu.

   —or—

   From the Tools menu, select Timer.

   - In the Timer dialog box, type a descriptive term in the Subject field.
   - Click the Start button.

   A timer title bar appears at the bottom of the screen.
3. Double-click the Timer title bar when you want to stop timing.
4. In the Timer dialog box, click the Stop button.
5. Click the Close button.

   Maximizer creates a timer note for the selected Address Book entry in the Notes window.

➤ To use the timer for a series of Address Book entries

1. In the Address Book, Contacts, Related Entries or Hotlist window, select the entries for which you would like to time tasks.
2. Select Make Selected List Current from the Edit menu.

   Maximizer displays the selected list.
3. Select Timer from the Tools menu.
4. In the Timer dialog box, type a Subject and click the Start button.
5. When you complete the task, double-click the Timer, which is minimized, and click the Stop button.

6. Click the Previous button.

   —or—

   Click the Next button.

   The previous or next entry in the current Address Book list is displayed in the Timer dialog box.

7. Repeat steps 2-4 for each task in the current Address Book list.
8. When you are finished timing tasks, click the Close button.

Viewing an Address Book Entry Associated with a Hotlist Task

From a task in your Hotlist, you can find the associated Company, Contact or Individual and then add the company or person to the current Address Book list.

➤ To add a person or company to the Address Book list

1. In the Hotlist window, select a task.
2. Select View in Address Book from the Search menu.

   —or—

   Click the View in Address Book button on the View bar.

   Maximizer switches to the Address Book window and highlights the Contact, Company or Individual associated with the task.

Making and Tracking Appointments

The Calendar is where you schedule business meetings and appointments. You just select a day and time, and add your appointment. This information is then displayed in the Calendar. You can also print a Calendar Book that lists all your meetings and appointments. For more information about printing a Calendar Book, see "Printing a Calendar Book" on page 214.

You can create an unlimited number of appointments in your Calendar, for yourself or for multiple users, and optionally set priorities and alarms for them.

Opening the Calendar Window

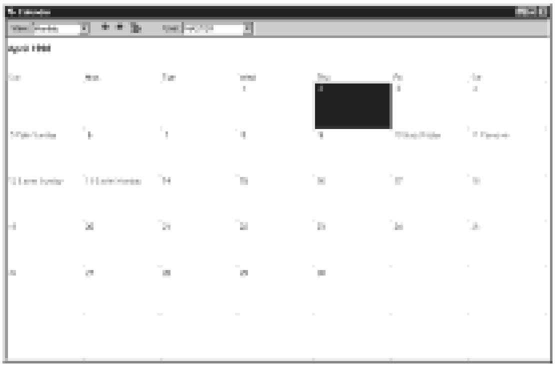
Use the Calendar to make appointments. To open the Calendar window, complete one of the following steps.

➤ To open the Calendar window

- Click the Calendar button on the Icon bar.

  —or—

- Select Calendar from the Window menu.



Changing Calendar Views

Each time you open the Calendar window, the time period that you have selected as the Default View on the Preferences > Calendar tab is displayed. You can change the Calendar view so it displays a day, week, month, or bi-monthly (two months) period. When you move from a monthly or bi-monthly period to a daily or weekly view, be sure to select the day, or a day in the week, you would like to view before changing views. Then, when you change views, the appropriate day or week will appear in the Calendar window.

You can also display future or past calendar periods.

➤ To change the Calendar view

1. Select a calendar period from the View menu.

   —or—

Select Day, Weekly, Monthly, Bi-monthly or Today from the View list on the View bar.

➤ To change the Calendar period

1. Click the Forward button on the View bar to move ahead.

   —or—

   Click the Backward button on the View bar to move back.

   —or—

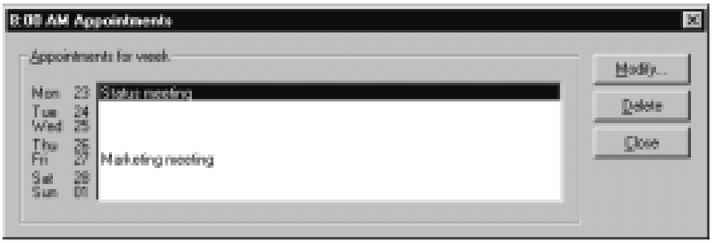
   Select Go to Calendar Date from the View menu or click the Go To button on the View bar. Type or select a date in the Go to Calendar Date dialog box, and click OK.

Viewing Your Appointments for the Week

You can view a list of all the appointments you have scheduled for the week in the weekly Calendar view for a particular time period.

➤ To view appointments for the week

1. Open the Calendar window.
2. Select the weekly calendar view by selecting Weekly from the View menu on the View bar or the Menu bar.
3. Click the first column header (Month/Year). This sorts your Calendar by week.
4. Double-click a time block listed in the first column.



A dialog box lists all your appointments for that time block in the currently active week.

Displaying Another User's Calendar

You can check the Calendar of another Maximizer user. The access rights to other user's Calendars are set up in the File > Preferences > Calendar tab. This is done by the Master user, as described in "Adjusting the Calendar" on page 236.

➤ To view another user's Calendar

1. Select the user whose Calendar you want to view from the User drop-down list on the View bar.

   —or—

   In the Calendar window, select Other User's Calendar from the View menu.

   In the Other User's Calendar dialog box, select a user name from the list of Available Users and click OK.

   The selected user's Calendar appears in your Calendar window. You can now add or modify the appointments for that user.

Scheduling an Appointment

When you schedule an appointment, it appears in both the Calendar and Hotlist windows. You can schedule appointments from the Calendar, Address Book, Contacts, Related Entries Hotlist window, or from the Actions menu.

➤ To schedule an appointment from the Calendar window

1. Select the Address Book entry with whom you would like to schedule an appointment.
2. In the Calendar window, click a date. Or, click the Go To button on the View bar to select a specific date. In the Go To Calendar Date dialog box, indicate a date, and then click OK.

   Select Add Appointment from the Edit menu or shortcut menu.

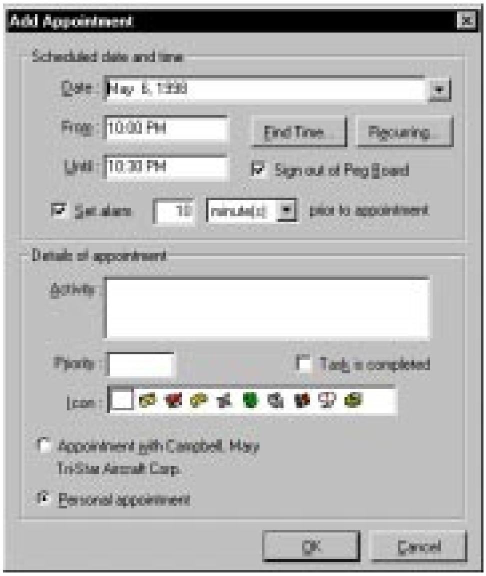
   —or—

   Click the New button on the Standard toolbar.

—or—

Press Insert.

The Add Appointment dialog box appears.



3. Fill in or modify the information in the Scheduled Date and Time group box.

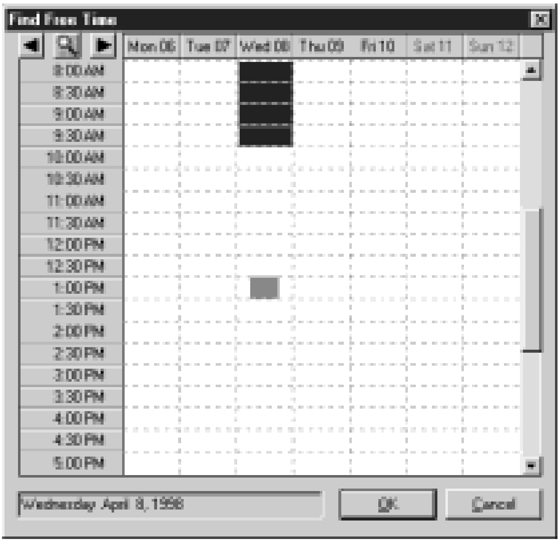
   A drop-down calendar is available for the Date field.

4. Fill in the Details of Appointment group box.

   Drop-down lists are available for the Activity and Priority fields. Use the Priority field to indicate the importance of the appointment. This priority information only appears in the Hotlist.

   If you want to add a small graphic to the appointment, select an icon in the Icon box.

Select the appropriate checkbox to indicate whether this is a Contact-related appointment or a personal appointment.



5. Click the Find Time button to select an appointment time.
   - In the Find Free Time dialog box, click the time you want.

     Drag the cursor to include more than one hour. Click the right or left arrow buttons to select a different week.
6. Click OK in the Find Free Time dialog box.
7. If you want to include other users, select them in the Other Users to Attend list box.

NOTE

To schedule appointments with other users, the Calendar preference Add or Modify Multi-user Appointments must be on.

8. When you are finished, click OK.

   The appointment is displayed in the Calendar.

   In the daily view of the Calendar, Maximizer can optionally display a column of Hotlist tasks. You can add, modify, or delete these tasks by clicking in the Hotlist column and selecting the appropriate command from the Edit menu or shortcut menu.

NOTE

You can hide or show the column of Hotlist tasks. To turn the display on or off in the Daily Calendar view, select View Hotlist Tasks column from the View menu.

To schedule appointments with other users, the Calendar preference Add or Modify Multi-user Appointments must be on.

➤ **To schedule an appointment from the Address Book, Contacts, Related Entries or Hotlist window**

1. In the Address Book, Contacts, Related Entries or Hotlist window, drag a name to a date in the Calendar window.
2. In the Add Appointment dialog box, fill in the details of the appointment.
3. When you are finished, click OK.

➤ **To schedule an appointment from the Actions menu**

1. From the Actions menu, select Schedule a Meeting.
2. In the Add Appointment dialog box, fill in the group box information.
3. When you are finished, click OK.

Assigning a Priority to an Appointment

You may want to assign a priority to an appointment in your Calendar. This allows you to order your appointments so you can deal with the most important items first.

➤ **To assign a priority to an appointment**

1. In the Calendar window, select an appointment where you want to assign a priority.
2. Double-click the appointment.

   —or—

   Select Modify from the Edit menu or shortcut menu.

3. In the Appointment dialog box, click the Priority field.
4. Type a priority number or letter or select one from the drop-down list.
5. When you are finished, click OK.

NOTE

Appointment priority information appears in the Hotlist window, not in the Calendar window.

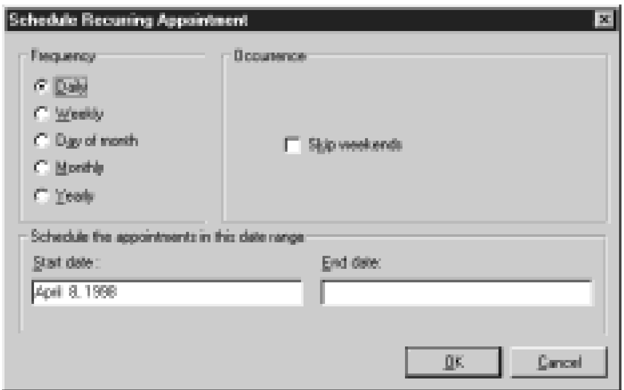
Scheduling a Recurring Appointment

You may sometimes have a regular commitment, such as a staff meeting or conference call that recurs every week or month. Instead of adding the appointment each time, you can create a recurring appointment in your Calendar.

➤ To schedule a recurring appointment

1. In the Calendar window, select a date, and add an appointment.
2. In the Add Appointment dialog box, click the Recurring button.

   The Schedule Recurring Appointment dialog box appears.



3. Select a time period in the Frequency group box.

   The default is Daily.

   If you select Weekly, Day of Month, or Monthly, a drop-down field appears in the Occurrence group box. In this field, select the preferred frequency. For example, to schedule regular Tuesday meetings, select Weekly and then select Tuesday.

4. Fill in the Schedule the Appointments in This Date Range group box.

   Use this option to schedule when to start and end the recurring appointment period.

   Drop-down calendars are available for the Start Date and End Date fields.

5. When you are finished, click OK.
6. Fill in the remaining details of the appointment. If you want to include other users, select each user in the Other Users to Attend list box.
7. Click OK.

   The appointment is displayed in the Calendar for each occurrence in the specified time period.

Rescheduling an Appointment

If your meeting or appointment time changes, you can reschedule it.

➤ To reschedule an appointment using the Appointment dialog box

1. Double-click the appointment in any of the Calendar views. The Appointment dialog box appears.
2. Modify the date and/or time of the appointment.
3. Click OK.

➤ To reschedule an appointment using a drag and drop method

1. Click the appointment you want to reschedule and while holding down your mouse button, drag it to the day or time — depending on which Calendar view you are in — where you want to reschedule the appointment.
2. Release the mouse button.

➤ To reschedule an appointment to a day outside the active Calendar view using drag and drop

If you want to drag the appointment to a day that is not displayed in the currently active view, you can use the scrolling feature in Maximizer.

- **If you are in the weekly Calendar view:**
  - Click the appointment you want to move. While holding down your mouse button, move the appointment outside the Calendar window to the right or left. If you move the appointment to the right, the Calendar scrolls forward through each day. If you move the appointment to the left, the Calendar scrolls backward through each day.
  - When the desired day is visible, position your mouse over the desired time period, and release the mouse button.
- **If you are in the monthly or bi-monthly Calendar view:**
  - Click the appointment you want to move. While holding down your mouse button, move the appointment outside the Calendar window. If you move the appointment to the right or below the window, the Calendar scrolls forward through each month. If you move the appointment to the left or above the window, the Calendar scrolls backward through each month.
  - When the desired day is visible, position your mouse over the day and release the mouse button.

NOTE

You can copy appointments using the drag and drop method, as described above, if you hold down the Ctrl key while you are dragging the appointment to the rescheduled day or time period for which you wish to make a duplicate appointment.

Scheduling an Appointment With Other Users

If you are using a multi-user system, you can schedule meetings with other users. It's just like making a regular appointment in your Calendar, except that you also include other users.

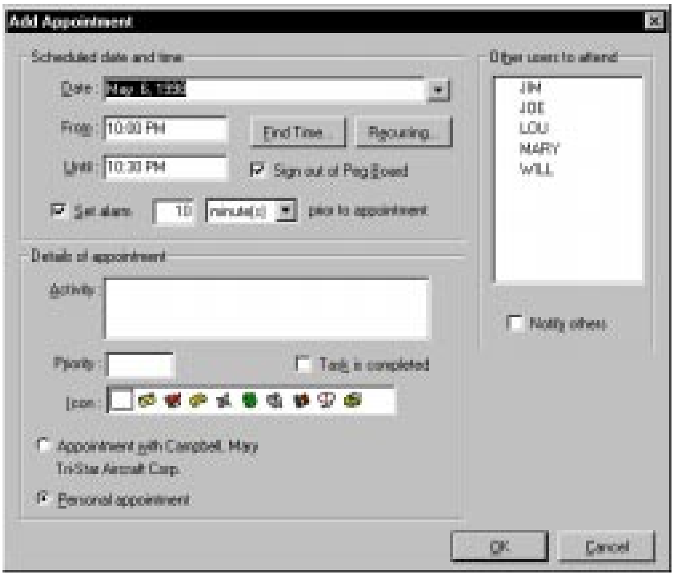
NOTE

To schedule appointments with other users, the Calendar preference Add or Modify Multi-user Appointments must be on. As well, you must have access to all users' Calendars. Check with your administrator (Master user) about your multi-user appointment privileges.

➤ To make an appointment with other users

1. In the Calendar window, select a date.
2. Select Add Appointment from the Edit menu or shortcut menu.

   The Add Appointment dialog box appears.



3. Fill in the Scheduled Date and Time group box.

   A drop-down calendar is available for the Date field.
4. Fill in the Details of Appointment group box.

Drop-down lists are available for the Activity and Priority fields.

5. Select each name you want to include in the Other Users to Attend edit box. If you want to notify these users of the appointment, click the Notify Others checkbox.
6. Click the Find Time button if you want Maximizer to find an available time for your appointment.

   The Find Free Time dialog box appears, showing when the selected users are busy.

   - In the Find Free Time dialog box, click the time you want.

     Click and drag the cursor to include more than one hour. Click the right or left arrow buttons to select a different day.
   - Click OK.
7. To notify the other users of the appointment, and to prompt them to reply with a confirmation, select Notify Others.
8. When you are finished, click OK.

   Maximizer marks the appointment in your Calendar as well as in the Calendars of the selected users in the Other Users to Attend list.

Scheduling a Recurring Appointment With Other Users

You can schedule recurring appointments with other users in your Calendar. This is useful if you have regular multi-user meetings on an ongoing basis.

➤ To schedule a recurring appointment with other users

1. In the Calendar window, select a date.
2. Select Add Appointment from the Edit menu or shortcut menu.
3. In the Add Appointment dialog box, click the Recurring button.

   The Schedule Recurring Appointment dialog box appears.
4. Select a time period in the Frequency group box. The default is daily.

   If you select Weekly, Day of Month, or Monthly, a drop-down field appears in the Occurrence group box. In this field, select the preferred frequency.

5. Fill in the Schedule the Appointment in This Date Range group box to schedule when to start and end the recurring appointment period.

   Drop-down calendars are available for the Start Date and End Date fields.
6. Click OK.
7. In the Other Users to Attend edit box, select the users you want to include. To notify them of the meeting, click Notify Others.
8. Click OK.

Finding an Address Book Entry from an Appointment

From the Calendar, you can quickly find the Address Book entry associated with an appointment. This is useful if you want to check an address or phone number.

NOTE

This procedure doesn't apply to personal appointments.

➤ To find a Company or Individual Contact in the Address Book window

1. In the Calendar window, select an appointment.
2. Select Retrieve Companies and Individuals from the Search menu.

   Maximizer switches to the Address Book window and locates (highlights) the entry associated with the appointment.

Marking or Unmarking an Appointment as Complete

You can check off your appointments as they are completed. Completed appointments appear in both the Calendar and Hotlist windows.

NOTE

When you complete an appointment, it continues to appear in the current day's Hotlist, but it will not appear in the Hotlist for the next day. You can see these appointments by building a Hotlist for an earlier date.

➤ To mark an appointment as complete

1. In the daily Calendar window view or Hotlist window, find the appointment you have completed.
2. Double-click in the check mark column.

   —or—

   Select Mark as Completed from the Edit menu or shortcut menu.

   Maximizer displays a dialog box that asks if you want to schedule a follow-up activity.

   - Click the Yes button to add an appointment.

     —or—

     Click the No button.

     A check mark appears in the check-mark column, indicating the task is complete.

➤ To unmark an appointment as complete

1. Double-click the check-marked appointment.
2. In the Appointment dialog box, de-select the Task is Completed checkbox.
3. Click OK.

   This option is useful if you incorrectly mark an appointment as complete.

NOTE

Appointments marked as completed remain in your Address Book folder so that you have a record of them. To remove them, you need to delete the appointments. For more information about deleting appointments, see “Deleting an Appointment” on page 91.

Modifying an Appointment

If your meeting or appointment is moved or changed, you can update it in your Calendar.

➤ **To modify an appointment**

1. In the Calendar window, double-click the appointment you want to modify.
2. In the Appointment dialog box, modify the appointment.
3. When you are finished, click OK.

Modifying a Recurring Appointment

If a recurring meeting or appointment is moved or changed, you can update it in your Calendar.

➤ **To modify a recurring appointment**

1. In the Calendar window, double-click the recurring appointment you want to modify.
2. Modify information in the Scheduled Date/Time, Details of Appointment, and Other Users to Attend group boxes. If this is a multi-user appointment you will be prompted with a message asking you if you would like to update the appointment for only yourself or for all users.
3. When you are finished, click OK. The Modify Recurring Appointment dialog box appears.
4. Click Yes to modify all occurrences of the appointment, or No to modify only this one.

   The modified appointments are displayed in the Calendar window.

Modifying an Appointment With Other Users

If you need to reschedule an appointment with other users, you can open and change the appointment in your Calendar.

➤ **To modify an appointment with other users**

1. In the Calendar window, double-click the appointment you want to modify.
2. In the Appointment dialog box, modify the appointment.

3. When you are finished, click OK.

   The Update Appointment With Other Users dialog box appears.

4. Click the Just Myself button to update the appointment information for yourself only.

   —or—

   Click the Selected Users button to update all the users selected for the appointment.

Deleting an Appointment

If you cancel or complete an appointment, you can delete it from your Calendar.

NOTE

Deletions are permanent and can't be undone.

➤ To delete an appointment

1. In the Calendar or Hotlist window, click the appointment you want to delete.
2. Select Delete Selected Appointments from the Edit menu or shortcut menu.

   NOTE

   If you are using the monthly or bi-monthly view, the Delete Appointments dialog box appears. In this dialog box, modify the Start Date and End Date to delete all appointments within the specified period or leave the default date as it is.

   If it is a recurring appointment, the Delete Recurring Appointment dialog box appears. In this dialog box, you have the option of deleting all or just the selected occurrence of this appointment. Also, if the recurring appointment involves more than one user, you have the option of removing just yourself from the appointment, or removing all users.

3. In the Maximizer message box, click OK to confirm the deletion.

   Maximizer deletes the appointment(s) from the Calendar and Hotlist window.

Removing a User from a Multi-User Appointment

You can remove another user from an appointment using the Calendar.

➤ **To delete a user from a multi-user appointment**

1. In the Calendar window, double-click the appointment from which you want to delete the user.
2. In the Other Users to Attend edit box, click the user name of the user you are removing from the appointment. This de-selects the user.
3. Click OK.

NOTE

If you are using the monthly or bi-monthly view, the Delete Appointments dialog box appears. In this dialog box, modify the Start Date and End Date to delete all appointments within the specified period or leave the default dates as they are. Also, because the appointment involves more than one user, you have the option of updating the appointment for only yourself or all users.

If it is a recurring appointment, the Delete Recurring Appointment dialog box appears. In this dialog box, you have the option of deleting all or just the selected occurrence of this appointment. Also, because the appointment involves more than one user, you have the option of removing just yourself from the appointment, or removing all users.

4. Click OK to confirm the deletion.

   Maximizer deletes the user from the appointment.

NOTE

To delete another user from a multi-user appointment, you must have modification rights. This is set in the File > Preferences > Calendar tab.

Deleting Yourself from a Multi-User Appointment

If you cannot attend an appointment with other users, you can delete yourself from it using the Calendar. There are two ways to remove yourself from an appointment that you have scheduled.

➤ To remove yourself from an appointment with other users if the notification option is turned on

1. In the Calendar window, open the appointment from which you want to delete yourself.
2. Select Declined in the My Response group box.
3. You are prompted with a message asking you if you would like to update the appointment for all other users or only yourself. Choose Just Myself.

   Maximizer removes you from the multi-user appointment.

➤ To remove yourself from an appointment with other users if the notification option is turned off

1. In the Calendar window, select the appointment from which you would like to remove yourself.
2. From the shortcut menu or from the Edit menu, choose Delete Selected Appointments.
3. Leave the date range as the currently selected date.
4. You are prompted by a message asking you if you would like to delete the appointment for the other users. Click No.

   Maximizer removes you from the multi-user appointment.

Setting and Responding to an Appointment Alarm

You can set alarms for your Calendar appointments. These alarms will sound to remind you of a meeting.

You can set your appointment alarms to go off up to several weeks ahead of time. To set an alarm, complete the following steps. When an alarm goes off, you hear a sound. Once an alarm goes off, you can respond in several ways. One option is to ‘snooze’ the alarm for a period of time; after the time interval, the alarm sounds again.

➤ To set an alarm

1. In the Calendar window, select an appointment for which you want to set up an alarm.
2. Double-click the appointment.

   —or—

   Select Open Appointment from the Edit menu or shortcut menu if you are in the daily or weekly view.

   If you don't have the Calendar set to a daily or weekly view, Maximizer changes to this view. Double-click again on the appointment.
3. In the Appointment dialog box, select the Set Alarm checkbox.
4. Modify the alarm lead time in the Prior to Appointment field.
5. When you are finished, click OK.

   A bell icon appears beside the appointment to indicate that an alarm is set.

➤ To respond to an alarm

When an alarm goes off, the Appointment Alarm dialog box appears. Select one of the following options:

- Click the Snooze All button. This snoozes the alarm.
  - In the Snooze All Alarms dialog box, select a time option.
  - Click OK.
- Click the Edit button.
  - In the Appointment dialog box, modify the appointment.
  - When you are finished, click OK.
- Click the Turn Off button to turn off the alarm permanently.
- Click the Address Book button.

  This option locates the associated entry in the Address Book window. The Address Book option is inaccessible if it is a personal appointment, or it is an appointment associated with a private Address Book entry that belongs to another user. It is also inaccessible if you are working in a dialog box at the time you received the Appointment Alarm.

Using the Maximizer Holiday Editor

Maximizer Holiday Editor is a utility you can use to add holidays to your Maximizer Calendar.

By default, the Maximizer Holiday Editor uses a file called mxzhol.nam that is inserted in your Maximizer folder when you install Maximizer. This file includes many North American holidays. All the holidays that are listed in Maximizer Holiday Editor appear in the Calendar window. These can be modified or deleted and new holidays may be added.

NOTE

Note that you cannot access the Maximizer Holiday Editor while the Calendar window is open.

Adding a Holiday

You can add any holidays you care to with the Maximizer Holiday Editor — even your own vacations.

➤ **To add a holiday**

1. In Maximizer Holiday Editor, click the Add button.
2. Enter the date and name of the holiday you are adding. If you want the holiday to apply to every year, select the Every Year checkbox.
3. Click OK. The holiday is added to the Maximizer Holiday Editor list and the next time you start your Maximizer Calendar, it will appear in the Calendar window.
4. If the holiday conflicts with an existing holiday listed in the Maximizer Holiday Editor, a message appears asking you if you want to continue. If you choose to proceed, the new holiday overwrites the existing holiday. If you choose No, the existing holiday remains in the Maximizer Holiday Editor and the new holiday is not added.

Updating or Modifying a Holiday

You may modify a holiday using the Maximizer Holiday Editor if necessary.

➤ To modify a holiday

1. In Maximizer Holiday Editor, click the Go To button.
2. Enter the date of the holiday you want to update. Note that if any of the information from the currently active record is correct for the holiday you are updating, you do not have to re-enter it.

   Maximizer Holiday Editor retrieves the holiday. If a holiday does not exist in Maximizer Holiday Editor with the date you have specified, the following holiday that most closely matches the date is retrieved.
3. Click the Update button.
4. Update the information for the holiday.
5. Click OK. The holiday is updated and the next time you start your Maximizer Calendar, it will appear in the Calendar window.

   If the holiday conflicts with an existing holiday listed in the Maximizer Holiday Editor, a message appears asking you if you want to continue. If you choose to proceed, the new holiday overwrites the existing holiday. If you choose No, the existing holiday remains in the Maximizer Holiday Editor and the holiday you were updating is not modified.

Finding a Holiday

You can easily find a holiday in the Maximizer Holiday Editor.

➤ To find a holiday

1. In Maximizer Holiday Editor, click the Go To button.
1. Enter the date of the holiday you want to find.
1. Click OK.

Maximizer Holiday Editor retrieves the holiday. If a holiday does not exist in Maximizer Holiday Editor with the date you have specified, the following holiday that most closely matches the date is retrieved.

NOTE

To browse through all holidays in Maximizer Holiday Editor, use the Previous and Next buttons.

Deleting a Holiday

You can delete a holiday from the Maximizer Holiday Editor.

➤ **To delete a holiday**

1. In Maximizer Holiday Editor, click the Go To button.
2. Enter the date of the holiday you want to delete.
3. Maximizer Holiday Editor retrieves the holiday. If a holiday does not exist in Maximizer Holiday Editor with the date you have specified, the following holiday that most closely matches the date is retrieved.
4. Click the Delete button. A message appears asking you to confirm the deletion. Click Yes to proceed and No to cancel the deletion.

NOTE

To delete all holidays in Maximizer Holiday Editor, click the Delete All button.

Using the Maximizer World Clock

The Maximizer World Clock is a new utility that allows you to view the time in various locations around the world. You determine which locations are displayed. It's great if you have international dealings of any kind — from the occasional phone call to regular contact with your international clients.

Your local time is taken from your Windows registry settings and is shown in the larger clock displayed on the map of the world.

NOTE

You may adjust your local time if necessary; adjust the Date and Time options in Settings > Control Panel under your Start menu. See the Windows 95 online help for more information.

Setting Time for Remote Locations

You can set the time for up to six remote locations around the world by adjusting the dials shown in the Clock frame in the World Clock window.

➤ To set time for remote locations

1. Select World Clock from the Tools menu.
2. Right-click on any one of the six dials in the Clock frame.
3. Select the desired time zone and caption from the list boxes on the Change Clock dialog box. You can type in a customized caption — Head Office, for example — instead of the suggested captions.
4. Click OK.

Hiding and Displaying Day and Night

You can choose to view, or ignore the differences in day and night around the world, in the Maximizer World Clock.

➤ To turn the Show Night option on or off

1. Select World Clock from the Tools menu.
2. Right-click on the Map frame in the World Clock window.

   A shortcut menu appears.
3. By default, the time zones where it is night time are displayed in a darker color than those that are in daylight hours. Click on the Show Night option to change the Show Night option on or off.

Using the Activity Log

The Activity Log displays Hotlist tasks and appointments for a particular Company, Individual, or Contact. This is a useful feature if you want to focus in on a customer; for example, to examine the tasks to be completed before a meeting or presentation.

Viewing the Activity Log

If you don’t select a Company, Individual or Contact, the Log displays a list of personal activities. From the Activity Log, you can add, modify, delete, and print Hotlist tasks.

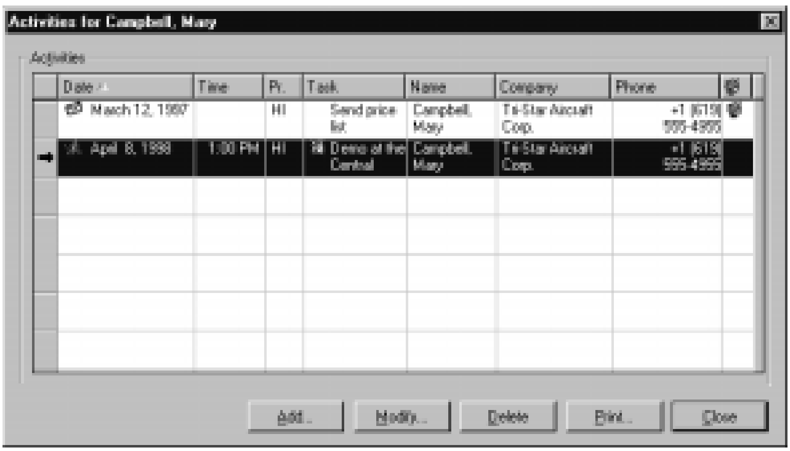
➤ To open the Activity Log

- Select Activities for Contact/Company or Individual Name from the View menu.

  —or—

  Click the Activity Log button on the toolbar.

  The Activities dialog box appears.



Adding a Task to the Activity Log

You can add a Hotlist task for the Address Book entry or Contact directly from the Activity Log.

➤ To add a task

1. In the Address Book, Contacts, Related Entries or Hotlist window, select an Address Book entry.
2. Select Activities for Contact/Company or Individual from the View menu, or click the Activity Log button on the Standard toolbar.
3. In the Activities dialog box, click the Add button.
4. In the Hotlist Task dialog box, fill in the details of the task.
5. When you are finished, click OK.

   Maximizer displays the new task in the Activities list.

Modifying a Task in the Activity Log

If a Hotlist task or appointment date or description must be changed, you can modify the entry from the Activity Log.

➤ To modify a task

1. In the Address Book, Contacts, Related Entries or Hotlist window, select an Address Book entry.
2. Select Activities for Contact/Company or Individual from the View menu, or click the Activity Log button on the Standard toolbar.
3. In the Activities dialog box, click the Modify button.
4. In the Hotlist Task or Appointment dialog box, modify any of the information.
5. When you are finished, click OK.

   Maximizer updates the information.

Deleting a Task from the Activity Log

When a task is no longer required, you can delete it from the Activity Log.

➤ **To delete a task**

1. In the Address Book, Contacts, Related Entries or Hotlist window, select an Address Book entry.
2. Select Activities for Contact/Company or Individual from the View menu, or click the Activity Log button on the Standard toolbar.
3. Select the item you want to delete.
4. In the Activities dialog box, click the Delete button.
5. In the Delete Selected Activities dialog box, take one of the following actions.
   - To permanently delete the activity from the Address Book folder, click OK.

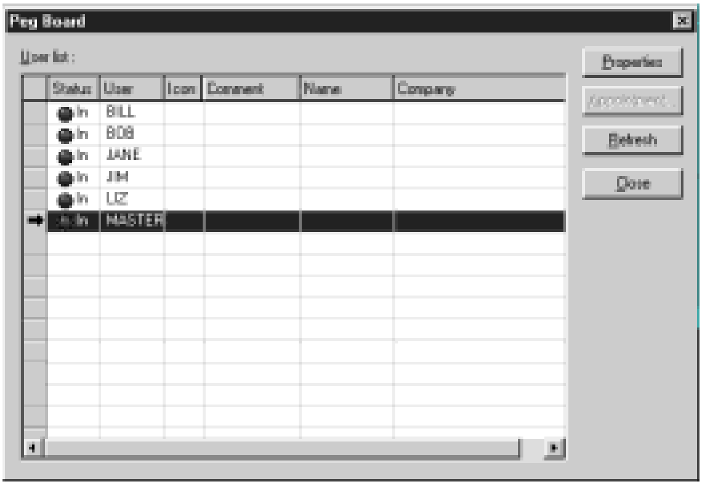
     This permanently removes the task or appointment from both the Activity Log and the Hotlist or Calendar windows.
   - To delete the activity only from the current Activity Log list, select Delete Only From Current List, and then click OK. The task will appear again if you re-open the Activity Log.

Using the Maximizer Peg Board

The Peg Board is a great way to let other users know when you are in and out of the office, and when you are free or occupied. You have the option of using the Calendar to update the Peg Board or manually indicating when you are in and out.

1. Select Peg Board from the View menu.

The Peg Board dialog appears.



To quickly find a User in the list, click on the User column header and type the first letter, or first few letters, of the user's name. Maximizer will find the user entry for you.

2. The status column indicates if a user is IN or OUT. Note that you have three options determining how the Peg Board works which are controlled in the Peg Board Properties dialog. Click the Properties button to change the selection. The following describes your options:

   - Use the Calendar to Update the Peg Board (default)

     If the first option is selected, the Maximizer Calendar is linked to the Peg Board. When a user has scheduled appointments, the Peg Board is automatically updated to reflect the user's time availability.

   - In / Remarks

     This manually overrides the link between the Peg Board and the Calendar window and marks the user as IN. You may want to use this option when you have scheduled appointments in the office, but would like people to know you are there. You may also enter additional remarks explaining the details in the User Status dialog.

   - Out / Remarks

     This manually overrides the link between the Peg Board and the Calendar window and marks the user as OUT. You may want to use this option when a user is away from the office because of an illness.

You may also enter additional remarks explaining the details in the User Status dialog.

3. The Peg Board is automatically refreshed periodically during the day. However, if you need to, you can refresh the Peg Board manually so that it will display all recently booked appointments and any changes made to existing appointments. To do so, click the Refresh button.
4. Click Close to exit the Peg Board.

Chapter

4 COMMUNICATING WITH PEOPLE

Maximizer provides all the tools you need to communicate with your customers and prospects by telephone, fax, E-mail, and the Internet. You can also manage all your correspondence and mailing requirements with Maximizer's document, envelope, and label printing capabilities.

Maximizer also provides a new central Company Library to store vital sales and marketing information for everyone to access. It's easy to manage your documents and other files such as graphics, spreadsheets and multi-media presentations.

NOTE

Before you can use Maximizer's communications features, you must set up your modem, fax software, and Internet connections. For information about setting up your communications devices for modem, fax and Internet access, see chapter 3, "Setting Up Communications and Security" in the *Setup* guide.

Working with the Company Library

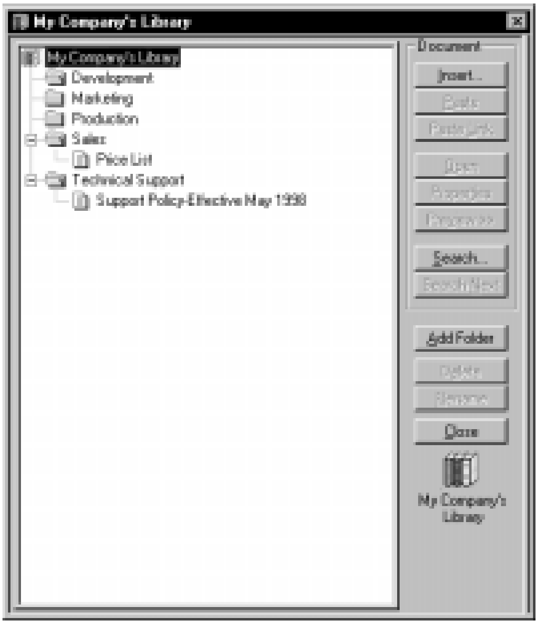
The Maximizer Company Library is a component of Maximizer that helps you to manage your customer information. Its central to everyone using multi-user configurations, so documents, spreadsheets, graphics and even multi-media presentations may be easily accessed and shared by everyone in your company.

Adding a Document to the Company Library

➤ To add a document to the Company Library

1. From any window in Maximizer, select My Company's Library from the View menu or press Ctrl+L.

   The main Company Library dialog box appears.

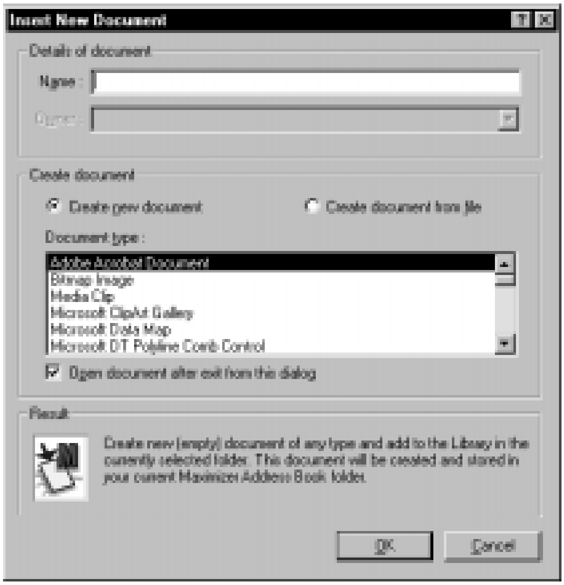


   A tree-type view of all folders and files in the Company Library is displayed. The top-level folder is a master folder that contains all other folders and files your company includes in the Company Library.

2. To add a new folder to the Company Library, click the Add Folder button. It's much like the Windows Explorer whereby you may rename and delete any of your folders by using the appropriate buttons. You may also reorganize the structure of your folders using drag and drop. If you do not choose to add a folder, any documents you create will be added to the master Company Library folder, or the selected folder if any exist.

3. To add a new file to the Company Library, click the Insert button.

The Insert New Document dialog box appears.



4. Type a descriptive name for the document.
5. If you would like to share the document with other users, leave the Owner as Public. Select your User ID if you want the document to be private.
6. Select Create New Document or Create Document from File, depending on what you want to do.

   If you've selected to create a new document:

   - Specify the type of document you are including in the Company Library. The application associated with the type of document you have specified will open, unless you have de-selected the Open Document After Exit from this Dialog option. You may now create the document or close the application leaving the document empty. Note that if you've added information to the document and you close the application, you will be prompted with a message to save the document. It is then placed in the Company Library.

   If you've selected to create a document from an existing file:

   - Type the folder path of the document or click the browse button to locate the document.

7. If you would like to create a link to document, select Create a Link to the Selected File. This stores the folder path of the document rather than creating a duplicate copy of the document in the Company Library. If the a linked document is modified, the document is automatically updated in the Company Library.
8. Regardless of whether you are creating a new document or creating a document from an existing file, the application associated with the document will open unless you have de-selected the Open Document After Exit from this Dialog option. Leave the option selected if you would like to work with the document immediately, or de-select the option to add the document to the Company Library without opening it.
9. Click Close to exit the Company Library and return to the currently active Maximizer window.

NOTE

To search for a document, click the Search button and enter the document name in the search dialog box. Also, in the Scope of Search group box, select to Search the Entire Library or Search in Current Folder and all Subfolders.

To preview a document, select the document and click the Preview button. A view of the first page of the document will appear in a Preview pane of the Company Library. Text (.txt) files associated with the application Notepad may not be previewed or linked.

To view the Properties of a document, select the document and click the Properties button. This information provides you with the name of the Owner of the document, the date it was created and the date and time it was most recently accessed.

You can copy documents to your Windows clipboard and paste it into the Company Library in a few simple steps.

➤ To paste a document into the Company Library

1. From the Windows Explorer, select a document.
2. Choose copy from the Edit menu or shortcut menu.
3. Open the Company Library.
4. Click the Paste button. This pastes the contents of your Windows clipboard as a new document in the Company Library.

   —or—

Click the Paste Link button. This pastes a link to the document from which the contents of your Windows clipboard originated. For example, if you have copied a Microsoft Word document and pasted it into the Company Library, it will create a link to the original document.

NOTE

You can also drag and drop a document from the Windows Explorer to a Company Library folder. Holding the Ctrl key down while dragging the document copies it to the Company Library and holding the Ctrl+Shift will create a link to the document.

Using the Telephone

With Maximizer, you can quickly dial any Address Book entry, make a series of phone calls, receive calls and record incoming and outgoing phone call activity in the Phone Log. You can also make calls from the Phone Log.

Making a Quick Phone Call

To quickly call one Address Book entry, use quick dial. Quick dial is faster; you do not add a subject and the first phone number in the entry is dialed by default.

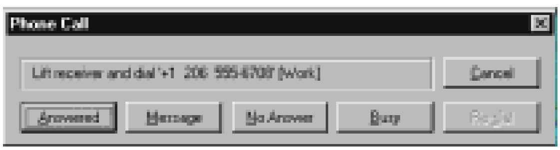
➤ To make a quick call

1. In the Address Book, Contacts, Related Entries or Hotlist window, select an entry.
2. Drag the Address Book or Contact entry to the Phone button on the toolbar.

   —or—

   Select Make a Call from the Actions menu.

   The Phone Call dialog box appears.



Maximizer dials the first number in the phone list or asks you to dial the number yourself.

3. In response to the call, click one of the following buttons:
   - Answered
   - Message
   - No Answer
   - Busy
   - Re-dial

   Maximizer automatically logs the phone call activities according to your History Preferences.

Making a Single Phone Call

You can make a single phone call to an Address Book entry, select a subject, and choose the phone number you want to use (you can have up to four phone numbers for each Address Book entry).

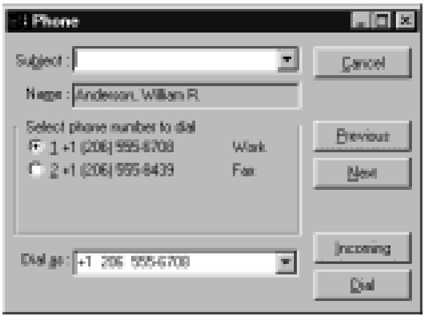
➤ To make a single call

1. In the Address Book, Contacts, Related Entries, Hotlist, or Calendar window, select an entry.
2. Click the Phone button on the toolbar, or press F7.

   —or—

   Select Phone from the Tools menu.

   The Phone dialog box appears.



3. In the Subject field, type a subject.

   A drop-down list is available for this field.

4. Select a phone number from the list in the Select Phone Number to Dial group box. If required, select a phone number format from the Dial As list. For example, select a long distance or local call format.

5. Click the Dial button.

   The Phone Call dialog box appears. Maximizer dials the selected number or asks you to dial the number yourself.

NOTE

How Maximizer handles a call depends on your call setup. For more information, see “Adjusting Communications Settings” in the *Setup* guide.

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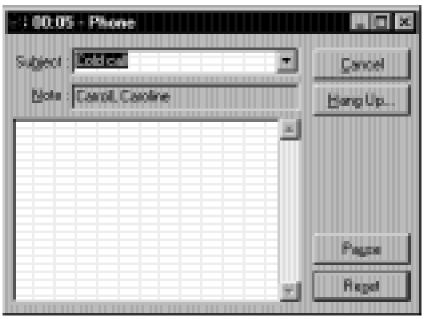
6. If you do not reach the party you called, click one of the following buttons:

   - Message
   - No Answer
   - Busy
   - Re-dial

   The Phone dialog box re-appears and displays the results under Last Result.

7. If the party answers, click the Answered button.

   The Phone timer dialog box appears.



   - In the Subject field, type a subject for the call, then type any notes you want to make.

- Click the Hang Up button when you finish the call.

  The Phone Call Result dialog box appears.

- Select a Results item.

  To add a Results item, click the Add button. Type an item and click OK.

- Click OK to end the call.

  Maximizer asks if you wish to schedule a follow-up activity.

  - Click Yes to display the Add Hotlist Task dialog box and enter a follow-up activity; otherwise, click No.
  - The Phone dialog box re-appears and displays the results under Last Result.

8. When you are finished with the call, click Cancel to close the Phone dialog box.

   Maximizer automatically logs phone call activities in the Notes window. You can change this setting in the History Preferences.

Making a Series of Phone Calls

You can work through a list of Address Book entries, calling each one in turn. For each, you select a subject and choose the phone number to use (you can have up to four phone numbers for each Address Book entry).

➤ To make a series of calls

1. In the Address Book, Contacts, Related Entries or Hotlist window, select an entry.
2. Click the Phone button on the toolbar.
3. In the Phone dialog box, select a number in the Select Phone Number to Dial list. If required, select a phone number format from the Dial As list. For example, select a long distance or local call format.
4. Click the Dial button.
5. Depending on the result of the call, click one of the following buttons:
   - Answered

- Message
- No Answer
- Busy
- Re-dial

6. When you complete the first call, click the Next button to move to the next entry in the window.

   The next Address Book entry or Contact is displayed in the Phone dialog box.

7. Repeat steps 3-5 for each call in the series.
8. When you are finished making calls, click Cancel to close the Phone dialog box.

Receiving a Phone Call

You can keep track of incoming calls. When you receive a call, just click the Phone button. You can then search for the associated Company, Individual, or Contact. When you complete the call, it is logged for the selected entry according to your History Preferences.

➤ To receive a call

1. Click the Phone button on the toolbar, and then click the Incoming button in the Phone dialog box.

   —or—

   Select Receive a Call from the Actions menu.

2. In the Subject field of the Phone timer dialog box, type a subject for the call and any notes.
3. If the caller is an Address Book entry, find and select his or her name in the controlling window.
4. Click the Hang Up button.
5. Depending on your selections in History Preferences, Maximizer may prompt you with a message asking you if you would like to schedule a follow-up activity. The call may also be logged as a note, in the Phone Log and in the Journal.

6. In the Phone Call Result dialog box, select a Results item.
7. Click OK.
8. When you have finished the call, click Cancel to close the Phone dialog box.

Viewing the Phone Log

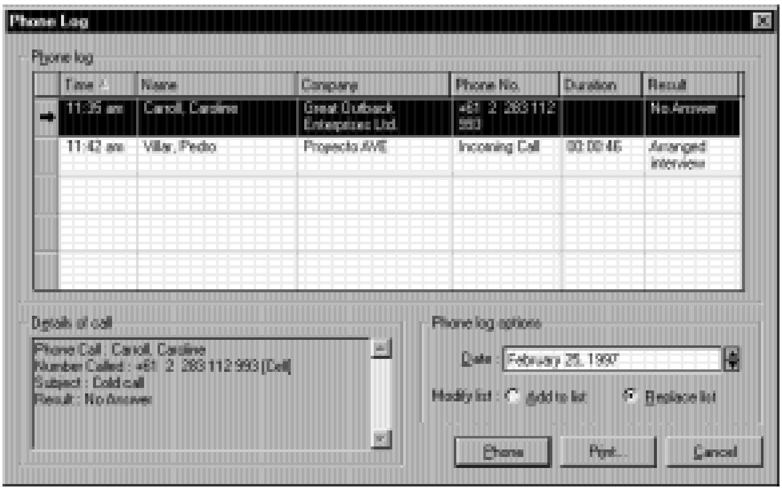
The Phone Log lists all incoming and outgoing calls for the current date. This gives you a quick overview of your phone activities. By default, the Phone Log displays the current date. You can change the date to review past or future time periods.

➤ To view the Phone Log

- Click the Phone Log button on the Standard toolbar.

  —or—

  Select Phone Log from the View menu.



➤ To change the Phone Log date

1. In the Phone Log, go to the Date field.
2. Use the Up or Down Arrow keys to select a different day.

—or—

Press Insert and use the drop-down calendar to select a day from a different month or year.

Making a Phone Call from the Phone Log

You can use the phone log to find and redial any uncompleted calls.

➤ **To make a call from the Phone Log**

1. Click the Phone Log button on the Standard toolbar.

   —or—

   Select Phone Log from the View menu.
2. In the Phone Log, select one or more entries.

   Press Ctrl+click to select more than one entry, or click the row headings at the left edge of the window.
3. Select Add to List to add the entries to the existing Address Book list.

   —or—

   Select Replace List to replace the existing Address Book list with the selected entries.
4. Click the Phone button.

   Maximizer adds the selected entries to your Address Book list and displays the Phone dialog box.
5. In the Phone dialog box, select a number and a Dial As format if required, and then click the Dial button.
6. Depending on the result of the call, click one of the following buttons:
   - Answered
   - Message
   - No Answer
   - Busy
   - Re-dial

7. When you complete the first call, click the Next button to move to the next Address Book entry.

   The next Address Book entry is displayed in the Phone dialog box.

Sending Faxes

You can create faxes with the Fax Form template and fax letters and mail-merge documents.

Creating a Fax

You can quickly compose a fax to a Company, Contact, or Individual.

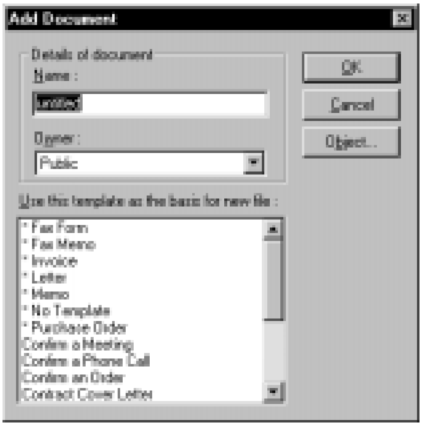
➤ **To create a fax**

1. In a controlling window, select an entry to which you want to attach the fax.
2. Click the Write a Fax button on the Action toolbar and go to step 7 below.

   —or—

3. Do one of the following:
   - Drag the entry to the Documents window or button.
   - In the Documents window, double-click in a blank field.
   - Select Add Document from the shortcut menu.

The Add Document dialog box appears.



4. Fill in the Details of Document group box.
5. Select your User ID if you don't want to share the document with other users.

   This option applies only if you have a multi-user configuration.
6. In the Use Template group box:

   Select *Fax Form and click OK.

7. Format and type your fax using the Format, Paragraph, and Document menus.

Some formatting may already be done; for example the *Fax Form template fills in the name and address of your current Address Book entry or Contact.

8. When you are finished, select Close from the Maximizer Word Processor's File menu.
9. In the Maximizer Word Processor message box, click Yes to save the file.

10. In the Save As dialog box, specify a file name. Select your User ID if you don't want to share the fax document with other users.

    This option applies only if you have a multi-user configuration.
11. Click OK.

To fax the document, follow the procedure in the next section.

Faxing a Document

You can easily fax a single letter to a Company, Contact, or Individual.

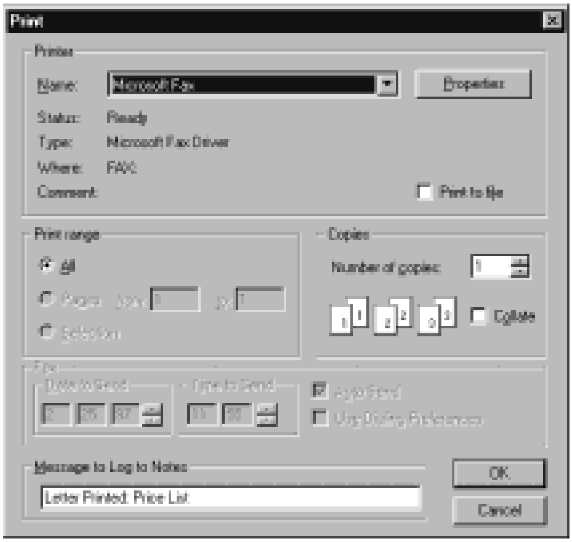
NOTE

If you import Address Book entries from other sources, always check for the proper FAX or FACS extension. A quick way to check is to set up a column in the Address Book window that shows all phone extensions. Maximizer sends the fax to the first phone number that has a FAX or FACS extension; any other numbers with the extension are ignored.

➤ To fax a document

1. In a controlling window, select an entry.
2. In the Documents window, double-click the document you want to fax.

3. Select Print from the Maximizer Word Processor's File menu.



4. In the Print dialog box, select the name of your fax driver from the Name list.

   Depending on the fax software you have installed, the driver is called Microsoft Fax, WINFAX, E-FAX, FX-WORKS, or FXHPPCL. Also depending on the driver you have installed, various options are available through your Dialing Preferences such as date and time auto-send features.

5. Click OK to start transmission.

   Use the Compose New Fax Wizard or other fax software prompts to complete and send your fax.

Faxing Mail-Merge Documents

Maximizer provides full mail-merge capability that you can use to fax documents to your Address Book entries. For a mail-merge, you need to create a template form letter that includes merge codes for names and addresses. For more information, see “Creating a Document Template” on page 167.

NOTE

To send a series of faxes without user intervention, all the entries in your current Address Book list must have a FAX or FACS extension in the phone extension field.

➤ To fax a mail-merge

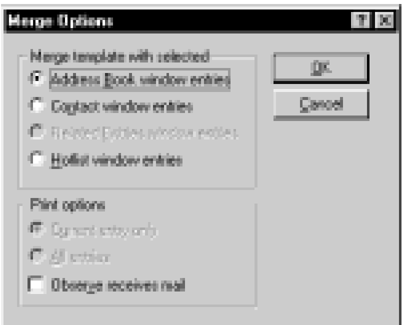
1. In a controlling window, select the entries you want to include in a mail-merge.
2. In the Maximizer Word Processor window, select Open from the File menu.
3. In the Open Template dialog box, select a template.
4. Click the Open button.

   The Maximizer Word Processor opens the document.
5. Select Merge > to Microsoft Fax from the File menu. If you are using other fax software, use Merge > To Printer and select your fax driver.

   NOTE

   To use Microsoft Fax you must have it properly installed and set your Mail Profile to an option that includes the Microsoft Fax service.

   The Merge Options dialog box appears.



6. Adjust the Merge Template with Selected and Print Options group boxes.

If you select Address Book or Hotlist, you can check the Observe Receives Mail checkbox to send the faxes only to the Contacts designated to receive mail.

7. When you are finished, click OK.

   Maximizer displays the first document with the merge codes replaced by the appropriate fields from your current list.

8. Click Send to fax the current document and move to the next Address Book entry.

   —or—

   Click Skip if you don’t want to fax the current document.

   —or—

   Click Send All to fax all of the documents for the mail-merge.

9. Maximizer faxes the mail-merge document(s).

Using E-mail Within Maximizer

Maximizer includes a new E-mail window. From this window, you can send E-mail and attachments, including Internet mail. You can also view, compose and delete E-mail. Message attachments that require special conversion such as MIME and Base 64 files can easily be re-formatted using the decode functionality.

The Maximizer E-mail window works much the same as any Extended MAPI E-mail application with additional functionality that enables you to easily integrate your Address Book entries with your E-mail. Using drag and drop you can quickly associate an E-mail with an existing entry in your Address Book folder or create a new entry in a few simple steps.

If you have an Internet connection for sending and receiving E-mail and you’re taking advantage of the Maximizer E-Commerce features, you can receive orders and inquiries by E-mail. It’s easy to manage customer information that is stored in your Maximizer Address Book folder.

➤ To work with the Maximizer E-mail window

1. Click on the E-mail icon in the Icon bar or select E-mail from the Windows menu.
2. Select the E-mail profile that you want to use, and then click OK. You may choose not to be prompted for the E-mail profile each time you open the E-mail window in the Preferences > E-mail tab.
3. Adjust the options for viewing received E-mail.
   - To view all of the E-mail messages associated with the currently active Address Book folder, open the top-level folder in the left pane of the window.
   - To filter messages by date range, choose one of the following options from the Filter drop-down list: All, Today, Yesterday, This Week or This Month.
   - As an additional filter, you may select the Only Unread Messages checkbox which will display only those messages you have not opened. You also have the option of displaying unread messages in blue text by choosing this as a preference in the Preferences > E-mail tab. You can access this tab quickly by choosing Preferences on the shortcut menu.
   - To view only messages that are sales inquires or orders, choose one of the following Subjects from the drop-down list: E-Commerce Inquiries, E-Commerce Orders or All E-Commerce Messages. This feature is for users that are taking advantage of the Maximizer E-Commerce functionality allowing instantaneous access to E-mails generated through your Web site.
   - To sort the columns in the Inbox, click the column heading by which you want to sort messages. This will sort all of your E-mail messages according to the column header subject in ascending or descending order.
4. To handle received mail, take one or more of the following actions.
   - To read a message, double-click it, or click the Open button. This opens the message in the E-mail Message dialog. Here, you may choose to respond to or forward the message as well as save attachments.

- To decode an E-mail attachment, select decode from the Edit menu. This is a feature in the Maximizer E-mail window that will convert attachments back to their original file format. For example, if you receive an E-mail that was sent via the Internet the original file format may be lost in the transmission. Using the decode functionality, the original format is restored allowing you to read and save the attachment in it's proper file format. This functionality works for all 7-bit Internet conversion, MIME and Base 64. Note that you must be using the Maximizer E-mail view in order for this functionality to work.
- To save a message as a document, close the E-mail message and while the message is selected, select one of the Save options from the Edit menu. If you choose to Save All, this will save all of your E-mails in your current Inbox view for which there is a corresponding Address Book entry. You may also drop an E-mail message on the Documents window. You will then be prompted to name the document and select an Owner. If you choose your User ID, the document will not be public to others.
- You can also drag and drop an E-mail message to the Address Book or Contacts window or its associated icon. This allows you to create a new address book entry for the sender of the E-mail message, update an existing E-mail address or save the message as a document. Note that if your selected target is in the Contacts window and you choose to create a new Address Book entry, it will be added as a Contact. If you drop the E-mail message on the Address Book window, you will be prompted to add the entry as a Company, Individual or Contact.
- You can drag and drop an E-mail message on the Hotlist window or icon. This opens the Hotlist Task dialog. If an associated Address Book entry exists in Maximizer, you have the option to automatically create a hotlist task for the associated entry. If the sender of the E-mail does not exist as an Address Book entry, you have the option to create a personal task. In either case, the activity is derived from the E-mail's subject heading. Any of the items may be modified. When you are satisfied with the details for the task, click OK to close the Hotlist Task dialog. This creates a task for the specified date and time.
- To delete a selected message, select Delete the Selected Messages from the shortcut menu or click the Delete button on the Standard toolbar. This action will move the E-mail message to the Deleted Items folder.

If you then delete the message from this folder, it will be deleted permanently. Note that when messages are deleted or moved to another folder, the action is reflected in your Maximizer E-mail window as well as in your E-mail Service Provider application.

5. When you are finished working with the Maximizer E-mail window, click the close button.

Sending a Message to One or More Address Book Entries

You can an send an E-mail message to one or more Address Book entries at once.

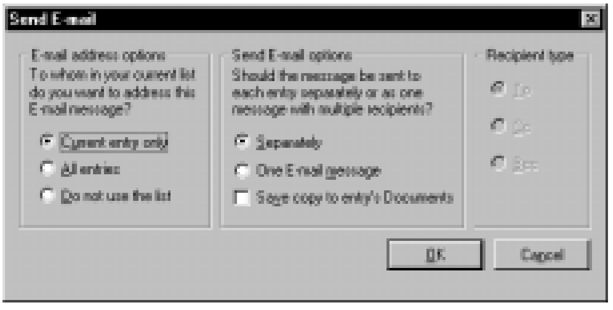
NOTE

Take advantage of automatic E-mail addressing in Maximizer to send an E-mail to one or more Address Book entries. It is easy to associate an E-mail address with a Company, Individual or Contact. Simply drag an E-mail from your Maximizer E-mail window and drop it on the entry to which you want it associated, in the Address Book or Contacts window. Or, you can enter E-mail addresses manually in the *E-mail Address field on the User-Defined Fields tab of the Address Book entry main tabbed dialog.

➤ To send a message

1. Select the Address Book entries you want to send mail to in a controlling window.
2. Select Send E-mail from the File menu or shortcut menu. You may also click the Send E-mail button on the Action toolbar.

   The Send E-mail dialog box appears.



3. Select the option you want.
   - Select Current Entry Only to send a message to the currently selected entry.

   —or—

   - Select All Entries to send a message to all of your Companies, Individuals and Contacts in the currently active list.

NOTE

This option appears only if you do not have entries selected in your list. If you do have entries selected, this option will change to All Selected Entries which allows you to send the E-mail to only those entries.

   —or—

   - Select Do Not Use the List to send a message to someone not in your current list. If you choose this option, you must select a recipient in the Compose E-mail Message dialog.
4. Under Send E-mail Options, select a delivery preference.

   Select Separately to send each message individually even if you are addressing multiple recipients. This means each person who receives the mail does not see a list of the other recipients. This option also allows you to send the message as a fax if some of the recipients do not have an E-mail address.

   Select One E-mail Message to send a single message to multiple recipients.

NOTE

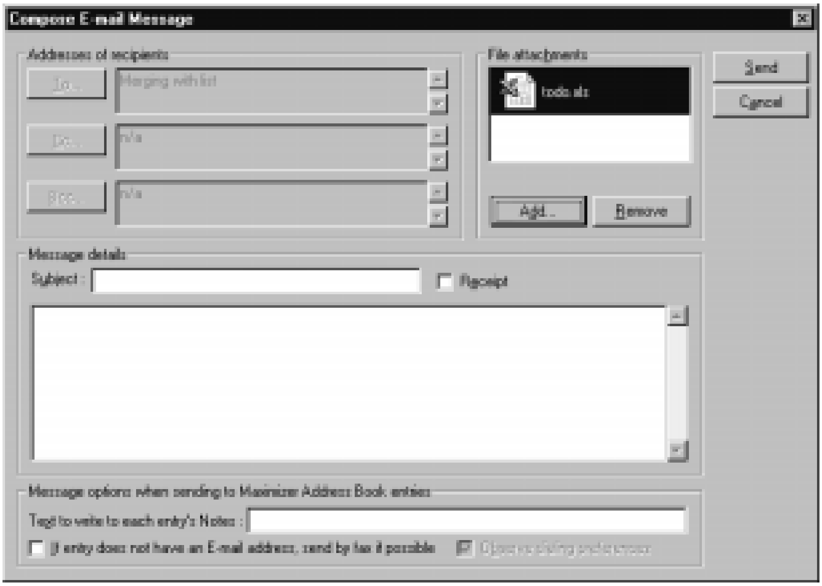
The One E-mail Message option is valid only if the current list has 999 or fewer entries. To send an E-mail message to more than 999 entries, select a group of fewer than 1000 entries and send the message. Then select another group of Address Book entries and send the same message.

   Select Save Copy to Entry's Documents to save the outgoing E-mail message as a Maximizer document. This option is only available if you are sending separate messages.
5. Indicate where you want the addresses inserted in the E-mail message. Under Recipient Type, select To, CC, or BCC. These options are not available when you are sending a single E-mail message to multiple recipients.

6. Click OK.
7. If this is the first time you are sending E-mail during a Maximizer session, select the profile that you want to use, and then click OK. If prompted, specify the logon information for your mail system.

   The Compose E-mail Message dialog box appears.

   If you are sending messages separately to multiple recipients, the Address field displays Merging With List.



8. Fill in the Subject text box. Click Receipt if you want message receipt notification.

9. Type your message in the Message Body text box. If you wish, type a message to log to your Notes window.

NOTE

If you are sending separate messages to multiple recipients, some of whom do not have an E-mail address but do have a fax number, you can have Maximizer automatically send those recipients a fax instead of an E-mail message.

- Click the ‘If Entry Does Not Have an E-mail Address Send by Fax’ option. (This option is available only if you have Microsoft Fax properly installed and you have selected the E-mail Profile option which includes the Microsoft Fax service.)
- Check Use Dialing Preferences to send the fax using your Maximizer Modem Dialing preferences. (This option is available only if you selected Separately in the Send E-mail Options group box.)

10. Add any Attachments you want to send.

    Click the Add button to add a new attachment to the list. Select an attachment and click the Remove button to delete it from the list.

11. When you are finished, click Send.

    Maximizer sends the message or messages to your E-mail to your E-mail Service Provider for delivery to the selected recipients.

E-mailing Mail-Merge Documents

Maximizer provides full mail-merge capability that you can use to E-mail documents to your Address Book entries. For a mail-merge, you need to create a form letter or document that includes merge codes for names and addresses. For more information, see “Creating a Document Template” on page 167.

NOTE

It is a good idea to build an Address Book list by including only those Address Book entries that have E-mail addresses before E-mailing mail-merge documents. You may do a search to locate the entries. You can optionally route the document to a fax if Microsoft Fax is installed and set up under Microsoft Exchange.

➤ To send a mail-merge using E-mail

1. In a controlling window, select the entries you want to include in a mail-merge.
2. Open the Maximizer Word Processor.
3. Select Open from the File menu.
4. In the Open Template dialog box, select a template.
5. Click the Open button.
6. Modify the content of the template if you wish.
7. Select Merge > To E-mail from the File menu.

   The Merge Options dialog box appears.
8. Adjust the Merge Template with Selected and Print Options group boxes.

   NOTE

   If you do not know the mail readers used by your recipients, select the Text format option. Not all mail readers can display complex formatting and graphics. This option converts your document into a text-only attachment by removing complex formatting and graphics.
9. When you are finished, click OK.

   Maximizer displays the first document with the merge codes replaced by the appropriate fields from the current Address Book entry.
10. Click the Send button to send the document to the recipient and move to the next address entry.

    —or—

    Click the Skip button if you do not want to forward the current document.

    —or—

    Click the Send All button to send all of the documents in the mail-merge to the recipients.

    The Choose Profile dialog box appears.
11. Select your mail profile or create a new one. Then click OK.

    For instructions on how to set up a mail profile, see your Windows documentation.

The Compose E-mail Message dialog box appears.

12. To add a message, type the Subject and Message Body. If you do not want extra message text, ensure that the Subject and Message Body fields are blank.
13. If one or more address entries in the mail-merge list do not have an E-mail address and if the Microsoft Fax service is available, you can route the letter or document to their fax.

NOTE

Maximizer scans all 4 phone extensions for the word FAX or FACS, and uses the associated phone number of the first one it finds. For more information about setting up fax numbers in Maximizer, see “Adding Address Book Entries” on page 11.

- Select Use Fax Number if no E-mail Address.
- To format the fax numbers, select Use Dialing Preferences. For example, when you are travelling you can quickly change the number in the Current Area Code field to the area code where you are currently located. If the Current Area Code and the Local Area code are different, Maximizer adjusts the fax numbers accordingly. If you are using TAPI, reset the preferences for the current location. For information about setting up dialing preferences in Maximizer, see “Adjusting Communication Settings” in chapter 3, “Setup” in the *Setup* guide.

14. Click Send.

Maximizer merges the template with each of the Address Book entries in the selected list and then sends (or faxes) the mail-merged document.

Reading a Maximizer Report in an E-mail Message

If you receive an E-mail message that contains a Maximizer report, you can easily view the report. You can also read a Maximizer Word Processor document or template sent by E-mail.

➤ To read a Maximizer report sent by E-mail

1. Open the E-mail message in the Maximizer E-mail window.

2. Double-click the .RTF attachment (Rich Text Format) to open and read the report.

3. When you are finished, select Exit from the application's File menu to close the attachment.

   If you prefer, you can save the attachment for later use by selecting the attachment, then clicking the Save As button and choosing a name and location where you can save the file.

NOTE

If double-clicking on the attachment doesn't work, it means you do not have an association between the .RTF attachment and an existing program. To create an association, using Windows Explorer select the Options command from the View menu, and then click the File Types tab in the Options command. Or, import the attachment into another application, such as Microsoft Word. You should not import it into the Maximizer Word Processor.

➤ **To read an Maximizer Word Processor document or template sent by E-mail**

1. Open the E-mail message in the Maximizer E-mail window.

2. Double-click the RTF attachment to open and read the file.

3. When you are finished, select Exit from the application's File menu to close the attachment.

   If double-clicking on the attachment doesn't work, it means you don't have an association between the RTF attachment and an existing program. To create an association using Windows Explorer, select the Options command from the View menu, then click the File Types tab and add the file type. For more information, refer to your Windows 95 documentation. You may also save the attachment and open it in an application that will open .rtf files.

Receiving an Address Book Transfer Sent by E-mail

You can receive a message containing a Maximizer transfer data file and bring its contents into your Address Book folder. Double-clicking the attachment starts a new instance of Maximizer. With this instance of Maximizer, you can transfer the records into another Address Book.

➤ To receive a Maximizer transfer sent by E-mail

1. Open the E-mail message, either in the Maximizer E-mail window, or using your E-mail client software.
2. Double-click the compressed data file attachment.

   This launches a new instance of Maximizer. The new instance decompresses the mail attachment and places the files into the reserved folder called TMP_MDE.ARC. (By default, the folder is under C:\PROGRAM FILES\MAXIMIZER.)

   CAUTION

   The TMP_MDE.ARC folder is used exclusively for transfers. Never use this folder to store your own data files; they will be overwritten by the Maximizer program.

   Once the files are decompressed, you can transfer them to a Maximizer Address Book folder.

3. In the new instance of Maximizer, select the entries to transfer.
4. Select Transfer from the File menu or click the Transfer Data button on the Standard toolbar.
5. Select an item from the Transfer sub-menu.
6. In the Transfer dialog box, select an Address Book folder where you want to send the data files.
7. Click OK.
8. In the Transfer Options dialog box, fill in the appropriate group boxes.
9. When you are finished, click OK.

Maximizer transfers the data to the target folder. You can then close the second instance of Maximizer and return to your regular Address Book.

CAUTION

If you receive more than one compressed file attachment, make sure you transfer the first set of data files out before double-clicking on the next attachment. Maximizer overwrites the files in the TMP_MDE.ARC folder each time.

Attaching a Maximizer Report to an E-mail Message

You can attach certain Maximizer reports to an E-mail message. Maximizer sends the report in Rich Text Format (.RTF). The message recipient can then read the report from any application that supports RTF, such as Microsoft Word or Corel WordPerfect.

NOTE

Reports are printed using tables. Since Maximizer Word Processor doesn't support the importing of tables from RTF files, do not use it to read RTF files containing tables.

➤ To attach a Maximizer report to an E-mail message

1. In a window, select the entries you want to include in the report.
2. Select Print from the File menu.

   Select a sub-menu option, if applicable.
3. In the Print Report dialog box, under Send Report To, select E-mail and click OK.
4. If the Choose Profile dialog box appears, select your E-mail Profile.

   If the Choose an E-mail Messaging System dialog box appears, select MAPI or VIM and click OK.

   If the E-mail Sign In or Log into VIM Mail System dialog box appears, type your password and click OK.

   The Compose E-mail Message dialog box appears. It contains a message that consists of an RTF file attachment (containing the report) and brief instructions to the recipient(s).

5. Complete and address the message.
6. Click Send to send the E-mail message. Click OK to confirm the successful delivery.

   The Maximizer report is sent to the selected recipient(s).

Writing Documents

You can use Maximizer's built-in Maximizer Word Processor or your favorite word processor to handle all your correspondence.

Using Your Favorite Word Processing Program

You have the option of using the Maximizer Word Processor, Microsoft Word, or Corel WordPerfect as your word processor.

NOTE

To use Microsoft Word, you must have version 6.0a or higher. To use Corel WordPerfect, you must have Corel or Novell WordPerfect, version 6.1 or higher.

Use your word processor to create letters, faxes and reports and insert Maximizer fields where appropriate. (Use the buttons on the Maximizer toolbar in Word and WordPerfect to insert fields; the Maximizer Word Processor provides both toolbar buttons and commands from the menus. If it's not visible in Microsoft Word, choose View > Toolbars > Maximizer).

The Maximizer Word Processor is a full-featured word processor that lets you create letters, templates, and mail-merges for your Companies, Individuals and Contacts. The Maximizer Word Processor provides the word processing features you need, including full formatting capability, a spell checker and thesaurus, search and replace, headers and footers, and graphics support.

The Documents window lists all the documents you've created for your Companies, Individuals, and Contacts. This allows you to see what you've written for a Company, Individual, or Contact and to easily retrieve your documents later on. You may create all of your documents in the Maximizer Word Processor.

For a complete description of the features of the Maximizer Word Processor, see chapter 6 "Using the Maximizer Word Processor" on page 165.

Opening the Documents Window

To manage the documents for a Company, Individual, or Contact, open the Documents window.

➤ To open the Documents window

- Click the Documents button on the icon bar, or the Documents tab in the tabbed windows view.

  —or—

  Select Documents from the Window menu.

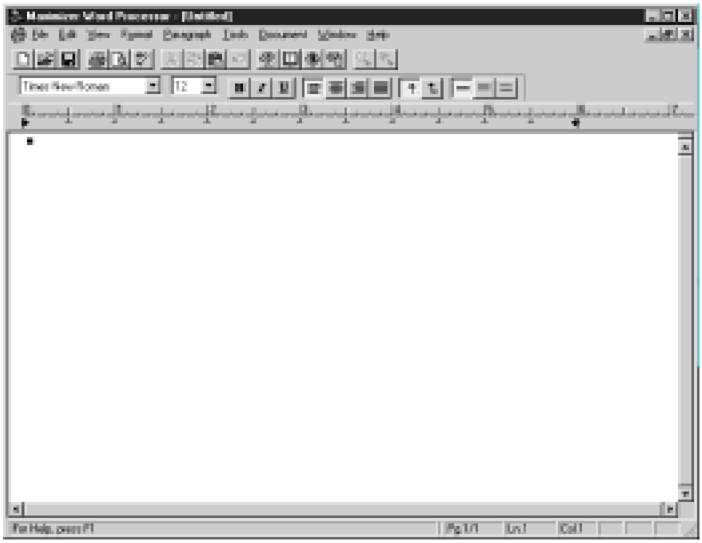
Opening or Closing the Maximizer Word Processor

When you create or update a document such as a letter or a fax, use the Maximizer Word Processor to type and format the contents of the document. You can also use the Maximizer Word Processor to create and update a document template.

➤ To open the Maximizer Word Processor window

- Click the Maximizer Word Processor button (the typewriter icon) on the Standard toolbar.

This opens the Maximizer Word Processor window.



➤ To close the Maximizer Word Processor window

- Select Exit from the Maximizer Word Processor's File menu.

Creating a Document

For maximum flexibility, Maximizer lets you create documents from the Documents window, Actions menu, or the Maximizer Word Processor window.

➤ To create a document from the Documents window

1. In a controlling window, select an entry to which you want to attach a document.
2. Drag the entry to the Documents window or Icon bar button, or to the Maximizer Word Processor button on the Standard toolbar.

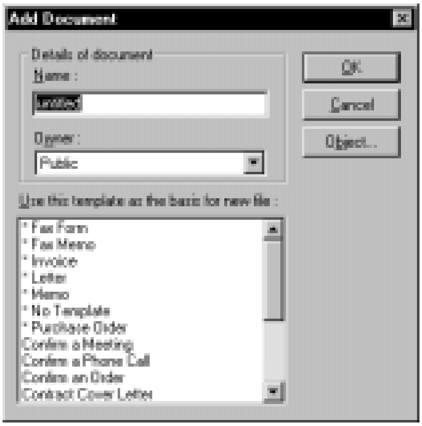
   —or—

   In the Documents window, double-click a blank cell.

   —or—

In the Documents window, select Add Document from the Edit menu or shortcut menu.

The Add Document dialog box appears.



3. Fill in the Details of Document group box.
4. Select your User ID if you want don't want to share the document with other users.

   This option applies only in multi-user configurations.
5. In the Use Template group box:

   Select No Template.

   —or—

   Select one of the listed templates.
6. Click OK.
7. Type the content of your document and optionally, format it using the commands on the Format, Paragraph, and Document menus.

   If you selected a template to use in the new document, some formatting may already be done. For example the Letter template already fills in the name and address of your current Address Book entry.
8. When you are finished, select Close from the Maximizer Word Processor's File menu.
9. In the Maximizer Word Processor message box, click Yes to save the file.
10. In the Save As dialog box, click OK.

➤ To create a document from the Actions menu

1. In a controlling window, select an entry to which you want to attach a document.
2. Select Write a Document from the Actions menu.

   The Create New Document dialog box appears.
3. Fill in the Document Details group box.
4. Select your User ID if you don’t want to share the document with other users.

   This option applies only if you have a multi-user configuration.
5. In the Use Template group box:

   Select No Template.

   —or—

   Select one of the listed templates.
6. Click OK.
7. Type the content of your document and optionally, format it using the commands on the Format, Paragraph, and Document menus.

   If you selected a template to use in the new document, some formatting may already be done. For example the Letter template already fills in the name and address of your current Address Book entry.
8. When you are finished, select Close from the Maximizer Word Processor’s File menu.
9. In the Maximizer Word Processor message box, click Yes to save the file.
10. In the Save As dialog box, click OK.

➤ To create a document from the Maximizer Word Processor menu

1. In a controlling window, select an entry to which you want to attach a document.
2. In the Maximizer Word Processor window, select New from the File menu.

   The Create New Document dialog box appears.

3. Fill in the Document Details group box.
4. Select your User ID if you don't want to share the document with other users.

   This option applies only if you have a multi-user configuration.
5. In the Use Template group box:

   Select No Template.

   —or—

   Select one of the listed templates.
6. Click OK.
7. Type the content of your document and optionally, format it using the commands on the Format, Paragraph, and Document menus.

   If you selected a template to use in the new document, some formatting may already be done. For example, the Letter template fills in the name and address of your current Address Book entry.
8. Select Close from the Maximizer Word Processor's File menu.
9. In the Maximizer Word Processor dialog box, click Yes to save the file.
10. In the Save As dialog box, click OK.

Creating a Letter

You can quickly compose a letter to a Company, Contact, or Individual.

➤ To create a letter

1. In a controlling window, select an entry to which you want to attach the letter.
2. Drag the entry to the Documents window or Icon bar button, or to the Maximizer Word Processor button on the Standard toolbar.

   —or—

   Click the Write a Letter button on the Actions toolbar, or select Write a Letter from the Actions menu.

   —or—

In the Documents window, double-click in a blank cell, or select Add Document from the shortcut menu.

The Add Document dialog box appears.

3. If you selected Actions > Write a Letter, skip to step 7. Otherwise, fill in the Details of Document group box.
4. Select your User ID if you don’t want to share the letter with other users.

   This option applies only if you have a multi-user configuration.
5. In the Use Template group box:

   Select *Letter.
6. Click OK.
7. Type the content of your document and optionally, format it using the commands on the Format, Paragraph, and Document menus.

   If you selected a template to use in the new document, some formatting may already be done. For example, the Letter template fills in the name and address of your current Address Book entry.
8. When you are finished, select Close from the Maximizer Word Processor’s File menu.
9. In the Maximizer Word Processor message box, click Yes to save the file.
10. In the Save As dialog box, click OK.

Editing a Document

You can easily update the content of a document whenever required.

➤ To edit a document

1. In the Address Book or Contacts window, click the entry to which the document is attached.
2. In the Documents window, select the document you want to modify.
3. Select Open Document from the Edit menu or shortcut menu.

   —or—

   Double-click the selected document.

Maximizer displays the document in the Maximizer Word Processor window.

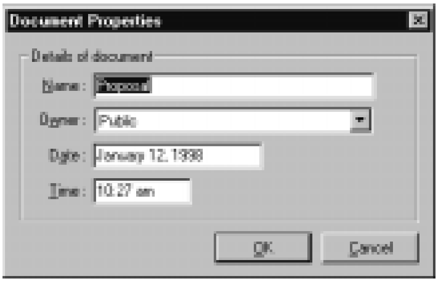
4. Modify your document.
5. Select Save and then select Close from the Maximizer Word Processor's File menu.

Editing Document Properties

You can edit the properties of a document, such as the name and date on which it was created.

➤ To edit a document's properties

1. In a controlling window, click the entry to which the document is attached.
2. In the Documents window, select the document you want to modify.
3. Select Document Properties from the Edit menu.



4. In the Document Properties dialog box, modify the Name, Owner, Date, or Time fields.

Deleting a Document

If a document is no longer necessary, you can delete it from your Address Book folder. Deletions are permanent and cannot be undone.

HINT

To delete a large number of documents, use the Purge command to remove them all at once. For more information about purging documents, see "Purging Documents", below.

➤ To delete a document

1. In a controlling window, click the entry to which the document is attached.
2. In the Documents window, click the document you want to delete.
3. Select Delete Selected Documents from the Edit menu or shortcut menu, or click the Delete button on the Standard toolbar.
4. In the Maximizer message box, click OK to confirm the deletion.

   Maximizer removes the document from the system.

Purging Documents

You can purge several documents at a time. If you are the MASTER user, you can also delete other users' documents.

NOTE

Purging deletes all documents in the date range for all Address Book entries, not just those in your current list.

➤ To purge documents

1. Select Purge > Documents from the File menu.

   The Purge Documents dialog box appears.
2. Indicate a calendar period in the Date Range to Delete group box.

   Drop-down calendars are available for the From and Until fields.
3. When you are finished, click OK.

4. In the Maximizer message box, click OK to confirm the deletion.

   Maximizer deletes all documents within the specified date range.

Working with Objects

Using Object Linking and Embedding (OLE), you can bring work you created in many other applications into Maximizer as linked objects. You can create new objects or add existing objects in your Documents window. You can also paste link objects from the Windows Clipboard.

Adding a New Object to the Documents Window

You can create a special kind of document called an object. You can attach objects directly to your Address Book entries by dragging the object from your desktop or the Windows Explorer and dropping it inside the main Maximizer application window.

NOTE

You can add objects only from applications that support Object Linking and Embedding (OLE). These include Microsoft Word, Excel, Lotus Word Pro, and many other applications.

You can also add a new document object from the Maximizer Word Processor window. For more information, see "Adding a New Object in a Document" on page 187.

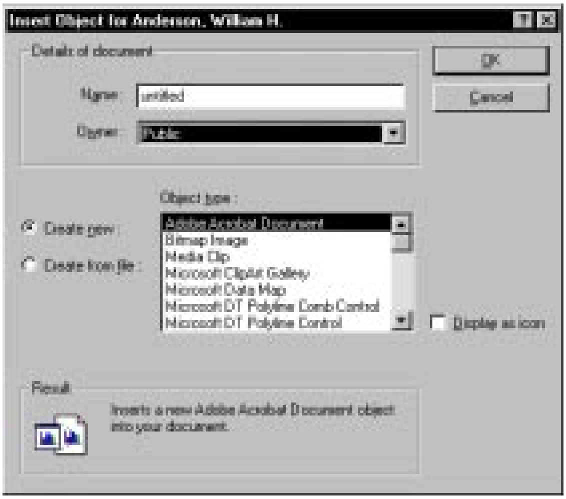
➤ **To add a new object to an Address Book entry from the Documents window**

1. In a controlling window, click the entry to which you want to add an object.
2. Select Insert Object from the Edit menu or shortcut menu.

   —or—

   - Drag the entry to the Documents window or Documents button.
   - In the Add Document dialog box, click the Object button.

The Insert Object for Address Book Entry dialog box appears.



3. Fill in the Details of Document group box.

   Select your User ID if you don't want to share the document with other users.

   This option applies only in multi-user configurations.

4. Select Create New.

5. Select an application in the Object Type box.

6. To display a shortcut icon for the object, click Display as Icon.

   Otherwise, Maximizer displays a preview of the object.

   The icon or preview appears in the Type column in the Documents window. You can start the application by double-clicking the icon or preview of the object.

7. Click OK.

   The selected application opens. Use the application to create an object, such as a spreadsheet. When you are finished, exit the application. The object appears in the Documents window.

Linking an Object to an Address Book Entry

You can link an object, such as a word-processor document, graphic, or spreadsheet created in another application to an Address Book entry by copying and pasting it, or by using drag and drop.

Linking an object is different from adding an object; when an object is linked, only the location of the file is stored in memory and when an object is not linked the entire file is stored in Maximizer.

➤ To link an object to an Address Book entry

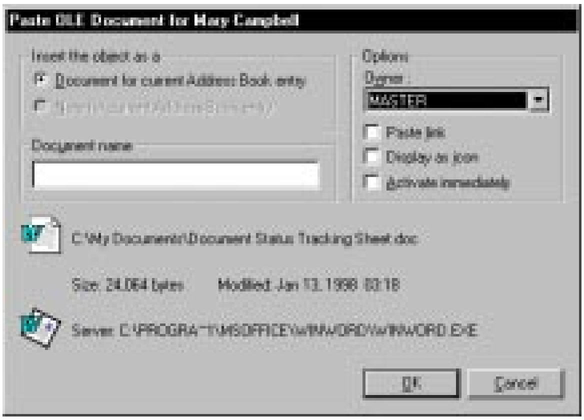
1. Take one of the following actions.

   - In the Windows Explorer, select the object you want to copy. Select Copy from the Edit menu or press Ctrl+C to copy the object to the Clipboard.

     In Maximizer, select Paste Link from the Edit menu or shortcut menu.

     —or—

   - Drag the object from the Windows Explorer to anywhere inside the main Maximizer application window.



   The Paste OLE Document dialog box appears.

2. In the Document Name text box, type a name for the document.
3. Fill in the Options group box.

   Select your User ID if you don't want to share the document with other users.

This option applies only in multi-user configurations.

Select Activate Immediately if you want to launch the application in which the object was created.

4. Click OK.

   Maximizer pastes the document into the Documents window.

Adding an Existing Object to the Documents Window

You can also add an object to an Address Book entry you have previously created with another application, such as a spreadsheet, a picture, or a word processor document.

NOTE

You can add objects only from applications that support Object Linking and Embedding (OLE). These include Microsoft Word, Excel, Lotus Word Pro, and many other applications.

You can also add an existing object to a document from the Maximizer Word Processor window. For more information, see "Adding an Existing Object in a Document" on page 188.

➤ To add an existing object to an Address Book entry

1. In a controlling window, select an entry to which you want to add an object.
2. Select Insert Object from the Edit menu or shortcut menu.

   —or—

   - Drag the entry to the Documents window or Documents button.
   - In the Add Document dialog box, click the Object button.

     The Insert Object for Address Book Entry dialog box appears.
3. Fill in the Details of Document group box.

   Select your User ID if you don't want to share the document with other users.

   This option only applies in multi-user configurations.
4. Select Create from File.

5. Find and select the object file by using the Browse button.
6. To automatically update the object in the document when you make changes, select Link.
7. To display an application shortcut icon, click Display as Icon.

   Otherwise, Maximizer displays a preview of the object.

   The icon or preview appears in the Type column in the Documents window. You can start the application by double-clicking the icon or preview of the object.
8. Click OK.

   The object appears in the Documents window.

Deleting an Object from the Documents Window

You can delete an object if it is no longer useful or applicable.

NOTE

You can also delete an existing object in a document from the Maximizer Word Processor. For more information, see "Deleting an Object in a Document" on page 189.

➤ To delete an object from the Documents window

1. In a controlling window, click the entry to which the object is attached.
2. In the Documents window, select the object.
3. Select Delete Selected Documents from the Edit menu or shortcut menu, or press the Delete key.
4. In the Maximizer message box, click OK to confirm the deletion.

   If the object is linked to the original file, the original file still exists. If the object is an embedded Maximizer document, the object is permanently removed.

Editing an Object from the Documents Window

If you need to modify or update an object, you can open the associated application and make your changes.

NOTE

You can also edit an existing object in a document from the Maximizer Word Processor. For more information, see "Deleting an Object in a Document" on page 189.

➤ To edit an object from the Documents window

1. In a controlling window, click the entry to which the object is attached.
2. In the Documents window, select the object.
3. Select Open Document from the Edit menu or shortcut menu.

   —or—

   Make one of the following selections from the shortcut menu. You may see more selections, depending on the application that created the object.

Type of Object	Select
Image	Select Image Object > Edit
Worksheet	Select Worksheet Object > Edit
Chart	Select Chart Object > Edit
Slide	Select Slide Object > Edit
Sound Clip	Select Wave Sound Object > Edit
HTML Hypertext Document	Select Hypertext Object > Edit

   Maximizer opens the object's application.

4. Edit the object.
5. When you are finished, exit the application.

Printing Documents, Envelopes and Labels

With Maximizer, you can print regular documents, mail-merge documents, envelopes and labels.

Printing a Document Report from Maximizer

You can print a document report for an Address Book entry from the Documents window..

NOTE

You can print a document from the Maximizer Word Processor. For more information about printing from the Maximizer Word Processor window, see "Printing a Document from the Maximizer Word Processor" on page 181.

➤ **To print a document report**

1. In a controlling window, click an entry.
2. Open the Documents window.
3. Click the Print button on the Standard toolbar or select Print from the File menu.
4. If this is the first time you are printing a document from Maximizer, click the Page Setup button and select a printer from the drop-down list. Adjust the page settings to suit your document preferences. Click OK to close the Page Setup dialog.
5. In the Print dialog box, adjust the Print Range and Copies group boxes as desired.
6. When you are finished, click OK.

   Maximizer prints the document report.

Printing a Mail-Merge Document from Maximizer

Maximizer provides full mail-merge capability that you can use to print hundreds or thousands of personalized letters to any or all of your Address Book entries. To print a mail-merge, you need to create a form letter that includes merge codes for names and addresses. For more information, see "Creating a Document Template" on page 167.

NOTE

You can also perform mail-merges from the Maximizer Word Processor window. For more information about printing from the Maximizer Word Processor window, see "Printing a Mail-Merge from the Maximizer Word Processor" on page 182.

➤ To print a mail-merge

1. In a controlling window, select the entries you want to include in a mail-merge.
2. Click the Print button on the Standard toolbar, then select Merge Documents.

   —or—

   Select Print > Merge Documents from the File menu.

   The Print Merge Documents dialog box appears.
3. Select an item in the Document Templates list. Maximizer includes many templates you may use for mail-merge documents although you may create customized templates using the Maximizer Word Processor.
4. Click OK.
5. In the Merge Options dialog box, fill in the appropriate group boxes.

   If you select Address Book or Hotlist, you can check the Observe Receives Mail checkbox.

   The Observe Receives Mail option allows you to direct mail to Company Contacts in addition to the Company. To specify that a Contact receive company mail, the Receives Mail Sent to Company option on the Mailing Options tab in the basic tabbed dialog for the associated Contact must be selected. To use this functionality with mail-merge documents you must also select the Observe Receives Mail checkbox on this dialog.
6. When you are finished, click OK.
7. For each entry in your list, click the Print button to print the document, click the Skip button to bypass the document, or click Print All to print the whole list without viewing each letter.

The Maximizer Word Processor prints the mail-merge document(s).

Printing a One-Time Envelope

You can print an envelope by directly entering the address details for the recipient, instead of retrieving them from an Address Book entry.

➤ **To print an envelope with manually entered recipient address information**

1. Clear the Address Book list by choosing Clear List from the Edit menu.
2. Select Print an Envelope from the Actions menu, shortcut menu or Action toolbar.
3. Fill in the address details for the recipient in the Delivery Address dialog box.
4. When you are finished, click OK, then click OK to start printing.

   Maximizer prints an envelope using the information you entered.

Printing a One-Time Label

You can print a label by directly entering the details for the label, instead of retrieving them from an Address Book entry.

➤ **To print a one-time label with manually entered label information**

1. Clear the Address Book list by choosing Clear List from the Edit menu.
2. Select Print a Label from the Actions menu, shortcut menu or Action toolbar.
3. Fill in the label details in the Delivery Address dialog box
4. When you are finished, click OK.

Setting Envelope Print Options

Before you print envelopes, you must adjust some of the printer settings. Many of these adjustments are optional, but you do need to specify the paper source and size. Also, ensure that you have the proper printer selected. This selection is used as the default printer.

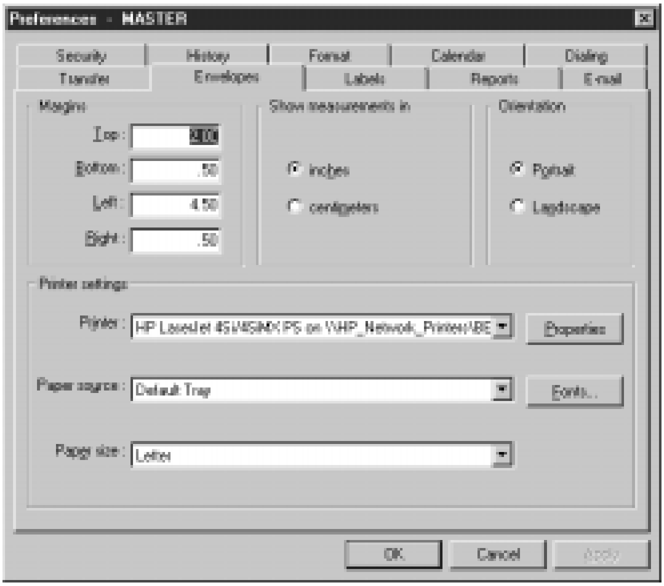
➤ To set envelope preferences

1. From the File menu, select Preferences, then click the Envelopes tab.

   —or—

   From the File menu, select Page Setup, then click the Envelopes tab.

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



3. In the Margins group box, set the envelope dimensions according to the selection in the Show Measurements In group box.
4. In the Orientation group box, select Portrait or Landscape.
5. In the Printer Settings group box, adjust the settings.

   Specify the envelope source and its size in the Paper Source and Paper Size fields.

   Click the Properties button if you want to change any default printer settings. This opens the Windows Printer Properties dialog box where you may adjust your settings. You may also click the Fonts button if you want to change the default font. This opens the Windows Font dialog box where you may change the font selections. For more information, see the Microsoft Windows 95 online Help.

6. When you are finished, click OK.

Printing Envelopes

You can print envelopes from your Address Book, Contacts, Related Entries or Hotlist window.

➤ To print an envelope

1. In a controlling window, select the entries you want to print.

   —or—

   If you would like to include all the entries in your current list, do not select any entries.

2. Click the Print button on the Standard toolbar and select Envelopes.

   —or—

   Select Print > Envelopes from the File menu, or the shortcut menu.

3. In the Print Envelopes dialog box, adjust the selections in Print Options group box.

4. Type a description in the Message to Log to Notes field if you wish. This option creates a Mail type note containing this text for each selected entry.

5. To set advanced printing options, click the Advanced button.

   - Under Address options, set the All Capitals, No Punctuation and Observe Receives Mail options as desired.

   - The Observe Receives Mail option allows you to direct mail to Company Contacts in addition to the Company. To specify that a Contact receive company mail, the Receives Mail Sent to Company option on the Mailing Options tab in the basic tabbed dialog for the associated Contact must be selected. To use this functionality for printing envelopes you must also select the Observe Receives Mail checkbox on this dialog.

   - To print POSTNET bar codes, click the POSTNET Bar Code (USA) checkbox. This option applies only to Address Book entries with U.S.

zip codes. Although not certified for postage discounts, bar codes may reduce postal delivery time.

- To print a return address, select the Return Address checkbox, then click the Return Address button and type the address. The return address is stored on the local workstation; it is not shared over a network or any type of multi-user configuration, and is the same for every Address Book you access.
- If desired, specify the Additional Fields text and field selections, then click OK. These fields print above the name and address on the envelopes. You could, for example, type ‘Personal and Confidential’ and print an Account Number user-defined field.

6. Make sure your printer is loaded with envelopes.
7. In the Print Envelopes To group box, select Preview if you want to check the envelope settings first. If the Preview looks good, select Print from the Preview window.

   —or—

   Click OK.
8. The Printing dialog box appears if you did not select any entries.
   - Select Current Entry Only and click OK to print the current selection.

     —or—
   - Select All Entries and click OK to print the entire list.

   Maximizer prints envelopes for your Address Book entries.

Setting Label Print Options

Before you print your labels, you must adjust some of the printer settings. Many of these adjustments are optional, but you do need to specify the type of label you are using. Also, ensure that you have the proper printer selected. This selection is used as the default printer.

➤ To set label preferences

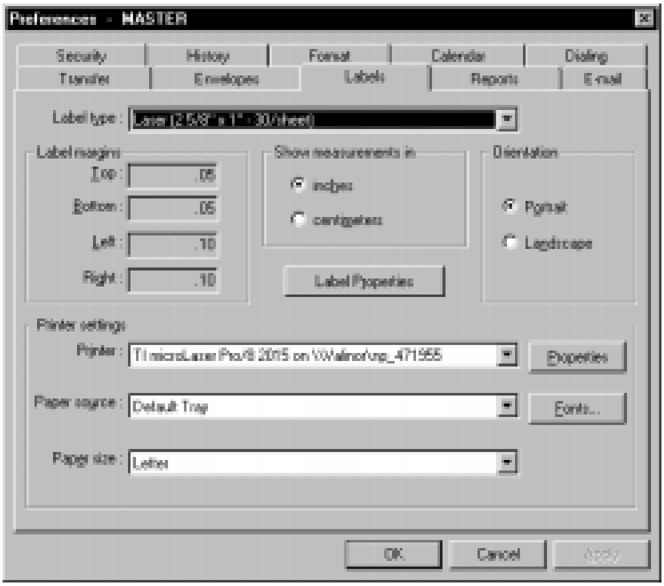
1. From the File menu, select Preferences, then click the Labels tab.

   —or—

From the File menu, select Page Setup, then click the Labels tab.

2. Modify the group boxes as follows.

   Select a standard label format from the drop-down menu in the Label Type field.



   If you select User Defined in the Label Type field, click the Label Properties button.

   - In the Label Properties dialog box, adjust the printing specifications for your customized labels.
   - Click Close.

3. In the Printer Settings group box, adjust the settings.

   Specify the label sheet size in the Paper Size field.

   Click the Properties button if you want to change any default printer settings. This opens the Windows Printer Properties dialog box where you may adjust your settings. You may also click the Fonts button if you want to change the default font. This opens the Windows Font dialog box where you may change the font selections. For more information, see the Microsoft Windows 95 online Help.

Click the Fonts button if you want to change the default font. This takes you to the Windows Font dialog box.

4. When you are finished, click OK.

Printing Labels

You can print labels from your Address Book, Contacts, Related Entries or Hotlist window. One of the most convenient features about printing labels in Maximizer is that you can start your printing from any label on the page by specifying the Sheet Unprintable Area in the Label Properties dialog in Label Preferences. This allows you to finish a sheet of labels before starting the next one, saving unnecessary waste and expense.

➤ To print a label

1. In the Address Book, Contacts, or Hotlist window, select the entries you want to print.

   —or—

   If you would like to include all the entries in your current list, do not select any entries.
2. Click the Print button on the toolbar and select Labels.

   —or—

   Select Print > Labels from the File menu, or the shortcut menu.
3. In the Print Labels dialog box, modify the Print Options group box if required.
4. Type a description in the Message to Log to Notes field if you wish. This option creates a Mail-type note containing this text for each selected entry.
5. Click the Set Start button if you want to specify a starting label other than the default.
   - In the Start Label dialog box, click the label at which you want to start printing.
   - Click OK.
6. To set advanced printing options, click the Advanced button.

- Under Address options, set the All Capitals, No Punctuation and Observe Receives Mail options as desired. The Observe Receives Mail option allows you to direct mail to Company Contacts in addition to the Company. To specify that a Contact receive company mail, the Receives Mail Sent to Company option on the Mailing Options tab in the basic tabbed dialog for the associated Contact must be selected. To use this functionality for printing labels you must also select the Observe Receives Mail checkbox on this dialog.
- To print POSTNET bar codes, click the POSTNET Bar Code (USA) checkbox. This option applies only to Address Book entries with U.S. zip codes. Although not certified for postage discounts, bar codes may reduce postal delivery time.
- If desired, specify the Additional Fields text and field selections, then click OK. These fields print above the name and address on the labels. You could, for example, type 'Personal and Confidential' and print an Account Number user-defined field.

7. Make sure your printer is loaded with labels.
8. In the Print Labels To group box, select Preview if you want to check the label settings first. If the Preview looks good, select Print from the Preview window.

   —or—

   Click OK.
9. The Printing dialog box appears if you didn't mark any entries.
   - Select Current Entry Only and click OK to print the current selection.

     —or—
   - Select All Entries and click OK to print the entire list.

   Maximizer prints labels for your Address Book entries.

Chapter

5 USING MAXIMIZER'S INTERNET TOOLS

Maximizer has several built-in features to help you do business on the Internet, visit Maximizer's Web site, build your own Web site, and draw maps that show the route to Company, Individual and Contact locations. For more information on the Maximizer E-Commerce features, please see the E-Commerce booklet included with Maximizer 5.0.

Working with Maximizer's Electronic Commerce Features

If you have an Internet connection for sending and receiving E-mail and browsing the World Wide Web, you can use Maximizer to build and edit your own Web site with an easy-to-use wizard, visit other sites in the Maximizer BusinessNet Web community, take orders and inquiries by E-mail, and manage order and inquiry information stored in your Maximizer Address Book folder. For more information about using E-mail in Maximizer, see "Using E-mail Within Maximizer" on page 121.

You can find Maximizer's electronic commerce features under the E-Commerce sub-menu on the Web menu.

➤ To access Maximizer's E-Commerce features

1. Click on Maximizer's Web menu.
2. Move your mouse to the E-Commerce menu item.
3. Choose one of the five E-Commerce sub-menu options:

   Web Site Creation Wizard… launches the Maximizer MARKETbuilder wizard, which takes you through an easy, step-by-step process of creating your own business Web site for the Maximizer BusinessNet (or your own ISP’s Web server). No knowledge of hypertext markup language (HTML) is required to create your site, and you can change your site using the same wizard anytime.

Visit BusinessNet…launches your default Web browser (such as Netscape Navigator or Microsoft Internet Explorer) and takes you to the Maximizer BusinessNet Web site.

View Order/Inquiry E-mails… opens Maximizer’s E-mail window, allowing you to examine orders and inquiries you’ve received from your Web site.

Search Notes for Orders… opens a special version of the Search by Notes dialog box which lets you easily find orders from your Web site that have been stored in your Maximizer Address Book folder.

Search Notes for Inquiries… opens a special version of the Search by Notes dialog box which lets you easily find inquiries from your Web site that have been stored in your Maximizer Address Book folder.

Searching for Notes for Orders and Inquiries

You can search the Notes window for orders and inquiries received through your Web site.

➤ To search for notes for orders and inquiries

1. Select Search Notes for Inquires or Search Notes for Orders from the E-Commerce sub-menu.

The Search by Notes for Orders/Inquires dialog box appears.

2. In the Date Range group box, indicate a calendar period, or select Search All Dates.
3. Select one of the listed items in the Modify Current Address Book List group box to narrow or expand the search.
4. When you are finished, click OK.

   Maximizer searches the Address Book folder and displays a list of matching Notes containing 'Maximizer Web Inquiry' or 'Maximizer Search Order' as their subject heading.

Viewing a Company or Individual Web Site

When you enter a *Web Page address for a Company, Individual or Contact as a user-defined field, you can automatically launch your Web browser and view their World Wide Web home page.

➤ To view a Web site

1. Connect to your Internet service provider directly or use your network server, if applicable.
2. Select the Address Book entry whose Web site you want to connect with.
3. Click the Web Page button on the toolbar or select View Web Page from the Web menu.

Using Maximizer DirectAccess

Maximizer DirectAccess connects you to a special, users-only area of the Maximizer Web server, where you can read about the latest news from Maximizer, contact technical support, get new Maximizer Wizards, and use List Merchant to transfer prospective customer names and addresses into your Maximizer Address Book folder.

You can find new sales leads by conducting searches of the List Merchant database by company name and title, zip code, S.I.C. code, city, state, sales volume code or employee size code. After importing selected data into Maximizer, you can continue the contact management process with the familiar look and feel of Maximizer.

➤ **To use Maximizer DirectAccess**

1. Connect to your Internet Service Provider.
2. Select Maximizer DirectAccess from the Web menu, or click the Maximizer DirectAccess button on the Standard toolbar.

Using Maximizer List Merchant

List Merchant is a secure, Internet list-brokering service that provides you with direct access to over 100 million consumer and business listings. List Merchant allows you to search and download targeted and qualified marketing lists based on criteria you select. The lists can be downloaded to your computer and then imported directly into Maximizer for direct mail, telemarketing or sales prospecting activities.

➤ **To use Maximizer List Merchant**

1. Connect to your Internet Service Provider.
2. Select List Merchant from the Web menu.

   When the List Merchant Web site is launched, follow the instructions on your screen.

Visiting the Maximizer Web Site

From the Visit Maximizer menu option, you can choose to visit the Maximizer home page, register your product, view information about other Maximizer products, purchase Maximizer products, view information about the Maximizer Business Partners program or contact Technical Support.

➤ **To visit the Maximizer Web site**

1. Connect to your Internet Service Provider.
2. Move your mouse to the Visit Maximizer item on the Web menu, and click on one of the sub-menu items: Register Your Software, Home, Products, Purchase, Partners or Support. You may also click the Maximizer Status Indicator button in the View bar to access the Maximizer home page.

Drawing Maps

You can create a map that directs you how to get to and back from a Company's, an Individual's or a Contact's location in just a few simple steps. You can also create a map to view just the selected Company's, Individual's or Contact's location and its surrounding area.

There are two different tools provided with Maximizer that allow you to plan your route to a client's location. The first is accessed through the Draw a Map option on the Web menu. The second is accessed through the AND Route for Maximizer option on the Tools menu.

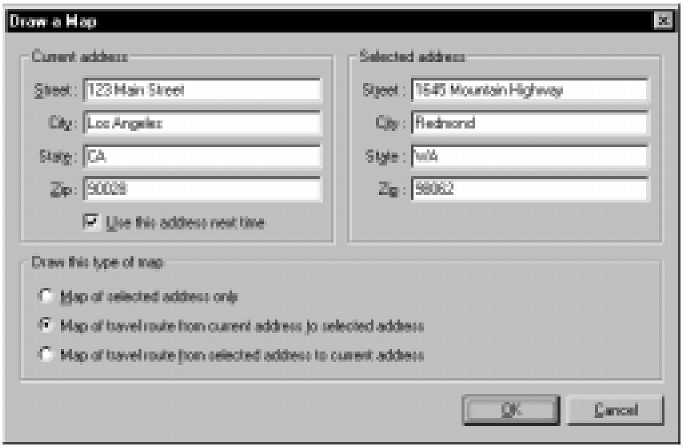
To Draw a Map Using Maps On Us

The Draw a Map using Maps On Us feature launches your Web browser and goes to a Web site where you can view a map of a selected Company or Individual's location. You can also create a map that shows how to get to, and from, the active Company or Individual's address.

➤ To draw a map using Maps On Us

1. In a controlling window, select an entry. The selected Company's, Individual's or Contact's mailing address is used as your destination. You can change this address if necessary.
2. From the Web menu, select the Draw a Map option.

The Draw a Map dialog appears.



The Current Address is retrieved from the address you entered during the installation of Maximizer. If you want to use a different address as your current location, modify the details.

If you want to use a different location for the Selected Address, modify the details.

If your address includes a suite number, make sure you enter it after the main building number and street address. Also, do not use a number symbol at the start of an address. For example, enter '505 Walker Drive, #9' or '505 Walker Drive, Suite 9' for the address '#9 - 505 Walker Drive'.

3. Select an option in the Draw This Type of Map group box.

   To draw a map of the surrounding area of the Selected address, choose the first option. To draw a map of a suggested travel route to the selected Company's, Individual's or Contact's location, select the second option. The third option will draw a suggested return route.

4. Click OK. The Maps On Us Web site is launched in your Web browser displaying a map of the type you have specified.

NOTE

This feature is available for the United States only.

To Draw a Map Using AND Route for Maximizer

AND Route for Maximizer, provided on the Maximizer CD as an installation option, launches an application where you may enter the location you want to travel and in seconds the optimal route from your present location will be displayed on your screen.

By default, the address information for your present location is retrieved from the address you entered during the installation of Maximizer. If you want to use a different address as your current location, you may modify the details. You can then zoom in to get a more detailed look. AND Route for Maximizer also offers you other valuable information such as distance calculations, names and numbers of roads, crossings and exit ramps as well as some geographical information such as altitude levels.

➤ To Draw a Map Using AND Route for Maximizer

1. In a controlling window, select an entry. The selected Company's, Individual's or Contact's mailing address is used as your destination. You can change this address if necessary.
2. From the Tools menu, select the AND Route for Maximizer option.

   The AND Route for Maximizer application opens.
3. Follow the instructions on your screen to create the map.

NOTE

This feature is available for the United States, Canada and Mexico.

Working with News Agents

Maximizer offers you a new feature called News Agent that allows you to seek out key information about any company or subject and have it delivered right to your E-mail inbox. These E-mails can be turned into phone calls, leads, proposals or leading edge tips.

News Agent launches your Internet browser and connects you to an Inquisit Web site expressly designed for Maximizer customers. You can follow a company, client, competitor, prospect, stock or trend in the marketplace.

Inquisit monitors over 400 publications a day and sorts information through a sophisticated search and indexing engine. News Agents then report back to you at any time of the day, as frequently as you stipulate.

➤ To use the News Agent feature

1. Connect to your Internet Service Provider.
2. Select News Agent from the Web menu.

   When the Inquisit Web site is launched, follow the instructions on your screen.

Chapter

6 Using the Maximizer Word Processor

The Maximizer Word Processor is a full-featured word processor you can use to handle all your correspondence from within Maximizer.

NOTE

For a list of Maximizer Word Processor keyboard shortcuts, see “Maximizer Word Processor Keyboard Shortcuts” in online Help.

Opening and Closing the Maximizer Word Processor Window

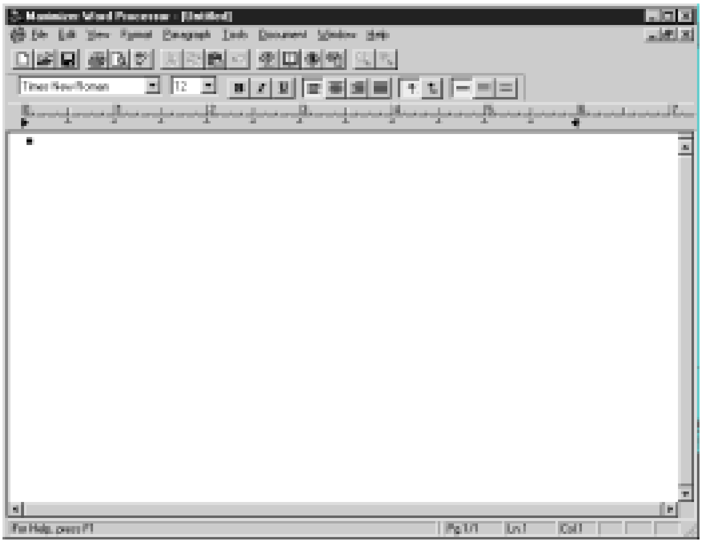
The Maximizer Word Processor is slightly different from other windows, since the Maximizer Word Processor is a separate application. You’ll notice that the window includes its own menu bar, toolbar and ribbon (formatting) bar.

When you are finished with the Maximizer Word Processor, you should exit from it.

➤ **To open the Maximizer Word Processor**

- Click the Maximizer Word Processor button on the Maximizer standard toolbar.

This opens the Maximizer Word Processor.



➤ To close the Maximizer Word Processor

- Select Exit from the Maximizer Word Processor File menu. Or press Alt+F4.

  This closes the Maximizer Word Processor and puts you back in the main Maximizer workspace.

Working With Document Templates

You can create, modify and delete document templates and insert merge codes for mail-merge documents.

Creating a Document Template

You can create a document template for mail-merge letters, faxes, memos, and other documents.

NOTE

You can create a template for mail-merge printing by inserting merge codes. For more information about adding merge codes, see "Inserting, Removing, and Viewing Merge Codes" on page 170.

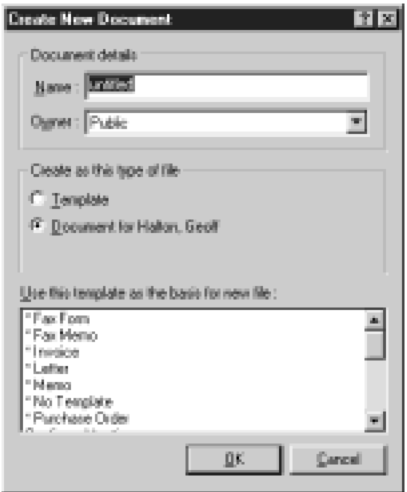
➤ To create a document template

1. In the Maximizer Word Processor, select New from the File menu.

   —or—

   Select Write a Document from the Actions menu.

   The Create New Document dialog box appears.



2. Type a name for your document in the Document Details group box.

3. Select your User ID if you don't want to share the template with other users.

   This option applies only if you have a multi-user configuration.
4. In the Create This Type of File group box, select the Template checkbox.
5. In the Use Template as the Basis for New File group box:

   Select *No Template.

   —or—

   Select one of the listed templates.
6. Click OK.
7. Type the content of your document template and optionally, format it using the commands on the Format, Paragraph, and Document menus.
8. When you are finished, select Close from the Maximizer Word Processor File menu.
9. In the Maximizer Word Processor message box, click Yes to save the file.
10. In the Save As dialog box, click OK.

    The next time you open the Create New Document dialog box, the file appears as a template in the Use Template list box.

Editing a Document Template

You can update an existing document template by changing the contents or format of your template.

NOTE

You can create a template for mail-merge printing by inserting merge codes. For more information about adding merge codes, see "Inserting, Removing, and Viewing Merge Codes" on page 170.

Use or modify the sample document templates that were installed with Maximizer.

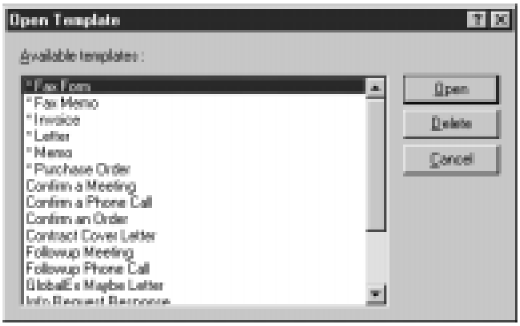
HINT

You can transfer templates between Address Books folders. For instructions, see "Transferring Document Templates" on page 293.

➤ To edit a document template

1. In the Maximizer Word Processor, select Open from the File menu.

   The Open Template dialog box appears.



2. Select the template you want to modify in the Available Templates list box.
3. Click the Open button.
4. Modify your template as desired.
5. Select Save and then Close from the Maximizer Word Processor File menu.

Deleting a Document Template

If a document template is no longer applicable, you can delete it from the Address Book folder.

NOTE

Do not delete the templates *Letter or *Fax Form. These are the templates used by the Write A Letter and Write A Fax commands found under the Action menu in Maximizer. You can, however, change the contents of these templates.

➤ To delete a document template

1. In the Maximizer Word Processor, select Open from the File menu.

   The Open Template dialog box appears.
2. Select the template you want to delete in the Available Templates field.
3. Click the Delete button.
4. In the Maximizer Word Processor message box, click OK to confirm the deletion.

Inserting, Removing, and Viewing Merge Codes

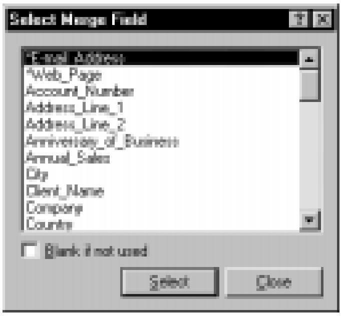
Use merge codes to insert information from your Address Book entry information. You can quickly check to see if you have the correct merge code, and if a merge code is no longer required, you can remove it.

➤ To insert merge codes in a template

1. In the Maximizer Word Processor, select Open from the File menu.

   The Open Template dialog box appears.
2. Select a template in the Available Templates box.
3. Click the Open button.
4. Place the cursor where you want to insert a merge code.

5. Select Merge Field from the Maximizer Word Processor Tools menu, or click the Merge Field button on the toolbar.



6. In the Select Merge Field dialog box, select an item.
7. Click the Select button.
8. Repeat steps 6-7 for each merge field you want to add.
9. Select the Blank if Not Used checkbox if you prefer.

   During a mail-merge, this option leaves a blank space if there is no address information available for a field. (By default, if there is no information in the field, the Maximizer Word Processor simply omits the field, leaves no space, and moves the other fields up.)
10. When you are finished, click the Close button.

    Maximizer inserts the selected merge codes in the template.

➤ To delete a merge code

1. Select the merge code by highlighting the text.
2. Press Delete.

➤ To view merge code results temporarily

1. Select Merge Document from the Tools menu, click the Merge Field button on the toolbar, or press Shift+F9.
2. Select Undo from the Edit menu or press Ctrl+Z.

Using the Spell Checker and Thesaurus

You can set Spell Checker options, and change the default language for the Spell Checker and Thesaurus.

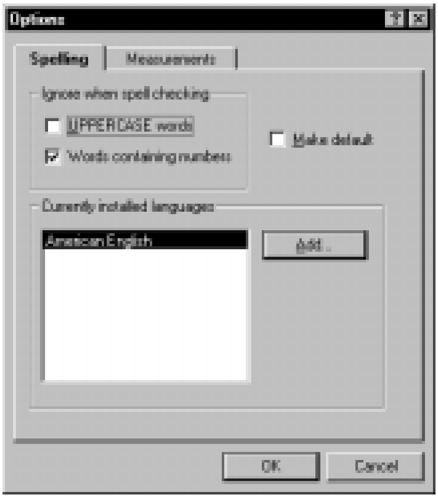
Setting Spell Check Options

You can set options to ignore uppercase words and words containing numbers.

➤ **To set spell check options**

1. In the Maximizer Word Processor, select Options from the Tools menu.

   The Options dialog box appears with the Spelling tab displayed.



2. In the Ignore group box, click the options you want the Spell Checker to ignore in the current document.
3. You may change the default language used for the Spell Checker and Thesaurus, if desired. If you change the default language, it also changes for the Spell Checker used for notes and E-mail messages.

   Ensure you have the Make Default check box selected to set a language as the default and also to set the other options you have selected.
4. When you are finished, click OK.

Checking Spelling

Use the Spell Checker to verify spelling of words in your document. You can also add your own terms in the user dictionary.

NOTE

You may receive an error message while checking your document if you have five or more documents open. If this occurs, close one or more documents and spell check your document again.

A spell check always begins at the cursor. To check your whole document, place the cursor at the beginning of your document. To check a single word or portion of the document, select the text and then run the Spell Checker.

HINT

If you want to temporarily suspend the spell check, you can click outside the Spell Check dialog box. This allows you to make revisions or add some text. When you want to resume the spell check, click the Start button in the dialog box.

➤ To spell check a document or template

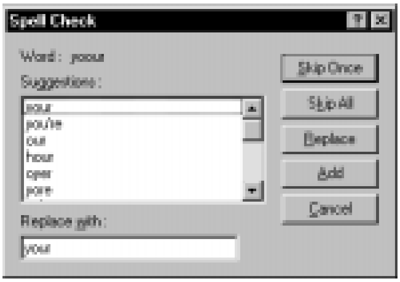
1. Place the cursor at the top of the document.

   —or—

   Highlight a portion of the document. This selects only a portion of the text for spell checking.

2. Select Spell Check from the Maximizer Word Processor Tools menu, or click the Spell Check button on the toolbar.

The Spell Check dialog box appears and displays the first word in the document that isn't found in the Maximizer Word Processor dictionary.



3. Click the Replace button to substitute the word in the Replace With field. You can type a replacement if you wish.

   —or—

   Select an item from the Suggestions box and click the Replace button.

   —or—

   Select the Skip Once or Skip All button to ignore the change. (Skip All ignores other occurrences of the same word for this Spell Check.)

   —or—

   Select Add to add the word to your dictionary.

4. Repeat step 3 for each word that the Maximizer Word Processor finds.

Using a Different Language

You can install a different language for the Spell Checker and Thesaurus.

NOTE

Order additional languages for the Spell Checker and Thesaurus by contacting Multiactive Software.

➤ To install a different language for the Spell Checker and Thesaurus

1. Select Options from the Maximizer Word Processor Tool menu.

   The Options dialog box appears. The Spelling tab lists the languages that are currently installed.

2. If the language you want appears in the list, select the language and click the Set As Default button. Then click OK.

   The version of the Spell Checker and Thesaurus are now available for the language you set as the default.

3. If the language is not in the list, click the Add button.

   The Add New Language dialog box displays the languages that are available.

4. Select the language you want, and then specify the disk drive and folder path to the Spell Checker and Thesaurus files for the selected language.

   The Spelling tab reappears with the installed language now in the list.

5. Select the language and click the Set As Default button. Then click OK.

   The version of the Spell Checker and Thesaurus are now available for the language you set as the default.

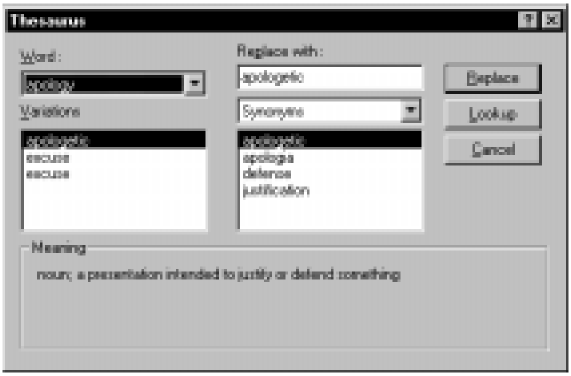
Using the Thesaurus

The Maximizer Word Processor includes an extensive Thesaurus. With the Thesaurus, you can look up synonyms and their definitions for any word in your document. You can also make replacements using related synonyms, related antonyms, and other suggestions provided by the Thesaurus.

➤ To replace a word in your document

1. In your document or template, highlight the word you want to check.

2. Select Thesaurus from the Maximizer Word Processor Tools menu to display the Thesaurus dialog box.



In the Variations list box, synonyms for the selected word are listed. The Replace With field contains the currently selected variation.

3. Click Synonyms to display the drop-down list of other types of word matches.

Synonyms are listed by default. Other types are available in the Replace With drop-down list.

NOTE

The types of word matches displayed depend on the word you are looking up. That is, you may be able to view only Synonyms and Related Synonyms for one word, whereas another word may be matched with Antonyms as well.

4. Select the type of word that you want to match your highlighted word to from the Replace With drop-down list.

The related word is displayed in the Replace With field.

5. If you prefer, click the Lookup button and select a suitable word from the new list that is displayed.

6. Click the Replace button to substitute the word in the Replace With field for the word you highlighted.

—or—

Select an item from the Variations box or from the list of words and click the Replace button.

Maximizer replaces the word in your document.

Searching For and Replacing Text

You can use the Maximizer Word Processor search and replace features to locate and replace information in your documents.

Searching for Text

You can quickly find text in your document. Find always begins at the cursor, so to search your whole document, place the cursor at the beginning of the document. To search only a portion of the document, select the text you want to search before using the Find command.

➤ To find a string of text

1. Select Find from the Maximizer Word Processor Edit menu.

   The Find dialog box appears.

2. Type a text string in the Find What field.

   A text string can be words, spaces, punctuation, numbers, or anything else that appears in a document.

3. Select the Match Whole Word Only and Match Case checkboxes if you prefer.
   - To find only complete words that match the text you type, select Match Whole Word Only.
   - To find text that matches not only the phrase you type, but the upper and lower case you specify, select Match Case.

4. Select an item in the Direction group box.
   - To search from the position of your cursor to the beginning of the document, select Up.
   - To search from the position of your cursor to the end of the document, select Down.

5. Click the Find Next button to start your search.

   The first occurrence of the text string is highlighted. The occurrence is either before or after the position of your cursor depending on the direction you selected.

   —or—

   A Maximizer Word Processor dialog box appears, telling you the text string was not found. Click OK to end the search.

6. Click the Find Next button to find the next occurrence of the text string.

   —or—

   Click Cancel to close the dialog box and return to your document.

   The last occurrence of your search string remains highlighted. If you want to repeat the last search, select Repeat Find from the Edit menu. You can also select Reverse Find to search in the opposite direction.

Finding and Replacing Text

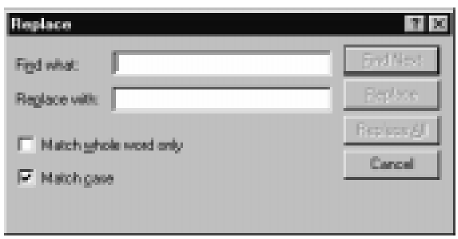
You can find and replace any string of text in your document, making global changes quick and easy.

Find and Replace begins at the cursor, so to search the whole document, place the cursor at the start of the document.

➤ To find and replace a string of text

1. Place the cursor at the top of your document.
2. Select Replace from the Maximizer Word Processor Edit menu.

   The Replace dialog box appears.



3. Type a text string in the Find What field.

4. Type a substitute text string in the Replace With field.
5. Select the Match Whole Word Only and Match Case checkboxes as you prefer.
6. Click the Find Next button to start your search.

   The first occurrence of the text string is highlighted. The occurrence is either before or after the position of your cursor depending on the direction you selected.

   —or—

   A Maximizer Word Processor dialog box appears, telling you the text string wasn't found.

   - Click OK.
7. Click the Replace button to replace the highlighted text.

   —or—

   Click the Find Next button to skip to the next occurrence of the text string.
8. Repeat step 7 for each occurrence of the text string.
9. Click Cancel to close the Replace dialog box.

Printing Documents

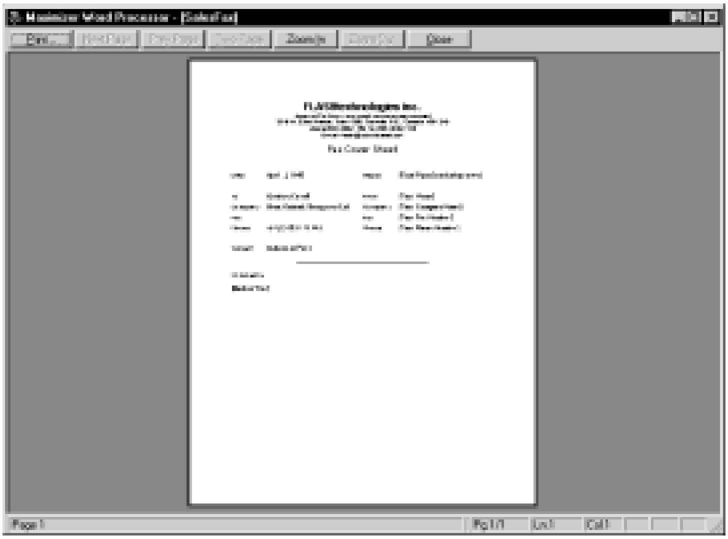
You can preview and print documents and mail-merge documents.

Previewing a Document

You can display a document before you print it to ensure that it is formatted the way you want.

➤ **To preview a document**

- Select Print Preview from the Maximizer Word Processor File menu.



Use this option to preview the formatted document before you print it.

Use the buttons at the top of the window to change pages, zoom, set up the printer or print the document.

To exit Preview without printing, click Close.

Printing a Document from the Maximizer Word Processor

You can print a document from the Maximizer Word Processor.

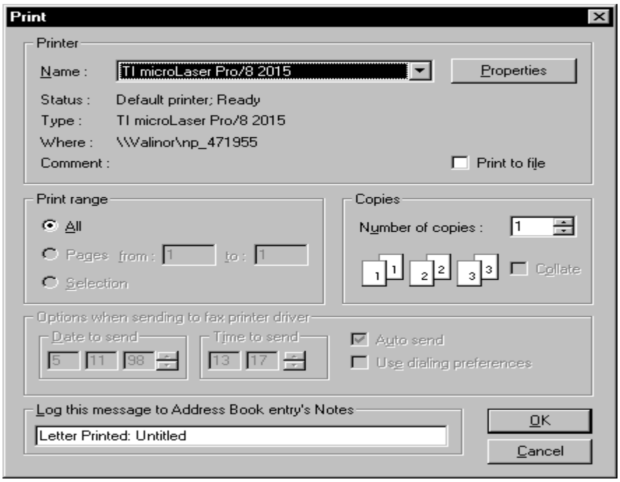
NOTE

You can print a document report from the Documents window. For more information about printing from the Documents window, see "Printing a Document Report from Maximizer" on page 148.

➤ To print a document

1. In a controlling window, select an entry.
2. In the Documents window, double-click the document you want to print.

   Maximizer opens the document in the Maximizer Word Processor.
3. Click the Preview button on the toolbar or select Print Preview from the File menu if you want to preview the document before you print it.
4. Click the Print button on the toolbar or select Print from the Maximizer Word Processor's File menu.



5. In the Print dialog box, adjust the Print Range and Copies group boxes as desired.
6. When you are finished, click OK.

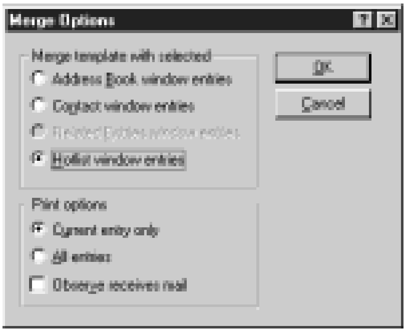
   The Maximizer Word Processor prints the selected document.

Printing a Mail-Merge from the Maximizer Word Processor

Maximizer provides full mail-merge capability that you can use to print hundreds or thousands of personalized letters to any or all of your Address Book entries. To print a mail-merge, you need to create a form letter that includes merge codes for names and addresses.

➤ To print a mail-merge

1. In a controlling window, click the entries you want to include in a mail-merge.
2. In the Maximizer Word Processor, select Open from the File menu.
3. In the Open Template dialog box, select a template.
4. Click the Open button.
5. Select Merge > To Printer from the File menu.



6. Adjust the Merge Template with Selected and Print Options group boxes.
7. When you are finished, click OK.

   Maximizer displays the first document with the merge codes replaced by the appropriate fields from the first entry of those you have selected.

8. Click the Print All button to print all of the documents for the mail-merge, without pausing to preview each document.

   The Maximizer Word Processor prints the mail-merge document(s).

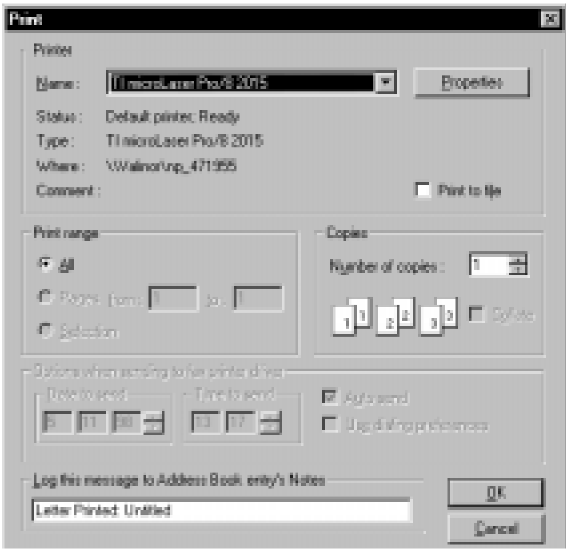
Switching Printers

If you need to print with a different printer, you can change printers. You can switch printers from either the Print or Page Setup command.

➤ To select the printer and print a document from Print

1. With a document open, select Print from the File menu.

   The Print dialog box appears.



2. To change the printer, select a printer or fax driver from the Name drop-down list in the Printer group.
3. Click OK in the Print dialog box.

   —or—

   If you want to change any properties of this printer, click the Properties button to display the Printer Properties dialog box.

   Change any properties and choose the number of copies to print.

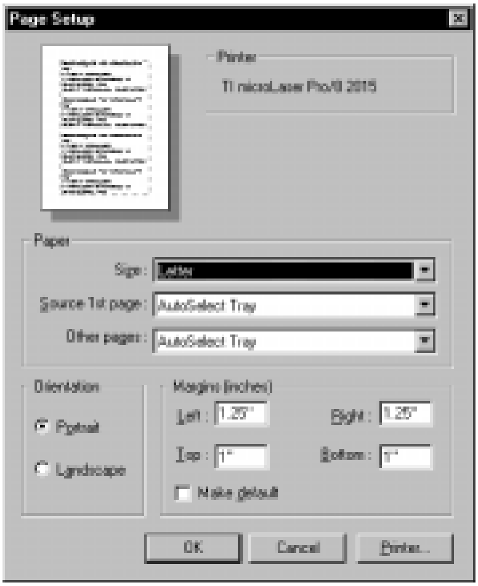
   Click OK.
4. Check that the printer you have selected is displayed in the Print dialog box, and then click OK.

   Maximizer prints the document.

➤ To select the printer for the current document from Page Setup

1. With a document open, select Page Setup from the File menu.

   The Page Setup dialog box appears with the name of the default printer.



2. To change the printer, click the Printer button.

   The Printer group box displays.

3. Click the printer drop-down list and select the printer or fax driver you want to use.

4. Click OK in the Printer group box.

   —or—

   If you want to change any properties of this printer, click the Properties button. The Printer Properties dialog box appears.

   Change any properties that you want and choose the number of copies to print.

   Click OK.

   Click OK in the Printer group box.

5. Check that the printer you have selected is displayed in the Page Setup dialog box, and then click OK.

Working With Graphics

You can add graphics and other linked objects to documents and edit linked graphics and objects.

Adding a Graphic

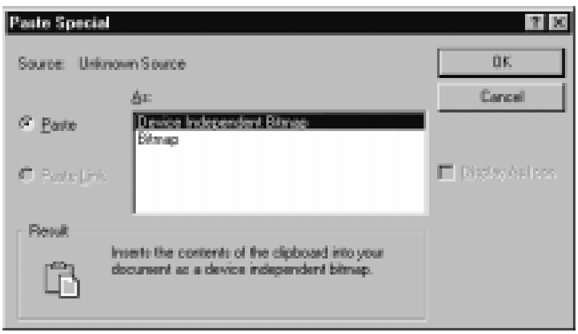
You can add a bitmapped picture, digitized signature, or logo to your Maximizer document or template.

First create the graphic in another application, such as Paint. Once you have an image, add it to your document by pasting or linking it. When you paste the image, it is inserted directly in the document. With the link option, you copy the image and link your document to the graphic source file. If you link the file, you can edit the image in the document by modifying the source file.

➤ **To add a graphic to a document**

1. Use Paint or another application to create or open a bitmap file.
2. Select the graphic and copy it to the Clipboard (in most applications you can use Edit > Copy).
3. Open a document or template.
4. Position the cursor where you want to add the graphic.
5. Select Paste Special from the Maximizer Word Processor Edit menu.

   The Paste Special dialog box appears.



6. Select Paste or Paste Link to insert the contents of the Clipboard.

The Paste option only adds the graphic, whereas Paste Link links the document to the graphic source file.

7. Select the graphic source in the As field.
8. When you are finished, click OK.

   The graphic is inserted in the document.

Changing a Graphic Link

You can modify the graphic links in your document. For example, you may want to update the file, change the link to a new location of the file, or remove the link.

➤ To modify links to a source file

1. In the Maximizer Word Processor, open the document that contains the graphic you want to edit.
2. Select the graphic.
3. Select Links from the Maximizer Word Processor Edit menu.
4. In the Links dialog box, click the appropriate buttons to modify the links to the graphic source file.

   Update Now updates all the linked files that are listed.

   Open Source opens the graphic source file.

   Change Source changes the source of the linked file.

   Break Link detaches the original graphic from your document.
5. When you are finished, click the Close button.

NOTE

This procedure applies only to graphics that are embedded using the Paste Link option.

Adding a New Object in a Document

You can create an object such as a spreadsheet, graphic or a document and insert it in the current document.

NOTES

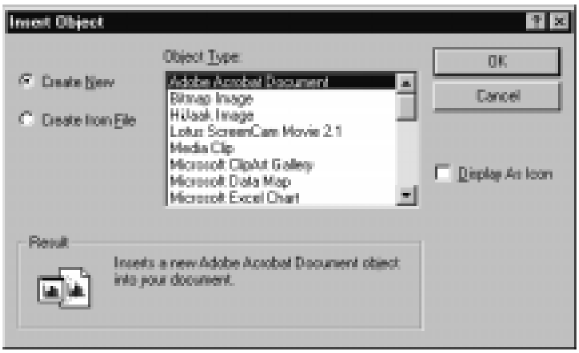
You can add objects only from applications that support Object Linking and Embedding (OLE). These include Microsoft Word and Excel, Corel WordPerfect and Quattro Pro, Lotus Word Pro and many other applications.

If the object is an entire document, add it from the Documents window. For more information about adding new objects from the Documents window, see “Adding a New Object to the Documents Window” on page 142.

➤ To add a new object to a document

1. Open a document or template in the Maximizer Word Processor.
2. Position the cursor where you want to add the object.
3. Select Insert New Object from the Maximizer Word Processor Edit menu.

   The Insert Object dialog box appears.



4. Select Create New.
5. Select an application in the Object Type field.
6. Click OK.

   The selected application opens. Use the application to create an object, such as a spreadsheet. When you are finished, exit the application.

A message box appears, asking if you want to update the object in the Maximizer document.

7. Click the Yes button.

   Maximizer adds the object to the document.

Adding an Existing Object in a Document

You can add an object to a document stored in Maximizer you have previously created with another application, such as a spreadsheet or bitmap.

NOTES

You can add objects only from applications that support Object Linking and Embedding (OLE). These include Microsoft Word and Excel, Corel WordPerfect and Quattro Pro, Lotus Word Pro and 1-2-3, and many other applications.

If the object is an entire document, add it from the Documents window. For more information about adding existing objects from the Documents window, see "Adding an Existing Object to the Documents Window" on page 145.

➤ To add an existing object to a document

1. Open the document to which you would like to add the object in the Maximizer Word Processor.
2. Select Insert Object from the Maximizer Word Processor Edit menu.
3. In the Insert Object dialog box, select Create from File.
4. Select the object file by using the Browse button.
5. Select Link if you prefer. Selecting the Link option saves only the file location, rather than the entire object within the document, and also updates the object automatically when changes are made.
6. When you are finished, click OK.

   Maximizer inserts the contents of the object file into the document.

Editing an Object in a Document

If you need to modify or update an object, you can open the associated application and make your changes.

NOTE

If the object is an entire document, edit it from the Documents window. For more information about editing an object from the Documents window, see “Editing an Object from the Documents Window” on page 147.

➤ **To edit an object in a document**

1. In the Maximizer Word Processor, open the document.
2. Double-click the object.

   Maximizer opens the object’s application.
3. Edit the object as you prefer.
4. When you are finished, exit the application.

   A message box appears, asking if you want to update the object in the Maximizer document.
5. Click the Yes button.

Deleting an Object in a Document

You can delete an object if it is no longer useful or applicable.

NOTE

You can also delete an object from the Documents window. For more information about deleting objects from the Documents window, see “Deleting an Object from the Documents Window” on page 146.

➤ **To delete an object**

1. In the Maximizer Word Processor, select the object.
2. Press the Delete key.

Importing and Exporting Text Files

You can import both Rich Text Format files (RTF) and plain Text format files (TXT) into the Maximizer Word Processor.

Importing a Text File

You can import a document from a text file. With this option, you can exchange documents between Maximizer and other applications such as Microsoft Word, Corel WordPerfect, and Lotus WordPro.

NOTE

If you are importing a file in .RTF format, you must specify a file extension of .RTF; otherwise, the file is imported in .TXT format.

➤ To import a file

1. In the Maximizer Word Processor, open a document or template.
2. Select Import from the Maximizer Word Processor File menu.

NOTE

Be sure to use the File menu within the Maximizer Word Processor. If you select Import from the main Maximizer File menu, you will call up the Import File dialog box which is used to import Address Books.

3. In the Import dialog box, select a file type in the List Files of Type field.
4. Select the import file name and path, and specify the type of file to import.

5. Click OK.

   Maximizer imports the contents of the file into your open document.

Exporting a Text File (.RTF or .TXT)

You can export your document as a text file. With this option, you can exchange data between Maximizer and other applications such as Microsoft Word, Corel WordPerfect, and Lotus WordPro.

You can export documents into two types of files: Rich Text Format (.RTF) or Text Format (.TXT).

➤ To export a file

1. In the Maximizer Word Processor, open a document or template.
2. Select Export from the Maximizer Word Processor File menu.

3. In the Export dialog box, select a file name and path.
4. Select the file type in the Save File as Type field.
5. Click OK.

   Maximizer creates an export file in the selected folder. You can now access the export file from another application.

Formatting a Document or Template

You can change the page setup, fonts, units of measure, paragraph indents, line spacing, tab settings, and headers and footers. You can also zoom and split the view in the Maximizer Word Processor.

Setting the Document Layout

You can change the page margins of your document.

➤ **To change the page setup**

1. Open a document or template.
2. Select Page Setup from the File menu.
3. In the Print Setup dialog box, modify the page margins.

   Your changes are reflected in the page preview.
4. Select Set as Default to apply these settings to any new documents you create.
5. When you are finished, click OK.

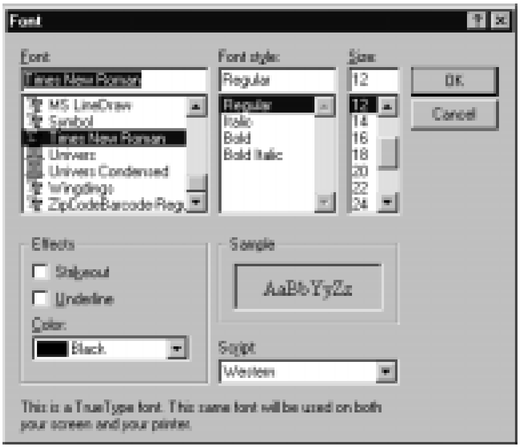
Changing Fonts

You can change the font in which the text of your document is displayed and printed.

➤ **To change fonts**

1. In the Maximizer Word Processor, open the document or template.

2. Select Font from the Format menu.



3. In the Font dialog box, select a font.
4. Click OK.

Changing Font Styles

You can change the default font or style used in your Maximizer documents.

➤ To change fonts

1. Open a document or template.
2. Select Font from the Format menu, or click the Font button on the ribbon bar.
3. In the Font dialog box, select a font.
4. Click OK.

➤ To change font styles

- Select a style from the Maximizer Word Processor Format menu or ribbon bar.

  —or—

- Select a style or effect in the Font dialog box and click OK.

If you select superscript, your text is elevated above the rest of the characters on that line. Subscript text appears below the line. The strike or strikeout option draws a line through each word.

Changing the Units of Measure

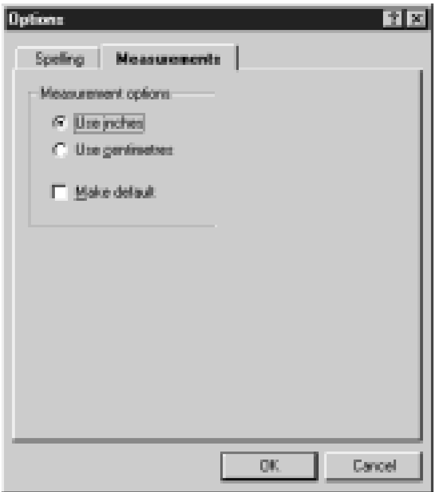
You can change the units of measurement for your document to inches or centimeters. The ruler changes to reflect your choice, as do measurements for margins and tab stops.

➤ **To change the units of measurement**

1. In the Maximizer Word Processor, select Options from the Tools menu.

   The Options dialog appears with the Spelling tab displayed.

2. Select the Measurements tab.



3. Select the type of units you want for the current document.
4. Set the units as the default for new documents, if you want.
5. When you are finished, click OK.

Aligning a Paragraph

You have several options for aligning the text in your document. You can align text left-justified, right-justified, centered, or fully justified.

➤ To align paragraphs

1. Open a document or template.
2. From the Paragraph menu or ribbon bar select one of the following options:
   - Left
   - Centered
   - Right
   - Justified (both margins)

Indenting a Paragraph

You can select how you want your paragraphs indented.

NOTE

You can also set indents using the indent controls on the ruler. The left indent control splits in two: use the first to set the indent for the first line and the second to set the hanging indent.

➤ To indent paragraphs

1. Select Indents from the Maximizer Word Processor Paragraph menu.
2. In the Indents dialog box, modify the Left Indent, First Line, and Right Indent fields as you prefer.
3. When you are finished, click OK.

Setting Paragraph or Line Spacing

You can set the line spacing between paragraphs.

➤ To set paragraph or line spacing

1. Go to the Maximizer Word Processor Paragraph menu.
2. Select Paragraph Spacing.

   —or—

   Select Line Spacing.
3. From the sub-menu select one of the following options:
   - For single-spacing, select 1.
   - For one and a half line-spacing, select 1.5.
   - For double-spacing, select 2.

Setting Tabs

You can set up to 19 tab positions in your document or template. To set the tabs, you can use the Document menu or the Maximizer Word Processor ribbon bar.

NOTE

You set tabs for the entire document; you cannot set different tabs for individual paragraphs or sections in your document.

➤ To set tabs using the Document menu

1. Open a document or template.
2. Select Tabs from the Maximizer Word Processor Document menu.
3. In the Tab Settings dialog box, indicate the tab stops.

   Choose the tab alignment. Select Left to align the lines to the left of the Tab; select Decimal to align decimal points at the Tab (if there is no decimal point, characters before a space are aligned to the left of the Tab, characters after the space are aligned to the right of the Tab).

For each tab stop you indicate in the Tab field, click the Set button.

Use the Default Tab Size option to enter a default tab that recurs at the same interval across the line.

4. When you are finished, click OK.

➤ To set tabs using the ribbon bar

1. Click the Tab Settings button on the ribbon bar. Choose a Left or Decimal tab stop.
2. On the document ruler, click the points where you want to add a tab.

   Once they are set, press the Tab key to move the cursor to the tabs.

Setting Headers or Footers

You can add headers and footers to your documents. Use the fonts, styles, and formats, and change tab stops you need in your headers and footers.

NOTE

The header or footer can contain only one line of text; you cannot add a graphic.

➤ To add headers and footers

1. Open a document or template.
2. From the Document menu:

   Select Header.

   —or—

   Select Footer.

3. In the Header or Footer area, type your text.
4. Click the Page # or Date buttons to add page numbers or a date.

5. De-select First Page if you don't want a header/footer on the first page.
6. De-select Line if you don't want a visible line between the header/footer and main text.
7. Indicate a number in the From Edge field to set the header/footer distance from the edge of the page (in units of measurement for the document).
8. When you are finished, click Close.

Zooming the Document

The zoom feature lets you move into or out of a document. You can zoom from 50% to 150%. The lower the percentage number, the more you see of the whole document.

➤ To use the zoom feature

1. Open a document or template.
2. Select Zoom from the View menu.
3. Select an item from the sub-menu.

   Maximizer changes the view of the document, based on your selection. Select View > Zoom > Set As Default to make the current view the default for all new documents.

Splitting the Maximizer Word Processor Window

If you want to work on two parts of a document at the same time, you can split the Maximizer Word Processor.

➤ To split the Maximizer Word Processor

1. Open a document or template.
2. Place the insertion point where you want to split the window.
3. Select Split from the Window menu.
4. A splitter bar appears.

5. Move the bar to the insertion point and click the mouse button.

   Maximizer splits the view of the document or template at the insertion point.

➤ To split the Maximizer Word Processor in half

- Double-click the small bar above the scrolling bar located at the right side of the Maximizer Word Processor.

➤ To undo a window split

- Select Remove Split from the Window menu or double-click the splitter bar.

Chapter

7 KEEPING PERSONAL RECORDS

You can keep personal and financial records by making journal entries and entering income and expenses in accounts.

Making Entries in Your Journal

Journal entries can be business activities, reference notes, and ideas. Journal entries are similar to notes, except they are not attached to an Address Book entry.

Opening the Journal Window

➤ **To open the Journal window**

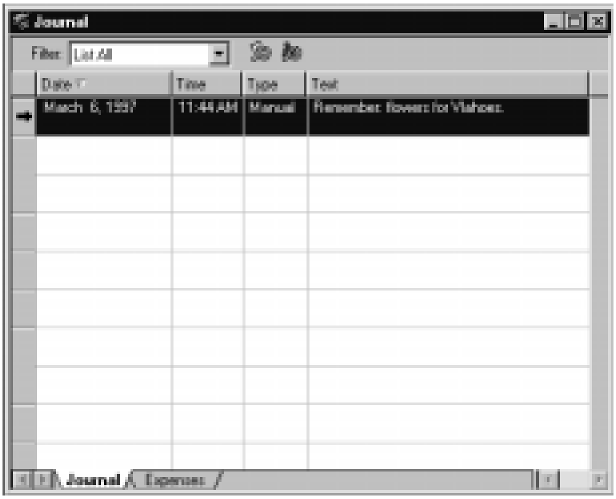
- If you are in Tabbed windows mode, click the Personal icon on the icon bar and click the Journal tab.

  —or—

  If you are not using the Tabbed windows mode, click the Journal icon on the Icon bar.

  —or—

Select Journal from the Window menu.



Adding a Journal Entry

You can add journal entries up to 9,216 characters in length. By default, journal entries are stamped with today's date. You can change the date stamp if you want to add an entry for a past or future time period.

HINT

If you always want a journal entry to appear at the top of the list in the Journal window, type or select a date that is a few years in the future.

➤ To add a journal entry

1. In the Journal window, select Add Journal Entry from the Edit menu or shortcut menu.

   —or—

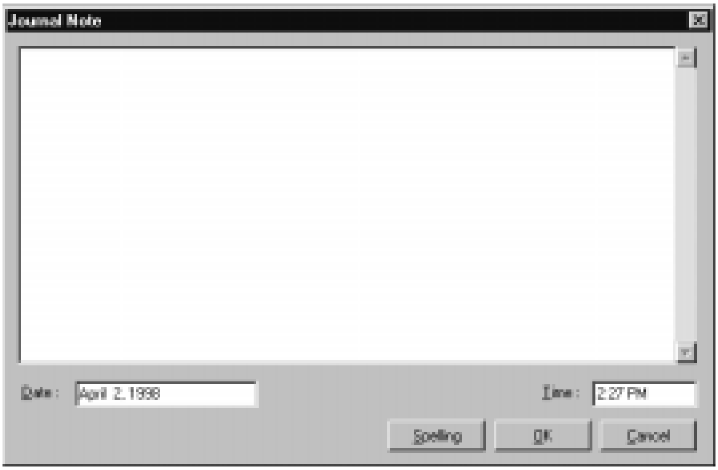
   Double-click in a blank Journal Note cell.

   —or—

   Click the New button on the Standard toolbar.

   —or—

Press the Insert key.



2. In the Journal Note dialog box, type your text.

   You can check the spelling in your Journal note using the Maximizer Spell Checker. Click the Spelling button to initiate the process.

3. Modify the Date and Time fields if you wish.

   A drop-down calendar is available for the Date field.

4. When you are finished, click OK.

Modifying a Journal Entry

If you need to change a journal entry, you can go back to the text dialog box and make your modifications.

➤ To modify a journal entry

1. In the Journal window, click the entry you want to modify.
2. Select Open Journal Entry from the Edit menu or shortcut menu.
3. In the Journal Note dialog box, modify your entry.
4. When you are finished, click OK.

   Using the above steps, you can also modify any journal entries created by automatic logging (such as a record of the phone call).

Deleting Journal Entries

If you decide you don't need a particular journal entry, you can delete it from the Address Book folder.

➤ To delete one or more journal entry

1. In the Journal window, select an option from the Filter list on the View bar.

   —or—

   Select All Journal Entries from the View menu.
2. Select one or more entries you no longer require. You may also search for a particular Journal entry, if necessary.
3. Select Delete Selected Journal Entries from the Edit menu or shortcut menu, or press the Delete key.
4. In the Maximizer message box, click OK to confirm the deletion.

   Maximizer deletes the selected entries from the Address Book folder.

Listing Journal Entries

Using the Filter list, you can build several lists in the Journal window including all journal entries, today's journal entries, and yesterday's journal entries.

➤ To build a list of journal entries

- In the Journal window, select one of the following items from the Filter list on the View bar:
  - List All
  - Today
  - Yesterday
  - This Week
  - This Month

  Maximizer builds a list of journal entries based on your selection.

Monitoring Income and Expenses

You can record all your income and expense items in separate accounts.

Opening the Expenses Window

In the Expenses window, the fiscal year runs from January 1 to December 31. Year-to-date figures are always based on this period. This period is fixed and can’t be changed.

➤ **To open the Expenses window**

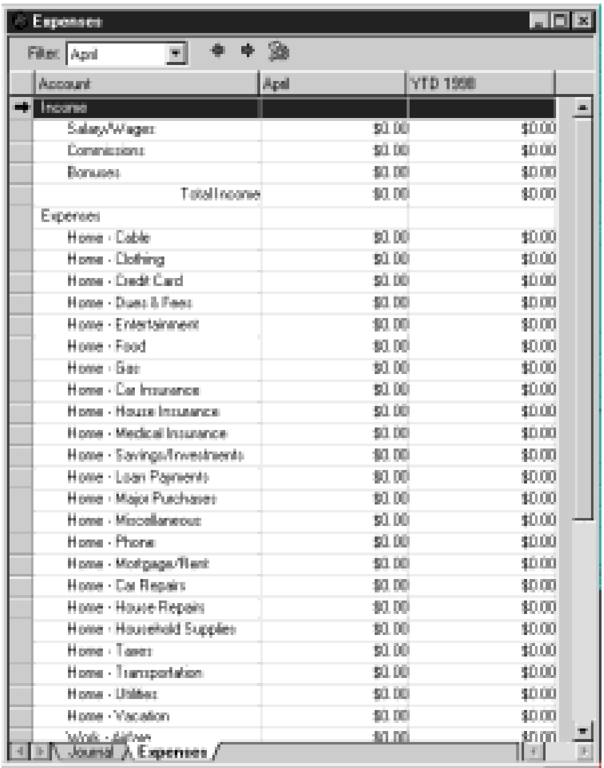
- If you are in Tabbed windows mode, click the Personal icon on the icon bar and click on the Expenses tab.

  —or—

  If you are not using the Tabbed windows mode, click the Expenses icon on the icon bar.

  —or—

- Select Expenses from the Window menu.



Adding an Account

Before you can record your income and expenses, you need to set up an account. An account has two parts: a name and a description.

A name is always required, but it is not displayed in the Expenses window. (This is useful if you have internal accounting codes.) The name is shown on the dialog box when you enter figures for the account. The account description is always displayed in the Expenses window.

➤ To add an account

1. Open the Expenses window to make it active.

.

2. Select Add Account from the Edit menu or shortcut menu, or press the Insert key.

   —or—

   Click the New button on the Standard Maximizer toolbar.

   The New Income/Expense Account dialog box appears.

3. Fill in the Account group box.
4. Select an option in the Type group box.
5. Select an option in the Security group box.

   Select Private if you do not want to share the account with other users. (Multi-user configuration only.)
6. When you are finished, click OK.

Adding an Account Entry

Once you set up your accounts in the Expenses window, you can enter your income and expenses.

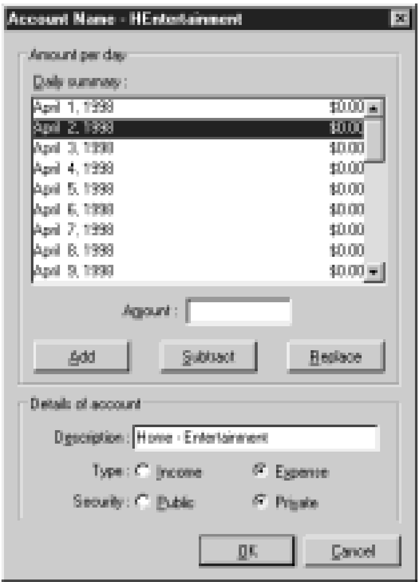
NOTE

These entries must be added directly; you can't import them from another Address Book folder.

➤ To add an account entry

1. In the Expenses window, double-click the account to which you want to add income or an expense.

The Account Name dialog box appears.



2. In the Daily Summary list, select a day.
3. Click in the Amount field and type an amount.

   If you don't add a decimal point, Maximizer assumes that the number you type is a whole number.
4. Click the Add, Subtract, or Replace button.

   If you select Add or Subtract, the new amount will be added to or subtracted from any existing figures for that day. If there are no existing figures and you select Subtract, the new amount is entered as a negative number.

   If you select Replace, the new amount replaces any existing figures for that day.
5. Under Details of Account, change the description, type, or security if you want.

   Select Private if you don't want to share the account entries with other users. (Multi-user configuration only.)
6. Click OK.

Maximizer adds all the income and expenses for the current month and indicates the total amount in the Expenses window.

Modifying an Account Entry

You can modify an entry in an account listed in the Expenses window.

➤ To enter income or expenses

1. In the Expenses window, double-click the account to which you want to add income or an expense.

   The Account Name dialog box appears.

2. In the Daily Summary field, select a day from the current month.
3. Click in the Amount field and type an amount.

   If you don't add a decimal point, Maximizer assumes that the number you type is a whole number.

4. Click the Add, Subtract, or Replace button.
5. Click OK.

   Maximizer adds all of the income and expenses for the current month and indicates the total amount in the Expenses window.

Modifying an Account

You can modify any account set up in the Expenses window. You can modify only the account description or status, not the account name.

➤ To modify an account

1. In the Expenses window, click the account you want to modify.
2. Select Open Account from the Edit menu or shortcut menu.
3. In the Account Name dialog box, modify the information in the Details of Account group box.
4. When you are finished, click OK.

Deleting an Account

If an account in the Expenses window is no longer applicable, you can delete it from the Address Book folder.

NOTE

Deletions are permanent and cannot be undone.

➤ To delete an account

1. In the Expenses window, click the account you want to delete.
2. Select Delete Selected Account from the Edit menu or shortcut menu, or press the Delete key.
3. In the Maximizer message box, click OK to confirm the deletion.

   Maximizer deletes the account (and all account figures) from the Address Book folder.

Viewing Income/Expenses for a Different Date Range

By default, the Expenses window displays the current month. You can select a different month and/or year.

➤ To view a different date range in the Expenses window

1. In the Expenses window, select Choose Date Range from the View menu or click the Choose Date Range button on the View bar.

2. In the Show Expenses for This Date Range dialog box, select a new date in the Year and Month fields.
3. Click OK.

Chapter

8 PRINTING BOOKS AND REPORTS

Maximizer has integrated into its product one of the most powerful, functionally capable, and user friendly reporting systems available today — ReportSmith Explorer for Maximizer. This tool provides you everything you need to create professional, itemized reports against a Maximizer Address Book folder. You can even add your own graphic or graphs. Maximizer integration ingenuity, combined with ReportSmith's user interface, brings you the best technology to help you do the most effective job on your reports.

You can also print books that list all your appointments and Address Book entries. Maximizer Address Book-related reports range from a simple Name, Address and Telephone report to a complete Detailed report. You can print reports that list hotlist tasks, appointments, notes, journal entries, income and expenses, and user-defined fields.

Creating a Custom Report Using ReportSmith Explorer for Maximizer

ReportSmith for Maximizer is a powerful visual database reporting and query tool, providing you with a streamlined approach to creating reports using a Maximizer Address Book folder.

Using ReportSmith Explorer for Maximizer, you can:

- Create reports from Maximizer Address Book folders without knowing complex database commands.
- Edit and format reports, combining items such as data, text, charts, pictures, and sound bites.

- Use 'live data' to see the result of your changes immediately.

➤ To create a custom report

1. From the File menu, choose Print > Custom Report.

   The Custom Report dialog appears.
2. Select Create a Custom Report or Open an Existing Report.
3. In the Printing dialog box, select to print the report for only the current Address Book entry or all the entries in your current list.

   ReportSmith Explorer for Maximizer opens. You may now create your custom report. For more information on how to create a custom report with a Maximizer Address Book folder, refer to the ReportSmith Explorer for Maximizer online help.

Setting Report Print Options

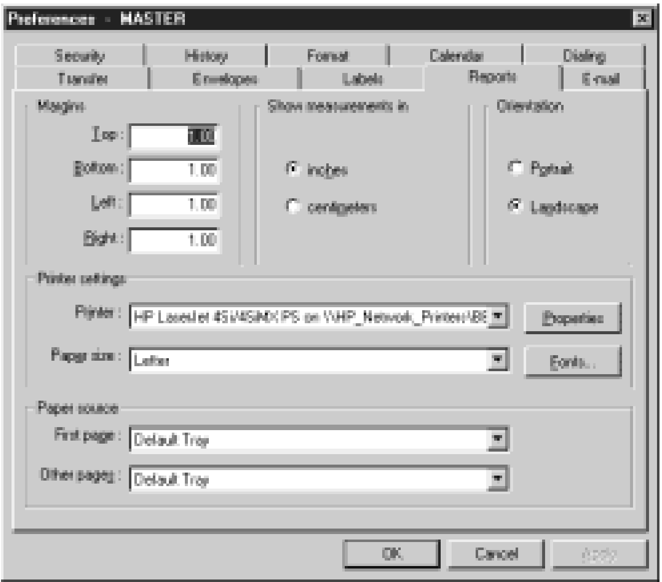
Before you print reports, you may want to adjust some of the printer settings.

➤ To set report preferences

1. From the File menu, select Preferences, then click the Reports tab.

   —or—

From the File menu, select Page Setup, then click the Reports tab.



2. Modify the Margins, Show Measurements In, and Orientation group boxes as desired.

NOTE

By clicking on the Properties button, you can go directly to the printer driver's setup dialog box. For more information on Windows printer setup, see the Microsoft Windows online Help.

By clicking on the Fonts button, you can go directly to the Font dialog box. Here you can set the font type, style, effects and color.

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3. When you are finished, click OK.

Printing Books

The two books you can print on special paper are the Calendar Book and the Personal Organizer. For information about ordering Maximizer paper for these books, select Order Maximizer Paper from the Help menu.

Printing a Calendar Book

You can print a Calendar book that lists appointments for today or for up to the next one or two years.

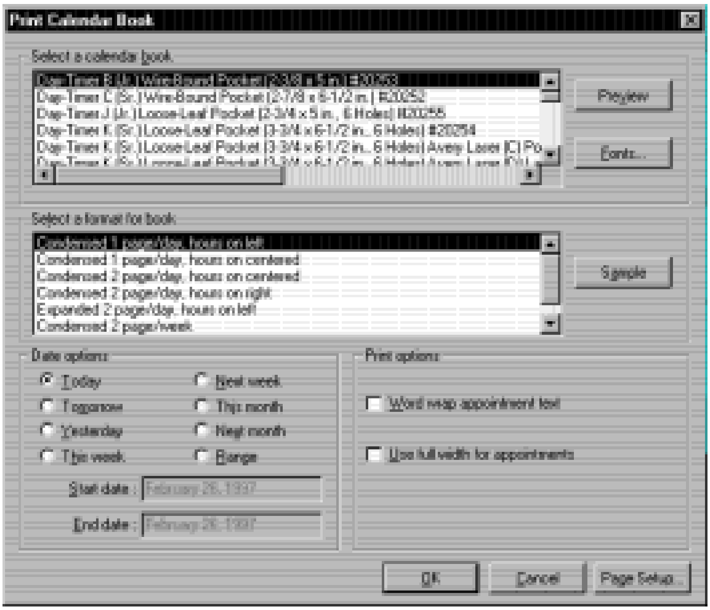
➤ To print a Calendar book

1. In the Calendar or Hotlist window, click the Print button on the Standard toolbar and then select Calendar Book.

   —or—

   Select Print > Calendar Book from the File menu or shortcut menu.

   The Print Calendar Book dialog box appears.



2. In the Select a Calendar Book field, select an item to match the size of printout you want.

   - Click the Preview button to see the basic layout of the selected type of Calendar Book. If you are printing a monthly or weekly Calendar and the preview does not provide enough detail, you have an opportunity to preview it again. Once you click the OK button in the Print dialog, another dialog gives you the option to print, preview, or cancel.

3. In the Select a Format for Book field, select an item.

   This field displays the layout and spacing options for the type of Calendar book you selected.

   - Click the Sample button to preview the layout of how your calendar will print. These options provide you with the flexibility to organize your printout so it's easy for you to use.

4. Click the Fonts button to change the default fonts.

   - In the Calendar Book Fonts dialog box, select the font you want to use for the Calendar Headers, Appointments, and Numeric fields. The default is Arial — Arial Black is a bold type of Arial.
   - When you are finished, click OK.

5. In the Date Options group box, select an item.

   If you select Range, indicate a calendar period in the Start Date and End Date fields. A drop-down calendar is available for these fields. If your Calendar will not fit on one page (for example, when you are using a date range or a weekly or monthly view), Maximizer automatically adjusts the number of pages to use.

6. Select an item from the Print Options group box as follows.

   Use the Word Wrap Appointment Text option if you want to wrap text longer than one line onto the next line when you print the Calendar book.

   To print text starting at the left-most position on the page, select Use Full Width for Appointments.

7. Click the Page Setup button if you need to adjust the printer options.

8. When you are finished, click OK. Also, make sure your printer is set up and contains the right paper.

   Maximizer prints the Calendar book.

Printing a Personal Organizer

You can print names and addresses of your Address Book entries in many popular printed organizer formats.

1. In a controlling window, select the entries you want to print.

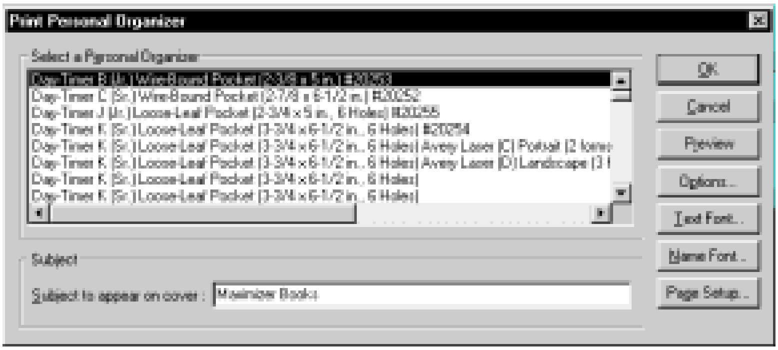
   —or—

   If you would like to include all the entries in your current list, do not select any entries.

2. Click the Print button on the toolbar and then select Personal Organizer.

   —or—

   Select Print > Personal Organizer from the File menu or shortcut menu.



3. In the Select a Personal Organizer list, select the format and size of your book.

4. If you want to Preview the format, click the Preview button.

5. Set the Print Options by clicking the Options button.

   - Set the sort order to Company or Last Name.
   - Set the Print Options.

     The Print Last Name/Company Cross Reference option prints a cross-referenced list at the end of the organizer.

     Use the Suppress Duplicate Company Information option if you want company information to appear only once. Do NOT select this option if only Companies are displayed in the Address Book list.

   - Set the Other Fields options.

Use the Secondary Cross Reference to include an additional cross-referenced list at the end of the organizer.

You can include up to four additional fields for each entry.

- Click OK when you are done.

6. Click the Text Font and Name Font buttons to change the default fonts for regular text and for proper names.
   - In the Font dialog box, select an item from the Font, Font Style, and Size fields.
   - When you are finished, click OK.
7. Click the Page Setup button if you need to adjust the paper size or other printer settings, and then click OK.
8. Type a title in the Subject To Appear On Cover field.
9. When you are finished, click OK.
10. The Printing dialog box appears if you didn't select any entries.
    - Select Current Entry Only and click OK to print the current selection.

    —or—

    - Select All Entries and click OK to print the entire list.
11. Click Print to print the organizer, or Preview to view it in the Preview window. Click Print from the Preview window to print the organizer.

Printing Address Book Reports

Maximizer offers a full range of printed reports related to your Address Book entries. You can also save all these reports to a file.

Printing a Column Report

A column report shows the same information you see displayed in the Address Book, Contacts or Related Entries window, such as names and addresses.

➤ To print a column report

1. Select the desired column setup and adjust your row heights and column widths.

   NOTE

   The report prints with the same column and row settings shown on your screen.

   ---

2. In the Address Book, Contacts or Related Entries window, select the entries you want to print.

   —or—

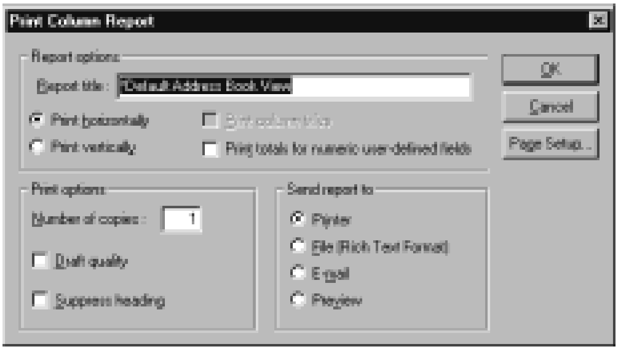
   If you would like to include all the entries in your current list, do not select any entries.

3. Click the Print button on the toolbar, then select Column Report.

   —or—

   Select Print > Column Report from the File menu or shortcut menu.

The Print Column Report dialog box appears.



4. Set Report Options as follows.
   - Modify the default text in the Report Title if you want.
   - Select Print Horizontally or Print Vertically. If you select Print Vertically, you can also select Print Column Titles.
   - Select whether to Print Totals for Numeric User-Defined Fields. When you select this option, Maximizer totals numeric user-defined fields even when non-numeric fields are also in the column. If there is more than one numeric user-defined field in a column, Maximizer totals each one individually and displays them at the bottom of each column.
5. Fill in the Print Options and Report Options group boxes. Choose Preview if you want to see the report on screen before sending it to the printer.
6. When you are finished, click OK.

   The Printing dialog box appears if you didn’t select any entries.
   - Select Current Entry Only and click OK to print the current selection.

     —or—
   - Select All Entries and click OK to print the entire list.

   Maximizer prints the column report.

Printing a Detailed Report

For each Address Book entry a detailed report can include mailing address information, appointments, Hotlist tasks, user-defined fields, Contacts, document summaries and notes.

➤ To print a detailed report

1. In a controlling window, select the entries you want to print.

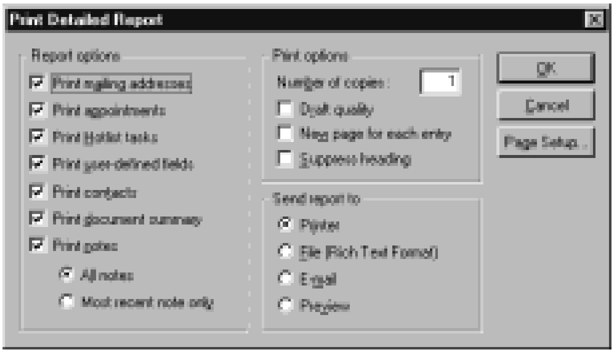
   —or—

   If you would like to include all the entries in your current list, do not select any entries.

2. Click the Print button on the Standard toolbar, then select Detailed Report.

   —or—

   Select Print > Detailed Report from the File menu.



3. Modify the selections in the Report Options group box as desired.

NOTE

If you select companies with associated Contacts in the Address Book window and leave Print Contacts checked, the same Contact information may print twice. To avoid duplicate Contact listings, select only Company and Individual entries, and leave Print Contacts checked, or specifically select each Company, Individual, and Contact and uncheck Print Contacts.

4. Make your selections in the Print Options group box.
5. When you are finished, click OK.

6. The Printing dialog box appears if you didn't select any entries.
   - Select Current Entry Only and click OK to print the current selection.

     —or—
   - Select All Entries and click OK to print the entire list.

   Maximizer prints the detailed report.

Printing a Hotlist Report

A Hotlist report shows you a list of current tasks and activities.

➤ To print a Hotlist report

1. In the Hotlist window, select the entries you want to print.

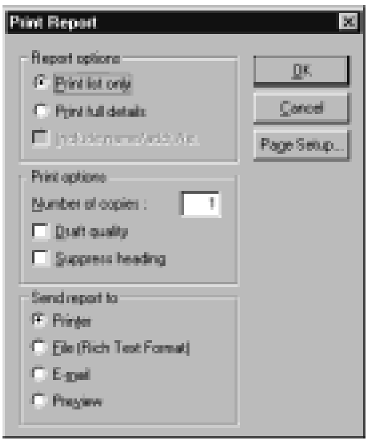
   —or—

   If you would like to include all the entries in your current list, do not select any entries.
2. Click the Print button on the Standard toolbar and then select Hotlist Report.

   —or—

   Select Print > Hotlist Report from the File menu or shortcut menu.

   The Print Report dialog box appears.



3. Fill in the Report Options. The default is to print only the list displayed in the window. Select Print Full Details to print all information for each task; select the Include Name/Addr/Tel to print name, address and telephone information for the associated Address Book entries.
4. Make your selections in the Print Options and Send Report To group boxes as desired.
5. When you are finished, click OK.
6. The Printing dialog box appears if you didn't select any entries.
   - Select Current Entry Only and click OK to print the current selection.

   —or—

   - Select All Entries and click OK to print the entire list.

   Maximizer prints the Hotlist report.

Printing a Name/Address/Telephone Report

A name/address/telephone report provides address and telephone information for each Address Book entry.

➤ To print a name/address/telephone report

1. In a controlling window, select the entries you want to print.

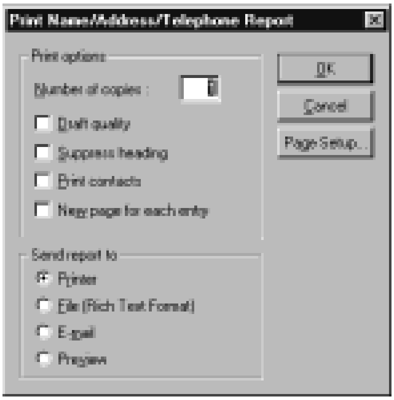
   —or—

   If you would like to include all the entries in your current list, do not select any entries.
2. Click the Print button on the Standard toolbar, then select Name/Address/Telephone Report.

   —or—

   Select Print > Name/Address/Telephone Report from the File menu.

The Print Name/Address/Telephone Report dialog box appears.



3. Fill in the Print Options and Send Report To group boxes as desired.

   Suppress Heading prints the report without a title, page number, or date and time on each page.

NOTE

If you select companies with associated Contacts and check Print Contacts, the same Contact information may print twice. To avoid duplicate Contact listings, select only Company and Individual entries, and check Print Contacts, or specifically select each Company, Individual, and Contact and leave Print Contacts unchecked.

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4. When you are finished, click OK.
5. The Printing dialog box appears if you didn't select any entries.
   - Select Current Entry Only and click OK to print the current selection.

   —or—

   - Select All Entries and click OK to print the entire list.

   Maximizer prints the name/address/telephone report.

Printing a Note Report

A note report lists the notes attached to your Address Book entries. You can specify the type of notes you want to see. There are six types to choose from:

Type	Description
All Notes	Includes your own notes and those logged by the program.
Mail-Outs	Notes logged when you print a label, an envelope, or a letter, or send E-mail.
Phone Calls	Notes logged when you dial a phone number, or log a received call.
Timed Note	Notes logged when you use the Maximizer Timer.
Transfer Log	Notes logged when you use Maximizer Data Exchange.
Tasks	Notes logged for a completed and scheduled appointment or Hotlist task.

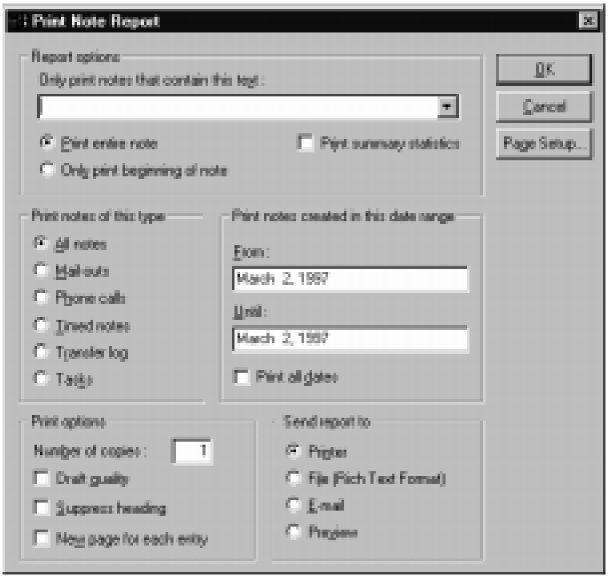
➤ To print a note report

1. Open a controlling window and select the Companies or Individuals whose notes are to be included in the report, or select the Contacts for which you want a note report from the Contacts window.
2. Click the Print button on the Standard toolbar, then select Note Report.

   —or—

   Select Print > Note Report from the File menu.

The Print Note Report dialog box appears.



3. Fill in the Report Options as follows.
   - Type a text string in the Only Print Notes That Contain This Text field if you want to limit the report to notes that contain matching text. A drop-down list is available for this field.
   - To print only the first line of the note, select Only Print Beginning of Note.
   - To print statistics about the number of notes of each type, select Print Summary Statistics. Statistics include numbers for all phone calls, mail-outs, tasks (timed and not timed) and transfers.
4. Select an item from the Print Notes of This Type group box.
5. Indicate a calendar period in the Date Range group box, or select Print All Dates.

   Drop-down calendars are available for these fields.
6. Make your selections in the Print Options and Send Report To group boxes as desired.
7. When you are finished, click OK.

   Maximizer prints the Note report.

Printing a Journal Report

You can print any or all of your Journal entries including every word an entry contains, or simply a brief column report.

➤ To print a Journal report

1. In the Journal window, select the entries you want to print.

   —or—

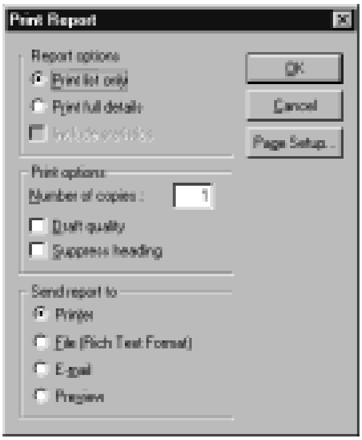
   If you would like to include all the entries in your current list, do not select any entries.

2. Click the Print button on the Standard toolbar.

   —or—

   Select Print from the File menu or shortcut menu.

   The Print Report dialog box appears.



3. Fill in the Report Options. The default is to print only the list. Select Print Full Details to print all the information; select Include Statistics to print statistics about entry types. Statistics include numbers for all phone calls, mail-outs, tasks (timed and not timed) and transfers.

4. Make your selections in the Print Options and Send Report To group boxes as desired.

5. When you are finished, click OK.

6. The Printing dialog box appears if you didn't select any entries.

- Select Current Entry Only and click OK to print the current selection.

  —or—

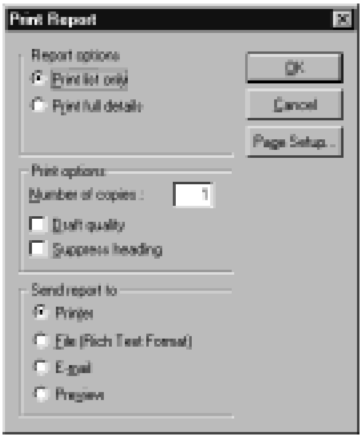
- Select All Entries and click OK to print the entire list.

Maximizer prints the Journal report.

Printing an Activity Log

The Activity Log provides a list of your customer-related or personal activities for the day.

1. In the Activity Log, click the Print button on the Standard toolbar.



2. Select the desired Report Options. If you select Print Full Details, you can also include all name, address, and telephone information as well as the activities themselves.
3. Make your selections in the Print Options and Send Report To group boxes as desired.
4. When you are finished, click OK.

   Maximizer prints the Activity Log.

Printing a Phone Log

The Phone Log provides a list of your phone call activities for the selected date.

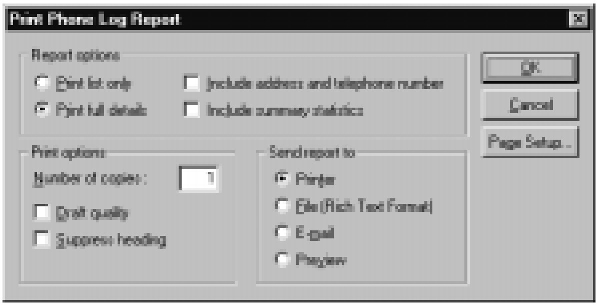
➤ To print a Phone Log

1. Click the Phone Log button on the Standard toolbar or select Phone Log from the View menu.

   The Phone Log dialog appears.

2. In the Phone Log, click the Print button.

   The Print Phone Log Report dialog box appears.



3. Fill in the Report Options. If you select Print Full Details, you can also include the name, address and telephone numbers and/or summary statistics about the call type (incoming or outgoing) and call durations.

4. Make your selections in the Print Options and Send Report To group boxes as desired.

5. When you are finished, click OK.

   Maximizer prints the Phone Log.

Printing a User-Defined Field Report for Address Book Entries

A user-defined field report lists the user-defined fields that are attached to each of your Address Book entries. You can also print a detailed listing of all user-defined fields in Maximizer. For more information, see "Printing a System User-Defined Field Report" on page 229.

➤ To print a User-Defined Field Report from the User-Defined Fields window

1. In the User-Defined Fields window, select the entries you want to print.
2. From the File menu or shortcut menu, select Print.

   —or—

   Click the Print button on the Standard toolbar.

   The Print Report dialog box appears.

3. Make your selections in the Print Options and Send Report To group boxes as desired.
4. When you are finished, click OK.
5. The Printing dialog box appears if you didn't select any entries.
   - Select Current Entry Only and click OK to print the current selection.

     —or—

   - Select All Entries and click OK to print the entire list.

   Maximizer prints the user-defined field report.

Printing a System User-Defined Field Report

You can print a system-wide report that provides you with detailed information for each user-defined field that has been set up in the current Address Book folder. The report includes: user-defined field name, Applicable Entry Types, Owner, Type, Table Items (if the user-defined field is a table type), Attributes and Record Count.

➤ To print a system User-Defined Field Report

1. From any window other than the User-Defined Fields window, select System Reports > User-Defined Field Report from the File menu.

   The Print Report dialog box appears.

2. Make your selections in the Print Options and Send Report To group boxes 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.

NOTE

The report contains information only for which the user-defined fields that the currently logged-in user has visibility rights.

Printing an Appointment Calendar

You can print a listing of the Calendar appointments in a daily, weekly, monthly, or bi-monthly view.

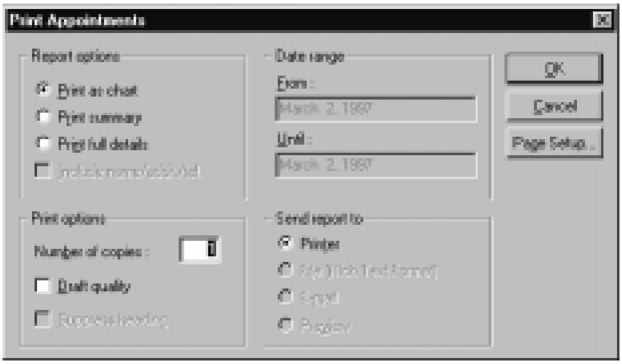
➤ To print a Calendar

1. In the Calendar window, select a calendar period from the View menu.
2. Click the Print button on the Standard toolbar and then select Appointments.

—or—

Select Print > Appointments from the File menu or shortcut menu.

The Print Appointments dialog box appears.



3. Select an item from the Report Options group box. If you select Print Summary or Print Full Details, you can select a date range. For a full details report, you can also include the name, address and telephone number.

   If you select Print Chart, Maximizer prints a graphical summary of appointments for the day you selected in the Calendar. The Print Chart option appears only when you are printing appointments from the monthly or bi-monthly views.

4. Make your selections in the Print Options and Send Report To group boxes as desired.

5. When you are finished, click OK.

   Maximizer prints the appointments.

Printing an Income/Expense Report

An income/expense report shows you all the income and expenses for your selected accounts.

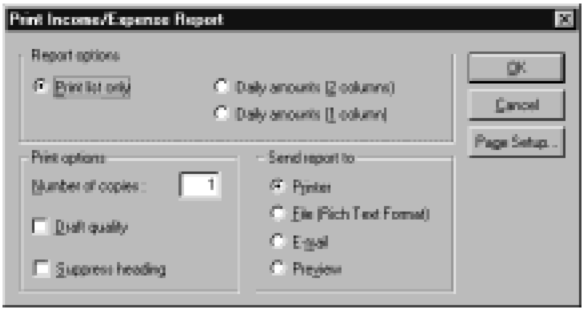
➤ To print an income/expense report

1. In the Expenses window, click the Print button on the Standard toolbar.

   —or—

2. Select Print from the File menu or shortcut menu.

   The Print Income/Expense Report dialog box appears.



3. Fill in the Report Options by selecting Print List Only, or Daily Amounts in 1 or 2 column format.
4. Make your selections in the Print Options and Send Report To group boxes as desired.
5. When you are finished, click OK.

   Maximizer prints the income/expense report.

Printing an Address Book Folder Summary Report

You can print an Address Book Folder Summary report that provides you with the total number of entries in an Address Book folder for the following elements:

- Users
- Companies
- Individuals
- Contacts
- User-Defined Fields
- Notes
- Documents

➤ To print an Address Book Folder Summary report

1. From the File menu, select System Reports > Address Book Folder Summary.

   The Print Report dialog box appears.

2. Make your selections in the Print Options and Send Report To group boxes 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 Address Book Folder Summary report.

Saving a Maximizer Report to a File

You can save certain Maximizer reports in a file, which then can be read by other applications. Maximizer saves the report in a Rich Text Format (RTF) file. You can then read the report from any other application that supports RTF, such as Microsoft Word or Corel WordPerfect.

NOTE

Reports are printed using tables. Since the Maximizer Word Processor doesn't support the importing of tables from RTF files, don't use the Maximizer Word Processor to read RTF files containing tables.

➤ To output a report to a file

1. In a window, select the entries you want to appear in the report.
2. Select Print from the File menu.

   Select a sub-menu report, if applicable.

   The Print Report dialog box appears.

3. Select File (Rich Text Format) in the Send Report To group box and click OK.

   The Save As dialog box appears.

4. Modify the file name and folder if you want.

Remember to keep the .RTF extension.

5. Click Save.

   The Printing dialog box appears if you didn't select any entries.

   - Select Current Entry Only and click OK to save the current selection to the file.

     —or—

   - Select All Entries and click OK to save the entire list to the file.

Chapter

9 CUSTOMIZING MAXIMIZER

You can customize Maximizer by adjusting your preferences, tailoring your workspace, creating custom column setups, changing toolbar settings, and recording macros to automate repetitive tasks.

Adjusting Preferences

You can change many of the default settings to suit your needs.

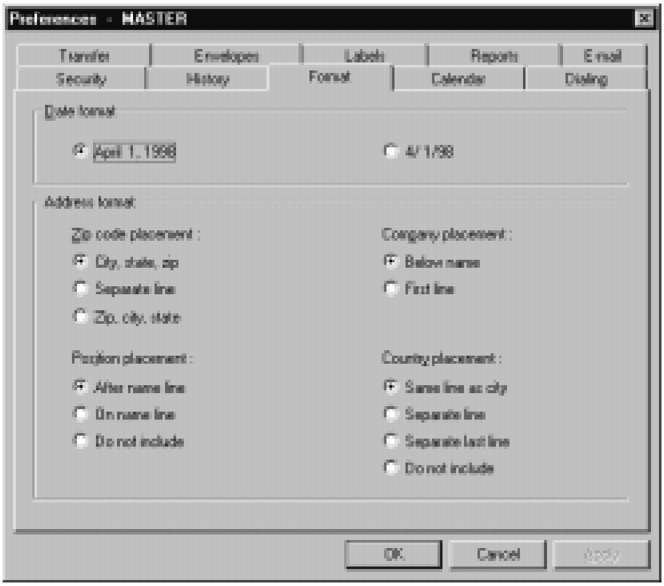
Adjusting the Address Format

You can adjust the address format, which determines where the address fields appear when you print labels, envelopes, and reports.

➤ **To adjust the address format**

1. Select Preferences from the File menu.

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



3. Select the preferences you would like to use for address information. De-select any default preferences that you do not want to use. For example, if you select Do Not Include under Country Placement, Maximizer will not print the country on labels or envelopes.
4. When you are finished, click OK.

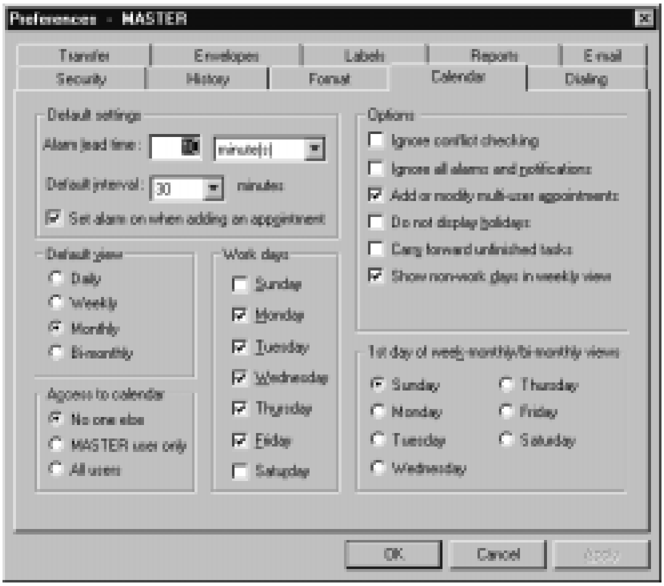
Adjusting the Calendar

Maximizer lets you make several adjustments to the Calendar, including showing or hiding holidays, turning off conflict checking, and setting default lead times for alarms.

➤ To adjust Calendar preferences

1. Select Preferences from the File menu or if you are in the Calendar window, select Preferences from the shortcut menu.

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



3. Adjust the Default Settings group box as follows.

- Use the Alarm Lead Time field to determine the length of time in advance of an appointment your alarm goes off. You can specify the lead time in minutes, hours, days, or weeks. You can adjust the lead time for individual appointments when you make or edit them in the Appointments dialog.
- Use the Default Interval field to divide the time periods in the daily and weekly view of the Calendar. Time periods can be as short as five minutes or as long as 60 minutes.
- The Set Alarm On When Adding an Appointment option turns on alarm sounds for appointments that you arrange.
- If you want Maximizer to ignore any conflicts between existing appointments and any new ones you make, select Ignore Conflict Checking.

- Ignore All Alarms and Notifications turns off alarm sounds and notifications of group appointments with other users set by you or other users.

NOTE

If you select this option, you will not be notified of any upcoming activities or appointments with other users.

- The Add or Modify Multi-user Appointments checkbox applies only in multi-user configurations.
- You can choose not to display holidays in your Calendar. If you do choose to display holidays, they are shown in red.
- Carry Forward Unfinished Tasks brings unfinished Hotlist tasks from past dates into the Hotlist column of the daily Calendar view. They do not appear in the Hotlist window itself, and are not visible in the monthly, weekly, or bi-monthly Calendar views.
- Show Non-work Days in Weekly View allows you to see days you normally don't work in the weekly Calendar view.

4. Select an item in the Default View group box. This view is used each time you open the calendar.
5. Select an item in the Access to Calendar group box.

   This option determines whether any other users can access your Calendar. It is only applicable in a multi-user configuration.
6. Select your work days in the Work Days group box. This determines what days appear as work days in all Calendar views.

NOTE

If the Show Non-work Days in Weekly View checkbox is not selected, only those days that you normally work appear in the weekly Calendar view. Also note that in the monthly and bi-monthly views, non-work days appear in red.

7. Select the First Day of the Week you want to appear in the monthly and bi-monthly Calendar views.
8. When you are finished, click OK.

Adjusting the Date Format

To adjust the default date format, complete the following steps.

➤ To adjust the date format

1. Select Preferences from the File menu.
2. In the Preferences dialog box, click the Format tab.
3. Click a radio button in the Date Format group box.
4. Click OK.

Disabling Creation of the Internet User-Defined Fields

To prevent the use of Maximizer to connect to a Company or Individual Web site or E-mail address, disable the creation of the Internet user-defined fields in Preferences. This function may be performed only by the MASTER user.

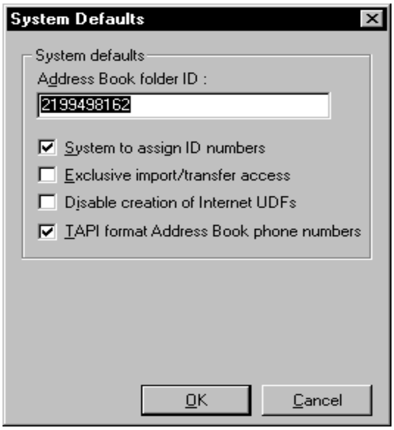
WARNING

This procedure disables and permanently deletes all Web page and E-mail addresses in your Address Book folder.

➤ To disable the E-mail Address and Web Page User-Defined Fields

1. Select Preferences from the File menu.

2. In the Preferences dialog box, click the System Defaults button.



3. Select the option Disable Creation of Internet user-defined fields.
4. Click OK.
5. In the Preferences dialog box, click Close.
6. Select Setup User-Defined Fields from the File menu.
7. Click *Web Page in the User-Defined Fields list, and then click the Delete button.
8. Confirm the deletion.
9. Repeat steps 7 and 8 for the *E-mail Address user-defined field.
10. Click Close.

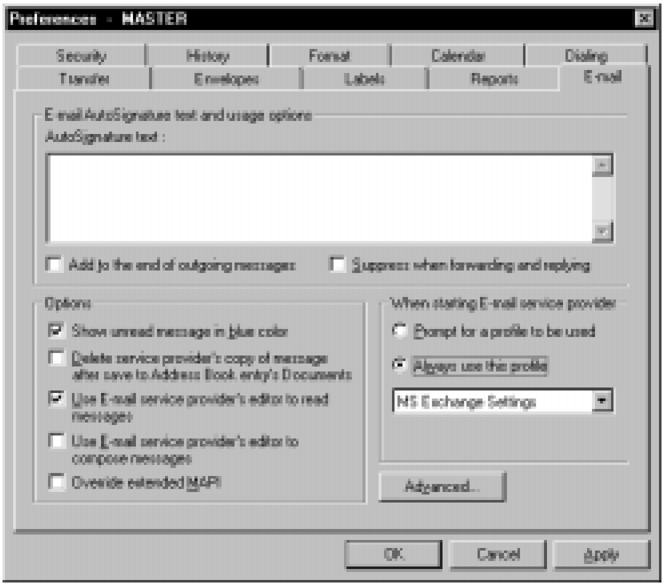
Adjusting E-mail Options

E-mail preferences control how Maximizer's E-mail window shows unread messages, whether an auto-signature is added to outgoing E-mail messages, and allows you to specify how Maximizer's E-mail works in conjunction with your service provider and with Microsoft Exchange/Outlook.

➤ To adjust E-mail preferences

1. Select Preferences from the File menu.

2. In the Preferences dialog box, click the E-mail tab.



3. In the AutoSignature Text box, enter the information you want to use as your auto signature each time you send a message from the Maximizer E-mail window.

   - Select Add to the End of Outgoing Messages to display the information you enter in the text box as your auto signature in each message you send out from the Maximizer E-mail window. Select Suppress When Forwarding and Replying to conceal your auto signature on E-mail messages when you forward or reply to them.

4. Under Options, select or de-select options as follows.

   - Show Unread Messages in Blue Color displays your unread messages in blue inside the Maximizer E-mail window.
   - Delete E-mail From Inbox After Save to Address Book Entry's Documents deletes E-mail messages after they are saved as documents in Maximizer for the associated Address Book entry.
   - Use E-mail Service Provider's editor to Read Messages allows you to use your E-mail Service Provider's E-mail editor rather than the Maximizer E-mail editor to view your messages each time you select the Open [E-mail] command from the Edit menu in Maximizer.

- Use E-mail Service Provider's editor to Compose Messages allows you to use your E-mail Service Provider's E-mail editor rather than the Maximizer E-mail editor to compose your messages each time you select the Compose New E-mail command from the Edit menu in Maximizer.
- Override Extended MAPI sets Simple MAPI as the default used for the Maximizer E-mail window. If your E-mail Service Provider does not use Extended MAPI, this option will not affect your settings. If you choose to leave this option turned off, you have the ability to use other personal E-mail folders in your Maximizer E-mail window. Simple MAPI provides you access to only the Inbox in the Maximizer E-mail window.

5. Under When Starting MS Exchange/Outlook, select or de-select options as follows.
   - Prompt for Profile to be Used prompts you to select an E-mail profile each time you open the Maximizer E-mail window. This is useful if you have multiple E-mail profiles on your computer, used in different circumstances.
   - Always Use this Profile saves your selected E-mail profile as the default. If you select this option you will not be prompted to select a profile each time you open the Maximizer E-mail window.
6. Click OK.

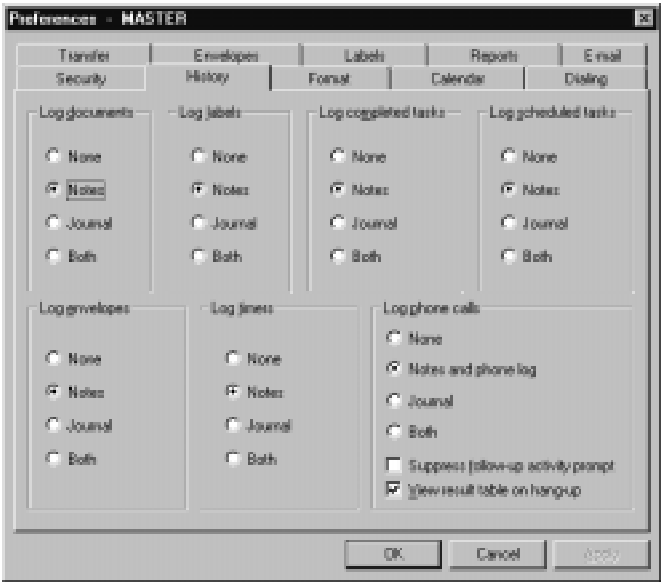
Adjusting Logging History

History preferences control whether to create automatic note or Journal entries for activities, such as making a phone call or printing a letter. The default is to log these activities in your Notes window. You can change this default by adjusting the history preferences.

➤ To adjust history preferences

1. Select Preferences from the File menu.

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



3. Select items in the group boxes to reset your preferences.

   If you want to turn off the automatic logging feature, select None.

   Select Suppress Follow-up Activity Prompt to prevent Maximizer from asking if you want to schedule a follow-up activity when you complete a phone call. The prompt still appears when you mark an appointment or task as complete.

   De-select the View Result Table on Hang-up checkbox to turn off the Phone Call Result dialog box display after a phone call.

4. When you are finished, click OK.

Adjusting Address Book Transfer Settings

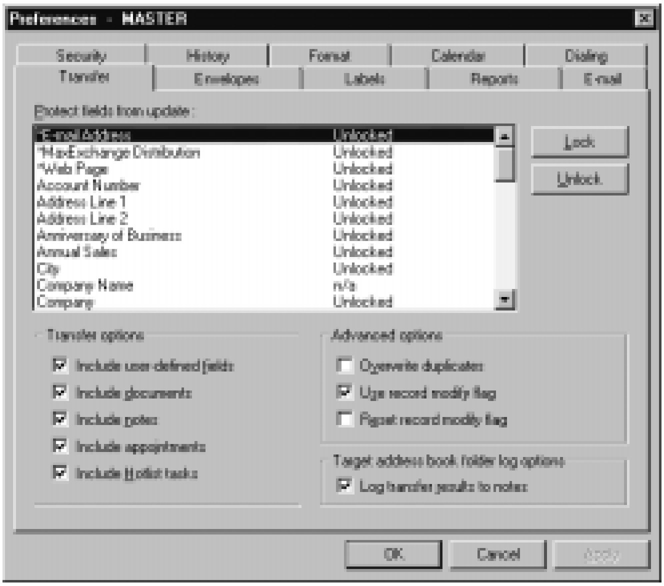
You can set the options for copying information from one Address Book folder to another.

NOTE

If you are the MASTER user, you can change update protection on fields.

➤ To adjust transfer settings

1. Select Preferences from the File menu.
2. In the Preferences dialog box, click the Transfer tab.



3. Double-click an item in the Protect Fields from Update box to toggle it from unlocked to locked.

   By locking a field, you protect the data from being updated through an incoming Transfer.

4. De-select any checkboxes in the Transfer Options group box.
5. Select or de-select any checkboxes in the Advanced Options group box.

   The Overwrite Duplicates option overwrites the target Address Book entry with source Address Book entry information when duplicate records are found.

   The Use Record Modify Flag sets a flag to on when an Address Book entry is added or modified. Maximizer uses it as an internal check to determine if the Address Book entry has been modified since the last transfer.

   The Reset Record Modify Flag resets the Record Modify Flag back to null (not modified) for each transferred record.

6. De-select the Log Transfer Results To Notes checkbox if you want.
7. When you are finished, click OK.

Setting System Defaults

You can adjust four system defaults: assignment of Company/Individual ID numbers, exclusive import/transfer access, automatic creation of Web Page and E-mail Address user-defined fields, and TAPI formatting for phone numbers.

By default, Maximizer automatically assigns a unique ID number to each new Address Book entry you create. You can change the system default so that you can assign these numbers to each entry manually.

Exclusive access prevents other users from accessing an Address Book folder during an import or transfer operation. By default, this option is turned off.

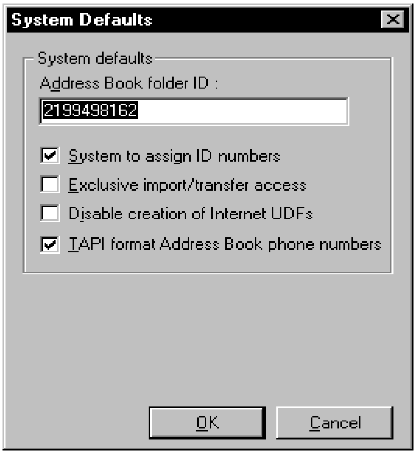
Disable Creation of Internet user-defined fields allows you to turn off the default creation of *Web Page and *E-mail Address user-defined fields for Companies and Individuals.

TAPI Format Address Book Phone Numbers uses international phone number formats by default when you add Address Book entries to a new Address Book folder.

➤ To set system defaults

1. Select Preferences from the File menu.

2. In the Preferences dialog box, click the System Defaults button.



3. De-select the System to Assign ID Numbers checkbox if you want to assign your own ID numbers.

WARNING

You must ensure that all Address Book entry ID numbers are unique.

4. Select the Exclusive Import/Transfer Access checkbox if you want to stop other users from accessing Address Book folders when you import or transfer Address Book folder information.
5. Select the Disable Creation of Internet user-defined fields checkbox if you do not want Maximizer to automatically create both *E-mail Address and *Web Page user-defined fields for all your Address Book entries.
6. Select TAPI Format Address Book Phone Numbers to use international phone number formats for all your Address Book entries on the Basic Information entry screen. Phone numbers in your existing Address Book folders will retain their current format. For any new Address Book folders you create, this option is on by default.
7. When you are finished, click OK.

Tailoring Your Workspace

You can change the view of the Maximizer windows, arrange windows, change window fonts and colors, create column setups, add buttons to toolbars, resize and move toolbars, and create macros. Once you have arranged your workspace as desired, you may save it as a Favorite Workspace. For more information, see "Creating a Favorite Workspace" on page 252

Changing the Maximizer Workspace

You have two choices of how to view your Address Book in Maximizer: a tabbed windows view or the standard windows view.

The tabbed windows view splits the main window into three panes with the Address Book on top, the Contacts and Related Entries windows on the lower left and the Notes, User-Defined Fields and Documents on the lower right. If you open the Hotlist window, it becomes the main window on top. You click the tabs in the lower panes to change the view from one window to another.

For more information about working in the standard windows view, see the next section, "Arranging Windows".

➤ To change the view

- Select Tabbed Windows from the Window menu.

Arranging Windows

When you open several Maximizer windows at the same time, especially if you are not using the tabbed windows view, they may begin to overlap and obscure each other. With the tiling feature, you can arrange the open windows so they are all visible at once. Or you may choose to cascade the windows, so each overlaps the next with only their title bars showing.

NOTE

The tabbed windows view behaves as a single window when tiled, cascaded, minimized, maximized, or closed. To toggle the tabbed windows view, see "Changing the Maximizer Workspace" on page 247.

➤ To tile windows side by side

- Select Tile Vertically from the Window menu.

➤ To tile windows one above the other

- Select Tile Horizontally from the Window menu.

➤ To make windows overlap

- Select Cascade from the Window menu.

Each of the above three options arranges the windows in the order they were most recently active, with the current window on top.

➤ To close all windows

- Select Close All from the Window menu. This does not close your Address Book folder; just click the Address Book icon to open the window.

Sizing Windows

As in most Windows programs, you can minimize, maximize, or restore any of your Maximizer windows. When you minimize the Maximizer program window, you reduce it to a button on the Windows Taskbar. Minimizing a window within Maximizer (for example, the Journal window) reduces it to a small title bar. Maximizing a window means to enlarge it to fill the screen.

When you restore, you bring a window back to its previous size before it was minimized or maximized.

➤ To minimize a window

- Click the Minimize button in the top right corner of the window.

  Maximizer reduces the window to a small title bar at the bottom of the Maximizer workspace.

➤ To restore a minimized window

- Double-click the minimized window title bar.

  Maximizer restores the window to the size it was before it was minimized.

➤ To maximize a window

- Click the Maximize button in the top right corner of the window.

  Maximizer expands the window to fill the workspace area. Click the button again to restore a maximized window to its former size.

Changing Window Colors

You can adjust the colors in your Maximizer windows. Change the colors in a single window if you want a window to stand out from the others. You may also want to modify the colors in all your windows.

If you decide you don't like the changes you have made, you can return your windows to the default colors.

➤ To change colors in a single window

1. Click a window in which you want to change the color.

   Select Set Color > Current Window from the Window menu.

   —or—

   Click the Set Color button on the Formatting toolbar. (If it is not visible, right-click any toolbar and select Formatting.)

The Set Color dialog box appears.

2. In the List Element field, select an item from the drop-down list.
3. Click one of the Basic Colors.
4. When you are finished, click OK.

   Maximizer changes the colors in the selected window.

➤ To change colors in all windows

1. Select Set Color > All Windows from the Window menu.

   The List Colors dialog box appears.
2. In the List Element field, select an item.
3. Click one of the Basic Colors.
4. When you are finished, click OK.

   Maximizer changes the colors in all the windows.

➤ To undo a color change

- In the Set Color dialog box, click the Default button.

Changing Window Fonts

You can adjust the fonts in your Maximizer windows. Choose to use a different typeface or select a larger font size for better visibility. You can change the fonts in a single window or you can modify the fonts in all your windows at once. You can also display the Formatting toolbar to make changes to individual character formats. For more information, see "Displaying Toolbars" on page 259.

➤ To change fonts in a single window

1. Click a window in which you want to change the display fonts.
2. Select Set Font > Current Window from the Windows menu.

   The Font dialog box appears.

3. In the Font, Font Style, and Size fields, select the desired items from the drop-down menus.
4. In the Effects group box, select an item if you want.
5. When you are finished, click OK.

   Maximizer changes the display fonts in the selected window.

➤ To change fonts in all windows

1. Select Set Font > All Windows from the Window menu.

   The Font dialog box appears.
2. In the Font, Font Style, and Size fields, select the desired items from the drop-down menus.
3. In the Effects group box, select an item if you prefer.
4. When you are finished, click OK.

   Maximizer changes the display fonts in all the windows.

Restoring Saved Window Settings

If you change the window setup and then decide you don't like it as well as your last setup, you can restore the last saved window display. The display is saved whenever you exit Maximizer if Window > Save Settings on Exit option is on.

➤ To restore last saved settings

- Select Restore Saved Workspace from the Window menu.

  Maximizer reverts to your last saved window settings.

Restoring Default Window Settings

If you change the window setup and then decide you don't want to keep it, you can recover the default window display.

➤ To restore default settings

1. Select Reset Default Workspace from the Window menu.
2. In the Maximizer message box, click OK to confirm the reset.

   Maximizer erases your changes and restores the workspace to the default settings.

Changing Maximizer Sounds

You can change the sounds Maximizer uses to alert you to alarms, search results, receipt of E-mail and illegal commands.

➤ To change Maximizer sounds

1. From the Windows Start menu, select Settings > Control Panel.
2. Open the Sounds item.
3. Find the Maximizer folder.
4. Modify the sounds as you wish.
5. Click OK to close the dialog box.

Creating a Favorite Workspace

You can arrange your Maximizer desktop and save it so that you can use it anytime without having to arrange your window settings again.

➤ To create a favorite workspace

1. Open the windows you want to include in your workspace arrangement.
2. Size and position all of the windows inside the Maximizer workspace as desired. Also, size and position the main Maximizer application window; it's size and position is saved and restored as part of the workspace.

3. From the Window menu, select the Favorite Workspaces option. The Favorite Workspaces dialog box appears.
4. Click the Add button. The Add New Workspace dialog box appears.
5. Enter a name for the workspace.
6. Click OK.
7. Click Close to close the Favorite Workspaces dialog box.

Using a Favorite Workspace

You can retrieve a favorite workspace arrangement that you have previously saved.

➤ To use a favorite workspace

1. From the Window menu, select the Favorite Workspaces item.
2. Select the workspace from the Workspace List.
3. Click the Use Now button. Maximizer arranges your workspace.
4. Click Close to close the Favorite Workspaces dialog box.

NOTE

To view the properties of a favorite workspace, open the Favorite Workspaces dialog box, select the workspace, and click the Properties button.

Deleting or Modifying a Favorite Workspace

If you no longer need a favorite workspace, or if you want to modify the details, you can do so in the Favorite Workspaces dialog box.

➤ To delete a favorite workspace

1. From the Window menu, select the Favorite Workspaces option.
2. Select the workspace you want to delete from the Workspace List.
3. Click the Delete button and click OK to confirm the deletion. Maximizer removes the workspace from the list.

4. Click Close to close to exit the dialog box.

➤ **To modify a favorite workspace**

1. While the Maximizer workspace you would like to modify is active, select the Favorite Workspaces option from the Window menu.
2. Size and position the windows inside your workspace.
3. Click the Save button and then click OK to confirm the update. Maximizer saves the modified workspace arrangement.
4. Click Close to exit the dialog box.

Changing Column Displays

You can change the sort order for columns and create, edit and delete custom column setups.

Resizing a Column or Row

You may sometimes want to increase or decrease the size of a column or row. You can resize any window column or row using your mouse.

➤ **To resize a column or row**

1. Move the cursor to the edge of the row or column heading for the column you want to resize.
2. Grab the vertical border of the column and drag it left or right to change the width.

   —or—

   Grab the horizontal border of the row and drag it up or down to change the height.

Sorting Data in Columns

Information in each window is sorted by a default column. For example, the Hotlist window is always sorted by Date when it is first opened.

You can select a different column to re-sort the information in another way. This gives you several ‘views’ of your information. In the Hotlist window, for example, you could sort the information by Name if you wanted to quickly find a Contact. Or you might select the Priority column to determine what tasks should be done first.

➤ To sort columns

1. Open or click a window in which you want to sort the columns.
2. Click in the title area of the column you want to sort by.

   —or—

   Select the column you want to sort by from the View menu.
3. Click the column heading again if you want to reverse the order in which it is sorted, as indicated by the arrow in the heading.

NOTE

To sort on multiple fields, simply create your column setup, and be sure to prioritize the sort order of the fields by starting with the highest priority field in the first (left-hand) column. When you perform your search, the data will automatically be sorted sequentially for each column, from left to right. You can also change which column is sorted first by clicking on the top of the column. However, keep in mind that the columns sort from left to right — so if you click in the third (out of four) columns, the data will be sorted by the third and then the fourth columns only.

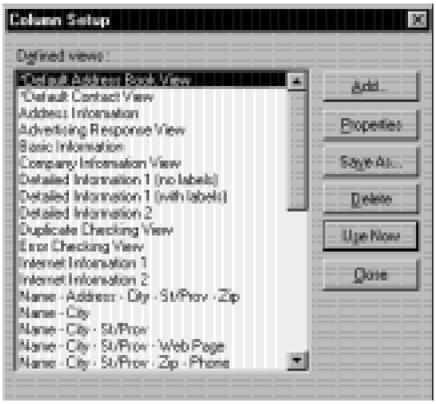
Creating a Column Setup

Maximizer provides a pre-defined selection of editable column setups you can use for the Address Book, Contacts and Related Entries windows, if you have selected to install the Starter data when you installed Maximizer. If you prefer, you can create your own column setups or modify the existing ones. This allows you to display different fields in various combinations.

You can create as many column setups as you wish.

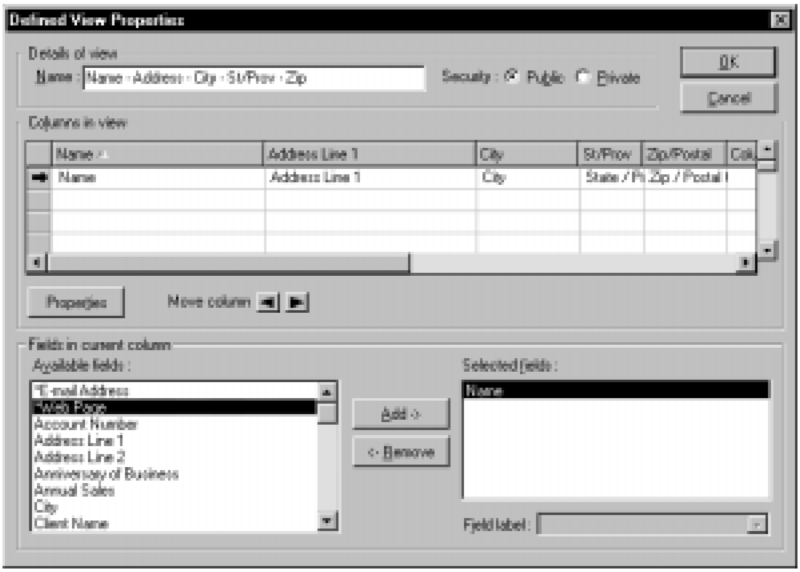
➤ To create a column setup

1. In the Address Book, Contacts or Related Entries window, select Column Setup from the View menu or click the Column Setup button on the View bar.



2. In the Column Setup dialog box, click the Add button.

   The Defined View Properties dialog box appears.



3. Type a description in the Details of View group box.
4. Select Private if you don't want to share the column setup with other users.

This option applies only in multi-user configurations.

5. Click a column header in the Columns in View box.
6. Click the Properties button to modify the column title or width. In the Column Properties dialog box, modify the title and/or width and click OK.

NOTE

The width is measured in units of the average character width of the font you are using. So a width of 15 fits about 15 characters of the current font.

7. Select a field in the Available Fields box.
8. Click the Add button to add it to the current column.

   Fields in the current column appear in display order in the Selected Fields box.
9. Change the name of the field label in the Field Label box if you want. You can type a new label, or select field separator characters such as commas, spaces, blanks, or dashes from the list. Select these special separators from the provided drop-down list.
10. Repeat steps 5-9 for each field you want to add to the column setup.
11. When you are finished, click OK.

    Maximizer adds the column setup to the list in the Column Setup dialog box.

NOTE

For more information, explore the column setups for the default views, installed with Maximizer, to see how they were constructed.

Changing a Column Setup

Maximizer lets you modify the attributes of a column setup.

➤ To change a column setup

1. In the Address Book, Contacts window or Related Entries, select Column Setup from the View menu or click the Column Setup button.

2. In the Column Setup dialog box, select the column setup you want to modify.
3. Click the Properties button.
4. Modify the column setup and click OK.
5. When you are finished, click OK, and then click Close.

Deleting a Column Setup

You can also delete any of your column setups. Remember, deletions are permanent and can't be undone.

➤ To delete a column setup

1. In the Address Book, Contacts or Related Entries window, select Column Setup from the View menu or click the Column Setup button.
2. In the Column Setup dialog box, select the column setup you want to delete.
3. Click the Delete button.
4. Click OK to confirm the deletion.

   Maximizer deletes the column setup.

Duplicating a Column Setup

You can create a duplicate column setup by saving an existing column setup under another name.

➤ To create a duplicate column setup

1. In the Address Book, Contacts or Related Entries window, select Column Setup from the View menu or click the Column Setup button.
2. In the Column Setup dialog box, select the column setup you want to duplicate.
3. Click the Save As button.
4. In the Name field, type a new name for the column setup.

5. Click OK.

   Maximizer creates a duplicate column setup using the new name.

6. To use the column setup for the currently active window, click Use Now.

   Maximizer creates a duplicate column setup using the new name.

   —or—

   Click Close to exit the column setup dialog box and return to the currently active window, without using the duplicate column setup.

Working With Toolbars

You can modify and resize toolbars to suit your needs. You can also add toolbar buttons that run macros, and launch applications, Web pages, and user-defined fields.

Displaying Toolbars

You can turn on and off the display of any toolbar as well as adjust its position and size.

➤ To make toolbars visible

1. Select Toolbars from the View menu.

   Right-click within any toolbar (but not on a toolbar button).

   Select a toolbar name to toggle its display on or off.

2. Select a toolbar from the Toolbar List, and then click the Properties button.
3. Click the Visible checkbox and then click OK.
4. Click OK again to close the Toolbars dialog box.

   —or—

1. Right-click within any toolbar (but not on a toolbar button).
2. Select a toolbar name to toggle its display on or off.

Re-positioning the Toolbars

You may re-position any of the Maximizer toolbars and adjust the position the buttons on Custom toolbars. You also have the option of displaying your toolbars in a docked or floating position.

➤ To change the location of any docked Maximizer toolbar

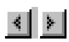
1. Click inside the toolbar frame containing the toolbar you want to move to another location.
2. Drag and drop the toolbar on the desired position in the toolbar area (between the menu bar and the upper window).

   Maximizer moves the toolbar to the new position.

➤ To change the location of any floating Maximizer toolbar

- Click on the title bar of the toobar and drag it to the desired location on your screen.

➤ To adjust the position of custom toolbar buttons

1. Select Toolbars from the View menu.
2. In the Toolbars dialog box, select a Custom toolbar, then click the Customize button.
3. Select the button to move, then click  to move the button left or right.
4. Click OK, then click OK again to close the Toolbars dialog box.

➤ To switch between docked and floating toolbars

1. Select Toolbars from the View menu.
2. In the Toolbars dialog box, select a toolbar, and then click the Properties button.
3. In the Location group box, select either Docked or Floating. If you have selected Docked, which is the default, the toolbar remains inside the toolbar area in the upper portion of the main Maximizer application window. You may move docked toolbars around anywhere inside this area. Floating toolbars may be positioned anywhere on your screen.

Resizing Toolbar Buttons

You can change the size of the buttons for any toolbar.

➤ To change the size of toolbar buttons

1. Select Toolbars from the View menu.
2. In the Toolbars dialog box, select a toolbar, and then click the Properties button.
3. Select an item in the Button Size group box.
4. Click OK, then click OK again to close the Toolbars dialog box.

   Maximizer changes the size of the buttons on the selected toolbar(s).

Showing the View Bar in a Window or Toolbar

The View bar provides commands and controls for each Maximizer window. You can display the View bar inside each Maximizer window or as a floating or docked toolbar.

➤ To change the display of the View bar

- In any window, right click in the View bar and select Show View Bar in A Toolbar.

  This moves the View bar to a toolbar.

  —or—

  Select Toolbars from the View menu. Select the View toolbar and click the Properties button. Select Docked in Window.

NOTE

When the View bar is displayed as a floating or docked toolbar, it changes depending on the window that is currently active.

Showing or Hiding the Status Bar

The Status bar appears at the bottom of the Maximizer workspace. It displays information about your current options in the program. You can turn this feature on or off.

➤ **To show or hide the Status bar**

- Right-click anywhere inside the Toolbar area (between the menu bar and the upper window) and select or de-select Status Bar on the shortcut menu.

NOTE

If you right-click inside the Status bar you can de-select the date or time display shown in the Status bar.

Showing or Hiding Tooltips and Icon Bar Titles

When you position your mouse pointer over a button, a Tooltip is displayed describing the command name and function of the button. (More details appear in the Status bar at the bottom of the Maximizer screen.) You can turn this feature on or off. You can also turn the display of button titles on the Icon bar on or off.

➤ **To show or hide Tooltips**

1. Select Toolbars from the View menu.

   —or—

   In the Toolbar area, select Customize from the shortcut menu.
2. In the Toolbars dialog box, select a toolbar, and then click the Properties button.
3. Check or uncheck the Display Tooltips checkbox.
4. Click OK, then click OK again to close the Toolbars dialog box.

➤ To show or hide Icon bar titles

1. Select Toolbars from the View menu.

   —or—

   In the Toolbar area, select Customize from the shortcut menu.

2. In the Toolbars dialog box, select Icon Bar, and then click the Properties button.
3. Check or uncheck the Show Title checkbox. You may also change the background color of the Icon bar by clicking the Color button, selecting a color and clicking OK on the Color dialog.
4. Click OK, then click OK again to close the Toolbars dialog box.

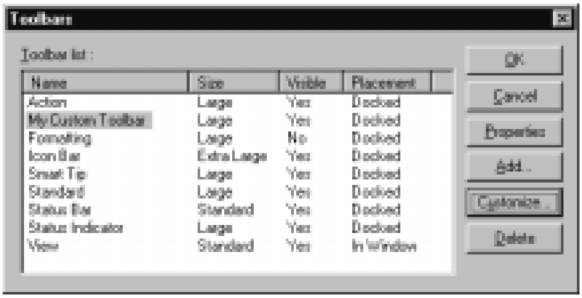
Creating a Toolbar Button for a Macro

For convenience, Maximizer lets you create toolbar buttons for any of your macros. This way, you can click a button when you want to run a macro. For information about creating and running macros, see “Using Macros” on page 268.

➤ To add a toolbar button for a macro

1. Once you create a macro, select Toolbars from the View menu.

   The Toolbars dialog box appears.

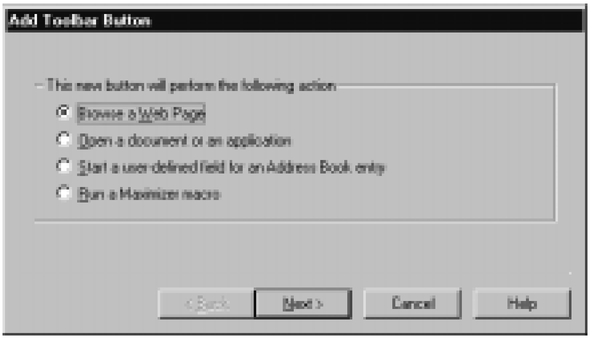


2. To create a new Custom toolbar, click Add. To add your button to an existing Custom toolbar, select that toolbar and then click Customize.

   The Modify Toolbar dialog box appears.

3. Click the Add button.

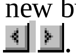
   The Add Toolbar Button Wizard appears.



4. Select Run a Maximizer Macro from the This New Button Will Perform the Following Action list, and then click Next.
5. From the Macro Description list, select the name of the macro you want to run from a button. Edit the Tooltip and Status Bar Help text if you wish, and then click Next.
6. Make your selections in the Select the Type of Icon to Display on This Toolbar Button group box, and then click Finish.

   If you select Standard Maximizer Button, you can select an icon from the Standard Maximizer Buttons box.

   If you select External Image File (Bitmap), click the Browse button to find the bitmap file.
7. When you are finished, click Finish.

   You can change the position of the new button on the toolbar using the Move Button Left or Right arrows .
8. Click OK and then click OK again to close the Toolbars dialog box.

   Maximizer creates a toolbar button for the selected macro.

Modifying a Toolbar Button for a Macro

If required, you can change or delete a toolbar button for a macro.

➤ **To modify a macro button**

1. Select Toolbars from the View menu.

   —or—

   Right-click in any frame containing a toolbar and select Customize from the shortcut menu.
2. Select the Custom toolbar you want to modify, and then click Customize.
3. In the Modify Toolbar dialog box, select the macro button you want to modify.
4. Change the macro button properties in the Button Properties group box.

   —or—

   Click the Delete button to delete the macro button from the toolbar.
5. Click OK, and then OK again to close the Toolbars dialog box.

Launching an Application, Web Page, or UDF from the Toolbar

From a Maximizer Custom toolbar, you can launch other applications, such as a word processor, or launch your browser and go to a specific Web page. For example, you can create a toolbar button that automatically launches your word processor and opens the document you use to invoice your customers by entering a path such as "C:\My Documents\Invoice.doc".

You can also use a toolbar button to execute the contents of any alphanumeric user-defined field for the current Address Book entry. For example, you can type C:\Article from Fred.doc in a user-defined field, and Maximizer will execute that command (open the document) when you click the toolbar button and the associated entry is current.

➤ **To launch an application from a custom toolbar**

1. Select Toolbars from the View menu, or right-click in any frame containing a toolbar and select Customize from the shortcut menu.

The Toolbars dialog box appears.

2. To create a new Custom toolbar, click Add. To add your button to an existing Custom toolbar, select that toolbar and then click Customize.

   The Modify Toolbar dialog box appears.

3. Click the Add button.

   The Add Toolbar Button Wizard appears.

4. Under This New Button Will Perform the Following Action, select one of the following options and then click Next.

   - Browse a Web Page
   - Open a Document or An Application
   - Start a user-defined field for an Address Book Entry
   - Run a Maximizer Macro

5. Take one of the following actions.

   - If you have chosen to Browse a Web Page or Open a Document or an Application, type the path to the document/application or Web address. Or, click the browse button to locate the document/application or URL you want to run.

     If you would like an application to open a specific file, make sure that the application path is enclosed in double quotes and also to include a space after the path of the application. For example, to launch WordPad and open the file NOTES.WRI, in the Document/Application text box type "C:\PROGRAM FILES\ACCESSORIES\WORDPAD.EXE" C:\NOTES.WRI

     To load a new instance of an already running program, click the Load New Instance checkbox.

   - If you are launching a user-defined field, or a Maximizer macro, select it from the list. The list contains all user-defined fields or Maximizer macros you have created, depending on your selection.

     —or—

     To load a new instance of an already running program, click the Load New Instance checkbox.

     If the folder or file contains a space and you want to pass parameters to the program, make sure that the path is enclosed in double quotes. For

example, to launch WordPad and open the file **NOTES.WRI**, in the Document/Application text box type:
“C:\PROGRAM FILES\ACCESSORIES\WORDPAD.EXE” C:\NOTES.WRI

6. Edit the Tooltip and Status Bar Help text if you wish, and then click Next.
7. Select the type of icon you would like to display in the toolbar, and then click Finish. If you choose to display the default icon, Maximizer will select the icon automatically and you may go on to step 8. If you choose to use a Standard Maximizer icon, click Next and select one of the available icons. If you choose to use an External Bitmap, locate the image using the browse button.
8. Click Finish.
9. You can change the position of the new button on the toolbar using the Move Button Left or Right arrows .
10. Click OK and then click OK again to close the Toolbars dialog box.
11. Maximizer creates a toolbar button for the selected action.

Launching an Application from the Control Menu

You can launch an application or open a file from the Maximizer Control menu.

➤ To launch an application from the Control menu

1. Select Launch from the Control menu in the upper left corner of the Maximizer window.

   —or—

   You can also set up macros to launch files. Press Alt+Spacebar, L to launch an application or open a file within a macro.

   The Launch Application dialog box appears.
2. Type the name (including the pathname) of the application or file in the Application to Launch or Open Document field.
3. Select an item from the Launch Options group box if you want.
4. When you are finished, click OK.

Maximizer launches the application or opens the file.

Using Macros

Maximizer provides a macro recorder that allows you to create a unlimited number of your own macros. A macro is a series of keystrokes and mouse actions that you 'record' and then 'replay' again and again. It is ideal for repetitive or global types of tasks. For example, you can record a macro that opens an Address Book list and adds a new user-defined field to each entry.

To illustrate the kinds of macros you can create in Maximizer, some examples are included in this chapter.

Recording a Macro

Before you start recording, you should map out your macro first, either by writing down the sequence of events or rehearsing the steps once or twice.

NOTE

When you record a macro, use keyboard commands rather than the mouse. Windows may be sized and placed differently when you play back a macro. For information on the keyboard commands you can use in Maximizer, see "Maximizer Keyboard Shortcuts" in online Help.

➤ **To record a macro**

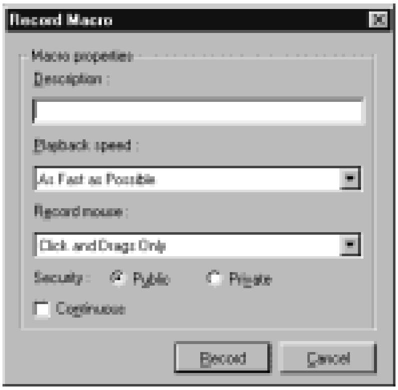
1. Select Record Macro from the Tools menu.

   —or—

   From the Standard toolbar:

   - Click the Macro List button.
   - In the Macro List dialog box, click the Record button.

- The Record Macro dialog box appears.



2. In the Record Macro dialog box, type a descriptive term in the Description field.

   This is a required field.

3. In the Playback Speed field, select an item.

   Use this field to determine the speed of the macro playback. The default is As Fast as Possible.

4. In the Record Mouse field, select an item.

   Use this field to determine how to record the mouse actions. The default is Clicks and Drags Only.

5. Select Private if you don’t want to share the macro with other users.

   This option applies only in multi-user configurations.

6. Select Continuous if you want to run the macro continuously when you play it back.
7. Click the Record button.
8. Go through the keystrokes you want to record in your macro.
9. When you are finished, press Ctrl+Break.
10. In the Macro Recorder dialog box, select Save Macro to save a finished macro, Resume Recording to continue, or Cancel to discard the macro.
11. Click OK.

Sample Macros

Following are two sample macros. You may not want to use these exact macros, but they illustrate some of the things you can do. Notice all the commands and options are indicated using key combinations.

➤ To change the priority for a group of Hotlist tasks

1. Open the Hotlist window and select a task.
2. Select Record Macro from the Tools menu.
3. In the Record Macro dialog box, type **change Hotlist priority** in the Description field.
4. Select Continuous and click the Record button.
5. Press Enter to open the current Hotlist task.
6. In the Hotlist Task dialog box, press Alt+R to move down to the Priority field.
7. Change the Priority to a different number or letter.
8. Press Enter to save the task.
9. Press ↓ to move to the next task.
10. Press Ctrl+Break to end the macro.
11. In the Macro Recorder dialog box, click OK.
12. Select Run Last Macro from the Tools menu.
13. In the Playback Count dialog box, type the number of times to run the macro.
14. Click OK to start the macro.

➤ To add the same expense value for several months

1. In the Expenses window, select an expense entry.
2. Select Record Macro from the Tools menu.
3. In the Record Macro dialog box, type **enter value for a month** in the Description field.
4. Select Continuous and click the Record button.

5. Press Enter.
6. In the Account Name dialog box, press Tab to go to the Amount field.
7. Enter a value.
8. Press Tab to go to the Add button.
9. Press Spacebar to add the expense.
10. Press Tab 6 times to go to the OK button.
11. Press Enter to close the dialog box.
12. Press Ctrl+Right Arrow to go to the next month.
13. Press Ctrl+Break to end the macro.
14. In the Macro Recorder dialog box, click OK.
15. Select Run Last Macro from the Tools menu.
16. In the Playback Count dialog box, type the number of times to run the macro.
17. Click OK to start the macro.

Running or Stopping a Macro

To run a macro, you can select the one you want from a list of available macros.

➤ To run a macro

1. Click the Macro List button on the Standard toolbar.

   —or—

   Select Macro List from the Tools menu.

   The Macro List dialog box appears.
2. Select a macro from the list. To change its name, speed, security, or play status, click Properties.
3. Click the Run button.
4. If you selected Continuous play mode, change the Number of Times To Play Macro setting if you want to play it more than once.

5. Click OK.

   Maximizer runs the selected macro.

➤ To stop a macro

1. Press Ctrl+Break to stop a running macro.

   Maximizer stops the macro.

2. In the Maximizer dialog box, click OK to confirm the abort.

NOTE

To run a macro a second time, press Shift+F12 or select Run Last Macro from the Tools menu.

Adjusting Macro Properties

You can't edit a macro once it is created. You can, however, modify macro properties such as the playback speed or description.

➤ To adjust macro properties

1. Select Macro List from the Tools menu, or click the Macro List button on the Standard toolbar.
2. In the Macro List dialog box, select a macro to modify.
3. Click the Properties button.
4. Modify the properties and click OK.
5. Click the Close button.

Deleting a Macro

You can delete a macro if it doesn't work properly or if you no longer need it. Remember, deletions are permanent and can't be undone.

➤ To delete a macro

1. Select Macro List from the Tools menu or click the Macro List button on the Standard toolbar.
2. In the Macro List dialog box, select a macro to delete.
3. Click the Delete button.
4. Click OK to confirm the deletion.

   Maximizer deletes the macro from the macro list.

Chapter

10 ADMINISTERING MAXIMIZER

You can create your own Address Book folders and transfer Address Book folder information over a network or via E-mail. You can also import data from other applications.

Maintaining Address Book Folders

This section contains the procedures for backing up and restoring Address Book folders. You can also create new Address Book folders, and modify and delete Address Book folders, transfer information between Address Book folders, and import and export Address Book folder information.

Creating a New Maximizer Address Book Folder

You can create one or more of your own Maximizer Address Book folders. Consider the following information before creating new Address Book folders.

Before you create Maximizer Address Book folders, spend a few moments planning how to set them up. You have two general options in Maximizer: create several smaller Address Book folders or one large Address Book folder.

With the first option, you can divide your information into more manageable groups — say, customers, suppliers, and leads. However, there are some disadvantages. It could, for example, fragment your Hotlist and Calendar window entries over several Address Books. This way, you may not realize you have a conflict between an appointment for a supplier and one for a customer. With several Address Books, it also takes more time to jump between groups.

If you use one large Address Book folder, all the information is contained in one place. However, a large Address Book folder can run more slowly, and you could mix up Address Book entries that should be kept separate.

As a compromise, you might want to create one large Address Book folder and use the Favorite List feature to display different groups of addresses. You could use user-defined fields to label, say, those that are customers and those that are suppliers. Using the Search feature, you could then display just your customers or suppliers in the Address Book window.

Once you decide on an approach, you can create your Address Book folders.

➤ To add a new Address Book folder

1. Select New Address Book Folder from the File menu.

   The New Address Book Folder dialog box appears.

2. In the Description of New Address Book Folder field, type a description.
3. In the Location of Folder field, type a folder name or click the Browse button to locate a folder.

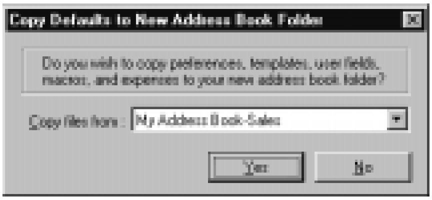
NOTE

Each new Address Book folder must be placed in a separate folder.

If you choose a folder that already contains Maximizer data, you will not overwrite the old information. Instead, Maximizer will link the new description you just typed to the existing Address Book folder. This functionality is most commonly used when you are setting up Address Book folders to access existing data files.

4. When you are finished, click OK.

The Copy Defaults to New Address Book Folder dialog box appears.



5. Click No if you want to create an Address Book folder with no drop-down table information, user-defined fields, income/expense accounts, saved searches, macros, or users, and with only two default column setups and four default document templates.

   —or—

   Select a folder from the Copy Files From field and click Yes.

   If you select a folder to copy, Maximizer transfers the following information to the new folder: drop-down tables, user-defined fields, document templates, income/expense accounts, the search catalog, macros, column setups, and users and their preferences.

   Maximizer opens the new folder. You can now add or transfer Address Book entries and Contacts.

NOTE

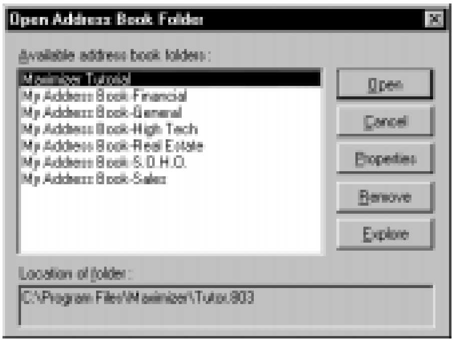
The starter data installed with Maximizer provides a wide range of default Address Book information you may find useful. If you choose not to copy information from it when you create a new Address Book folder, you can transfer the information later. For more information, see “Transferring Address Book Folder Information” on page 289.

Opening a Maximizer Address Book Folder

To open an existing Address Book folder, simply select the desired folder from the list of available Address Book folders.

➤ To open an Address Book folder

1. Select Open Address Book Folder from the File menu.



2. In the Open Address Book Folder dialog box, select an Address Book folder from the Available Address Book Folders list.

   If you are unsure of the contents of an Address Book folder, click the Explore button. This opens a file listing of all data files in the Address Book folder.

3. Click the Open button.

Creating a Start Menu Item for an Address Book Folder

You can create items in your Windows Start Menu for the Address Book folders you use frequently. This way, you just click the item to start Maximizer and immediately open that Address Book folder.

➤ To create a Start Menu item for a Maximizer Address Book folder

1. On the Windows Taskbar, click the right mouse button. Then click Properties.
2. In the Taskbar Properties dialog, select the Start Menu Programs tab.
3. On the Start Menus Programs tab, click the Add button in the Customize Start Menu group.
4. On the Create Shortcut dialog, in the Command Line, type "C:\PROGRAM FILES\MAXIMIZER\MAXWIN.EXE" /p:*Address Book folder pathname*.

For example, type
“C:\PROGRAM FILES\MAXIMIZER\MAXWIN.EXE” /P:C:\MAXDB\SUPPLIERS
for the Address Book folder C:\MAXDB\SUPPLIERS.

If you aren’t sure of the exact pathname, click the Browse button and search through the folder list. Then insert [space]/p:pathname parameter to locate the folder.

NOTE

If there are spaces in the folder path of your Address Book folder, you must enclose the Maximizer application folder path (in the first part of the Command Line) in double quotes. Do not put the path of your Address Book folder in quotes, regardless of whether it contains spaces or not. Following the previous example, if you installed Maximizer in
D:\BUSINESS PROGRAMS\MAXENT, you would type:

“D:\BUSINESS PROGRAMS\MAXENT\MAXWIN.exe” /P:C:\MAXDB\SUPPLIERS

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5. Click the Next button.
6. In the Select Program Folder dialog, click the folder where you want to place the Maximizer shortcut. To create a new folder, click the New Folder button.
7. Click the Next button.
8. In the Select a Title for the Program dialog, type a descriptive name for this Maximizer shortcut. You might want to use the same description you have in the list of available Address Book folders when you open an Address Book folder.
9. Click the Finish button, and then click OK.

   For more information about customizing the Windows Start Menu, refer to the Windows online help.

Modifying a Maximizer Address Book Folder

You can modify the name and description of an Address Book folder.

➤ To modify an Address Book folder

1. Select Open Address Book Folder from the File menu.

2. In the Open Address Book Folder dialog box, select a folder from the Available Address Book Folders field.
3. Click the Properties button.
4. In the Address Book Folder Description dialog box, modify the Address Book Folder Description and Location of Folder fields.

   If you are unsure of the path to the folder, click the Browse button to locate the folder.
5. When you are finished, click OK, and then click Close.

Removing or Deleting a Maximizer Address Book Folder

You can remove an Address Book folder from the list of available folders. This option only removes the name from the list. If you want to delete the folder itself, use the Windows Explorer.

NOTE

Back up the folder before you delete it in Explorer, in case you want to refer to it again at a later date.

If you remove a folder from the list of available folders but do not delete the folder itself, you can reconnect to it later. See "Creating a New Maximizer Address Book Folder" on page 275.

➤ To remove an Address Book folder

1. Select Open Address Book Folder from the File menu.
2. In the Open Address Book Folder dialog box, select an Address Book folder from the Available Address Book Folders list.
3. Click the Remove button.
4. Click OK to confirm the deletion.

   Maximizer deletes the Address Book folder from the list.

Backing Up a Maximizer Address Book Folder

Back up your Address Book folders on a regular basis. If a problem occurs and you have to restore the folder, you will have to re-enter all of the information since that backup. While one backup copy is often enough, many people keep two or three copies on a rotating basis. You can store Maximizer backup files on a network folder, on floppy disks, or on removable media such as Zip disks. You should always have one backup off-site — for example, if you work in an office, keep a recent backup at home.

NOTE

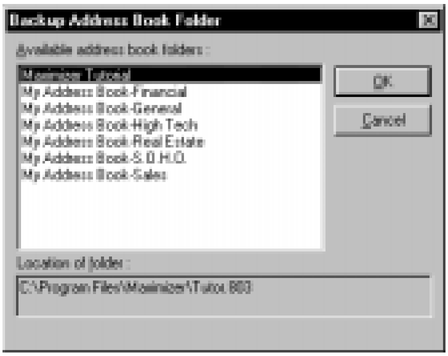
If you plan to do some radical work on your folders, such as purging old notes or deleting a large number of inactive Address Book entries, make a backup copy and set it aside. This way, if you need to restore anything you deleted, you have the backup copy to work from.

For information about the name and contents of each Maximizer data file and its corresponding backup file, see “Maximizer File Reference” in online Help.

➤ To back up a folder

1. Select Close Address Book Folder from the File menu.
2. Select Backup Address Book Folder from the Utilities menu.

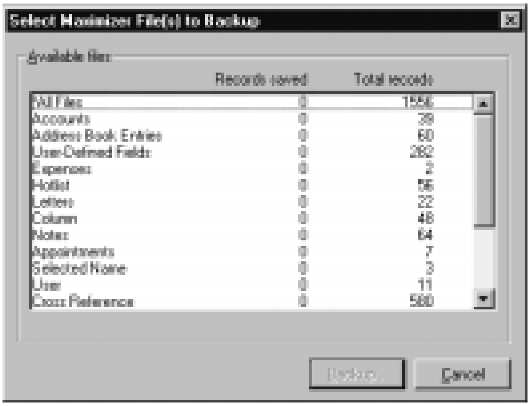
   The Backup Address Book Folder dialog box appears.



3. Select an Address Book folder from the Available Address Book Folders list.

4. Click OK.

   The Select Maximizer File(s) to Backup dialog box appears.



5. In the Available Files list:

   Select the individual files you want to back up.

   —or—

   Select *All Files.

6. Click the Backup button.

   The Drive and Folder dialog box appears.

7. Click OK to back up the folder to drive A:\.

   —or—

   Type an alternate drive folder and click OK.

   —or—

   If you are unsure of the path to the backup folder, you can search for the folder. Click the Browse button to find the folder.

8. In the Maximizer warning dialog box, click OK to confirm the backup.

9. Insert a formatted disk in the appropriate drive and click OK in the Maximizer dialog box.

   Maximizer backs up the selected folder. If the folder is large, a Maximizer message asks for the next disk.

10. When the backup is complete, click the Close button to close the Select Maximizer File(s) to Backup dialog box.

11. Click the Close button again to close the Backup Address Book Folder dialog box.

NOTE

Be sure to label each backup disk with the date and disk number. Store the disks in a safe place, away from direct sunlight, magnetic fields, and dust, and preferably in another building.

For information about the name and contents of each Maximizer data file and its corresponding backup filename, refer to the topic 'Maximizer File Reference' in the online help.

Repairing a Corrupted File

On rare occasions, your Maximizer data files may get corrupted through unusual circumstances or computer problems; for example, a folder may be stored in an area of your hard disk that gets damaged. If this occurs, use the following procedure.

NOTE

You should back up your data regularly even if you are not having problems. For more information, see "Backing Up a Maximizer Address Book Folder" on page 281.

If you receive an error message about a corrupted file, stop what you are doing and note it down immediately. See "Maximizer Address Book Folder Error Messages" in online Help.

In most cases, you can fix a file by closing the Address Book folder, backing up the corrupted file, and then restoring it again. For faster results, it's better to use a folder on your hard disk than a diskette for this purpose.

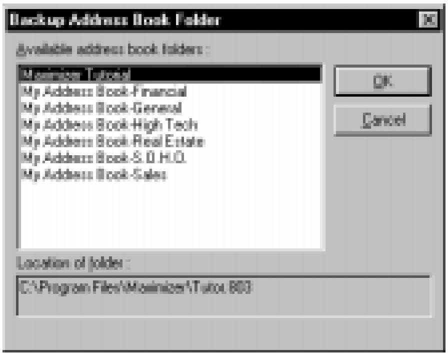
NOTE

If these procedures do not solve the problem, call Maximizer Technical Support for assistance.

➤ To restore a corrupted data file

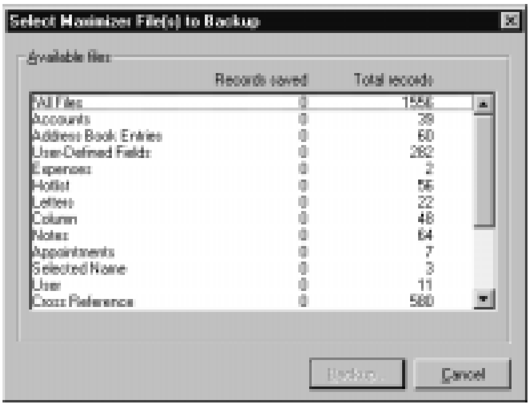
1. Select Close Address Book Folder from the File menu.

2. Select Backup Address Book Folder from the Utilities menu.



3. In the Backup Address Book Folder dialog box, select the Address Book folder that contains the file(s) needing repair from the Available Address Book Folders field.
4. Click OK.

   The Select Maximizer File(s) to Backup dialog box appears.



5. In the Available Files field, select the corrupted file to back up. The affected file is mentioned in the error message.
6. Click the Backup button.
7. In the Drive and Folder dialog box, type a folder name on your hard disk and click OK.
8. In the Maximizer warning dialog box, click OK to confirm the backup.

9. When the backup is completed, click the Close button twice to close the backup dialog boxes.
10. Select Restore Address Book Folder from the Utilities menu.
11. In the Restore Address Book Folder dialog box, select the same Address Book folder from the Available Address Book Folders list.
12. Click OK.

    The Select Maximizer File(s) to Restore dialog box appears.
13. In the Available Files list, select the backup file you want to restore.
14. Click the Restore button.
15. In the Drive and Folder dialog box, type the backup folder name and click OK.
16. In the Maximizer warning message box, click OK to confirm the restore.
17. When the restore is complete, click the Close button twice to close the restore dialog boxes.
18. Open the affected Address Book folder to determine if the problem has been fixed. If not, contact Maximizer Technical Support.

Restoring a Maximizer Address Book Folder

If you have lost your Address Book folder or you have a damaged Address Book folder, you can restore it to an earlier version that you previously backed up. You can restore an entire Address Book folder at once or only selected files.

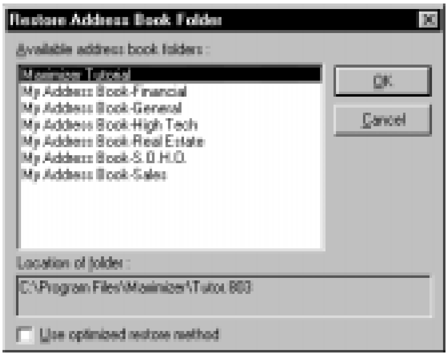
NOTE

This command replaces your existing data with the backup data.

➤ To restore an Address Book folder

1. Select Close Address Book Folder from the File menu.
2. Select Restore Address Book Folder from the Utilities menu.

The Restore Address Book Folder dialog box appears.



3. Select the required folder from the Available Address Book Folders list.

   If you run into memory problems restoring with the Use Optimized Restore Method turned on, de-select the option.

4. Click OK.

   The Select Maximizer File(s) to Restore dialog box appears.

5. In the Available Files list:

   Select the individual files you want to restore.

   —or—

   Select All Files.

6. Click the Restore button.

   The Drive and Folder dialog box appears.

7. Click OK to restore the folder from drive A:\.

   —or—

   Type an alternate drive folder and click OK.

   —or—

   If you are unsure of the path to the folder, you can search for it. Click the Browse button to find the folder.
8. In the Maximizer warning dialog box, click OK to confirm the restore.
9. Insert the backup disk in the appropriate drive and click OK. Ensure that you have all necessary backup disks before proceeding.

NOTE

This command replaces your existing data with the backup data.

10. When the restore is complete, click the Close button to close the Select Maximizer File(s) to Restore dialog box.
11. Click the Close button again to close the Restore Address Book Folder dialog box.

Exchanging Address Book Folder Data

You can copy data from one Maximizer Address Book folder to another. Transfer is ideal for merging Address Books together and sharing entries and setups. If you are on a network, you need to have full user rights to exchange Address Book folder data. Check with the MASTER user.

What Happens During a Transfer

Once you start a transfer, data is exchanged in one of several ways. Note that each Address Book entry has a unique ID. If an Address Book ID number from the source Address Book folder does not exist in the target Address Book folder, the Address Book entry is inserted into the target Address Book folder. If the Address Book entry ID number from the source exists at the target, Maximizer compares the source and target address entry names. If a match is found between Address Book entries, the entry in the target Address Book folder is updated. If the names are different, the program changes the ID number in the target Address Book folder and inserts the entry as a new Address Book entry.

Maximizer also checks the date and time of the record. For example, if a record has been modified in the Source Address Book folder and then the same modification is done later in the Target Address Book folder, Maximizer will not change the record in the Target Address Book during a transfer.

If the address ID and names are the same, they are considered to be duplicate entries. In this case, Maximizer merges duplicate address entries in the target Address Book folder.

Summary Reports and Logging

Each time you transfer Address Book entries, Maximizer displays a transfer summary report. The report indicates the number of data items inserted, modified, bypassed, and deleted. It also displays the transfer setting used and other related information. You can print this report for your records.

As well, for each Address Book entry updated in the target Address Book folder, Maximizer can, optionally, add a note. The note summarizes the fields that have been added, changed, and deleted. This feature can also be used if you want to find the data that has been added or modified. After a transfer, simply do a search by notes (in the Search dialog box, select Transfer Log).

Company, Individual and Contact Entries

By default, when you transfer Address Book entries, this includes user-defined fields, notes, documents, appointments, and tasks. You can optionally specify not to transfer some or all of these subordinate entries.

If you don't want to transfer all your address entries, you can build a smaller list by selecting only the relevant entries in the Address Book window.

Transferring Address Book Folder Information

You can transfer information between Maximizer Address Book folders and even send it to other Maximizer users via E-mail.

NOTE

You cannot transfer favorite lists or saved search specifications.

Transferring Address Book Entries

By default, when you transfer Address Book entries, all the associated Contacts, user-defined fields, notes, documents, appointments, and hotlist tasks are included. If you don't want to transfer all of your Address Book entries, you can build a smaller list by selecting only the relevant entries in the Address Book window. You can transfer entries to another Address Book folder on the network or workstation or mail the entries to another Maximizer user via your E-mail system.

➤ To transfer Address Book entries

1. In the Address Book window, select the Companies and Individuals you want to transfer.
2. Click the Transfer Data button on the Standard toolbar and select Address Book Entries.

   —or—

   Select Transfer > Address Book Entries from the File menu.

The Transfer dialog box appears.

3. To transfer entries to another workstation or another Address Book folder on the same computer:

   - Select Direct Address Book Folder Access.
   - Select a folder from the Available Target Address Book Folders list.

   To send the entries via E-mail to another Maximizer user:

   - Select E-mail.

4. Click OK.

   If security is enabled, enter your User ID and password in the Login to Target Address Book Folder dialog box.

The Transfer Address Book entries dialog box appears.

5. De-select any items in the Transfer Options group box as appropriate.
6. Fill in the Message to Log to Notes text box if you want. This note will appear in an associated note for each entry you transfer. There are separate options for logging notes for source and target Address Book folders.

   De-select the Log Transfer Results to Notes checkbox if you don’t want to log notes about the transfer.
7. Click the Advanced button to add more advanced transfer options.
   - In the Advanced Transfer Options dialog box, select Overwrite Duplicates to replace any duplicate entries. The Use Record Modify flag transfers only those Address Book entries that have been updated since the last transfer. The Reset Record Modify Flag resets the Record Modify Flag back to null (not modified) for each transferred record.
   - Click OK.
8. When you are finished, click OK.

   When the transfer is completed, Maximizer displays a Transfer Summary dialog box. The transfer summary provides statistics about the transfer, such as elapsed time and number of records inserted.
   - Click the Print button to print the summary.
   - In the Print Report dialog box, click OK.

     —or—
   - Click the Close button to close the Transfer Summary dialog box.

—or—

If you selected E-mail, Maximizer prepares the transfer file as an attachment to an E-mail message and displays the Compose Mail Message dialog box.

- Address the message and then click Send.

Transferring Column Setups

You can transfer column setups which you use to display the fields in your Address Book or Contacts window to another Address Book folder. You can also send them via E-mail.

➤ To transfer column setups

1. Click the Transfer Data button on the Standard toolbar and select Column Setup.

   —or—

   Select Transfer > Column Setup from the File menu.
2. In the Transfer Column Setups dialog box, select the column setup you want to transfer. If you want to transfer more than one, select multiple setups.
3. Click the Transfer button.
4. To transfer entries to another Address Book folder directly:
   - Select Direct Address Book Folder Access.
   - Select a Address Book folder from the Available Target Address Book Folders list.

   To send the entries via E-mail to another Maximizer user:
   - Select E-mail.
5. Click OK.
6. In the Maximizer message box, click OK, and then click Close.

   —or—

If you selected E-mail, Maximizer prepares the transfer file as an attachment to an E-mail message and displays the Compose Mail Message dialog box.

- Address the message and then click Send.

Transferring Document Templates

You can transfer the Maximizer default templates or any document template that you have set up for an Address Book folder. You can also send templates via E-mail.

➤ To transfer document templates

1. Click the Transfer Data button on the Standard toolbar and select Document Templates.

   —or—

   Select Transfer > Document Templates from the File menu.

2. In the Transfer Document Templates dialog box, select the templates you want to transfer.
3. Click the Transfer button.
4. To transfer entries to another Address Book folder directly:
   - Select Direct Address Book Folder Access.
   - Select an Address Book folder from the Available Target Address Book Folders list.

   To send the entries via E-mail to another Maximizer user:

   - Select E-mail.
5. Click OK.
6. In the Maximizer message box, click OK, and then click Close.

   If you selected E-mail, Maximizer prepares the transfer file as an attachment to an E-mail message and displays the Compose E-mail Message dialog box.

7. Address the message and then click Send.

Transferring Drop-Down Tables

Drop-down tables contain the field text you use in drop-down lists, such as cities, countries, or phone call results. These tables can be transferred between your folders so you only need to set them up once. You can also send these tables via E-mail.

➤ To transfer drop-down tables

1. Click the Transfer Data button on the Standard toolbar and select Drop-Down Tables.

   —or—

   Select Transfer > Drop-Down Tables from the File menu.
2. In the Transfer Drop-Down Tables dialog box, select the tables you want to transfer.
3. Click the Transfer button.
4. To transfer entries to another Address Book folder directly:
   - Select Direct Address Book Folder.
   - Select an Address Book folder from the Available Target Address Book Folders list.

   To send the entries via E-mail to another Maximizer user:
   - Select E-mail.
5. Click OK.
6. In the Maximizer dialog box, click OK, and then click Close.

   —or—

   If you selected E-mail, Maximizer prepares the transfer file as an attachment to an E-mail message and displays the Compose Mail Message dialog box.
   - Address the message and then click Send.

Transferring Macros

If you set up macros in an Address Book folder, you can easily transfer them to another folder or send them to another Maximizer user via E-mail. This way, you don't need to re-create the macro each time.

➤ To transfer macros

1. Click the Transfer Data button on the Standard toolbar and select Macros.

   —or—

   Select Transfer > Macros from the File menu.
2. In the Transfer Macros dialog box, select the macros you want to transfer.
3. Click the Transfer button.
4. To transfer entries to another Address Book folder directly:
   - Select Direct Address Book Folder Access.
   - Select a folder from the Available Target Address Book Folders list.

   To send the entries via E-mail to another Maximizer user:
   - Select E-mail.
5. Click OK.
6. In the Maximizer dialog box, click OK, and then click Close.

   —or—

   If you selected E-mail, Maximizer prepares the transfer file as an attachment to an E-mail message and displays the Compose Mail Message dialog box.
   - Address the message and then click Send.

Transferring User-Defined Fields

User-defined fields attached to Address Book entries are automatically transferred to the target folder when you transfer Address Book entries. You can, however, transfer all or a portion of these fields without including the Address Book entries. You can also send them via E-mail.

➤ To transfer user-defined fields without the Address Book entries

1. Click the Transfer Data button on the Standard toolbar and select User-Defined Fields.

   —or—

   Select Transfer > User-Defined Fields from the File menu.
2. In the Transfer User-Defined Fields dialog box, select the fields you want to transfer.
3. Click the Transfer button.
4. To transfer entries to another Address Book folder directly:
   - Select Direct Address Book Folder Access.
   - Select an Address Book folder from the Available Target Address Book Folders list.

   To send the entries via E-mail to another Maximizer user:
   - Select E-mail.
5. Click OK.
6. In the Maximizer message box, click OK, and then click Close.

   —or—

   If you selected E-mail, Maximizer prepares the transfer file as an attachment to an E-mail message and displays the Compose Mail Message dialog box.
   - Address the message and then click Send.

Sending a Maximizer Transfer by E-mail

You can also use E-mail to transfer data files.

When you select the transfer E-mail option, Maximizer saves the selected Maximizer data file(s) to a temporary folder and then compresses the files into a single file. The compressed file is then attached to a mail message, which you can send to another user.

When you receive a message with an attached transfer file, double-clicking the icon places the file in a temporary Address Book folder where it is decompressed and available for you to transfer into your own folder.

NOTE

If you receive more than one compressed file attachment, make sure you transfer the first set of data files out before double-clicking on the next attachment. Maximizer overwrites the files in the temporary Address Book folder TMP_MDE.ARC folder each time.

➤ To transfer Maximizer data via E-mail

1. In a window, select the entries you want to transfer.
2. Select Transfer from the File menu or click the Transfer Data button on the Standard toolbar.
3. Select an item from the Transfer sub-menu.

   The Transfer dialog box appears.
4. Select E-mail in the Transfer Method group box and click OK.

   If security is enabled, enter your User ID and password in the Maximizer dialog box.
5. De-select any items in the Transfer Options group box as appropriate.
6. When you are finished, click OK.

   When the transfer is completed, Maximizer displays a Transfer Summary dialog box.
7. Click the Print button to print the summary, or click the Close button to close the dialog box.

   The Maximizer dialog box appears, telling you it is compressing the transfer files. If you want to abort, click Cancel.

   If the Select a Profile dialog box appears, select your profile and click OK.

   If the Choose an E-mail Messaging System appears, select MAPI or VIM and click OK, and then log in to your E-mail system as you usually do.

   The Compose E-mail Message dialog box appears. It contains a message that consists of a file attachment (containing a compressed file called MAXARC.MDE) and a brief note.

8. Complete and address the message.
9. Click Send to send the E-mail message.

   The Maximizer Address Book information is sent to the selected recipients.

Exchanging Data with Other Applications

You can exchange data between Maximizer and other software applications using the program's sophisticated import and export features. This way, you don't need to retype data each time you use a different database product.

File Formats

In addition to supporting importing and exporting data in dBASE III, dBASE III+, and dBASE IV formats, Maximizer supports two types of text file formats: comma-delimited and tab-delimited.

Comma-delimited is the most popular type of format. It is widely supported and practical for exporting note text. When importing, Maximizer also automatically supports comma-separated value (CSV) files. (CSV is a type of comma-delimited text.)

Tab-delimited is an older format, which is not as commonly used. The following table illustrates these two file formats:

Type	**Format**	**Empty Field Format**
Comma-delimited	"field1", "field2"	"",
Tab-delimited	field1Tabfield2	TabTab

Importing into an Address Book Folder

When you import an Address Book folder, you bring information from another program into Maximizer. The simplest way is to import the data with all the records tagged as Individuals. This, however, groups all your addresses together on the same level.

Maximizer also gives you two other options: you can import a two-tiered data file with Companies and Contacts, or with Individuals and Contacts. With these options, Companies/Individuals and Contacts are separated on two different levels.

Before you begin to import your files, you should consider a couple of issues. First, you should check your import file and note any user-defined fields it contains. To import these fields into Maximizer, you may need to set up some new user-defined fields that match those in the import file. Secondly, if you want to import data into an existing Address Book folder, you should first back it up. This way you still have a copy of the original Address Book folder if the import process is interrupted or if problems occur.

Exporting Address Book Entries

When you export Address Book entries, you can send the resulting file out to another application. You can export all or part of your Maximizer Address Book folders. Be sure to order the data exactly as you want it to appear in the export file.

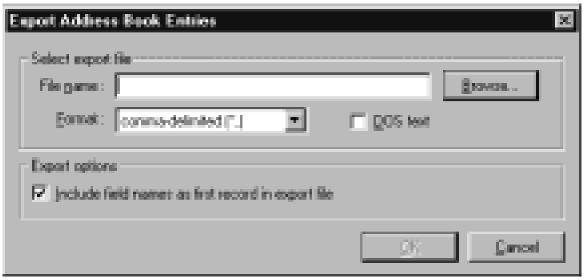
NOTE

Only Company, Individual and Contact information, user-defined fields, and notes can be exported.

➤ To export Maximizer Address Book entries

1. In the Address Book or Contacts window, build a list of entries sorted in the order in which you want it exported.
2. Select Export Address Book Entries from the File menu.

The Export Address Book Entries dialog box appears.



3. In the Select Export File group box, indicate the export filename and path.

   —or—

   If you are unsure of the path to the file, you can search for the folder. Click the Browse button to find the folder.

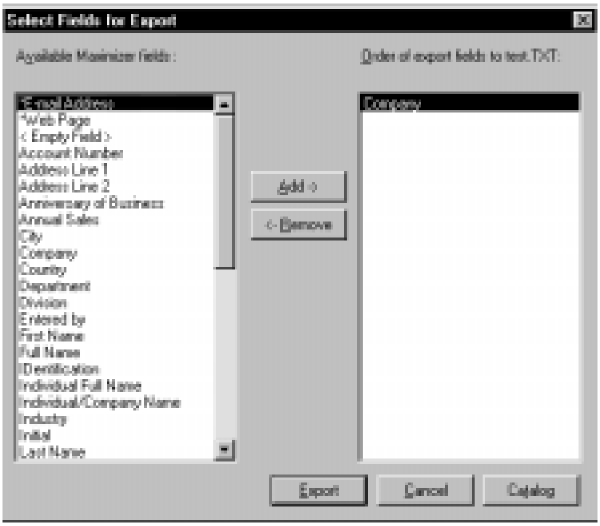
4. In the File Format field, select the appropriate item.

   If you select the CSV format, you must strip any commas in Address Book fields or notes before you export. You can easily find all the entries that require modification by doing a wildcard search in each field. Search for *,*. Select DOS Text only if you want to export text as DOS-standard ASCII instead of ANSI-standard (Windows) ASCII.

5. De-select the Include Field Names as First Record in Export File checkbox if you do not want the first record in the export file to contain all the field names.

6. Click OK.

The Select Fields for Export dialog box appears.



7. In the Available Maximizer Fields box, select an item.
8. Click the Add button to place the item in the Order of Export Fields box.
9. Select <Empty Field> to export a blank field.
10. Repeat steps 7-9 until you have all the fields you need in your export file.
11. When you are finished, click the Export button.

    Maximizer exports the Address Book entries to the selected file.

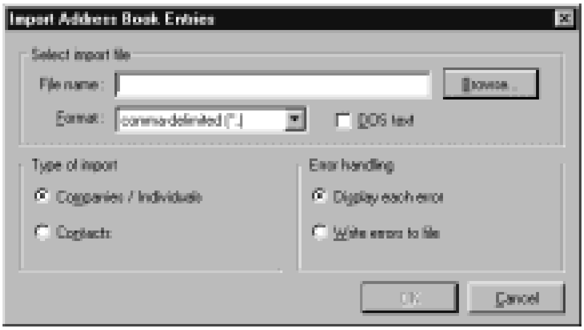
Importing Address Book Entries

If you prefer to treat all your Address Book entries as Individuals or Companies with no associated Contacts, use the following import option. While this option is simple, it gives you limited flexibility. All records are grouped at the same level, so you can't connect Company information and Contact information.

➤ To import Companies and Individuals only

1. Select Import Address Book Entries from the File menu.

   The Import Address Book Entries dialog box appears.

2. Indicate the import filename and path in the Select Import File group box.

   —or—

   If you are unsure of the path to the file, you can search for the folder. Click the Browse button to find the folder and file.

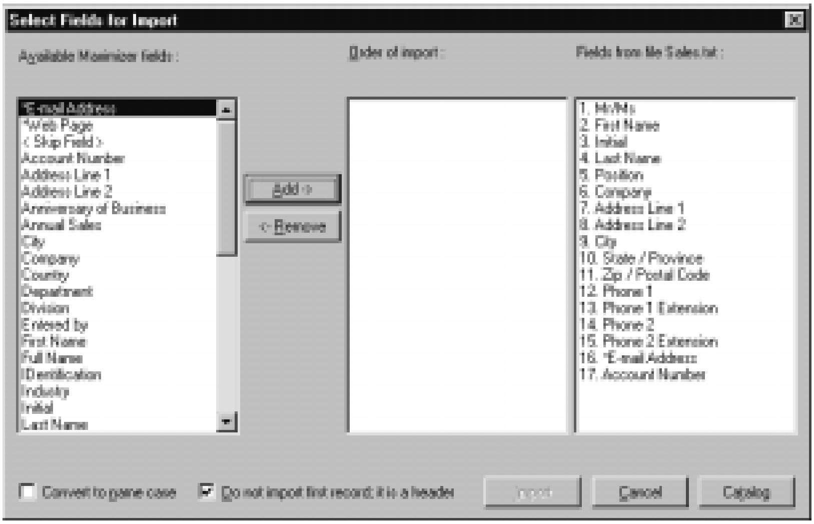
3. Select the correct format for the import file in the Format field. Click the DOS Text checkbox to import text using the ASCII character set instead of the Windows ANSI character set.

4. Select an item in the Error Handling group box.

   If you select Write Errors to File, Maximizer saves the errors as a text file in the same folder as the file you import.

5. Click OK.

The Select Fields for Import dialog box appears.



6. In the Available Maximizer Fields box, select an item and click the Add button.

   —or—

   Double-click the item.

   The item appears in the Order of Import list box.

7. Select <Skip Field> to skip any fields in the import file.

8. Repeat steps 6-7 until you have associated a Maximizer field with each field in the import file.

   If you want to insert a new field between two fields in the Order of Import list box, use the Up Arrow to move to the selected line. Then add the field.

9. Select Convert to Name Case if you want to convert any text that is in capital letters (uppercase) to mixed case.

10. Select Do Not Import First Record; it is a Header to skip the first record in the import file if it contains any fields. You may want to do this if the first record contains field names instead of data you want to import.

11. When you are finished, click the Import button.

    Maximizer imports the Address Book folder information.

If you selected Display Each Error in the Error Handling group box, Maximizer displays any invalid fields. Complete the following sub-steps:

- In the Missing or Invalid Field dialog box, enter a correction in the text field and click the Continue button.

  —or—

- Click the Skip button if you don't want to import the record.

  —or—

- Click the Abort button to cancel the rest of the import.
- Repeat this procedure for each error display.

12. When the import is complete, if you want to display the imported Address Book list immediately, click OK in the Maximizer dialog box. If you click Cancel, the list, named by time and date of import, is available by selecting Favorite Lists from the View menu.

Importing Company Entries and Contacts

You can import overall information on your Companies or Individuals at one level, and personal information on your Contacts at another. You can use this option even if your other software application limits you to one level of data entries. Maximizer can set up each company as a Company entry and then link all the associated Contacts under that Company.

To use this option, you make two passes through the import file. One pass brings in each Company entry, and the next brings in the associated Contacts.

➤ To import Companies and Contacts

1. Select Import Address Book Entries from the File menu.
2. In the Import Address Book Entries dialog box, fill in the Select Import File group box.
3. Select the appropriate item in the Format field. Click the DOS Text checkbox to import text using the ASCII character set instead of the Windows ANSI character set.
4. Select an item in the Error Handling group box.

If you select Write Errors to File, Maximizer saves the errors as a text file in the same folder as the file you import.

5. Click OK.

   The Select Fields for Import dialog box appears.

6. In the Available Maximizer Fields box, select an item and click the Add button.

   —or—

   Double-click the item.

   The item appears in the Order of Import list box.

7. Select <Skip Field> to skip any fields in the import file. You should skip any Contact fields such as Last Name.

8. Repeat steps 6-7 until you have associated a Maximizer field with each field in the import file.

   If you want to insert a new field between two fields in the Order of Import list box, use the Up Arrow to move to the selected line. Then add the field.

9. Select Convert to Name Case if you want to convert any text that is in capital letters (uppercase) to mixed case.

10. Select Do Not Import First Record; It Is a Header to omit the first record in the import file if it contains only a list of field names.

11. When you are finished, click the Import button.

    Maximizer imports the Companies. Click OK, then click Cancel when you are asked if you want to view the list immediately.

12. Select Import again from the File menu.

13. In the Import File dialog box, fill in the Select Import File and Error Handling group boxes.

14. Select an item in the Format field.

15. Select Contacts in the Type of Import group box.

16. Click OK.

17. In the Select Fields for Import dialog box, select and add only the fields that apply to your Contacts. Use <Skip Field> for those you don't want to include.

NOTE

To link the Contacts to the appropriate Company, you must select the Company or IDentification field in the import file.

18. When you are finished, click the Import button.

    Maximizer imports the Contacts.

Importing ACT! Data into Maximizer

You can import your ACT! contact management data directly into Maximizer in a few simple steps. Once you've imported the information into Maximizer, it is categorized into three main types: Companies, Individuals and Contacts. These are stored in an Address Book folder.

WARNING

Before you begin the import process, back up your existing target Maximizer Address Book folder, if you have one. This ensures that if for some reason you ever need this information, or if anything interferes with the import process, you can restore your original Address Book Folder and start again.

When you are importing data from ACT!, an application called MaxPort is launched. It is a tool used to import ACT! contact management data and it automatically recognizes and maps all fields in Maximizer. User-defined fields are also automatically created and mapped.

➤ To import ACT! data into Maximizer

1. In Maximizer, select Import > ACT! Database from the File menu. MaxPort is launched and the Import Databases dialog appears. The file format of an ACT! database (.blb) is automatically selected for you.

2. Locate the file you are importing. If the file is a network file, click the network button or use the Drives field drop-down list to access your folder.

3. In the Import Options group box, select the Log Errors to File option if you want to log all errors that occur during the import process to a text file. All other options in the Import Options group box are handled automatically by MaxPort.

   The Date Format and Delimiter buttons apply only to character delimited ASCII (.txt) files.

4. Specify how you want duplicate records handled. Your options include: Do Not Check for Duplicates or Combine Companies with Same Name. When you're finished specifying the duplicate records options, click OK. If duplicate records are found in your data, the option you select here determines whether duplicate records are combined or not. They will be added to your Address Book folder. The Select Target Address Book Folder dialog box appears.

   Maximizer requires that each Address Book entry be assigned a unique Address Book Entry ID. If the import record contains an Address Book Entry ID that is the same as an existing Maximizer Company, Individual, or Contact, the Address Book Entry ID of the imported entry is automatically changed when that entry is added to Maximizer and this action is recorded in the import error message file.

5. From the list of available databases, select the Maximizer Address Book folder that is to receive the imported ACT! data. To create a new Maximizer Address Book folder to receive the imported data, click the New button.

6. The import process starts immediately. During the import process a status indicator will appear on your screen. Click on Cancel if you want to halt the import process.

7. Once MaxPort imports the data from the import file into Maximizer, the Conversion Completed or Import Completed message box appears displaying the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings. Click OK to close the message box.

8. The Error Log appears next displaying the location of the import error message file. If you want to view this file, you may want to make a note of

where it is located. Click OK on the Error Log message box. Unless MaxPort reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

NOTE

For more information on importing contact management data, please refer to the MaxPort online help. You can access it directly from the MaxPort 5.0 Help menu or by pressing F1 once the main MaxPort application window appears.

Importing Other Contact Management Databases into Maximizer

You can import your contact management data directly into Maximizer from other applications such as ACT!, GoldMine, Lotus Organizer, Clipper, dBase, FoxPro, FoxBase or from any character delimited ASCII file. Once you have imported the information into Maximizer, it is categorized into three main types: Companies, Individuals and Contacts and stored in an Address Book folder.

WARNING

Before you begin the import process, back up your existing target Maximizer Address Book folder, if you have one. This ensures that if for some reason you ever need this information, or if anything interferes with the import process, you can restore your original Address Book Folder and start again.

The type of database file format you identify in the import procedure determines what import features are available in MaxPort. If you are importing data from ACT!, GoldMine or Lotus Organizer, MaxPort automatically recognizes and maps all fields in Maximizer. User-defined fields are also automatically created and mapped. With other applications such as dBase, FoxPro and Clipper, or a similar type of program, you have to map the fields manually. Note, this is not a time consuming process, you simply have to select the fields you want to have included in your Maximizer Address Book folder.

➤ To import any other contact management database

1. In Maximizer, select Import > Other Contact Manager Database from the File menu. MaxPort is launched and the Import Databases dialog appears.

2. Select the file format of the database you are importing from the List Files of Type drop-down list.

3. Locate the file you are importing. If the file is a network file, click the Network button or use the Drives field drop-down list to access your network drive.

4. In the Import Options box, select the options you want to include – Skip First Record, Log Errors to File, Make Salutation and Receive Mail. Depending on what type of database you are importing, some of these options may not be available.

   If you are importing a character delimited ASCII (.txt) file, you must specify a Date Format. To do so, click the Date Format button. Once you've selected the format on the Date Format dialog box, click OK. You must also identify the character used as the field delimiter in the import file. Click on the Delimiter button and select the delimiter type: comma, tab or semicolon in the Delimiter dialog box. If the character used as a delimiter in the import file is not listed, select Custom and type the character in the field. Click OK to close the Delimiter dialog.

5. Specify how you want duplicate records handled. Your options include: Do Not Check for Duplicates, Combine Companies with Same Name or Reject Duplicate Records. When you're finished specifying the import options, click OK on the Import Databases dialog box. The Select Target Address Book Folder dialog box appears.

   Maximizer requires that each Address Book entry be assigned a unique Address Book ID. If the import record contains an Address Book ID that is the same as an existing Maximizer Company, Individual, or Contact, the Address Book ID of the imported entry is automatically changed when that entry is added to the Maximizer Address Book folder and this action is recorded in the import error message file.

6. From the list of available databases, select the Maximizer Address Book folder that is to receive the imported data. To create a new Maximizer Address Book folder to receive the imported data, click the New button.

7. If the import file is a type for which MaxPort automatically maps the fields, the import process starts immediately. During the import process, a status indicator appears. Click Cancel to halt the import process.

8. If the import file is a type that MaxPort requires you to specify how fields in the import file are to be mapped in Maximizer, the Select Fields for

Import dialog appears. For instructions on how to map fields, see the following section, "Mapping Fields".

9. Once MaxPort imports the data from the import file into Maximizer, the Conversion Completed or Import Completed message box appears displaying the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings. Click OK to close the message box.
10. The Error Log appears next displaying the location of the import error message file. If you want to view this file, you may want to note where it is located. Click OK on the Error Log message box. Unless MaxPort reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

Mapping Fields in MaxPort

If the import file is a type for which you are required to specify how fields in your existing database are mapped to Maximizer, the Select Fields for Import dialog appears. This is where you perform your field mapping. A list of all the fields that are available in Maximizer, for Contacts, are shown in the upper left portion of the window. Directly below that is a list of all fields available for Companies and Individuals. The list on the right side of the dialog box is a display of all fields contained in the database you are importing.

You can also create templates for mapping fields in MaxPort. See "Mapping Fields in MaxPort Using a Template" on page 311 for more information.

➤ **To map fields from your import file to Maximizer**

1. Select a Maximizer field you want to associate with the first import field shown in the Import file list, then click Add. This moves the field to the Order of Import list.
2. Repeat this step for each field you want to include in the import. If there is a field in the Import file list you don't want to include, select 'Skip Field' and add it to your list.
3. Once you've added all the fields you want to include in your Maximizer database, click Import.

4. MaxPort displays a status dialog box during the import process. Click Cancel to stop the import prematurely.

Once MaxPort imports the data from the import file into the Maximizer, the Conversion Completed or Import Completed dialogue box appears displaying the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings. Click OK to close the message box.

The Error Log dialogue appears next displaying the location of the import error message file. If you want to view this file, you may want to make a note of where it is located. Click OK. Unless MaxPort reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

Mapping Fields in MaxPort Using a Template

If you want to create a template definition, just set up the import structure by selecting the database type and fields you want to include in the template, then click Save. By default, templates are saved to the same directory you specified for your Maximizer database. You can save them to a different directory if you want.

➤ **To map fields using a template**

1. If you have set up a template for a specific database format and field sequence, click the Open button in the Template section of the Select Fields for Import dialog box. A file browse dialog box appears.
2. Locate the template file using the browse dialog. Note that templates have a file extension of .itp.

INDEX

B

C

I

J

L

M

N

O

S

T