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USING THIS GUIDE

What is in This Guide

This guide describes how to install and use Maximizer Personal. It provides detailed information about the program and its features. It also describes how to use each feature step by step.

Related Documentation

The *Maximizer Personal User's Guide* is part of a comprehensive set of documentation included with your software. This documentation also includes indexed and context-sensitive *Online Help*. (To find out how to use Help, see “Using Online Help” on page 26.)



SECTION 1

Installing and Getting Started

INTRODUCTION

Maximizer Personal is an easy-to-use program designed to help you ‘manage’ your clients and customers. You can use it to make phone calls or send faxes, schedule appointments, write letters, and do all kinds of other administrative tasks.

How does it work? The Maximizer Personal program consists of three basic components: a database, a multi-window workspace, and a group of non-database utilities. Together, they allow you to fully track and manage your business activities.

The database is where you store all the information about your business customers. Once you have a database, you can use the information in all kinds of ways, as you’ll discover when you read through this guide.

Maximizer Personal provides several windows that you can use to work on different parts of the database. A multi-window environment relates quite nicely to managing your Clients in real life: you use one window to find a Client name and address, schedule a meeting using another window, and use a third window to add a note.

The table below describes Maximizer Personal's four windows.

Maximizer Personal Window	Definition
Clients	A list of Client names, addresses, and phone numbers.
Notes	A log of business notes and completed activities, such as phone calls made, and appointment followup.
Hotlist	A to-do list of tasks and activities.
Calendar	An electronic calendar for scheduling meetings or phone calls.

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

As well as the multi-window feature, Maximizer Personal provides a group of non-database utilities to further manage your business activities. These include a phone feature for calling your Clients, a print utility for printing everything from mailing labels to reports, and a powerful search feature to help you quickly find information in your database.

And that's basically all you need to know. The main task is to get used to how the database, windows, and other utilities work together so you can take full advantage of Maximizer Personal's power and flexibility.

Looking Ahead...

As you work with Maximizer Personal, you'll be saying "If only Maximizer Personal could..." If this is the case, upgrade to Maximizer 3.0is!

Maximizer Personal contains only a small subset of the features and functions in Maximizer 3.0is. Why upgrade to Maximizer 3.0is? Just turn the page and look at what you'll get.

When you upgrade to Maximizer 3.0is, you acquire a wealth of additional functionality. Here are just a few of the features you'll find in Maximizer 3.0is.

- **Multiple databases** — keep an unlimited number of Maximizer databases on your computer or on your LAN. You can even set up different databases for different purposes; for example, you can set up separate databases for clients, friends, suppliers, prospects, and employees.
- **Multiple users** — as the owner of the database, you can grant an unlimited number of users access to your Maximizer databases. You assign each user a different login name and password, as well as their access rights. Let your organization share the wealth of contact information contained in your Maximizer databases.
- **Multilevel contact tracking** — you can associate an unlimited number of contacts per company. If you know an individual works at ABC Corporation but can't remember their name, find the company in Maximizer to see its list of contacts.
- **Unlimited User-Defined Fields (UDFs)** — you know how useful the 10 UDFs are for sorting and searching in Maximizer Personal. With Maximizer 3.0is you can create as many as you need. All UDFs are full searchable to quickly target your attention on important contacts you previously designated by the UDF.
- **Maximizer Editor** — use our full-functioned word processor to create letters and documents to send to your contacts. Use one of the available templates or create one yourself. As you compose the text, you can merge information about the contact into the document, check your spelling and use the thesaurus to find a better word.
- **E-mail and fax** — store your contacts' E-mail addresses and fax phone numbers in Maximizer and automatically E-mail or fax your messages from Maximizer to your clients. You can even send files containing documents or data as attachments to your message. For E-mail, you can route messages using either your LAN E-mail system or the Internet.
- **OLE** — dynamically link documents from any Windows application to your contacts. Imagine how convenient it would be to have all client data at hand when they call, be they spreadsheets, documents, graphics, or video clips.

- Personal Journal — record confidential notes. Each note is date and time stamped and can only be read by you.
- Expense Tracker — maintain and track your income and expenses. Income and Expenses can be kept private or shared with other users.

As a user of Maximizer Personal, you can upgrade to Maximizer 3.0*is* by paying the upgrade price at:

- Your local CompUSA, Computer City, Egghead or other computer store
- Maximizer Technologies. To order your upgrade, call our toll-free line at 1-800-804-MAXX (1-800-804-6299)

How This Guide is Organized

This User's Guide has been divided into a number of sections which provide information about different parts of the program.

Section 1: Installing and Getting Started

This section describes to install Maximizer Personal and familiarizes you to Maximizer Personal features and functions.

Section 2: Using Maximizer Personal Windows

This section describes the four Maximizer Personal windows and how to use them.

Section 3: Performing Maximizer Personal Activities

In this section, you'll find information about the non-database features you can use with the windows. These include creating letters, printing and searching.

Section 4: Tailoring the Workspace

This section shows you how to modify the Maximizer Personal workspace to suit your own tastes and interests. You can do things like tile several open windows, move the toolbar, change colors or fonts in a window, and create a different setup for the columns in a window.

Section 5: Maintaining Your Database

This section describes how to protect your database from being used by others. In addition, it describes how to adjust the Maximizer Personal setup if it is necessary. It also includes such topics as opening a database, backup and recovery, as well as importing and exporting data.

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

Suggested "Routes" Through the Guide

If you are a new user, you should read the first three sections of the guide. This will give you all the basic information you need to install and use Maximizer Personal to manage your Clients.

You should also read chapter 14 "Changing Window Displays" on page 137. The "Tiling" part of the chapter describes how to arrange your windows if you have several open at the same time.

If you don't want to read all the chapters in these sections, a few suggested shortcuts are given below. The listed tasks and activities will give you some familiarity with the program.

To Learn How To	Read These Chapters
Install Maximizer Personal	Installation and Setup
Create a database of Clients	Clients Window
Phone a Client	Clients Window, Making Phone Calls
Schedule an Appointment	Clients Window, Calendar Window
Write a letter to a Client	Writing Letters

To Learn How To	Read These Chapters
Search for an address	Clients Window, Lists and Searching
Create a list of Clients with the same User-Defined Field	Clients Window, Lists and Searching

When you are more experienced with Maximizer Personal, 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.

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
Windows 95 or Windows NT	Indicates that you should only use this procedure if you are running Maximizer Personal on Windows 95 or Windows NT.
Windows 3.1	Indicates that you should only use this procedure if you are running Maximizer Personal on Windows 3.1 or Windows for Workgroups 3.11.
Bold	Indicates text you need to type. Usually a command.
<i>Italic</i>	Indicates variable information, such as a Client name. Also indicates anything you replace with your own information, such as <i>filename</i> . Also used for titles of publications.
“”	Used to refer to chapter titles and procedure headings in a document.
Initial Capitals	Used to indicate menu items, keyboard keys, command names, button names, and dialog boxes. For example, File menu.
➤	Indicates the beginning of a procedure.

Format/Symbol	Definition
•	Indicates a procedure with only one step. Also used to indicate items in a list.
Key1+Key2	Used for keyboard shortcuts. A plus sign (+) between keys means to hold down the first key while you press the second key. Then release both keys.
Key1,Key2	Used for keyboard shortcuts. A comma (,) between keys means to press and release the keys one after the other.

A Word About Commands

Maximizer Personal 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 right mouse menu. In many cases, you can even double-click on an entry to initiate a command.

Because of space limitations, we haven't 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.

You can also use Maximizer Personal without a mouse. You'll find the keyboard commands in Appendix A "Keyboard Shortcuts" on page 177.

INSTALLING MAXIMIZER PERSONAL

This chapter describes how to install Maximizer Personal on your computer. It also describes how you can set up Maximizer Personal for the Internet.

Presumably, you already have a PC set up with Windows software and the necessary peripheral devices. Before installing Maximizer Personal, review the requirements for your computer. These sections describe the hardware and software you need to run the program on your computer.

NOTE

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

You can install Maximizer Personal on a computer running Windows 3.1, Windows 95, or Windows NT. Follow the instructions for the operating system you are using.

Installing on a Windows 3.1 Computer

Following is a list of the hardware and software required when installing Maximizer Personal on a computer running Windows 3.1:

- An IBM PC or compatible with an 80386 processor having at least 4 MB of RAM
- One VGA monitor and a 1.44 MB disk drive
- MS-DOS or PC-DOS Version 5.0 or later

- Microsoft Windows Version 3.1 or later

➤ **To install Maximizer Personal on a Windows 3.1 computer**

1. Insert the Maximizer Personal disk into drive A or B.
2. In Program Manager, select Run from the File menu.
3. Type **a:\setup**. If the setup disk is in drive B, type **b:\setup** instead.
4. Click on OK, and then follow the setup instructions on the screen.

After the setup program has completed, Maximizer Personal is ready to use.

Installing on a Windows 95 or Windows NT Computer

Following is a list of hardware and software required when installing Maximizer Personal.

- A 386DX or higher (486 recommended) having at least 8 MB of RAM
- One VGA monitor and a 1.44 MB disk drive
- MS-DOS or PC-DOS Version 5.0 or later
- Microsoft Windows 95 or Windows NT Workstation Version 3.51 or higher

➤ **To install Maximizer Personal on a Windows 95 computer**

1. Insert the Maximizer Personal setup disk into drive A or drive B.
2. Click on the Start button. Select Settings and then select Control Panel.
3. Double-click on the Add/Remove Programs icon.
4. On the Install/Uninstall tab, click on the Install button.
5. Follow the setup instructions on the screen.

➤ **To install Maximizer Personal on a Windows NT computer**

1. Insert the Maximizer Personal setup disk into drive A or B.

2. In Program Manager, select Run from the File menu.
3. Type **a:\setup**. If the setup disk is in drive B, type **b:\setup** instead.
4. Click on OK, and then follow the setup instructions on the screen.

After the setup program has completed, Maximizer Personal is ready to use.

Setting Up Internet Access for Maximizer Personal

Maximizer Personal can automatically decompress and transfer Client information retrieved from the MultiActive Business Intelligence Service using your Internet connection. (For more information about MultiActive Business Intelligence Service, see “Transferring Client Information from MultiActive Eagle” on page 50.)

Setting Up Internet Access

There are several methods of setting up your computer so that Maximizer Personal can access the Internet. You can:

- Directly use the service offered by an Internet provider.

NOTE FOR WINDOWS 95 AND NT USERS

Although it is possible to set up an Internet connection using the instructions from your service provider, you will find it much easier if you install the Microsoft Plus! Internet tools provided in Microsoft Plus Companion for Windows 95.

- Use your company's network server that is directly connected to the Internet. To access this service, contact your system administrator.

NOTE

Before trying these features in Maximizer Personal or if you encounter problems, test your Internet connection. You should be able to link to a Web site using your Browser.

If you encounter problems browsing the World Wide Web, contact your Internet provider, or your Browser software manufacturer before requesting help from Maximizer Customer Support.

GETTING STARTED

Before using the Maximizer Personal windows and utilities, you need to know how to start and orient yourself in the program. This chapter shows you how to start Maximizer Personal, provides a quick orientation, and describes some of the program shortcuts.

Starting Maximizer Personal

Once you've installed Maximizer Personal, you're ready to start the program. You start Maximizer Personal just as you would other Windows applications. Complete the following step.

➤ **To start Maximizer Personal**

Windows 3.1 or
Windows NT

- In the Maximizer group window, double-click on the Maximizer Personal icon.

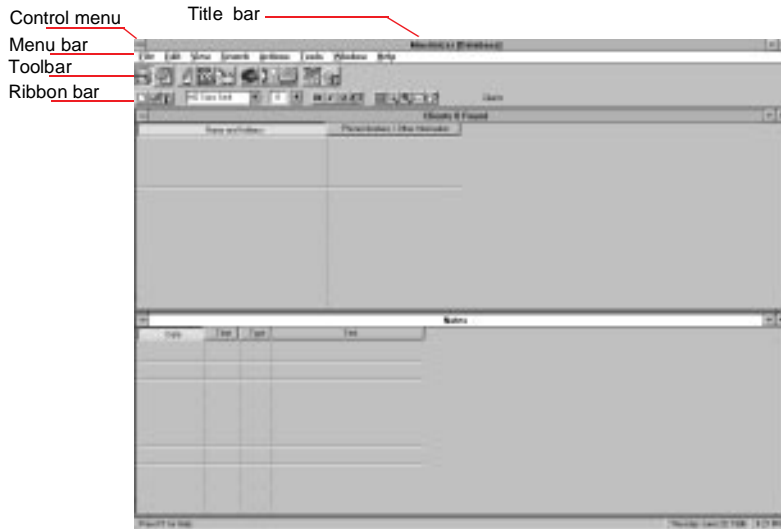
Windows 95

- Click on the Start button, and then point to Programs. Click on Maximizer Personal.

The Maximizer Personal workspace appears.

Maximizer Personal Workspace

When you first start the program, the Maximizer Personal workspace looks like this:



The name of the program appears in the title bar. Maximizer Personal automatically opens a database called Database, and this name also appears in the title bar. You should be familiar with the Control menu and the Maximize and Minimize buttons. They function just as they do in other Windows applications.

The menu bar appears below the title bar. It provides the menus of commands you need to do your Maximizer Personal tasks. Below the menu bar is the toolbar. It includes command buttons for opening windows and using utilities such as the phone feature and printer.

The ribbon bar provides buttons for common menu commands such as Add or Edit, which you use once you are in a window.

The Maximizer Personal workspace includes two open windows: Clients and Notes. The program automatically opens these windows when you first start up. The windows are empty since you haven't yet created any data.

Right Mouse Button

You can also click on the right mouse button to display a floating menu. Like the ribbon bar, the floating menu provides a subset of commands from the main menu bar. This provides another convenient way to use the commands that are available in Maximizer Personal.

Using Multi Windows

Now, click in the Calendar window to make it active. Notice that the menu bar commands, ribbon bar, and right mouse menus change. This is important to remember: the menu bar commands, ribbon bar, and right mouse menus always apply to the currently active window. Click in the Clients window to make it active. The command bars and menu items change again.

You'll find out more about using these windows and the various commands as you read through this guide. For now, let's look at a few other features that apply to the program.

Using Maximizer Personal in Windows 95

Windows 95 or
Windows NT

Maximizer Personal is essentially the same whether you install it on Windows 3.1, Windows 95, or Windows NT. If you are installing to Maximizer Personal for Windows 95, you'll notice that the Windows 95 version includes some minor procedure changes that were required to conform to Microsoft standards. In addition, there are some new features that make Maximizer Personal even easier to use. These are documented in the applicable User's Guide sections and in online help.

Entering File Names

Windows 95 or
Windows NT

In Maximizer Personal for Windows 95, you can use long file names whenever you want. The three-letter extension is still automatically added. An example is “Annual Sales Figures for 1994-1995”.

Selecting Directories and Files

Windows 95 or
Windows NT

There is a Browse button on database dialog boxes in Maximizer Personal for Windows 95. Instead of typing in a database pathname or file name, click on the Browse button and then select the path or file that you want to use from the list that is displayed.

NOTE

Maximizer Personal for Windows 95 uses the term “folder” as well as “directory.”

Using Online Help

Maximizer Personal includes a powerful Online Help feature. Online Help provides indexed and context-sensitive help for windows, commands, and dialog boxes.

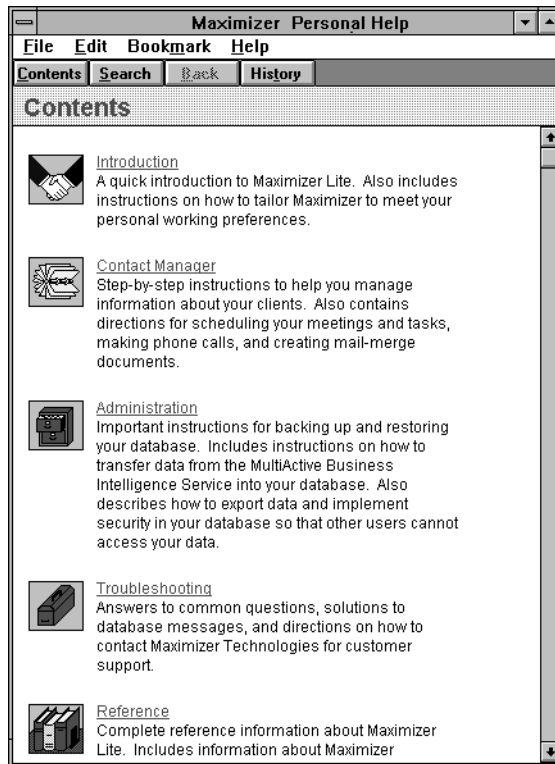
You can access Help at any point by pressing F1. This is especially useful if you are working in a dialog box and need detailed information about the fields, options, and buttons.

You can also access Help using the Help menu. Complete the following steps.

➤ **To access Online Help**

1. Select Contents from the Help menu.

The Maximizer Personal Help window appears.

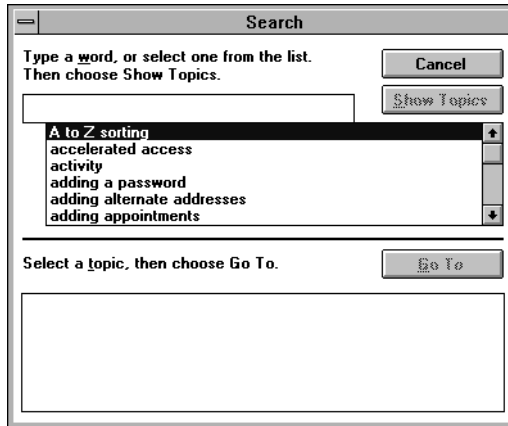


2. Click on a topic.

–or–

Click on the Search button.

- a. In the Search dialog box, double-click on a topic.



- b. Click on the Go To button.

Maximizer Personal displays information about the selected topic.

NOTE

You can also directly access the Search dialog box from Maximizer Personal by selecting Search for Help On from the Help menu.

➤ **To exit Online Help**

- In the Maximizer Personal Help window, select Exit from the File menu.

Other Help

If you ever have a problem with your Maximizer Personal program and you can't resolve it, you can call the Maximizer Customer Support line. To find the number, select About Maximizer Personal from the Help menu.

Shortcuts

Maximizer Personal provides a few shortcut utilities you should know about. These shortcuts will help you speed up your data entry and management activities.

Drop-Down Lists

You use dialog boxes for entering or changing the data in your Maximizer Personal database. To see a sample dialog box, go to the Clients window and double-click in a blank field. The Add Client dialog box appears.

Many of the dialog box fields include a drop-down list utility. The utility allows you to create a list of items, which you can then select from each time you add another record. This saves you from typing in the same items each time. For a complete list of dialog box fields that use this utility, refer to “drop-down lists” in the Index.

In the Add Client dialog box you just opened, use the City or Country field to try out the following four short procedures. When you are done, click on Cancel to close the dialog box.

➤ To call up a drop-down list

- In a dialog box field, click on the right mouse button.
The drop-down list appears.

➤ To add an entry to a drop-down list

1. In the drop-down list, press Insert.
2. In the Add Item dialog box, type an entry.
3. Click on OK.

Maximizer Personal adds the new entry to the drop-down list.

➤ To select an entry from a drop-down list

- In the drop-down list, double-click on the appropriate entry.
The selected entry appears in the selected field.

➤ To delete an entry from a drop-down list

1. In the drop-down list, select the entry you want to delete.

2. Press Delete.
3. In the Maximizer dialog box, click on OK to confirm the delete.

Maximizer Personal deletes the selected entry.

NOTE

You can't modify an entry in a drop-down list. Instead, you should delete the entry and then re-enter it as you prefer.

Drop-Down Calendars

Other dialog box fields include a drop-down calendar utility. The utility allows you to select a date from a calendar rather than having to type it each time.

Drop-down calendars appear mainly in dialog boxes within the Calendar and Hotlist windows. For a complete list of dialog box fields that use this utility, refer to “drop-down calendars” in the Index.

➤ **To use a drop-down calendar**

1. In a dialog box date field, click on the right mouse button.

The drop-down calendar appears.

2. In the drop-down calendar:
 - Click on the appropriate calendar date.

–or–

- a. Select a different date using the month and year drop-down lists.
- b. Click on the appropriate calendar date.

The selected date appears in the date field.

NOTE

For information on using keyboard shortcuts in the drop-down calendar, see Appendix A “Keyboard Shortcuts” on page 177.

Copying Fields

Finally, there is one more shortcut that you might find helpful. It allows you to copy text from one field to another field, which again, saves you extra typing. Complete the following steps.

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

1. Select a dialog box field.
2. Highlight the text you want to copy.
3. Press Ctrl+c.
4. Select another dialog box field where you want the text copied.
5. Press Ctrl+v.

Maximizer Personal pastes the highlighted text into the selected field.



HINT

This procedure can be applied across different dialog boxes. For example, you can copy text from a field in the Client dialog box and paste it into the text field in the Notes dialog box.

Exiting the Program

When you have finished using Maximizer Personal for the day, you should exit from the program. The exit procedure is the same as you find in other Windows applications. Complete the following step.

➤ **To exit Maximizer Personal**

- Select Exit from the File menu.



SECTION 2

Using Maximizer Personal Windows

CLIENTS WINDOW

Clients are the most fundamental element of Maximizer Personal, just as they are in your business. They can be customers, colleagues, patients, club members, suppliers, or any other group of people you deal with on a regular basis. Once you have a database of Clients, you can use Maximizer Personal to carry out many of your day-to-day business activities.

**HINT**

Looking for new Clients? Try MultiActive Eagle. For more information, see “Transferring Client Information from MultiActive Eagle” on page 50.

Opening the Clients Window

By default, Maximizer Personal opens the Clients window when you start Maximizer Personal. If you do need to open the window, complete one of the following steps.

► **To open the Clients window**



- Click on the Clients button on the toolbar.
–or–
- Select Clients from the Window menu.

In the Maximizer Personal workspace, the Clients window is the main ‘controlling’ window. That is, it controls what appears in other windows. This means that as you scroll through your Clients window, another window scrolls along with it. The other window that scrolls to match your Clients is Notes.

Adding a Client

Adding a Client is a two-step process. First, you create a blank record, and then you fill in the record information using a dialog box. Record information includes things like name, address, phone numbers, and fax numbers.

NOTE

With an Internet connection and a World Wide Web browser, you can connect to the MultiActive Eagle database of North American company and individual client information. You can search the database for information you want to transfer to Maximizer Personal. When you download data, the Clients are added to your database, and a Client List is created. A Note detailing the date and time of the transfer is added to the Notes window for each Client. For more information about registering with and using MultiActive Eagle, see "Transferring Client Information from MultiActive Eagle" on page 50.

➤ To add a Client

1. Click on the Clients window to make it active.
2. Select Add from the Edit menu.

–or–

Double-click in a blank Clients field.

–or–

Click on the Add button on the ribbon bar.

–or–

Click on the right mouse button and select Add.



The Add Client dialog box appears.

3. Fill in the Name group box.

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, Department, Division, City, State, and Country fields.

Use US zip or Canadian postal codes. Maximizer Personal automatically capitalizes any letters you type.

5. Fill in the Phone Numbers group box.

You can enter phone numbers without dashes; Maximizer Personal adds these for you. Include the area code for long distance numbers.

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.

6. Fill in the Identification group box if you prefer.

By default, Maximizer Personal assigns ID numbers to each Client. However, you can set up the system so you can assign these numbers manually. For more information, see “System Defaults” on page 165. If you do assign the ID numbers, type a unique number in the ID field (up to 11 characters).

The following table shows the breakdown of the ID number:

941216	00019	1458277753
yy/mm/dd	5-digit number that increases by 1 for each insert.	Database ID number used to identify your Maximizer Personal database.

7. When you are finished, click on OK.

Adding an E-mail Address

With Maximizer Personal, you can record an E-mail address for each of your Clients.

➤ **To add an E-mail address**

1. In the Add Client dialog box, click on the User-Defined Fields tab.
2. Type the Client's E-mail address in the *E-mail Address field.

Adding an Alternate Address

Some of your Clients may use more than one mailing address. For example, a company might have different shipping and billing destinations. You can include as many alternate addresses as you need in Maximizer Personal.

➤ **To add an alternate address**

1. In the Add Client dialog box, click on the Mailing Address tab.
The Mailing Address tab moves to the front.

The screenshot shows the 'Add Client' dialog box with the 'Mailing Address' tab selected. The dialog has three tabs: 'Basic Information', 'User-Defined Fields', and 'Mailing Address'. The 'Mailing Address' tab contains a 'Description' list with one entry, '*Main Address'. To the right of this list are three buttons: 'Add...', 'Change...', and 'Delete'. Below the list is a 'Set as Mailing Address' button. On the right side of the dialog is a 'Selected Address' text area containing the text: 'Mr John P. Abbot', 'President', 'ABC Products Ltd.', '403-1190 West Road', 'Joville, BC, Canada V3J 132'. At the top right of the dialog are 'OK' and 'Cancel' buttons.

2. Click on the Add button.

The Alternate Address dialog box appears.

The screenshot shows the 'Alternate Address' dialog box. It has a title bar 'Alternate Address' and a section header 'Alternate Address'. The fields are: 'Address Desc' (empty), 'Department' (empty), 'Division' (empty), 'Address 1' (95 East 87th Street), 'Address 2' (empty), 'City' (Victoria), 'State' (BC), 'Zip' (V9L 6T5), and 'Country' (Canada). At the bottom are 'OK' and 'Cancel' buttons.

3. Fill in the information fields as you prefer.

In the Address Desc field, type a short description of the address. For example, you could describe a shipping address as “Ship to.”

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

4. When you are finished, click on OK.

➤ **To set the default mailing address**

1. In the Mailing Address tab, select the Description of the address you want to set as the default.
2. Click on the Set as Mailing Address button.
3. Click on OK.

Modifying a Client

When your Clients move or change phone numbers, you can easily make these modifications in Maximizer Personal. To update or change a Client record, complete the following steps.



HINT

If some of your Clients are not in the list, select All Clients from the View menu to display all entries. For more information, see chapter 10 "Lists and Searching" on page 93.

➤ **To modify a Client**

1. In the Clients window, select the Client you want to modify.
2. Select Modify from the Edit menu.

–or–

Click on the Edit button on the ribbon bar.

The *Client Name* dialog box appears.

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



➤ **To modify an alternate address**

1. In the *Client Name* dialog box, click on the Mailing Address tab.
2. In the Mailing Address dialog box, select the address you want to modify.
3. Click on the Change button.

4. In the Alternate Address dialog box, modify the fields you want to change.
5. When you are finished, click on OK.

Deleting a Client

You may sometimes need to delete a Client. This can occur if they've gone out of business or are no longer your customer.

NOTE

Deletions are permanent and can't be undone. You may want to back up the Clients data file first. For more information, see chapter 16 "Database Management" on page 151.

➤ To delete a Client

1. In the Clients window, select the Client you want to delete.
2. Select Delete from the Edit menu.

The Delete Client Information dialog box appears.

3. If you are sure you want to delete the selected Client, click on OK.
4. In the Maximizer dialog box, click on OK to confirm the delete.

Maximizer Personal deletes the Client and all its associated entries (such as Notes) from your database.

➤ To delete an alternate address

1. In the Clients window, double-click on the Client you want to modify.
2. In the *Client Name* dialog box, click on the Mailing Address tab.
3. In the Mailing Address dialog box, select the address you want to delete.

NOTE

You can't delete the Main Address from this dialog box. If you want to change the Main Address, click on the Basic Information tab and modify the address fields there.

4. Click on the Delete button.

5. In the Maximizer dialog box, click on OK to confirm the delete.

Copying a Client

Sometimes, you may find it easier to modify a copied Client record than to create a new Client, or you might want to change the ID number of a Client. To copy a Client, complete the following steps.

➤ **To copy a Client**

1. In the Clients window, select the Client you want to copy.
2. Select Create Duplicate Client from the Edit menu.
3. In the Create Duplicate Client dialog box, change the default ID number if you prefer.
4. Click on OK.

Maximizer Personal duplicates the Client record and gives it a different ID number.

Using User-Defined Fields

User-Defined Fields (UDFs) are categories you use to 'classify' your Clients. They allow you to combine and group Clients in many different ways such as by occupation, hobby, income level, or any other criteria you want to use.

A stock broker, for example, might create a UDF for the type of stock each of her Clients is interested in (Gold, Blue Chip, High Tech, Transportation) and their investment approach (Conservative, Speculative, High Risk). This would allow her to, say, pull together all the Speculative investors interested in High Tech stocks from her database.

Types of UDFs

In Maximizer Personal, you can create four types of UDFs:

- Table
- Alphanumeric

- Date
- Numeric

A table UDF is used for general classifications. It consists of a heading, such as Personal Interests, and a drop-down list of items, say, Gardening, Sports, and Theatre. You set up the headings and add the items to a drop-down list. You can then select one or more items whenever you assign the UDF to a Client.

An alphanumeric UDF is used for code numbers or special identifiers that are unique to each Client. Typical examples are social security numbers, policy codes, and serial numbers. This type of UDF can contain text and/or numbers. Each alphanumeric UDF can only be attached once to each Client.

A date UDF is used for dates only. For example, one-time events such as a project review date. For this type of UDF, you can select from a drop-down calendar. Each date UDF can only be attached once to each Client.

A numeric UDF is used for figures only. Examples might be total company sales, number of employees, purchasing volume, and courier slip numbers. Each numeric UDF can only be attached once to each Client.

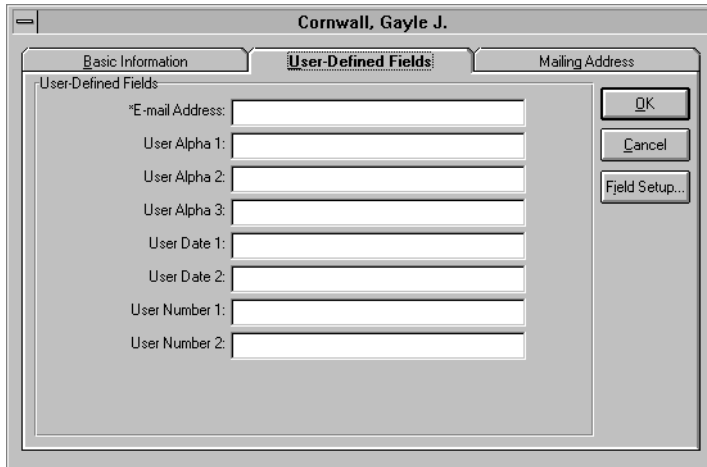
Adding a UDF

You use the tabbed Client window to add Client information and mailing addresses. You can also use the User-Defined Fields tab of this window to create up to 10 User-Defined Fields (UDF)s.

► To add a UDF

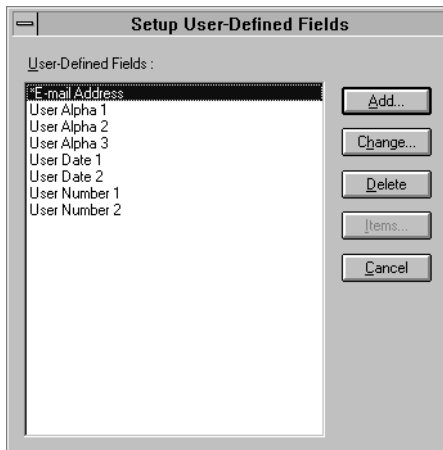
1. In the Clients window, double-click on the Client entry where you want to add a UDF.
2. In the *Client Name* dialog box, click on the User-Defined Fields tab.

The User-Defined Fields tab moves to the front.



3. Click on the Field Setup button.

The Setup User-Defined Fields dialog box appears.



4. In the Setup User-Defined Fields dialog box, click on Add.
5. In the Add User-Defined Field dialog box, type a descriptive name.
6. Select an item from the Type group box.
7. Select any items from the Attributes group box as you prefer.
8. Click on OK.

The new UDF appears in the Setup User-Defined Fields dialog box.

9. In the Setup User-Defined Fields dialog box, click on Close
The new UDF appears in the User-Defined Fields tab.

➤ **To add an item to a table UDF**

1. In the User-Defined Fields tab, select a table-type UDF.
2. Click on the right mouse button.
The Add Items dialog box appears.
3. Click on the New Item button.
4. In the Add Item dialog box, type an item.
5. Click on OK.
6. In the Add Items dialog box, click on Close

Modifying a User-Defined Field

When necessary, you can change a User-Defined Field (UDF).

➤ **To modify a UDF**

1. In the Clients window, double-click a Client entry.
2. In the Client Name dialog box, click on the User-Defined Fields tab.
The User-Defined Fields tab moves to the front.
3. Click on the Field Setup button.
4. In the Setup User-Defined Fields dialog box, select the UDF you want to rename.
5. Click on Change.
6. In the Change User-Defined Field dialog box, change the items as you prefer.
7. Click on OK.
8. In the Setup User-Defined Fields dialog box, click on Close.

➤ **To modify a table UDF item**

1. Click on the Field Setup button.
2. In the Setup User-Defined Fields dialog box, select a table UDF to modify.
3. Click on the Items button.
4. In the *UDF Name* dialog box, select an item to modify.
5. Click on the Change button.
6. In the Change Item dialog box, modify the Item name.
7. When you are finished, click on OK.
8. In the *UDF Name* dialog box, click on the Close button.
9. In the Setup User-Defined Fields dialog box, click on the Close button.

Deleting a User-Defined Field

You can remove a User-Defined Field (UDF)s from the database.

NOTE

Deletions are permanent and can't be undone.

➤ **To delete a UDF**

1. In the Clients window, double-click on a Client entry.
2. In the Client Name dialog box, click on the User-Defined Fields tab.
The User-Defined Fields tab moves to the front.
3. Click on the Field Setup button.
4. In the Setup User-Defined Fields dialog box, select the UDF you want to delete.
5. Click on the Delete button.
6. In the Maximizer dialog box, click on OK to confirm the deletion.
Maximizer Personal deletes the UDF from your database.
7. In the Setup User-Defined Fields dialog box, click on Close

➤ **To delete a table UDF item**

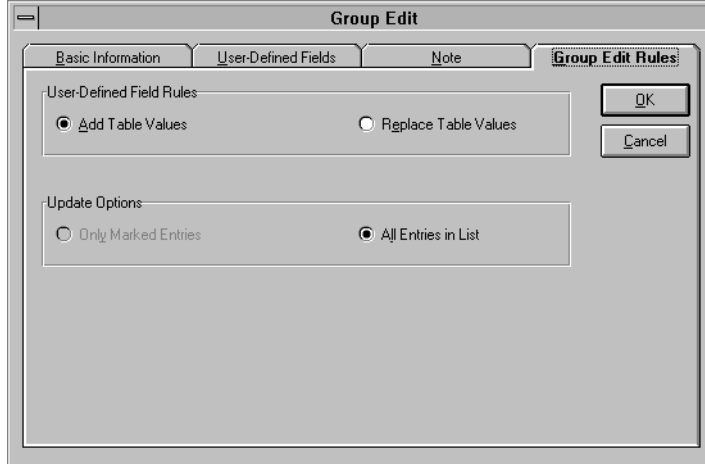
1. Click on the Field Setup button.
2. In the Setup User-Defined Fields dialog box, select the UDF where the item is to be deleted.
3. Click on the Items button.
4. In the *UDF Name* dialog box, select an item to delete.
5. Click on the Delete button.
6. In the Maximizer dialog box, click on OK to confirm the deletion.
Maximizer Personal deletes the item from the table.
7. In the *UDF Name* dialog box, click on Close.
8. In the Setup User-Defined Fields dialog box, click on Close.

Group Editing

In Maximizer Personal, you can update a number of Client records at the same time using the Group Edit feature. For example, you may want to add a FAX extension or a Note to several Clients. Complete the following steps.

➤ **To do a group edit**

1. In the Clients window, select Group Edit from the Edit menu.
The Group Edit dialog box appears.
2. Click on the Group Edit Rules tab.



3. Select the appropriate item in the User-Defined Field Rules group box.

This group box only applies to table-type User-Defined Fields. To replace the current User-Defined Fields with a new list, select Replace Table Values. To add new table-type User-Defined Fields to the current list, select Add Table Values.

NOTE

For more information on User-Defined Fields, see "Using User-Defined Fields" on page 42.

4. Select the appropriate item in the Update Options group box.
This group box only applies if you are working with a marked list of Clients. For more information on marked lists, see chapter 10 "Lists and Searching" on page 93.
5. Click on the Basic Information tab.
–or–
Click on the User-Defined Fields tab.
6. Modify the Client information as you prefer.
7. Click on the Note tab and add any text if you prefer.
This adds the Note to your selected Clients.

8. When you are finished, click on OK.
9. In the Maximizer dialog box, click on OK to confirm the changes.

Using a Default Client

You can set up a default Client in Maximizer Personal. This is a useful feature if you often enter Clients with many fields in common, such as the same city or country. When you use a default Client, each new Client you add appears with the default fields already filled in.

➤ To create a default Client

1. In the Clients window, select Default Record from the Edit menu.
The Default Record dialog box appears.
2. Fill in the group boxes where you want to include default information.
3. When you are finished, click on OK.

The default Client will affect all the new Clients you create. When you no longer want to use default information, you should delete the default Client.

➤ To modify the default Client

1. In the Clients window, select Default Record from the Edit menu.
2. In the Default Record dialog box, modify the fields you want to change.
3. When you are finished, click on OK.

➤ To delete the default Client

1. In the Clients window, select the default Client.

The default record is indicated by @DEFAULT RECORD.

NOTE

If the default Client doesn't appear in the window, select Default Record from the Edit menu, and then close the dialog box. This adds the default to the Client list.

2. Select Delete from the Edit menu.
3. In the Delete Client Information dialog box, click on OK.
4. In the Maximizer dialog box, click on OK to confirm the delete.

Transferring Client Information from MultiActive Eagle

Need information for business or marketing? Statistics to analyze potential customers, competition, product offerings? Need directories of potential Clients for surveys or advertising your product or service? An ever-expanding library of business, residential, and demographic data is just keystrokes away!

With a World Wide Web browser such as Netscape, you can develop new sales and other business leads. Find new leads by conducting searches of the Eagle database by company name, zip code, S.I.C. code, city, state, sales volume code or employee size code. After importing selected data into Maximizer Personal, you can continue the contact management process with the familiar look and feel of Maximizer Personal.

Using your favorite World Wide Web Browser, connect to the MultiActive Business Intelligence Service web site at <http://www.maximizer.com/eagle>, or link from the Maximizer web site. When you provide registration and credit card information and accept the license agreement, you can use Eagle to search millions of North American Business listings for sales leads and potential customers. After entering your search criteria and clicking the Download button, a file of the search results is transferred to your computer. When the transfer is complete, Maximizer Personal automatically starts, decompresses the downloaded file and displays the search results in your Clients window. Not only are these clients added to your database, but also a Client List is created as well as a Note detailing the date and time of the transfer for each Client.

Requirements

- Internet access
- World Wide Web (WWW) Browser such as Netscape, Mosaic, or Microsoft Internet Explorer
- Credit card information

Setting Up Your Browser for Automatic Transfer

You can set up your Browser so that Maximizer Personal automatically decompresses and transfers the search results when you download the file from Eagle. To do this you must specify the following settings in your WWW Browser. You generally find these settings in the Options menu under Setup Viewer or a similar command. If you forget to specify these before downloading search results, you will be prompted for the required information when downloading.

Path to Viewer for Windows 3.1	C:\MAXWIN\MAXWIN.EXE (or appropriate directory)
Path to Viewer for Windows 95 or NT	C:\PROGRAM FILES\MAXIMIZER\MAXWIN.EXE (or appropriate program folder)
MIME File Type	application/x-mel
File Extension	.MEL

Searching MultiActive Eagle

Search the Eagle database for instant results anytime, anywhere. Simply establish a session with your Internet service provider and start your WWW Browser.

➤ To search MultiActive Eagle

1. Go to the World Wide Web site called <http://www.maximizer.com/eagle>
2. Provide the requested registration and credit card information, and acknowledge the copyright restrictions. You only need to provide this once.
3. Using Eagle, type your search request and a preview of the results is displayed. If the search results are acceptable:
 - a. In the comment field, type the content you want to appear as the name for the Client List of these transferred Clients.
 - b. Download the file in compressed format.

Maximizer Personal transfers Clients from the Eagle search result file into your Maximizer Personal database along with a Note detailing the date and time of the import. A Client List representing these Clients is also added to the Client List catalog. You can access the Client List catalog from the View menu of Maximizer Personal.

NOTES WINDOW

Notes are used to record your contact management activities. By default, Maximizer Personal automatically logs all your phone calls, mail-merges, 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.

Opening the Notes Window

By default, Maximizer Personal opens the Notes window when you start Maximizer Personal. If you do need to open the window, complete one of the following steps.

➤ **To open the Notes window**



- Click on the Notes button on the toolbar.
- or–
- Select Notes from the Window menu.

The title bar in the Notes window shows the currently highlighted Client. This means if you now add a Note, it will be attached to this Client.

Adding a Note

Maximizer Personal lets you add an unlimited number of Notes to a Client. Each Note you add is tagged with a time and date. This tag is useful when you

want to search for Notes that fall within a particular date range. For more information on searching by Notes, see chapter 10 “Lists and Searching” on page 93.

➤ **To add a Note**

1. In the Clients window, select an entry where you want to add a Note.
2. Click on the Notes window to make it active.
3. Select Add from the Edit menu.

–or–

Double-click in a blank Notes field.

–or–

Click on the Add button on the ribbon bar.

–or–

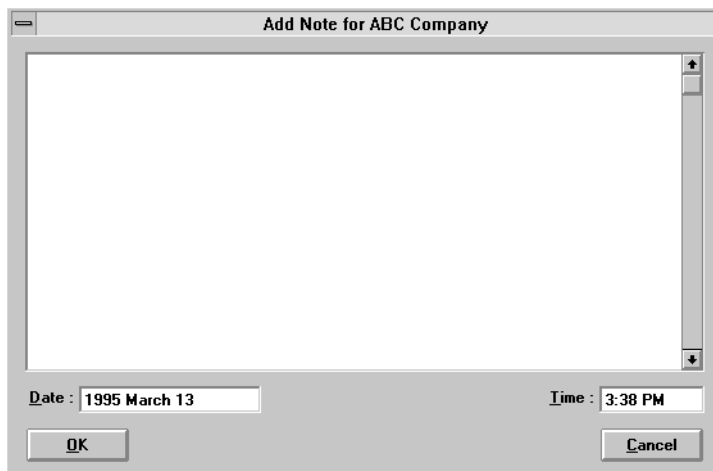
Click on the right mouse button and select Add.



HINT

To add a Note, you can also drag a Client to the Notes window or button.

4. In the Add Note dialog box, type your Note.



5. Modify the Date and Time fields if you prefer.
A drop-down calendar is available for the Date box.
6. When you are finished, click on OK.

**HINT**

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 ahead of the current date.

Modifying a Note

You may need to update or correct information in a Note or alter the time and date. Maximizer Personal lets you modify your own Notes as well as any Notes logged by the system (such as a record of a phone call).

➤ **To modify a Note**

1. In the Clients window, select the entry where the Note is attached.
2. In the Notes window, select the Note to modify.
3. Select Modify from the Edit menu.
4. In the Note for *Client Name* dialog box, modify your Note.
5. When you are finished, click on OK.

Deleting a Note

To delete a Note, complete the following steps. Remember, deletions are permanent and can't be undone.

➤ **To delete a Note**

1. In the Clients window, select the entry where the Note is attached.
2. In the Notes window, select the Note to delete.
3. Select Delete from the Edit menu.
4. In the Maximizer dialog box, click on OK to confirm the delete.

Maximizer Personal deletes the Note from the database.

HOTLIST WINDOW

The Hotlist is a to-do list of tasks and reminders. Tasks include calling, writing to, and meeting with Clients. For example, you can use the Hotlist to schedule a phone call to a Client who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

Many users start their business day by opening the Hotlist window and checking their current list of tasks. They continue working with it all day long, completing and adding tasks as they come up.

Opening the Hotlist Window

To open the Hotlist window, complete one of the following steps.

► **To open the Hotlist window**



- Click on the Hotlist button on the toolbar.
- or–
- Select Hotlist from the Window menu.

Like the Clients window, the Hotlist is a controlling window. As you scroll through the Hotlist window, the Notes window scrolls along with it.

Adding a Hotlist Task

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

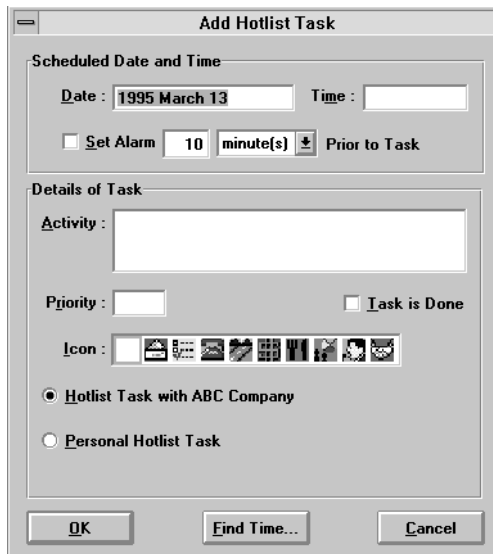
For maximum flexibility, Maximizer Personal lets you add Hotlist tasks using the Clients window, the Actions menu, or the Hotlist window. Each of these options is outlined below.

➤ **To add a Hotlist task**

Clients window

1. In the Clients window, drag a name to the Hotlist window.

The Add Hotlist Task dialog box appears.



2. Fill in or modify the 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 box.
Select the appropriate checkbox to indicate whether this is a Client-related task or a personal task.
4. Click on the Find Time button if you want to select a time.

- a. In the Find Free Time dialog box, click on the time you prefer. Click on the right or left arrow buttons to select a different week.



Click on the Go To button or Press Insert to select a specific date. In the Go to Calendar Date dialog box, indicate a date and click on OK.

- b. Click on OK.
5. When you are finished, click on OK.

Maximizer Personal adds the task to the Hotlist.

➤ To add a Hotlist task

Actions menu

1. In the Clients window, select an entry.
2. From the Actions menu:
Select Schedule a To-do.
–or–
Select Schedule a Call.
3. In the Add Hotlist Task dialog box, fill in the group box information.
4. When you are finished, click on OK.

➤ To add a Hotlist task

Hotlist window

1. In the Clients window, select an entry.
2. In the Hotlist window, select Add from the Edit menu.

–or–

Double-click in a blank Hotlist field.

–or–

Click on the Add button on the ribbon bar.

–or–

Click on the right mouse button and select Add.

3. In the Add Hotlist Task dialog box, fill in the group box information.
4. When you are finished, click on OK.



Assigning a Priority to a Task

You may want to assign a priority to a task. This allows you to order your tasks in the Hotlist window so you can deal with the 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. Once you select a task:
 - a. Select Set Priority from the Edit menu.
 - b. In the Set Priority dialog box, type a priority letter or select one from the drop-down list.
–or–
 - a. Double-click on the task.
 - b. In the Hotlist Task dialog box, click in the Priority field.
 - c. Type a priority or select one from the drop-down list.
3. Click on OK.

Building the Hotlist

By default, the Hotlist window always displays the tasks for today. You can build a different Hotlist range which lets you see tasks from yesterday or for tomorrow, next week, or next month.

The new Hotlist build applies until you exit Maximizer Personal. When you re-start the program, the default is once again displayed.

► To build a new Hotlist

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

Click on the Date Range button on the ribbon bar.



The Build Hotlist dialog box appears.



2. Select an item from the Date Options group box.
If you select Range, indicate a Start Date and End Date in the Range group box. Drop-down calendars are available for these fields.
3. De-select Carry Forward Unfinished Tasks if you prefer.
When selected, this option lets you see incomplete tasks from earlier dates.
4. When you are finished, click on OK.
Maximizer Personal creates a Hotlist for the specified dates.

NOTE

From time to time, you should go back and delete your old Hotlist tasks. To do this, build the Hotlist using a range of earlier dates. Mark the old entries in the Hotlist build and select Delete from the Edit menu. This periodic maintenance will help free up your hard disk space.

Modifying a Hotlist Task

If you have to update a Hotlist task or change the date, you can use the Modify option. Complete the following steps.

➤ **To Modify a Hotlist task**

1. In the Hotlist window, select the task you want to modify.
2. Select Modify from the Edit menu.

3. In the Hotlist Task dialog box, modify the task.
4. When you are finished, click on OK.

Deleting a Hotlist Task

You may want to delete a Hotlist task once it is completed or if it is no longer applicable. Complete the following steps.

➤ **To delete a Hotlist task**

1. In the Hotlist window, select the task you want to delete.
2. Select Delete from the Edit menu.
3. In the Delete Marked Activities dialog box, click on Yes to confirm the delete.

If you click on Yes, Maximizer Personal permanently deletes the Hotlist task from the database. If you click on No, the task is removed temporarily from the Hotlist window. It will appear again if you rebuild the Hotlist.

Completing a Hotlist Task

You should check off your Hotlist tasks as they are completed. When you check off a task, it will continue to appear in the current day's Hotlist. By showing the completed tasks until the end of the current day, you can see what you've accomplished. You can also include these tasks in a final daily report.

Completed tasks will not appear in the Hotlist for the next day. Although they disappear after the current day, they are still in your database (you need to delete a task to remove it from the database). You can recover them by going back and building a Hotlist for an earlier date.

➤ **To mark a task as complete**

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

–or–

Select Tag as Done from the Edit menu.

Maximizer Personal displays a dialog box asking if you want to schedule a follow-up activity. Select one of the following options:

- Click on the Yes button to open the Add Hotlist Task dialog box.
- Click on the No button.
- Click on 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**

1. In the Hotlist window, double-click on the completed task.
2. In the Hotlist Task dialog box, de-select the Task is Done checkbox.
3. Click on OK.

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

Refreshing the Hotlist

The Hotlist doesn't automatically update the screen each time you modify or complete your tasks. You can use the Refresh feature to update the Hotlist. Complete one of the following steps.

➤ **To refresh the Hotlist**

- Select Refresh Hotlist from the View menu.

–or–

- Click on the Refresh button on the ribbon bar.

Maximizer Personal rebuilds the Hotlist to reflect any recent changes or additions.



Using Alarms

Maximizer Personal lets you set alarms for your Hotlist tasks. These alarms will sound audibly at a prescribed time, reminding you to, say, attend a meeting or make a call. To hear the alarm, of course, you need to have your PC turned on and Maximizer Personal running.

Setting an Appointment Alarm

You can set your Hotlist alarms to go off up to many weeks ahead of time. Complete the following steps.

➤ **To set an alarm**

1. In the Hotlist window, select a task where you want to set an alarm.
2. Double-click on the task.

–or–

Click on the Edit button on the ribbon bar.



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 on OK.

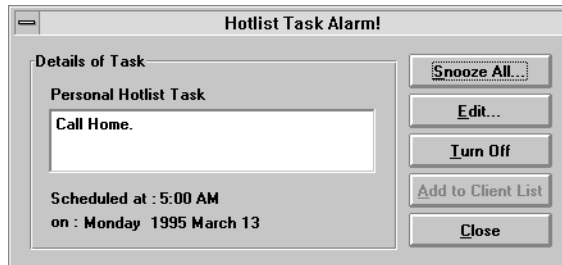
A bell icon appears beside the task to indicate that an alarm is set.

When an Alarm Goes Off

When an alarm goes off, you'll hear a beep. Once the alarm sounds, Maximizer Personal gives you several options for responding to it. One option is to 'snooze' all the alarms for a period of time; after the time interval, the alarms sound again.

➤ To respond to an alarm

When an alarm goes off, the Hotlist Task Alarm dialog box appears.



Choose one of the following options:

- Click on the Snooze All button.
 - a. In the Snooze Time dialog box, select a time option.
 - b. Click on OK. After the allotted time, the alarm sounds again.
- Click on the Edit button.
 - In the Hotlist Task dialog box, modify the task. Then click on OK.
- Click on the Turn Off button to turn off the alarm and remove the alarm icon.
- Click on the Add to Client List button.

This option highlights the associated Client in the Clients window. It is grayed out if it is a personal task or if you are in a dialog box.

Using the Activity Log

The Activity Log displays Hotlist tasks and activities for a particular Client. This is a useful feature if you want to focus in on a customer, say, to find out what needs to be done before a meeting or presentation. If you don't select a Client, the Log displays a list of personal activities.

➤ To open the Activity Log

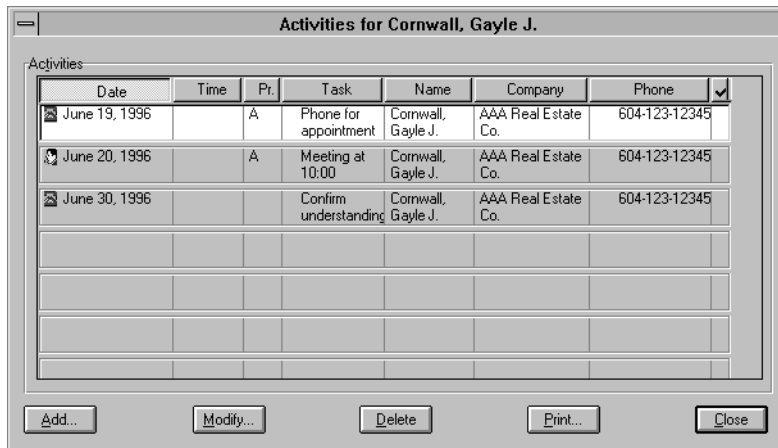
- Select Activities for *Client Name* from the View menu.

–or–



- Click on the Activity Log button on the toolbar.

The Activities dialog box appears.



➤ **To add an activity**

1. In the Activities dialog box, click on the Add button.
2. In the Hotlist Task dialog box, fill in the group boxes as you prefer.
3. When you are finished, click on OK.

➤ **To modify an activity**

1. In the Activities dialog box, click on the Modify button.
2. In the Hotlist Task dialog box, modify the group boxes as you prefer.
3. When you are finished, click on OK.

➤ **To delete an activity**

1. In the Activities dialog box, click on the Delete button.
2. In the Delete Marked Activities dialog box, click on the Yes button to confirm the delete.

CALENDAR WINDOW

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 create an unlimited number of appointments in your Calendar, and you have the option of setting priorities and alarms for them.

Opening the Calendar Window

To open the Calendar window, complete one of the following steps.

➤ **To open the Calendar window**



- Click on the Calendar button on the toolbar.
- or–
- Select Calendar from the Window menu.

You'll notice that holidays and weekends are indicated in red to assist you in your scheduling. If you want to turn off this feature, see "Calendar Preferences" on page 162.

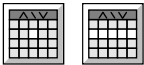
Changing Calendar Views

By default, the Calendar displays the current month. You can change the Calendar view so it displays a day, week, different month, or two-month period. When you move from a monthly or two-month period to a daily or

weekly view, be sure to click on the day or day in the week first. Then change views.

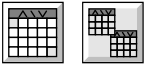
➤ **To change the Calendar view**

- Select a Calendar period from the View menu.
- or–



Click on the Daily, Weekly, Monthly, or Two-Monthly button on the ribbon bar.

–or–



Click on the right mouse button and select a view.

You can also display future or past Calendar periods by completing one of the following steps.

➤ **To change the Calendar period**



- Click on the Forward button on the ribbon bar to move ahead.
- or–



- Click on the Backward button on the ribbon bar to move back.
- or–
- Select Go to Day from the View menu. Then, type or select a date in the Go to Calendar Date dialog box, and click on OK.

Making an Appointment

One of the most common tasks you'll do in your Calendar is make appointments. Once you schedule an appointment, it appears in both the Calendar and Hotlist windows.

To assist you with your scheduling, you'll find color bars (in the daily and weekly views of the Calendar) that indicate the status of each time period. They are as follows:

- Green indicates that an appointment is booked.

- Red indicates that a time period is double-booked with conflicting appointments. When you see this bar, you should change one of the appointments.

➤ To make an appointment

Calendar window

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

–or–

Click on the Add button on the ribbon bar.

–or–

Click on the right mouse button and select Add.

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 Client-related task or a personal task.

5. Click on the Find Time button to select an appointment time.

- a. In the Find Free Time dialog box, click on the time you prefer.

Click and drag the cursor to include more than one hour. Click on the right or left arrow buttons to select a different day.



Click on the Go to button or press Insert to select a specific date. In the Go to Calendar Date dialog box, indicate a date and click on OK.

- b. Click on OK.

6. When you are finished, click on OK.

The appointment is marked in the Calendar. It is also displayed as a task in the Hotlist window; you'll see it when you refresh the Hotlist.

NOTE

In the daily view of the Calendar, Maximizer Personal displays 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. For more information on Hotlist tasks, see chapter 6 "Hotlist Window" on page 57.

➤ **To make an appointment**

Clients or Hotlist window

1. In the Clients or Hotlist window, drag a name to a date in the Calendar window.
2. In the Add Appointment dialog box, fill in the group box information.
3. When you are finished, click on OK.

➤ **To make an appointment**

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 on OK.

Making 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.

➤ **To make a recurring appointment**

1. In the Add Appointment dialog box, click on the Recurring button.
The Schedule Recurring Appointment dialog box appears.

The screenshot shows a dialog box titled "Schedule Recurring Appointment". It is divided into three main sections: "Frequency", "Occurrence", and "Duration".

- Frequency:** Contains five radio buttons: "Daily" (selected), "Weekly", "Day of Month", "Monthly", and "Yearly".
- Occurrence:** Contains a checkbox labeled "Skip Weekends".
- Duration:** Contains two text boxes: "Start Date" with the value "1995 March 20" and "End Date" which is empty.

At the bottom of the dialog are "OK" and "Cancel" buttons.

2. Select a time period from the Frequency group box.

Use this option to set the frequency of the appointment. The default is daily.

If you select Weekly, Day of Month, or Monthly, a pop-up 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.

3. Fill in the Duration 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.

4. When you are finished, click on OK.

The appointment is marked in the Calendar for each week or month in the specified time period.

Finding the Client Associated with an Appointment

From the Calendar, you can quickly find the Client record associated with an appointment. This is useful if you want to check an address or phone number. Complete the following steps.

► **To find the Client associated with an appointment**

1. In the Calendar window, select an appointment.

If you don't have the Calendar set to the daily or weekly view, double-click on the appointment. Maximizer Personal changes to the daily view. Select the appointment again.

2. Select Find *Client Name* from the Search menu.

–or–

Click on the Add to Client List button on the ribbon bar.

–or–

Click on the right mouse button and select Put into Client List.

Maximizer Personal highlights the Client associated with the appointment in the Clients window.

NOTE

This procedure doesn't apply to personal appointments.



Modifying an Appointment

If your meeting or appointment is moved or changed, you can use the Modify feature to update it. Complete one of the following procedures.

► To modify an appointment

1. In the Calendar window, select the appointment you want to modify.
If you don't have the Calendar set to the daily or weekly view, double-click on the appointment. Maximizer Personal changes to the daily view. Select the appointment again.
2. Select Modify from the Edit menu.
3. In the Appointment dialog box, modify the appointment.
4. When you are finished, click on OK.

► To move an appointment

1. Change to the daily or weekly Calendar view.
2. Select the appointment you want to move and drag it to a new day or time.
Drag to the right of the Calendar to move ahead one day or week. Drag to the left to move back one day or week. Drag up or down to move to a different time of the day.
The appointment appears in the new time slot.

► To modify a recurring appointment

1. Select the recurring appointment you want to modify.
2. Select Modify from the Edit menu.
3. In the Appointment dialog box, click on the Recurring button.
4. In the Schedule Recurring Appointment dialog box, modify the recurring appointment.
5. When you are finished, click on OK.

This only changes the current appointment. Repeat the procedure for each recurring appointment in the series.

Completing an Appointment

As with Hotlist tasks, you can check off your appointments as they are completed. Completed appointments appear in both the Calendar and Hotlist windows.

When you complete an appointment, it will continue to appear in the current day's Hotlist. It will not appear in the Hotlist for the next day.

Although completed appointments don't appear in the next day's Hotlist, they are still in your database (you need to delete an appointment to remove it from the database). You can recover them by going back and building a Hotlist for an earlier date.

► To mark an appointment as complete

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

–or–

Select Tag as Done from the Edit menu.

Maximizer Personal displays a dialog box asking if you want to schedule a follow-up activity.

- Click on the Yes button to open the Add Appointment dialog box.

–or–

- Click on the No button.

A check mark appears in the check-mark column and also appears next to the appointment task in the Hotlist window.

NOTE

The check-mark column only appears in the daily view of the Calendar.

➤ **To unmark an appointment**

1. Double-click on the completed appointment.
2. In the Appointment dialog box, de-select the Task is Done checkbox.
3. Click on OK.

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

Deleting an Appointment

If you cancel or complete an appointment, you can delete it from your Calendar. Complete the following steps.

➤ **To delete an appointment**

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

If you are using the monthly or two-monthly view, the Delete Appointments dialog box appears.

- a. In this dialog box, change the Start Date and End Date to delete all appointments within the specified period.

–or–

Leave the default dates as is.

- b. Click on OK.
3. In the Maximizer dialog box, click on OK to confirm the delete.

Maximizer Personal deletes the appointment(s) from the database.

NOTE

Deletions are permanent and can't be undone.

Using Alarms

You can set alarms for your Calendar appointments. These alarms will sound at a prescribed time to remind you of a meeting. To hear the alarm, of course, you need to have your PC turned on and Maximizer Personal running.

Setting an Appointment Alarm

You can set your appointment alarms to go off up to many weeks ahead of time. To set an alarm, complete the following steps.

► **To set an alarm**

1. In the Calendar window, select an appointment where you want to set up an alarm.
2. Double-click on the appointment.
–or–



Click on the Edit button on the ribbon bar.

If you don't have the Calendar set to a daily or weekly view, Maximizer Personal 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 on OK.

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

When an Alarm Goes Off

When an alarm goes off, you'll hear a beep. Once an alarm goes off, you can respond in several ways. One option is to 'snooze' all alarms for a period of time; after the time interval, the alarms sound again.

➤ **To respond to an alarm**

When an alarm goes off, the Appointment Alarm dialog box appears.



Choose one of the following options:

- Click on the Snooze All button.
 - a. In the Snooze Time dialog box, select a time option.
 - b. Click on OK.
- Click on the Edit button.
 - a. In the Appointment dialog box, modify the appointment.
 - b. When you are finished, click on OK.
- Click on the Turn Off button to turn off the alarm.
- Click on the Add to Client List button.

This option highlights the associated Client in the Clients window. It is greyed out if it is a personal appointment or if you are in a dialog box.



SECTION 3

Performing Maximizer Personal Activities

WRITING LETTERS

Maximizer Personal provides mail-merge capability for supported word processors. Using this capability, you can print hundreds or thousands of personalized letters to any or all of your Clients.

NOTE

Maximizer Personal currently supports Microsoft Word 6.0 or higher and Corel WordPerfect 6.1 or higher.

Creating and Printing Mail-Merge Documents

To generate a mail-merge, you first select the Clients you want letters for. Then use your word processor to type the form letter and insert Maximizer Personal merge codes where you want names and addresses to appear. When you print the letter, a letter is created for each entry you selected with the appropriate name and address.

► **To create and print a mail-merge**

1. In the Clients window, select the entries you want to include in your mail-merge.
2. Click on the Word Processor button. For example, if your word processor is Word, click on the Word button.
3. Type your letter or document. When you want to insert a Maximizer Personal field, click on the Maximizer Merge button.
The Select Merge Field dialog box appears.
4. Select the field you want to insert and click OK.

The field from the current Client appears in your document.

- When the document is complete, click on the Maximizer Print Merge button.

The Print Merge dialog box appears.

- Select one of the items in the Print group box.

To print the document for	Click
All Clients currently listed in the Clients window	Current List
Clients currently marked in the Clients window	Marked List
Currently highlighted Client	Current Client

- In the Note field, type a comment if you prefer. What you type will appear as a Note for each Client included in your print merge.
- Click List Document in Note if you want this document's name to appear in a Note for each client included in your print merge.
- When you are finished, click on OK.

Maximizer Personal displays each document with the merge codes replaced by the appropriate fields from your current Client before printing the documents.

Solving Mail Merge Problems

If Microsoft Word is your word processor:

- Check the version of Microsoft Word you are using. Only version 6.0 or higher is supported.
- Ensure the file, TML_LITE.DOT, is in your Word STARTUP directory.
- If the Maximizer Personal Print Merge toolbar does not appear when you start Microsoft Word, you can link the template to your document. From View, select Toolbars. Click on TeamMate Link Lite and click on OK.
- When doing mail-merges, Maximizer Personal response may slow if both Maximizer Personal and Word windows are open. You can improve Maximizer Personal response by changing the merge codes from hot links

to cold links. This means each time you move to a different Client, you must press F9 to update the fields.

To change hot links to cold links, edit the TML_LITE.INI file in your Windows directory. Then under the [Misc] section, add DDEAuto=No as shown below:

```
[Misc]
DDEAuto=No
```

If Corel WordPerfect is your word processor:

- Check which version of WordPerfect you are using. Only version 6.1 or higher is supported.
- Ensure the file, MAXWP.WPT, is in your WordPerfect TEMPLATE directory. A backup copy of MAXWP.WPT is in your Maximizer directory if the template is accidentally deleted from your WordPerfect directory.

MAKING PHONE CALLS

Maximizer Personal provides a phone utility that lets you make calls from any window. The program finds the phone number for the current Client and dials it for you.

All your calls are automatically logged in the Notes window and the Phone Log so you can keep track of calls made and received.

Making a Call

You can make two kinds of calls: a regular call and quick dial. Regular calls allow you to select a subject each time and to choose the phone number you want to use (you can have up to four phone numbers in your Client record). With regular calls, you can also phone a series of Clients.

Quick dial is faster but gives you fewer options. You don't add a subject, and the first phone number in the record is dialed by default. You can only call one Client at a time.

➤ **To make a single call**

1. In the Clients, Hotlist, or Calendar (daily view) window, select an entry.
2. Click on the Phone button on the toolbar.

–or–

Select Phone from the Tools menu.

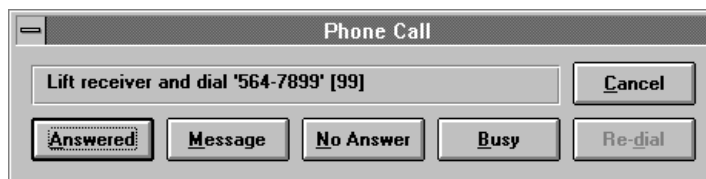


The Phone dialog box appears.



3. In the Subject field, type a subject or select one from the drop-down list. If you call from the Hotlist, the current task is displayed in this field. A drop-down list is available for this field. Any text you add in this field appears with the phone call information in the Notes window.
4. Select a phone number from the list in the Select Number to Dial field.
5. Select an alternate format for the number in the Phone field if you prefer. Change the field if you need to, say, include an area code or prefix.
6. Click on the Dial button.

The Phone Call dialog box appears.



Maximizer Personal dials the selected number or asks you to dial the call yourself.

NOTE

How Maximizer Personal handles a call depends on your call setup. For more information, see "Modem Preferences" on page 162.

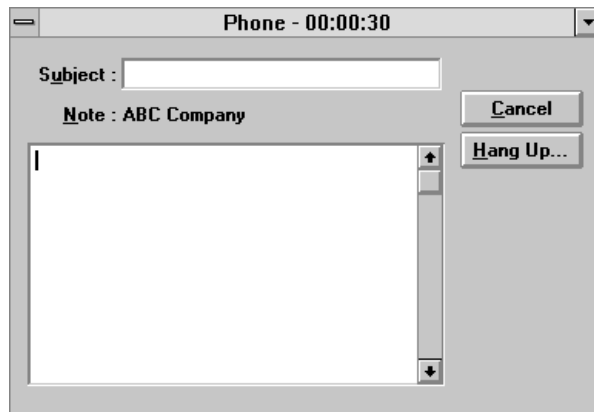
7. If you don't reach the party you dialed, click on one of the following buttons:

- Message
- No Answer
- Busy

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

8. If the party answers, click on the Answered button.

The Phone timer dialog box appears.



- Click on the Hang Up button when you finish the call.
- In the Phone Call Result dialog box, select a Results field item.
To add a Results item, click on the Add button. Type an item and click on OK.
- Click on OK to end the call.

The Phone dialog box re-appears and displays the Results field item in the Last Result field.

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

Maximizer Personal automatically logs your phone call activities in the Notes window.

You may want to work through a list of Clients, calling each one in turn. Complete the following steps.

➤ **To make a series of calls**

1. In the Clients or Hotlist window, select an entry.
2. Click on the Phone button on the toolbar.
3. In the Phone dialog box, select a number and click on the Dial button.
4. In response to the call, click on one of the following buttons:
 - Answered
 - Message
 - No Answer
 - Busy
5. When you complete the first call, click on the Next button to move to the next Client in the window.

–or–

Click on the Previous button to move to the previous Client.

The next or previous Client is displayed in the Phone dialog box.

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

➤ **To do a quick dial**

1. In the Clients or Hotlist window, select an entry.
2. Drag the Client to the Phone button on the toolbar.

–or–

Select Make a Call from the Actions menu.

The Phone Call dialog box appears. Maximizer Personal dials the first number in the phone list or asks you to dial the call yourself.



3. In response to the call, click on one of the following buttons:

- Answered
- Message
- No Answer
- Busy

Maximizer Personal automatically logs the phone call activities in the Notes window.

Receiving a Call

You can also keep track of incoming calls. When you receive a call, just click on the Phone button. You can then search for the associated Client. When you complete the call, the information is attached to the selected Client and logged in the Notes window.

► To receive a call



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

–or–

Select Receive a Call from the Actions menu.

2. In the Phone timer dialog box, type a Subject for the call and any notes if you prefer.

3. If the caller is a Client, find and select their name in the Clients window.

For information on searching for Clients, see chapter 10 “Lists and Searching” on page 93.

4. Click on the Hang Up button when you finish the call.

5. In the Save Note dialog box, select the Client where you want to save the phone notes and click on OK.

6. In the Phone Call Result dialog box, select an item in the Results field.

7. Click on OK.

Maximizer Personal logs the call in the Notes window.

Using the Phone Log

The Phone Log lists all incoming and outgoing calls for the current day. This gives you a quick overview of your daily phone activities.

➤ **To view the Phone Log**



- Click on the Phone Log button.
- or–
- Select Phone Log from the View menu.

The Phone Log appears.



By default, the Phone Log displays the current date. You can change the date to review past or future time periods. Complete the following steps.

➤ **To change the Phone Log date**

1. In the Phone Log, go to the Date field.
2. Use the up or down arrow to select a different day.

–or–

Use the drop-down calendar to select a day from a different month or year.

Making Calls with the Phone Log

You can use the Phone Log to find and redial any calls that were not completed. Complete the following steps.

► To make a call using the Phone Log

1. In the Phone Log, select one or more entries.
2. Select Add to List to add the entries to the existing Client list.
–or–
Select Replace List to replace the existing Client list with the selected entries.
3. Click on the Phone button.
Maximizer Personal adds the selected entries to your Client list and displays the Phone dialog box.
4. In the Phone dialog box, select a number and click on the Dial button.
5. In response to the call, click on one of the following buttons:
 - Answered
 - Message
 - No Answer
 - Busy
6. When you complete the first call, click on the Next button to move to the next Client in the window.
The next Client is displayed in the Phone dialog box.

LISTS AND SEARCHING

Maximizer Personal provides a powerful set of searching tools that you can use to quickly find any information in your database. For maximum flexibility, the program allows you to search Client records and Notes entries in a wide variety of ways.

Using Lists

The list utility lets you work with lists of Clients. This means you don't have to open or view your entire database at one time. Instead, you can view a subset of database entries.

A list can include one or all of your Clients. You can add or remove entries from the list, and you can save any of your lists for future reference.

Showing All Clients

If you want to display all the Clients in your database, complete the following steps.

➤ **To show all Clients**

1. Click on the Clients window to make it active.
2. From the View menu, select All Clients.

Clearing a List

You can clear a list at any time. This removes all the Clients from the Clients window. However, it doesn't mean the Clients are deleted. They still reside in the database. You can retrieve them again by building another list.

➤ To clear a list

- In the Clients window, select Clear List from the View menu.
Maximizer Personal clears the list that is currently displayed in the Clients window.

Marking and Narrowing a List

Once you display a list, you can narrow it further by marking some of the entries and rebuilding. This allows you to, say, set up a pre-selected mailing list.

You can also mark lists in other Maximizer Personal windows. This allows you to, say, select a group of Notes entries which you could then delete or print. To use the marking feature, complete the following steps.

➤ To mark entries in a list

1. In the Clients window, select an entry to mark the beginning of the list.
2. Shift+drag over the entries you want to mark.

–or–

Select Mark One from the Edit menu for each entry you want to mark.

Maximizer Personal highlights your marked entries.

➤ To unmark an entry in a marked list

1. Select the marked entry.
2. Select Unmark One from the Edit menu.

➤ **To unmark all entries in a marked list**

- Select Unmark All from the Edit menu.

Creating a List

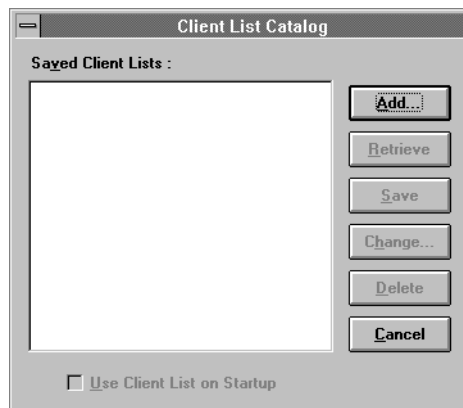
After you mark the entries, you can display them in a new list. Maximizer Personal also lets you save your new list in a catalog, which you can retrieve later on. Complete the following steps.

➤ **To display a new list**

1. In the Clients window, create a marked list.
2. Select Make Marked List Current from the Edit menu.
Maximizer Personal displays the marked list in the Clients window.

➤ **To save a new list**

1. In the Clients window, create a marked list.
2. Select Catalog of Saved Lists from the View menu.
3. In the Client List Catalog dialog box, click on the Add button.



4. In the Name of Client List dialog box, type a descriptive name for the list.
5. When you are finished, click on OK.

Maximizer Personal creates a catalog for the saved list.

Retrieving and Modifying a List

Once you have saved one or more of your own lists, you can quickly retrieve and use them again. Maximizer Personal also lets you modify the list names or delete any lists that are no longer applicable.

➤ To retrieve a saved list

1. In the Clients window, select Catalog of Saved Lists from the View menu.
2. In the Client List Catalog dialog box, select the catalog you want to retrieve from the Saved Client Lists field.
3. Click on the Retrieve button.

Maximizer Personal displays the selected list.

Maximizer Personal doesn't automatically update your saved lists as you work on them. So to update any entries you've added or removed, you must re-save the list.

➤ To re-save a list

1. In the Client List Catalog dialog box, select the existing list in the Saved Client Lists box.
2. Click on the Save button.

➤ To modify a Client list name

1. In the Client List Catalog dialog box, select the list you want to modify.
2. Click on the Change button.
3. Type a new name.
4. Click on OK.

➤ **To delete a list**

1. In the Client List Catalog dialog box, select the list you want to delete.
2. Click on the Delete button.
3. In the Maximizer dialog box, click on OK to confirm the delete.

Maximizer Personal deletes the list. This command doesn't delete any entries from the database.

Setting Up a Default Startup List

Any saved list can be assigned as your startup list. The startup list is the default list displayed in the Clients window when you start the Maximizer Personal program. If you prefer, you can also display an empty list on startup. Complete the following steps.

➤ **To select a list for startup**

1. In the Clients window, select Catalog of Saved Lists from the View menu.
2. In the Client List Catalog dialog box, select a catalog name from the Saved Client Lists field.
3. Select Use Client List on Startup.
4. Click on the Close button.

The selected list is displayed each time you start Maximizer Personal.

➤ **To select an empty list for startup**

1. In the Clients window, select Clear List from the View menu.
2. Select Catalog of Saved Lists from the View menu.
3. In the Client List Catalog dialog box, click on the Add button.
4. In the Name of Client List dialog box, type a descriptive name for the list. An example of a list description might be 'Startup.'
5. Click on OK.
6. Select Catalog of Saved Lists again from the View menu.

7. Select the empty startup list you just created.
8. Select Use Client List on Startup.
9. Click on the Close button to close the dialog box.

The empty list is displayed each time you start Maximizer Personal.

Combining Marked Entries

When working with large lists, it's fairly easy to add an entry for a Client that already exists. Maximizer Personal lets you check for duplicates quickly and easily. If any are found, you can combine them into one up-to-date entry. Complete the following steps.

► To check and eliminate duplicates

1. Select Check for Duplicates from the Search menu.
Maximizer Personal displays any duplicate entries it finds in the current Clients list.
2. Mark the duplicate entries.
3. Select the most up-to-date entry.
4. Select Combine Marked Entries from the Edit menu.
5. In the Maximizer dialog box, click on OK.
Maximizer Personal combines the entries into the selected entry.
6. Select Unmark One from the Edit menu.
7. Select Delete from the Edit menu.
8. In the Delete Client Information box, click on OK.
9. In the Maximizer dialog box, click on OK again to confirm the delete.
Maximizer Personal deletes the marked duplicate entries.

NOTE

Deletions are permanent and can't be undone.

Searching

Maximizer Personal lets you search your database in four ways: by Clients, User-Defined Fields (UDF)s, or Notes. You can also find Clients from the Hotlist window.

No matter what you need to find, the search process is basically the same. You bring up a search dialog box where you add your search criteria. This could be a last name, a User-Defined Field item, or a particular date for Notes. Once you add this information, Maximizer Personal searches the database and displays the results in the appropriate window.

By Clients

You can search two levels of Client information: main and secondary information. The search function is virtually the same for both, though you may find that searching by main Client information is faster in a large database.

The search fields correspond to the Client record fields, such as Last Name and City. To search by Client information, complete the following steps.

➤ **To search by main Client information**

1. From the Search menu, select one of the following:
 - Last Name
 - Company/Organization
 - City
 - State/Province
 - Zip/Postal Code
 - Client ID
 - Phone Number 1

The Search by *Client Information* dialog box appears.



2. Type a name or number in the search field.

NOTE

You can use wildcards in your search. Use a question mark (?) in place of a single character. For example, "4?? Main Street" would find address numbers from 400 to 499 on Main Street. Use an asterisk (*) in place of a word or character string. For example, "416*" would find all phone numbers with an area code of 416.

3. Select one of the listed items in the Modify List group box.

Use this group box to determine how to merge the Clients that Maximizer Personal finds during the search.

If you select Narrow List, Maximizer Personal searches only the current list in the Clients window, rather than the entire Clients database.

4. When you are finished, click on OK.

Maximizer Personal searches for the specified entry and displays a list of matching Clients in the Clients window.

➤ **To search using a range**

1. In the Search by *Client Information* dialog box, click on the Range button.

The Range dialog box appears.

2. Type the data range in the range fields.

As an example, if you were searching by last names, "aa" and "bz" in these fields would find all people with surnames beginning with A or B.

3. When you are finished, click on OK.

In the Search by *Client Information* dialog box, Maximizer Personal displays the range information in the search field.

➤ **To search by secondary Client information**

1. Select Other from the Search menu.
2. In the Other sub-menu, select one of the following:
 - First Name
 - Position
 - Department
 - Division
 - Address Line 1 or 2
 - Country
 - Phone Number 2–4
 - All Phone Numbers
 - Last Change Date

The Search by *Client Information* dialog box appears.

3. Type a name or number in the search field.
4. Select one of the listed items in the Modify List group box.
5. When you are finished, click on OK.

Maximizer Personal searches for the specified entry and displays a list of matching Clients in the Clients window.

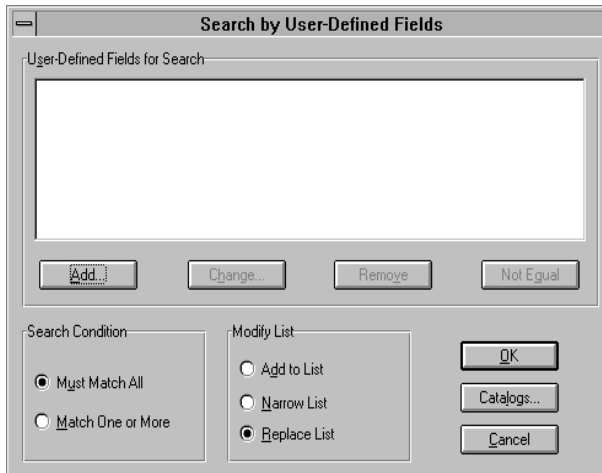
By UDFs

If you want to find any Clients attached to a UDF, you can search by that field. Setting up the search criteria can take a little longer, so you also have the option of saving the search information in a catalog. You can then retrieve the catalog later on if you have to do the same kind of search again.

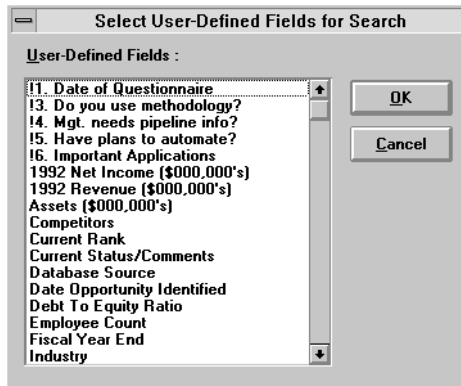
➤ **To search by UDFs**

1. Select User-Defined Fields from the Search menu.

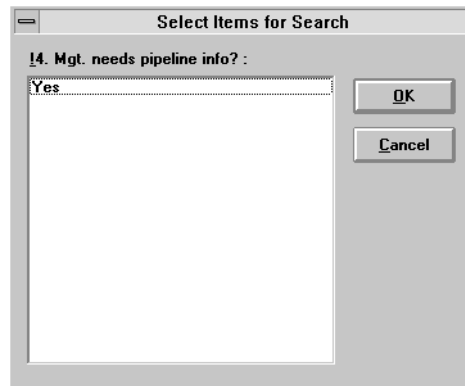
2. In the Search by User-Defined Fields dialog box, click on the Add button.



3. In the Select User-Defined Fields for Search dialog box, select one or more fields and click on OK.



4. In the Select Items for Search dialog box, select one or more UDF items and click on OK.



–or–

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

- a. Type the lowest value to search 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.

- b. Type the highest value to search in the To field.
- c. Click on OK.
5. In the Search by User-Defined Fields dialog box, select one of the listed items in the User-Defined Fields for Search group box.
6. Select one of the listed items in the Search Conditions group box.
7. Select one of the listed items in the Modify List group box.
8. When you are finished, click on OK.

Maximizer Personal searches the database and displays a list of matching Clients in the Clients window.

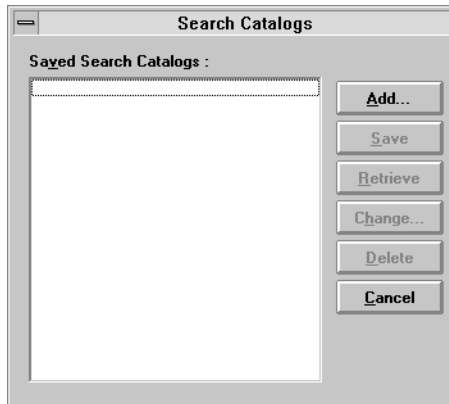
➤ **To modify or change search criteria for a UDF**

1. Complete steps 1–5 above.
2. Click on one of the following buttons to change the search criteria:

- **Change.** Click on this button to modify a User-Defined Field item.
- **Remove.** Click on this button to delete a User-Defined Field from the search box.
- **Not Equal.** Click on this button to search for UDF items that don't match the items you selected.

➤ **To save the search criteria in a catalog**

1. Complete steps 1–8 above.
2. Click on the Catalogs button.
3. In the Search Catalogs dialog box, click on the Add button.



4. In the Name of Search Catalog dialog box, type a catalog title.
5. Click on OK.
6. Click on the Close button.

Once you save a search catalog, you can retrieve it by clicking on the Retrieve button in the Search Catalogs dialog box. This brings up the search criteria in the Search by User-Defined Fields dialog box.

By Notes

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:

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.
Phone Calls	Notes logged when you dial a phone number.
Timed Note	Notes logged when you use the Maximizer Personal Timer.
Transfer Log	Notes logged when you transfer Clients from MultiActive Eagle.
Completed Tasks	Notes logged when you complete an appointment or Hotlist task.

► To search by Notes

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

The screenshot shows a dialog box titled "Search by Notes". It features a "Text Search" field at the top. Below it are two main sections: "Date Range" and "Type of Note". The "Date Range" section includes "From" and "Until" fields, both set to "June 18, 1996", and a "Search All Notes" checkbox. The "Type of Note" section has radio buttons for "All Notes", "Mail-Outs", "Phone Calls", "Timed Notes", "Transfer Log", and "Completed Tasks". At the bottom left is a "Modify List" section with radio buttons for "Add to List", "Narrow List", and "Replace List". "OK" and "Cancel" buttons are at the bottom right.

2. Type a string of text to search for in the Text Search field.
A drop-down list is available for this field.
3. Indicate a calendar period or select All Notes in the Date Range group box.
Drop-down calendars are available for the From and Until fields.
4. Select one of the listed items in the Type of Note group box.
5. Select one of the listed items in the Modify List group box.
6. When you are finished, click on OK.

Maximizer Personal searches the database and displays a list of matching Clients in the Clients window.

As well, a list of matching Notes is displayed in the Notes window. To view all Notes again, go to the Notes window and select All Notes from the View menu.

From the Hotlist

In Maximizer Personal, the Hotlist and Client windows are independent of each other. This means if you are working on a Client-related task in the Hotlist window you can't, say, directly access the Client record in the Clients window. To find the associated Client in the Clients window, complete the following steps.

➤ **To find a Client associated with a Hotlist entry**

1. In the Hotlist window, select a task.
2. Select Find *Client Name* from the Search menu.

–or–

Click on the Add to Client List button on the ribbon bar.

–or–

Click on the right mouse button and select Put into Client List.

Maximizer Personal highlights the Client associated with the task in the Clients window.

NOTE

This procedure doesn't apply to personal tasks.



Undoing a Search

Maximizer Personal 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 ribbon bar.

Maximizer Personal clears the list of search items from the Clients window and reverts to the previous list.

PRINTING

Maximizer Personal lets you print all kinds of business-related items, including reports, labels, and envelopes. As well, you can print Address and Calendar reports that list all your Client addresses or appointments.

To print, you must have a printer installed and initialized for Windows. This information is provided in your *Microsoft Windows User's Guide*. Once you have a printer set up, you can adjust the settings, such as page orientation and paper size. Windows itself handles many of these settings, but you can still make the adjustments from within Maximizer Personal.

Envelopes

In Maximizer Personal, you can print envelopes for some or all of your Clients.

Setup

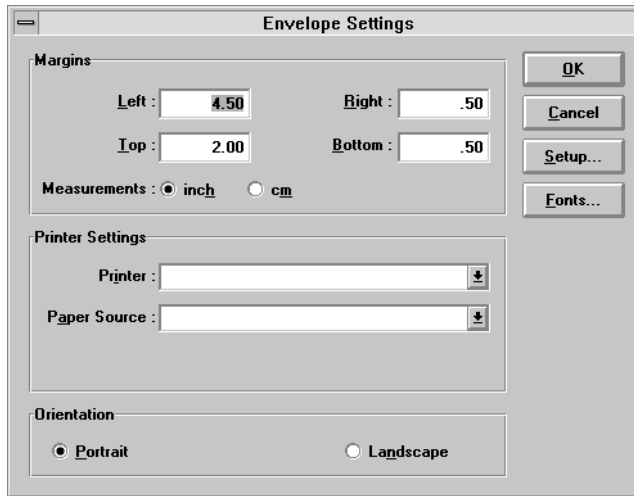
Before you print your envelopes, you should adjust some of the printer settings. Many of these adjustments are optional, but you do need to specify the paper source and size. Complete the following steps.

➤ **To set envelope preferences**

1. From the File menu:
 - a. Select Print Setup.
 - b. Select Envelopes from the Print Setup sub-menu.

–or–

- a. Select Preferences.
 - b. In the Preferences dialog box, click on the Envelopes button.
2. In the Envelope Settings dialog box, adjust the group boxes as you prefer.



Specify the envelope and its size in the Paper Source and Paper Size fields.

Click on the Setup button if you want to change any default printer settings. This links you to the Windows Setup dialog box. For more information, see the “Print Manager” chapter in your *Microsoft Windows User's Guide*.

Click on the Fonts button if you want to change the default font. This takes you to the Windows Fonts dialog box.

3. When you are finished, click on OK.

Print Envelopes

You can print envelopes from your Clients or Hotlist window. Or, you can do a quick print using the Actions menu. Each of these options is described below.

➤ **To print an envelope**

1. In the Clients or Hotlist window, mark the entries you want to print.

–or–

Leave the list unmarked.

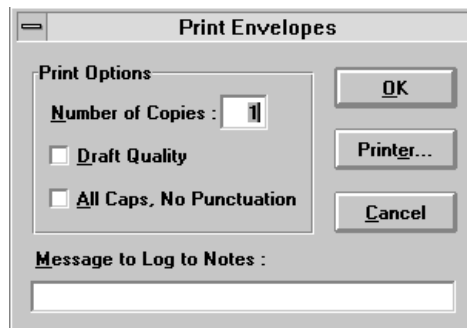
2. Click on the Print button on the toolbar.

–or–

Select Print from the File menu.

3. Select Envelopes from the Print sub-menu.

4. In the Print Envelopes dialog box, adjust the Print Options group box as you prefer.



5. Type a description in the Message to Log to Notes field if you prefer.

6. Make sure your printer is loaded with the appropriate envelopes.

7. When you are finished, click on OK.

8. The Printing dialog box appears if you didn't mark any entries.

- Select Current Entry Only and click on OK to print the current selection.

–or–

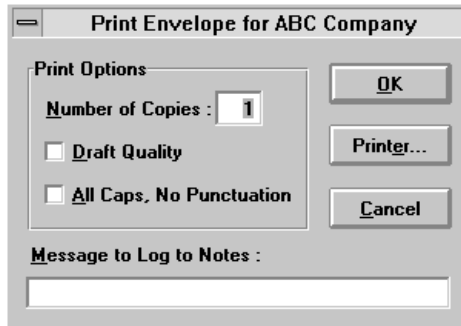
- Select All Entries and click on OK to print the entire list.

Maximizer Personal prints the envelopes for your Clients.

➤ **To do a quick print**



1. In the CLients window, select the Client you want the envelope for.
2. Select Print an Envelope from the Actions menu or ribbon bar.
3. Fill in the Print Envelope for *Client Name* dialog box.



4. When you are finished, click on OK.
Maximizer Personal prints an envelope for the current Client.

Labels

With Maximizer Personal, you can print labels for some or all of your Clients.

Setup

Before you print your labels, you should 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. Complete the following steps.

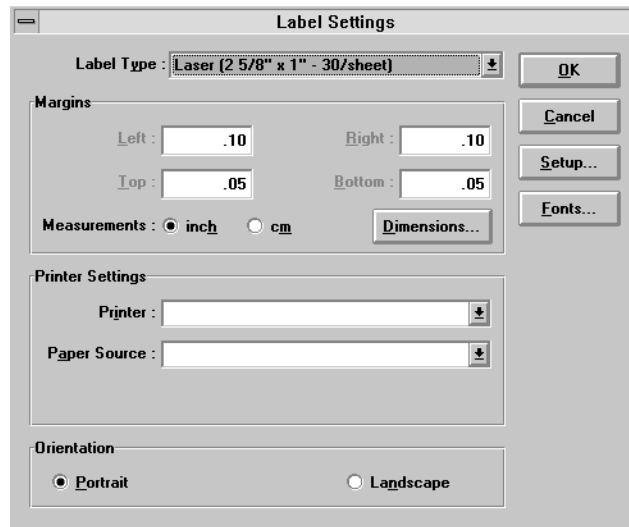
➤ **To set label preferences**

1. From the File menu:
 - a. Select Print Setup.
 - b. Select Labels from the Print Setup sub-menu.

–or–

 - a. Select Preferences.

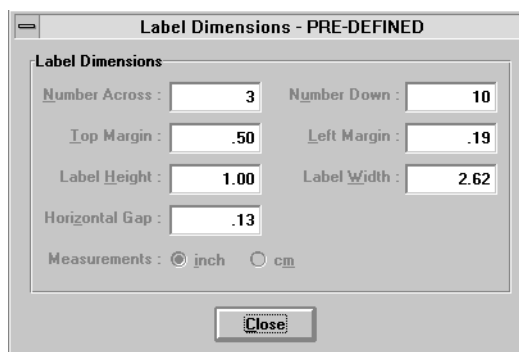
- b. In the Preferences dialog box, click on the Labels button.
2. In the Label Settings dialog box, adjust the group boxes as you prefer.



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 on the Dimensions button.

- a. In the Label Dimensions dialog box, change the default information fields to indicate the dimensions of your customized labels.



- b. Click on OK.

Click on the Setup button if you want to change any default printer settings. This links you to the Windows Setup dialog box. For more

information, see the “Print Manager” chapter in your *Microsoft Windows User's Guide*.

Click on the Fonts button if you want to change the default font. This takes you to the Windows Fonts dialog box.

3. When you are finished, click on OK.

Print Labels

You can print labels from your Clients or Hotlist window. Or, you can do a quick print using the Actions menu.

One of the most convenient features about printing labels in Maximizer Personal is that you can select any label to start printing from. This allows you to finish a sheet of labels before starting the next one, saving unnecessary waste and expense.

► To print a label

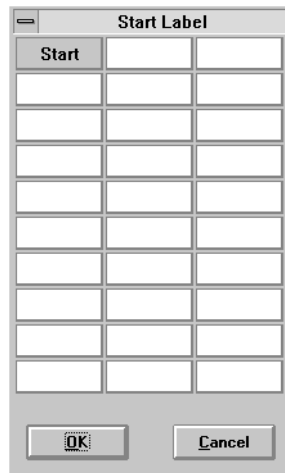
1. In the Clients or Hotlist window, mark the entries you want to print.
–or–
Leave the list unmarked.
2. Click on the Print button on the toolbar.
–or–
Select Print from the File menu.
3. Select Labels from the Print sub-menu.



- 4. In the Print Labels dialog box, adjust the Print Options group box if you prefer.



- 5. Type a description in the Message to Log to Notes field if you prefer.
- 6. Click on the Set Start button if you want to specify a starting label other than the default.
 - a. In the Start Label dialog box, click on the label where you want to start printing.



- b. Click on OK.
- 7. Make sure your printer is loaded with the appropriate labels.
- 8. When you are finished, click on OK.
- 9. The Printing dialog box appears if you didn't mark any entries.

- Select Current Entry Only and click on OK to print the current selection.

–or–

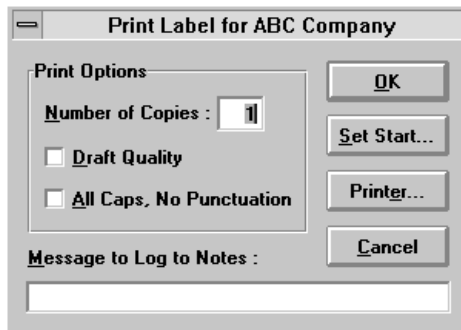
- Select All Entries and click on OK to print the entire list.

Maximizer Personal prints the labels for your Clients.

➤ **To do a quick print**



1. In the Clients window, select the Client you want the label for.
2. Select Print a Label from the Actions menu or ribbon bar.
3. Fill in the Print Label for *Client Name* dialog box.



4. When you are finished, click on OK.

Maximizer Personal prints a label for the current Client .

Reports

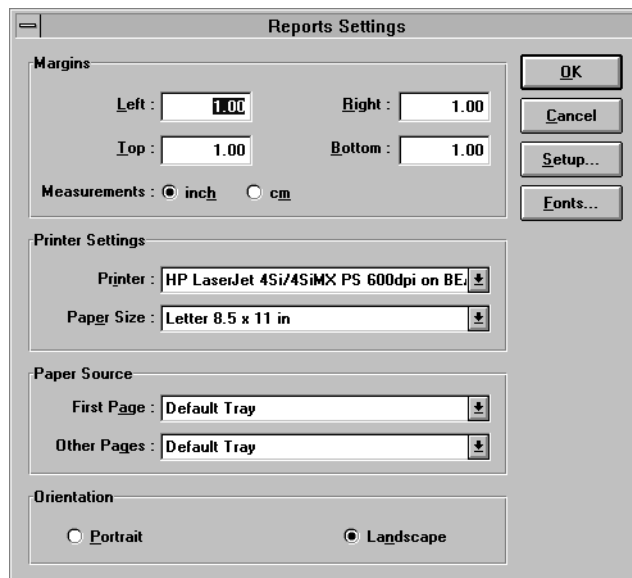
Maximizer Personal lets you print reports for your business-related activities. You can print reports from any window. The window you select from often determines the content of the report.

Setup

Before you print your reports, you may need to adjust some of the printer settings. Complete the following steps.

➤ **To set report preferences**

1. From the File menu:
 - a. Select Print Setup.
 - b. Select Reports from the Print Setup sub-menu.–or–
 - a. Select Preferences.
 - b. In the Preferences dialog box, click on the Reports button.
2. In the Reports Settings dialog box, adjust the group boxes as you prefer.



NOTE

By clicking on the Setup button, you can go directly to the printer driver's setup dialog box. For more information on Windows setup, see your *Microsoft Windows User's Guide*.

3. When you are finished, click on OK.

Client Reports

You can print several different Client reports. These reports can be very useful for tracking your calls, researching your database, or analyzing your business activities.

Column Report

A column report shows the same information you see displayed in the window, such as names and addresses.

► To print a column report

1. In the Clients window, mark the entries you want to print.

–or–

Leave the list unmarked.

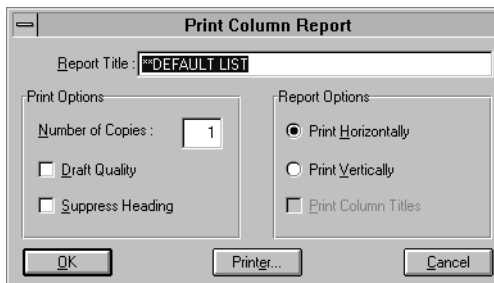
2. Click on the Print button on the toolbar.

–or–

Select Print from the File menu.

3. Select Column Report from the Print sub-menu.

The Print Column Report dialog box appears.



4. Modify the default text in the Report Title if you prefer.
5. Fill in the Print Options and Report Options group boxes as you prefer.

6. When you are finished, click on OK.
7. The Printing dialog box appears if you didn't mark any entries.
 - Select Current Entry Only and click on OK to print the current selection.
 - or–
 - Select All Entries and click on OK to print the entire list.

Maximizer Personal prints the column report.

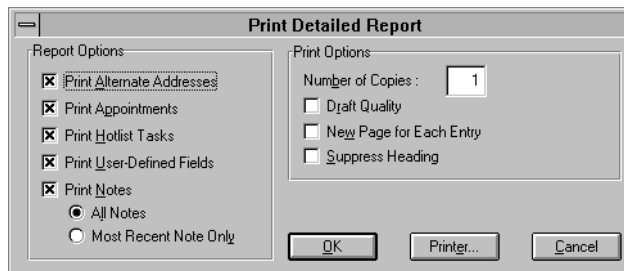
Detailed Report

A detailed report can include, for each Client, any related appointments, or Hotlist tasks.

► To print a detailed report

1. Select Detailed Report from the Print sub-menu.

The Print Detailed Report dialog box appears.



2. Modify the Report Options group box if you prefer.
3. Fill in the Print Options group box as you prefer.
4. When you are finished, click on OK.

Maximizer Personal prints the detailed report.

Name/Address/Telephone Report

A name/address/telephone report provides address and telephone information for each Client. It is similar to a column report but is formatted differently.

➤ **To print a name/address/telephone report**

1. Select Name/Addr/Tel Report from the Print sub-menu.

The Print Name/Address/Telephone Report dialog box appears.



2. Fill in the Print Options group box as you prefer.
3. When you are finished, click on OK.

Maximizer Personal prints the name/address/telephone report.

Note Report

A Note report lists the Notes attached to your Clients. You can specify the type of Note to print. There are six types to choose from:

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.
Phone Calls	Notes logged when you dial a phone number.
Timed Note	Notes logged when you use the Maximizer Personal Timer.
Transfer Log	Notes logged when you transfer Clients from MultiActive Eagle.
Completed Tasks	Notes logged when you complete an appointment or Hotlist task.

➤ **To print a Note report**

1. Select Note Report from the Print sub-menu.

The Print Note Report dialog box appears.

The screenshot shows the 'Print Note Report' dialog box. It features a title bar with a close button. The main area is divided into several sections: 'Type of Report' with radio buttons for 'All Notes' (selected), 'Mail-Outs', 'Phone Calls', 'Timed Notes', 'Transfer Log', and 'Completed Tasks'; 'Date Range' with 'From' and 'Until' text boxes, both containing 'June 18, 1996'; 'Text Search' with an empty text box; 'Report Options' with radio buttons for 'Print Entire Note' (selected), 'Print Abstract Only', and a checkbox for 'Print Statistics'; and 'Print Options' with a 'Number of Copies' spinner set to '1' and checkboxes for 'Draft Quality', 'Suppress Heading', and 'New Page For Each Entry'. Buttons for 'OK', 'Printer...', and 'Cancel' are in the top right.

2. Select an item from the Type of Report group box.
3. Indicate a calendar period in the Date Range group box.
Drop-down calendars are available for these fields.
4. Type a text string in the Text Search field if you prefer.
Filling in this field limits the number of Notes printed to those that match the search criteria.
A drop-down list is available for this field.
5. Fill in the Report Options and Print Options group boxes as you prefer.
6. When you are finished, click on OK.
Maximizer Personal prints the Note report.

Note Reports

A Note report is similar to a Client column report. This type of report shows the information you see displayed in the Notes window.

➤ **To print a Note report**

1. In the Notes window, mark the entries you want to print.

–or–

Leave the list unmarked.



2. Click on the Print button on the toolbar.

–or–

Select Print from the File menu.

The Print Report dialog box appears.

3. Fill in the Print Options and Report Options group boxes if you prefer.

4. When you are finished, click on OK.

5. The Printing dialog box appears if you didn't mark any entries.

- Select Current Entry Only and click on OK to print the current selection.

–or–

- Select All Entries and click on OK to print the entire list.

Maximizer Personal prints the Note report.

Hotlist Reports

A Hotlist report shows you a list of current tasks and activities. To print a Hotlist report, complete the following steps.

➤ **To print a Hotlist report**

1. In the Hotlist window, mark the entries you want to print.

–or–

Leave the list unmarked.



2. Click on the Print button on the toolbar.

–or–

Select Print from the File menu.

3. Select Hotlist Report from the Print sub-menu.
The Print Report dialog box appears.
4. Fill in the Print Options and Report Options group boxes if you prefer.
5. When you are finished, click on OK.
6. The Printing dialog box appears if you didn't mark any entries.
 - Select Current Entry Only and click on OK to print the current selection.

–or–

 - Select All Entries and click on OK to print the entire list.Maximizer Personal prints the Hotlist report.

Calendar

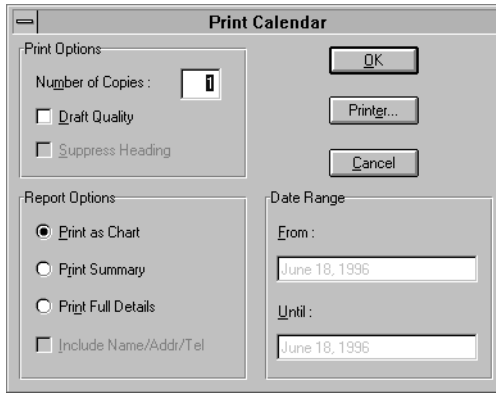
You can print a copy of the Calendar in the daily, weekly, monthly, or two-monthly view. Complete the following steps.

► To print the Calendar

1. In the Calendar window, select a Calendar period from the View menu.
 2. Click on the Print button on the toolbar.
- or–
- Select Print from the File menu.
3. Select Appointments from the Print sub-menu.



The Print Calendar dialog box appears.



4. Fill in the Print Options group box as you prefer.
5. Select an item from the Report Options group box.
6. When you are finished, click on OK.

Maximizer Personal prints the Calendar.

Phone Log

The Phone Log provides a list of your daily phone call activities. You can print the Phone Log by completing the following steps.

► To print the Phone Log

1. In the Phone Log, click on the Print button.

The Print Phone Log Report dialog box appears.



2. Fill in the Print Options and Report Options group boxes as you prefer.

3. When you are finished, click on OK.
Maximizer Personal prints the Phone Log.

TIMING TASKS

The Maximizer Personal timer is a convenient tool you can use to keep track of the time you spend on your business tasks. It is especially useful for lawyers and other professionals who bill their Clients by increments of time.

The timer keeps a running count of the minutes or hours you spend on an activity for a selected Client. When you complete the task, a Note is added to the Notes window showing the duration of time spent.

Using the Timer

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

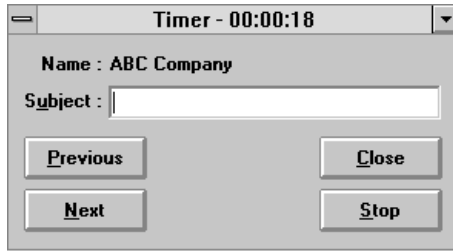
➤ **To use the timer**

1. In the Clients or Hotlist window, select an entry.
2. Select Time a Task from the Actions menu.

–or–

From the Tools menu:

- a. Select Timer.
- b. In the Timer dialog box, type a descriptive term in the Subject field.



c. Click on the Start button.

A running stopwatch icon appears at the bottom of the screen.

3. Double-click on the stopwatch icon when you want to stop timing.
4. In the Timer dialog box, click on the Stop button.
5. Click on the Close button.

Maximizer Personal creates a timer Note for the selected Client in the Notes window.

► **To use the timer for a series of Clients**

1. In the Clients or Hotlist window, select Timer from the Tools menu.
2. In the Timer dialog box, type a Subject and click on the Start button.
3. When you complete the task, double-click on the stopwatch icon and click on the Stop button.
4. Click on the Previous button.

–or–

Click on the Next button.

The previous or next Client in the list is displayed in the Timer dialog box.

5. Repeat steps 2–4 for each task in the series.
6. When you are finished timing tasks, click on the Close button.



SECTION 4

Tailoring the Workspace

THE TOOLBAR

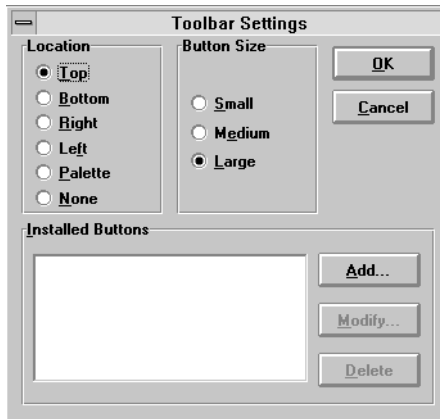
You can make many adjustments to your workspace to suit your needs and interests. For one, you can move the toolbar to a different area of the screen. Or you can set it up as a floating toolbar. If you prefer, you can also adjust the size of the toolbar buttons. You can also add buttons to your toolbar to launch other applications.

Maximizer Personal also gives you the option of turning off three default features: the ribbon bar, status bar, and Balloon Help.

Changing the Toolbar

To move the toolbar or adjust the toolbar buttons, complete the following steps.

- **To change the location of the toolbar**
 1. Select **Toolbar** from the **View** menu.
 2. In the **Toolbar Settings** dialog box, select an item in the **Location** group box.



3. Click on OK.

Maximizer Personal moves the toolbar to the selected new position.

➤ **To change the size of toolbar buttons**

1. Select Toolbar from the View menu.
2. In the Toolbar Settings dialog box, select an item in the Button Size group box.
3. Click on OK.

Maximizer Personal changes the size of the buttons on the toolbar.

Changing the Ribbon Bar

The ribbon bar provides a sub-set of command buttons for each Maximizer Personal window. You can toggle this feature on or off by completing the following step.

➤ **To show/hide the ribbon bar**

- Select Ribbon Bar from the View menu.

This toggles the view of the ribbon bar from visible to not visible.

Changing the Status Bar

The status bar appears at the bottom of your screen. It displays information about your current options in the program. Like the ribbon bar, this feature can be turned on or off.

➤ **To show/hide the status bar**

- Select Status Bar from the View menu.

Changing Balloon Help

When you move the mouse to a button, Balloon Help provides a brief information ‘balloon’ that describes the command name and function. You can turn this feature on or off.

➤ **To show/hide Balloon Help**

- Select Balloon Help from the View menu.
This toggles Balloon Help from visible to not visible.

Launching Applications

You can launch other applications, such as Microsoft Word for Windows, from within Maximizer Personal. Maximizer Personal lets you launch an application using either the toolbar or the Control menu. Both of these options are described below.

➤ **To launch an application**

Toolbar

1. Select Toolbar from the View menu.
The Toolbar Settings dialog box appears.
2. Click on the Add button in the Installed Buttons group box.
3. Fill in the Button Attributes group box.

NOTE

If the filename includes a blank and you are running Maximizer Personal on Windows 95, be sure to enclose the path in quotes.

4. Fill in the Select an Image for Button group box.
5. When you are finished, click on OK.

Maximizer Personal creates a toolbar button for the selected application launch.

NOTE

If you have a standard VGA display, you can only add a maximum of three buttons using the default toolbar button size (large). To add more buttons, either change to a toolbar palette or select a smaller button size.

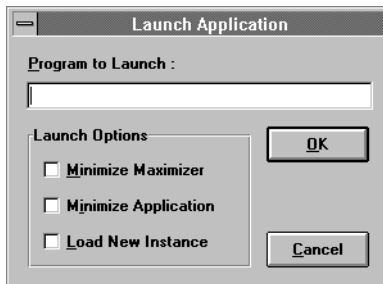
6. Click on the application button to launch the application.

➤ **To launch an application**

Control menu

1. Select Launch from the Control menu.

The Launch Application dialog box appears.



2. Type the name (including pathname) of the application in the Program to Launch field.
-

NOTE

If the filename includes a blank and you are running Maximizer Personal on Windows 95, be sure to enclose the path in quotes.

3. Select an item from the Launch Options group box if you prefer.

4. When you are finished, click on OK.

Maximizer Personal launches the application.

**HINT**

To access the Control menu from any of Maximizer Personal's primary windows, press Alt+spacebar.

CHANGING WINDOW DISPLAYS

Maximizer Personal lets you customize your window displays in many ways. You can tile and cascade your windows, minimize and maximize them, change window fonts, and adjust the colors.

Once you set up your windows as you prefer, you can save these settings so they appear the same way each time you start the program.

Tiling

When you open several Maximizer Personal windows at the same time, you'll find they 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. These options are outlined below.

➤ **To tile windows vertically**

- Select Tile Vertically from the Window menu.

➤ **To tile windows horizontally**

- Select Tile Horizontally from the Window menu.

- ▶ **To cascade windows**
 - Select Cascade from the Window menu.

- ▶ **To close down all open Maximizer Personal windows**
 - Select Close All from the Window menu.

Minimizing/Maximizing

As in most Windows programs, you can minimize, maximize, or restore any of your Maximizer Personal windows. When you minimize, you reduce a window to an icon. 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 on the Minimize button in the top right corner of the window.
Maximizer Personal reduces the window to an icon at the bottom of the screen.

- ▶ **To maximize a window**
 - Click on the Maximize button in the top right corner of the window.
Maximizer Personal expands the window to fill the workspace area.

Changing Fonts

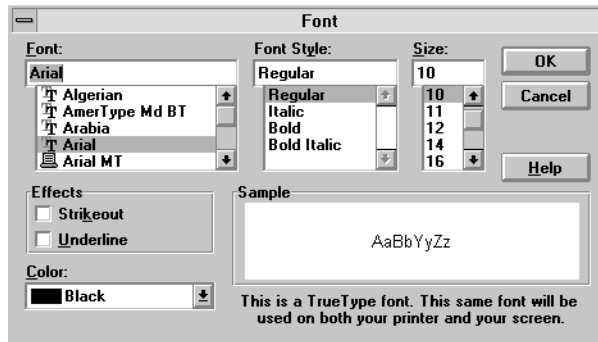
You can adjust the default fonts in the Maximizer Personal windows. You may choose to use a different typeface or select a larger font size for better visibility.

You can change the fonts in a single window or you can modify the fonts in all your windows at once. Both of these options are described below.

➤ **To change fonts in a single window**

1. Click on a window where you want to change the display fonts.
2. Select Set Font from the Window menu.
3. Select Current Window from the Set Font sub-menu.

The Font dialog box appears.



4. Select the desired items from the drop-down menus in the Font, Font Style, and Size fields.
5. Select an item in the Effects group box if you prefer.
6. When you are finished, click on OK.

Maximizer Personal changes the display fonts in the selected window.



HINT

You can also use the ribbon bar buttons to change window fonts.

➤ **To change fonts in all windows**

1. Select Set Font from the Window menu.
2. Select All Windows from the Set Font sub-menu.

The Font dialog box appears.

3. Select the desired items from the drop-down menus in the Font, Font Style, and Size fields.

4. Select an item in the Effects group box if you prefer.
5. When you are finished, click on OK.

Maximizer Personal changes the display fonts in all the windows.

Changing Colors

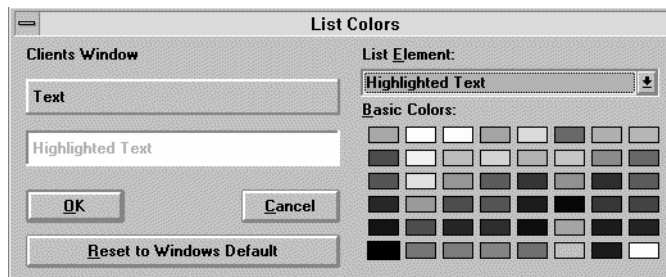
Maximizer Personal lets you adjust the default colors in your Maximizer Personal windows. You can change the colors in a single window, which is a useful feature if you want a window to stand out from the others. You might also want to modify the colors in all your windows.

If you decide you don't like the changes you have made, Maximizer Personal lets you return your windows to the Windows default colors.

► To change colors in a single window

1. Click on a window where you want to change the color.
2. Select Set Color from the Window menu.
3. Select Current Window from the Set Color sub-menu.

The List Colors dialog box appears.



4. Select an item from the drop-down list in the List Element field.
5. Click on one of the Basic Colors.
6. Repeat steps 4–5 for each list element where you want to set a color.
7. When you are finished, click on OK.

Maximizer Personal changes the colors in the selected window.

**HINT**

You can also use the ribbon bar buttons to change window colors.

➤ To change colors in all windows

1. Select Set Color from the Window menu.
2. Select All Windows from the Set Color sub-menu.
The List Colors dialog box appears.
3. Select an item in the List Element field.
4. Click on one of the Basic Colors.
5. Repeat steps 4–5 for each list element where you want to set a color.
6. When you are finished, click on OK.

Maximizer Personal changes the colors in all the windows.

➤ To undo a color change

- In the List Colors dialog box, click on the Reset to Windows Default button.

Saving or Restoring Changes

Once you have changed the window displays to suit your own preferences, you can save them. This way, your new window setup will appear again each time you start the Maximizer Personal program. If you make further window modifications, you can save these changes as the new default.

If you change the window setup and then decide you don't want to save it, you have two options. You can revert to the system default setup or you can recover the last saved window display.

➤ **To save your changes**

- Select Save Settings on Exit from the Window menu.

When you exit Maximizer Personal or close a window, this option saves the current window colors, fonts, position, size, and column height and width. You can toggle this option on or off.

To save the settings without exiting the program, press Shift and double-click on Maximizer Personal's Control menu. Or press Shift+Alt+F4.

NOTE

If you minimize Maximizer Personal and then exit the program, your settings will not be saved. You should restore the Maximizer Personal icon and then exit.

➤ **To revert to the default**

1. Select Reset Default Workspace from the Window menu.
2. In the Maximizer dialog box, click on OK to confirm the reset.

Maximizer Personal erases your changes and restores the workspace to the default setup.

➤ **To restore last saved changes**

- Select Restore Saved Workspace from the Window menu.

Maximizer Personal reverts to your last saved windows changes.

MODIFYING COLUMNS

Each Maximizer Personal window includes various columns of database information. These columns can be modified in a number of ways. You can sort information by a different column, re-size your column widths, choose a different column setup, and even create new column setups. All of these options are described below.

Sorting

Information in each window is sorted by a default column. For example, the Hotlist window is always sorted by Date.

If you prefer, you can select a different window column to re-sort the information in another way. This gives you several ‘views’ of your database. In the Hotlist window, for example, you could sort the information by Name if you wanted to quickly find a Client. Or you could select the Priority column to determine what tasks should be done first.

➤ **To sort columns**

1. Open or click on a window where 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.

Resizing

You may sometimes want to increase or decrease the size of a column. You can resize any window column using your mouse. Complete the following steps.

➤ **To resize a column using the mouse**

1. Move the cursor to the column border you want to resize.
The cursor changes to a resize indicator.
2. Grab the vertical border of the column and drag it left or right to change the width.
–or–
Grab the horizontal border of a column entry and drag it up or down to change the height.

Column Setup

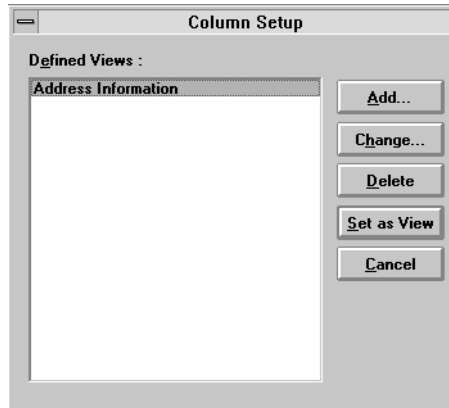
Maximizer Personal provides a default column setup for the Clients window. If you prefer, you can create your own column setup for this window. This allows you to display different information fields in various combinations.

Creating a Column Setup

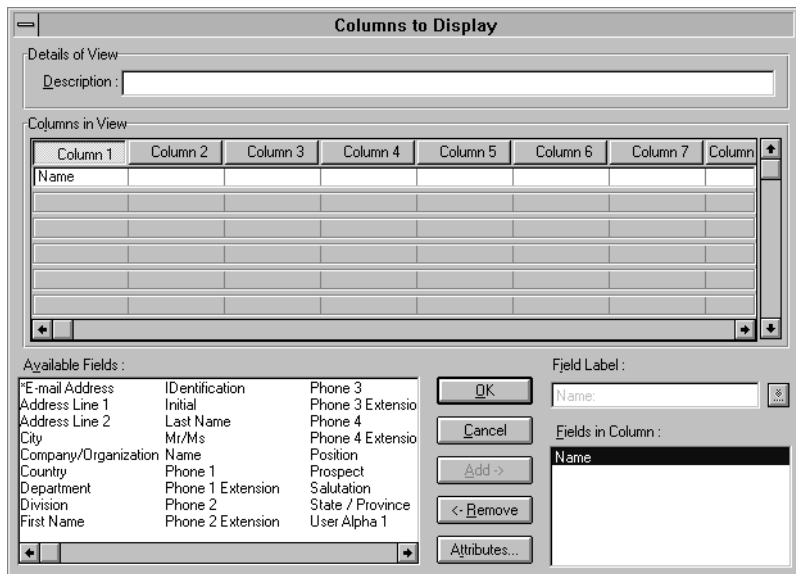
You can create as many column setups as you wish. When you want to use one of them, you select it from a list. Maximizer Personal then reformats the window according to your new column setup.

➤ **To create a column setup**

1. In the Clients window, select Column Setup from the View menu.
2. In the Column Setup dialog box, click on the Add button.



The Columns to Display dialog box appears.



3. Type a description in the Details of View group box.
4. Click on a column title button in the Columns in View box.
5. Click on the Attributes button to change the name of the column and click on OK.
6. Select a field in the Available Fields box.

These fields correspond to the information fields in the Client records. For more information about these fields, see “Adding a Client” on page 36.

7. Click on the Add button to add it to the current column.
8. Repeat steps 4–7 for each field you want to add to the column setup.
9. Change the name of the field label in the Field Label box if you prefer.
10. When you are finished, click on OK.

Maximizer Personal adds the column setup to the list in the Column Setup dialog box.

➤ **To select a column setup**

1. In the Clients window, select Column Setup from the View menu.
2. In the Column Setup dialog box, select your preferred view from the Defined Views field.
3. Click on the Set as View button.

Modifying a Column Setup

Maximizer Personal lets you modify the attributes of a column setup. You can also delete any of your column setups. Remember, deletions are permanent and can't be undone.

➤ **To change a column setup**

1. In the Clients window, select Column Setup from the View menu.
2. In the Column Setup dialog box, select the column setup you want to modify.
3. Click on the Change button.
4. Modify the column setup attributes.
5. When you are finished, click on OK.
6. Click on the Close button to close the Column Setup dialog box.

➤ **To delete a column setup**

1. In the Clients window, select Column Setup from the View menu.
2. In the Column Setup dialog box, select the column setup you want to delete.
3. Click on the Delete button.
4. In the Maximizer dialog box, click on OK to confirm the delete.
Maximizer Personal deletes the column setup.



SECTION 5

Maintaining Your Database

DATABASE MANAGEMENT

By default, Maximizer Personal automatically opens an empty database when you start the program. As with any database application, you also need to do frequent backups to preserve your data. Doing a backup is simple using the built-in features of Maximizer Personal.

NOTE FOR WINDOWS 95 OR NT USERS

If you are a Windows 95 user, click on the Browse button to select a Maximizer Personal folder or directory.

Closing and Opening Your Database

For some tasks, such as backing up your database, you need to close your Maximizer Personal database. When you are finished, you will then need to reopen the database.

➤ **To close a database**

- Select Close Database from the File menu.

Maximizer Personal closes your Maximizer Personal database.

➤ **To open a database**

1. Select Open Database from the File menu.

Maximizer Personal opens your Maximizer Personal database.

Backing Up a Database

A backup is another copy of your database which can be used if the original copy on your PC is ever damaged. For example, you might accidentally delete part of a database or your hard drive might be damaged. If this happens, you just restore your backed-up files with no loss of time or information.

A backup also checks and cleans up your data, and compresses it up to 80 per cent. This does take a little time, so you should allow a few minutes to back up a large database. You can back up an entire database at once or just selected files from it.

How Many Backup Copies?

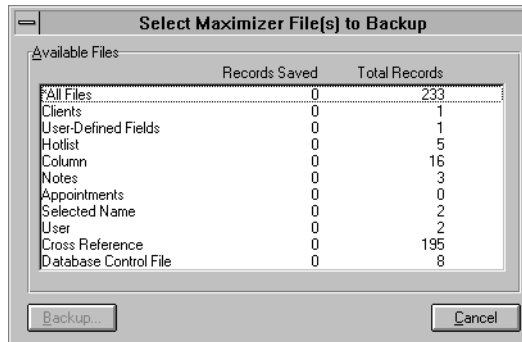
While one backup copy is often enough, many people keep two or three copies on a rotating basis. It's really up to you.

Also, if you plan to do some radical work on your database, such as purging old Notes or deleting a large number of inactive Clients, you should make an archive copy beforehand. An archive copy is simply a backup that you only make once and then set aside without using again. This way, if you ever need to restore anything you deleted from that time, you have the archive copy to work from.

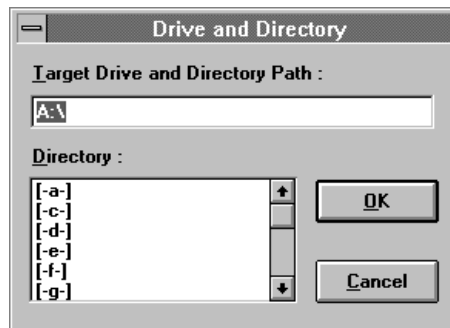
➤ To back up a database

1. Select Close Database from the File menu to close the current database.
2. Select Backup from the Utilities menu.

The Select Maximizer File(s) to Backup dialog box appears.



3. In the Available Files field:
 Select the individual files you want to back up.
 –or–
 Select All Files.
4. Click on the Backup button.
 The Drive and Directory dialog box appears.



5. Click on OK to back up the database to drive A:\.
 –or–
 Type an alternate drive directory and click on OK.
6. In the Maximizer warning dialog box, click on OK to confirm the backup.
7. Insert a formatted disk in the appropriate drive and click on OK in the Maximizer dialog box.

Maximizer Personal backs up the selected database. If the database is large, a Maximizer alert box asks for the next disk.

8. When the backup is complete, click on the Close button to close the Select Maximizer File(s) to Backup dialog box.
9. Click on the Close button again to close the Backup Database dialog box.



HINT

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.

Restoring a Database

Restoring means copying your backup file(s) from diskette back into the working directories on your hard disk. Since it replaces all your existing data, you should only restore files when you have lost or damaged your working database.

Sometimes, you may also want to do a restore to 'pack' your data. For example, if you delete six months of old Hotlist entries, the data files are still quite large. A backup/restore will compress this data and free up a lot of disk space.

You can restore an entire database at once or just the selected files from it.

➤ **To restore a database**

1. Select Close Database from the File menu.
2. Select Restore from the Utilities menu.

The Select Maximizer File(s) to Restore dialog box appears.



3. In the Available Files field:
Select the individual files you want to restore.
–or–
Select All Files.
4. Click on the Restore button.
The Drive and Directory dialog box appears.
5. Click on OK to restore the database from drive A:\.
–or–
Type an alternate drive directory and click on OK.
6. In the Maximizer warning dialog box, click on OK to confirm the restore.
7. Insert the backup disk in the appropriate drive and click on OK in the Maximizer dialog box.

NOTE

This command replaces your existing data with the backup data.

8. When the restore is complete, click on the Close button to close the Select Maximizer File(s) to Restore dialog box.
9. Click on the Close button again to close the Restore Database dialog box.

Recovering a Damaged File

On rare occasions, your Maximizer Personal data files may get corrupted through unusual circumstances or computer problems. For example, a database may be stored in an area of your hard disk that gets damaged.

In this case, you will see an error message telling you one of your Maximizer Personal files is corrupted. If you receive an error message about a corrupted file, stop what you are doing and note it down immediately. Then see Appendix B "Retrieve Error Messages" on page 183 for information on Retrieve error messages and what to do about them.

In most cases, you can uncorrupt a file by closing the database, backing up the corrupted file, and then restoring it again. For faster results, it's better to back up a directory on your hard disk instead of on a diskette.

If this doesn't solve the problem, try the advanced procedure outlined below. If you still have the problem, please call Maximizer Customer Support for assistance.

► To restore a corrupted data file

1. Select Close Database from the File menu.
2. Select Backup from the Utilities menu.
3. In the Available Files field, select the corrupted file to back up.
4. Click on the Backup button.
5. In the Drive and Directory dialog box, type a directory name on your hard disk and click on OK.
6. In the Maximizer warning dialog box, click on OK to confirm the backup.
7. When the backup is completed, click on the Close button twice to close the backup dialog boxes.
8. Click on the Minimize button to reduce Maximizer Personal to an icon.
9. Open the File Manager.
10. Find the corrupted file and rename it by giving it a .BAD extension.
11. Double-click on the Maximizer Personal icon.

12. Select Restore from the Utilities menu.
13. In the Drive and Directory dialog box, type the backup directory name and click on OK.
14. In the Maximizer warning dialog box, click on OK to confirm the restore.
15. When the restore is complete, click on the Close button twice to close the restore dialog boxes.
16. Delete the corrupted file with the .BAD extension.

SETUP

Maximizer Personal sets up many system defaults which allow you to start using the program right away. You can change some or all of these system settings to suit your own needs.

Setting Up Security

You can set up security using the Preferences dialog box. Complete the following procedures to enable security.

➤ **To turn on security**

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

➤ **To turn off security**

1. In the Preferences dialog box, click on the Security is On button.
This toggles the button to Security is Off.
2. Click on OK.

Once you enable security, you have to log in each time you start Maximizer Personal.

Setting Passwords

Once you've set a password, you can change it at any time.

NOTE

Until you specify otherwise, the password is "Control".

➤ To change your password

1. In the Preferences dialog box, click on the Set Password button.
2. In the New Password dialog box, type the new password and click on OK.

In the Retype Password dialog box, re-type the same password and click on OK.

Adjusting Preferences

In Maximizer Personal, you can adjust all kinds of system preferences, from modem settings to date format defaults. All of these adjustments are made using the Preferences dialog box.

Date Format

If you prefer, you can adjust the default date format. Complete the following steps.

➤ To adjust the date format

1. Select Preferences from the File menu.

- In the Preferences dialog box, select the appropriate item in the Date Format group box.



- Click on OK.

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

- Select Preferences from the File menu.
- In the Preferences dialog box, adjust the default checkboxes in the Address Format group box as you prefer.
- When you are finished, click on OK.

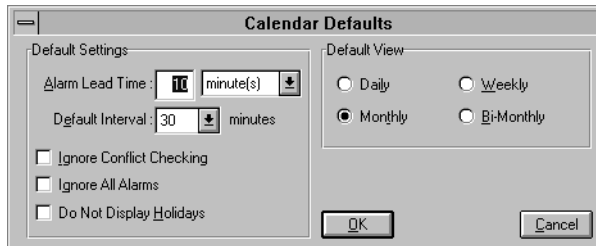
Calendar Preferences

Maximizer Personal lets you make several adjustments to the Calendar, including showing/hiding holidays, turning off conflict checking, and setting default lead times for alarms. Complete the following steps.

➤ **To adjust Calendar preferences**

1. Select Preferences from the File menu.
2. In the Preferences dialog box, click on the Calendar button.

The Calendar Defaults dialog box appears.



3. Adjust the Default Settings group box as you prefer.

Use the Alarm Lead Time field to determine how much time in advance your alarm goes off before an appointment or Hotlist task.

Use the Default Interval field to divide up 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.

If you want Maximizer Personal to ignore any conflicts between existing appointments and any new ones you make, select Ignore Conflict Checking.

4. Select the appropriate checkbox in the Default View group box.
5. When you are finished, click on OK.

Modem Preferences

Your modem preferences tell Maximizer Personal where your PC's modem is connected and how it performs. Some of these settings are more critical than others. For example, if you set up your port incorrectly, your modem will not

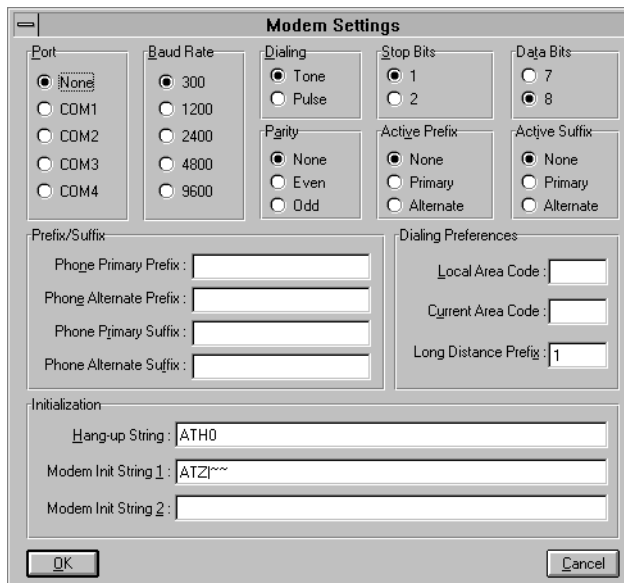
work at all; but if you set up your baud rate incorrectly, the modem will operate, but at a slower speed.

If you need more information about modem settings and options, you should refer to your modem manual.

➤ **To adjust modem preferences**

1. Select Preferences from the File menu.
2. In the Preferences dialog box, click on the Modem button.

The Modem Settings dialog box appears.



3. Adjust the checkboxes in the Port group box.
Leave the default option of None if you have no modem. This disables the auto-dial feature of the Phone button.
4. Adjust the checkboxes in the Baud Rate group box.
5. Adjust the checkboxes in the Dialing group box.
Select Pulse for rotary dial service.
6. Adjust the checkboxes in the Stop Bits, Data Bits, and Parity group boxes.

These three group boxes determine the stream of bits that your modem sends to the outside world.



HINT

If you are using 1200 baud or higher, you can quickly check that you've selected the appropriate options: count even and odd parity as one bit, and then check that the stop bits, data bits, and parity bits add up to at least nine.

7. Adjust the checkboxes in the Active Prefix and Active Suffix group boxes.

A prefix is any digit you need to dial before a number, such as "9." A suffix is any digit that follows a number, such as an account number.

8. Fill in the Prefix/Suffix group box if you prefer.
9. Fill in the Dialing Preferences group box if you prefer.

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

10. Adjust the fields in the Initialization group box.

By default, Maximizer Personal uses Hayes modem settings.

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

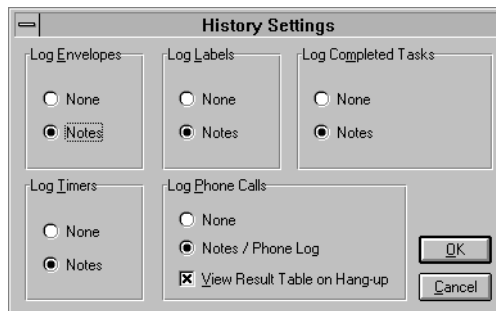
11. When you are finished, click on OK.

History Preferences

History controls whether to create automatic Note 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. Complete the following steps.

► To adjust history preferences

1. Select Preferences from the File menu.
2. In the Preferences dialog box, click on the History button.
3. In the History Settings dialog box, adjust the group box checkboxes as you prefer.



If you want to turn off the automatic logging feature, select None.

De-select the View Result Table on Hang-Up checkbox to turn off the Phone Call Result dialog box display after a phone call. For more information, see chapter 9 "Making Phone Calls" on page 85.

4. When you are finished, click on OK.

System Defaults

You can adjust system defaults with the Preferences dialog box: assignment of Client ID numbers, accelerated access, and e-mail addressing.

By default, Maximizer Personal automatically assigns a unique ID number to each new Client you create. You can change the system default if you want to assign these numbers manually.

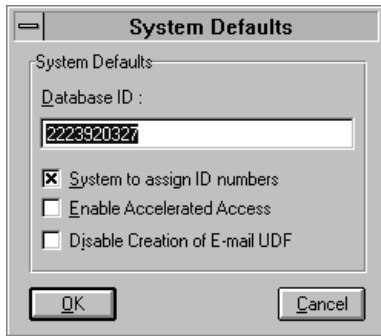
By default, the accelerated access option is turned off.

By default, Maximizer Personal automatically creates a system-defined UDF for recording E-mail addresses. This field is located on the User-Defined Fields tab in Client window and is called *E-mail Address. You can disable this feature if you want.

➤ **To set system defaults**

1. Select Preferences from the File menu.
2. In the Preferences dialog box, click on the Defaults button.

The System Defaults dialog box appears.



3. De-select the System to Assign ID Numbers checkbox if you prefer.
4. Select the Enable Accelerated Access checkbox if you prefer.
5. Select the Disable Creation of E-mail UDF checkbox if you do not want a field to record E-mail addresses.
6. When you are finished, click on OK.

Using the Windows Control Panel

Maximizer Personal is affected by many settings in the Windows Control Panel. In particular, the International option of the Control Panel controls the formatting of your dates, times, numbers, and window color schemes.

To adjust any of your Control Panel settings, you should refer to the “Control Panel” chapter of your *Windows User's Guide*. Once you've made your adjustments, you should restart Windows. Any changes you make will then appear in the Maximizer Personal program and any other Windows applications.

IMPORTING AND EXPORTING DATA

You can exchange data between Maximizer Personal and other software applications using the program's import and export features. (Some versions of Maximizer Personal do not include the export feature.) This way, you don't need to create data each time you use a different database product.

Windows 95

NOTE FOR WINDOWS 95 USERS

If you are a Windows 95 user, click on the Browse button to select a Maximizer Personal folder or directory.

File Formats

Maximizer Personal supports several types of file formats for importing and exporting data: comma-delimited, comma-separated values (CSV), or tab-delimited. Comma-delimited is the most popular type of format. It is widely supported and practical for exporting Note text.

CSV is also widely supported, but it has some limitations when handling text with commas. You will have to scan the data and take out any text commas before importing/exporting with this format. Tab-delimited is an older format, which is not as commonly used.

Importing a Database

When you import a file, you bring information into Maximizer Personal from another program.

Before you begin to import your file, you should consider a few issues. First, dates must be in a compatible format in both programs. This means you should review your import file to check the date format. Then check your date preferences in Maximizer Personal to ensure they are compatible. For more information on preferences, see chapter 25 "Setup" on page 297.

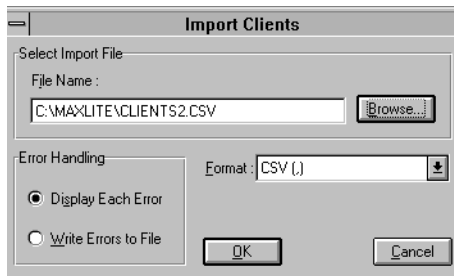
Second, you should check your import file and note any User-Defined Fields (UDFs) it contains. To capture these fields in Maximizer Personal, you need to set up new UDFs that match those in the import file.

Finally, you should first back up the database.

► To import Client data

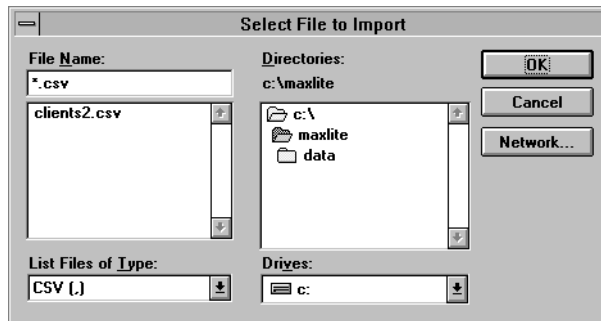
1. Select Import from the File menu.

The Import Clients dialog box appears.



- a. Click on the Browe button

The Select File to Import dialog box appears.

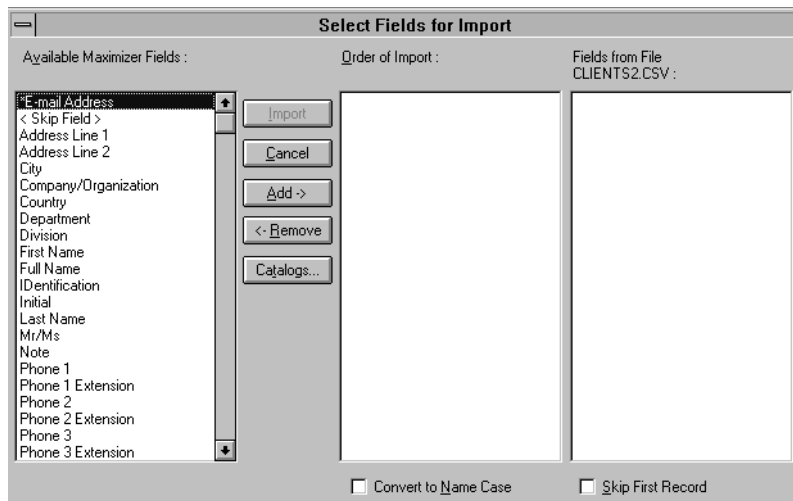


- b. Indicate the import filename and path.
- c. Click OK.

The Import Clients screen reappears.

2. Select the appropriate item in the Format field.
3. Select the appropriate item in the Error Handling group box.
4. Click on OK.

The Select Fields for Import dialog box appears.



5. In the Available Maximizer Fields box, select an item and click on the Add button.

—OR—

Double-click on the item.

The item appears in the Order of Import list box.

6. Select <Skip Field> to skip any fields in the import file.
7. Repeat steps 7–8 until you have associated a Maximizer Personal 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 ↑ arrow to move to the selected line. Then add the field.

8. Select Convert to Name Case if you prefer.

Use this option if you want to convert any text that is in capital letters (uppercase) to mixed case.

9. Select Skip First Record if you prefer.

Use this option to skip the first record in the import file if it contains field labels or names.

10. When you are finished, click on the Import button.

Maximizer Personal imports the database file.

If you selected Display Each Error in the Error Handling group box, Maximizer Personal displays any invalid fields. Complete the following sub-steps.

- a. In the Missing or Invalid Field dialog box, enter a correction in the text field and click on the Continue button.

–or–

Click on the Skip button if you don't want to import the record.

- b. Repeat step a for each error display.

–or–

Click on the Abort button to cancel the rest of the import.

Exporting Data

When you export data from your Maximizer Personal database, you send it out to another application. You can export all or part of your database. Be sure to order the data exactly as you want it to appear in the export file. Complete the following steps.

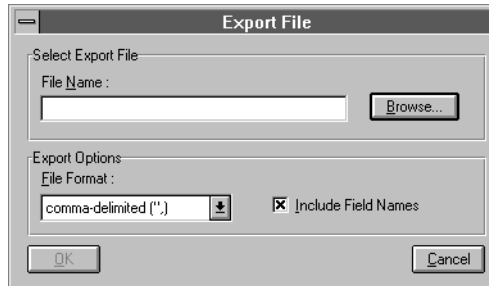
► **To export Maximizer Personal data**

1. In the Clients window, build a list of entries sorted in the order you want it exported.

For information on building lists, see chapter 10 "Lists and Searching" on page 93.

2. Select Export from the File menu.

The Export File dialog box appears.



3. Indicate the export filename and path in the Select Export File group box.
4. Select the appropriate item in the File Format field.

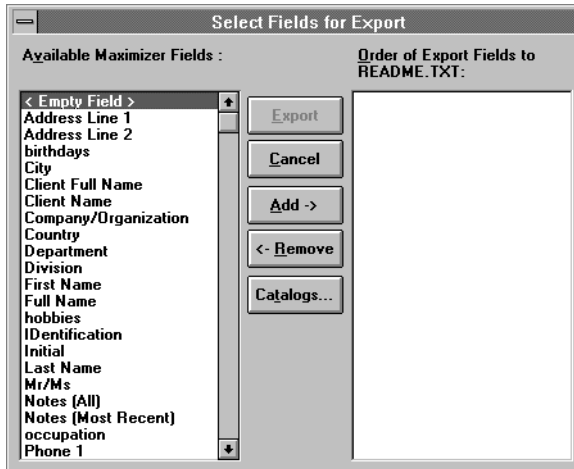
If you select the CSV format, you must strip out any commas in address lines or Notes before you export.

5. De-select the Include Field Names checkbox if you prefer.

This checkbox determines whether to export a first record showing all the field names in your export file.

6. Click on OK.
7. In the Maximizer dialog box, click on OK to confirm the command.

The Select Fields for Export dialog box appears.



8. Select an item from the Available Maximizer Fields box.
9. Click on the Add button to place it in the Order of Export Fields box.
10. Select <Empty Field> to export a blank field.
11. Repeat steps 7–9 until you have all the fields you need in your export file.
12. When you are finished, click on the Export button.

Maximizer Personal exports the database to the selected file.

NOTE

Only Client information, User-Defined Fields, and Notes can be exported.



Appendices

A

KEYBOARD SHORTCUTS

This appendix provides a list of the keyboard shortcuts available in Maximizer Personal. Remember, you can also find the shortcut for any menu item by looking at the menu itself: the keyboard equivalent is listed next to the command option.

General

The following keyboard shortcuts apply to the Maximizer Personal workspace in general, which means you can use them in any window.

Windows

Press	To
Alt+Spacebar,n	Minimize Maximizer Personal
Alt+Spacebar,x	Maximize Maximizer Personal
Alt+-,n	Minimize your current window
Alt+-,x	Maximize your current window
Alt+-,r	Restore your current window
Ctrl+1	Open Clients window
Ctrl+4	Open Notes window
Ctrl+6	Open Hotlist window
Ctrl+7	Open Calendar window

Press	To
Ctrl+F4	Close current window
Ctrl+Tab	Move between open windows
Shift+F4	Tile all windows vertically
Shift+F5	Cascade all windows
Shift+F6	Tile all windows horizontally
Tab	Sort by next column

Menus

Press	To
<i>Alt+underlined letter</i>	Select a menu
<i>underlined letter</i>	Select a menu option
Esc	Close a menu
Shift+F10	Access right mouse menu

Dialog Boxes

Press	To
Tab	Move to next field or button
Shift+Tab	Move to previous field or button
Enter	Close a dialog box

Entries

Press	To
Home	Go to first entry in list
End	Go to last entry in list
Insert	Add an entry
Enter	Modify the current entry
Delete	Delete the current entry
Ctrl+Spacebar	Mark the current entry
Ctrl+/	Mark all entries
Ctrl+\	Unmark all entries
Ctrl+=	Reverse mark
Shift+↓	Drag and mark entries

Phone Features

Press	To
F7	Use Phone features
Shift+F7	Use Quick Dial
Ctrl+F7	Use Phone Log
Alt+F7	Receive a call

Other Tasks

Press	To
F1	See Help
F9	Use the Timer

Press	To
Ctrl+z	Undo last search (up to last eight)
Alt+F4	Exit from Maximizer Personal

Drop-Down Calendars

Maximizer Personal provides keyboard shortcuts to use in a drop-down calendar. These apply once you have accessed the calendar from a field using the right mouse button.

Press	To
↓	Move ahead one week
↑	Move back one week
PageDown	Move ahead one month
PageUp	Move back one month
Ctrl+PageDown	Move ahead one year
Ctrl+PageUp	Move back one year

Navigating

You can use the following options in the Notes dialog boxes.

Press	To
→	Move right one character
←	Move left one character
↑	Move up one line
↓	Move down one line
Home	Jump to start of line

Press	To
End	Jump to end of line
Ctrl+Home	Jump to top of document
Ctrl+End	Jump to bottom of document
PageUp	Move up one screen
PageDown	Move down one screen

B

BTRIEVE ERROR MESSAGES

This appendix provides a list of all error messages produced by Btrieve, Maximizer Personal's database engine. If you see an error message, stop what you are doing and note down the number. Then try to solve the problem immediately.

If you ignore an error message, you could end up with serious problems in your database. If you can't resolve an error message, please call Maximizer Customer Support for assistance.

Data Manager Errors

Error code 02: I/O Error

This error occurs during a disk read/write and indicates a damaged file. To resolve the error, follow the procedure "To restore a corrupted data file" on page 156.

Error code 03: File Not Open

This error indicates Maximizer Personal was not able to perform a successful Open operation. For assistance, call Maximizer Customer Support.

Error code 04: Key Not Found

This message occurs when the specified key value in the index path is not found and indicates a damaged file. To resolve the error, follow the procedure "To restore a corrupted data file" on page 156.

Error code 05: Duplicate Key Value

This message indicates that an attempt was made to add a record with a key field containing a duplicate key value to an index that doesn't allow duplicate values. For assistance, call Maximizer Customer Support.

Error code 06: Invalid Key Number

This error may occur because your data is damaged. For assistance, call Maximizer Customer Support.

The error can also occur if you attempt to restore data and abort the restore before it is completed. If you abort a restore and then open a database, one or more files will not have the index built for that file. Try the restore again.

Error code 07: Different Key Number

This error occurs when the key number changes before a Get Next, Get Previous, Update, or Delete operation. It indicates a damaged file. To resolve the error, follow the procedure "To restore a corrupted data file" on page 156.

Error code 08: Invalid Positioning

This message occurs when an attempt is made to update or delete a record without first performing a Get or Step operation to establish the current position. It indicates a damaged file. To resolve the error, follow the procedure "To restore a corrupted data file" on page 156.

Error code 09: End of File

The error occurs if you read past the end of the file, and indicates the file is damaged. To resolve the error, follow the procedure "To restore a corrupted data file" on page 156.

Error code 10: Modifiable Key Value Error

This message occurs when you try to modify a key field which is defined as non-modifiable. It indicates a damaged file. To resolve the error, follow the procedure “To restore a corrupted data file” on page 156.

Error code 11: Invalid Filename

This error occurs if you try to convert a database that contains an invalid path, such as a directory that no longer exists. This may be a problem for users who add/change databases frequently.

Error code 14: Pre-Image Open Error

This error indicates the pre-image file could not be created or opened. There are three possible causes:

- Your hard disk directory is full. To resolve the error, delete any unnecessary files to free up disk space.
- Both the file and its pre-image file have been erased or damaged. Try to back up and restore the file. If unsuccessful, restore the file from its most recent backup.
- The current user has no access rights to the pre-image file. Ensure the current user has all the appropriate rights.

Error code 15: Pre-Image I/O Error

This message indicates an I/O error occurred during pre-imaging. It may indicate the disk is full. Delete any unnecessary files to free up disk space.

The pre-image file could also be damaged. To resolve the error, follow the procedure “To restore a corrupted data file” on page 156.

Error code 18: Disk Full

This error occurs when the disk is full and will not allow a file to be expanded to hold an insertion. Delete any unnecessary files to free up disk space.

This code may also occur on Novell network drives, where each file has an owner name. If the owner of a particular Maximizer Personal data file is deleted from the system, the error occurs when someone attempts to access their database.

To resolve the error, the system administrator should assign a new owner to the file using the Novell utilities. Alternatively, another user can copy the file elsewhere and then back again. This process of copying will assign the user as the owner of the affected file.

Error code 20: Record Manager Inactive

This message indicates Btrieve has not been loaded. For assistance, call Maximizer Customer Support.

Error code 22: Data Buffer Length

This error occurs when the data buffer parameter is not long enough to hold the data record. For assistance, call Maximizer Customer Support.

Error code 24: Page Size Error

To avoid this error, the page size must be 4096 Bytes. For assistance, call Maximizer Customer Support.

Error code 25: Create I/O Error

This error indicates the specified filename could not be created. If the disk is full, delete any unnecessary files to free up disk space. The disk may also be write-protected. If so, remove the diskette's write protection.

Error code 42: Incomplete Accelerated Access

This message occurs when you try to open a file that was previously accessed in accelerated mode and was never successfully closed. The file may be damaged. Restore the file from your most recent backup or follow the procedure "To restore a corrupted data file" on page 156.

Error code 43: Invalid Record Address

This error occurs when the address is outside the file's boundaries (i.e., it is not on a record boundary within a data page or on a data page). The file may be damaged. To resolve the error, follow the procedure "To restore a corrupted data file" on page 156.

Error code 56: Incomplete Index

This error indicates a supplemental index is damaged. Restore the file from your most recent backup or follow the procedure "To restore a corrupted data file" on page 156.

Error code 58: Compression Buffer Too Short

This error occurs when the record manager attempts to read or write a record that is longer than the specified value for the compression buffer.

This error can be caused by an incorrect setting of the compression buffer parameter. This can be found on the Options line of BTI.INI or in the Windows Registry. If you are a Windows 3.1 user, edit BTI.INI in the \WINDOWS directory, and add /U:2 to the Options= line. If you are a Windows 95 or NT user, re-install Maximizer Personal.

Another possible cause may be a corrupted record. To resolve the error, follow the procedure "To restore a corrupted data file" on page 156.

Error code 80: Conflict

This error indicates you can't update or delete a record because it has been changed by another workstation (applies in network configurations only).

To resolve the error, ensure NetBIOS is loaded on all workstations. If this doesn't work, your network may not be NetBIOS compatible. Contact your network dealer.

Error code 81: Lock Error

This error indicates the Btrieve lock table is full, indicating the locks parameter is too low. For assistance, contact Maximizer Customer Support.

Error code 82: Lost Position Error

This message indicates a record being retrieved has been deleted or had its key value modified by another application. The file may be damaged. To resolve the error, follow the procedure “To restore a corrupted data file” on page 156.

Error code 84: Record in Use

This error occurs when you attempt to lock a record that is currently locked by another workstation. Try again.

Error code 85: File in Use

This message occurs when the application attempts to open a file, lock a record, or access a record while another handle holds the transaction lock on the file or has opened it in accelerated mode. Try again.

Error code 88: Incompatible Mode Error

This message indicates that a file being opened is in an incompatible mode. If the first handle to access a file opens in accelerated mode, all others must open it in accelerated mode. Try again.

Error code 93: Incompatible Lock Type

This error occurs when the application attempts to mix single record locks and multiple record locks. Try again.

Error code 94: Permission Error

This error occurs when you try to open or create a file in a directory where you don't have sufficient rights. Ensure you have the appropriate rights.

Error code 1002: A Memory Allocation Error Occurred

In this case, not enough conventional memory was made available before running Windows (memory below 640K). You can free up more conventional memory by loading fewer Terminate and Stay Resident (TSR) programs. Or, try running the MS-DOS 6 Memmaker.

Error Code 2001: Insufficient Memory

This error occurs when the requester cannot allocate enough memory for the parameters specified in the BRQPARMS environment variable. This error may happen if conventional system memory is low.

To resolve the error, reduce the /D: startup option value when using BREQUEST.

Error code 2003: No Local Access Allowed

This error occurs when the application attempts to access a file stored on a local drive. To resolve the error, modify the BTL.INI file in your WINDOWS directory. In the Btrieve section of the file, type local=Yes.

Other Errors

Error Code 105: Unable to load/start IS launcher.

This error code is often caused by a memory resident virus checker interfering with the install program. To resolve the error, disable the virus checker, run the install, and then re-engage the checker afterward.

OLE Storage returned an error code of 262. The current operation could not be completed.

This message indicates there is no file locking system, such as SHARE.EXE or VSHARE, currently is running on the machine that attempted to load Maximizer Personal. The program will still execute, but to use OLE properly,

you should load SHARE.EXE on the machine attempting to run Maximizer Personal.

Error reading device when starting Maximizer for Windows.

When you run Maximizer Personal, the system checks to ensure that SHARE.EXE or VSHARE.386 has been loaded. This check is made on all drives that Maximizer Personal might access. It can cause a problem for some removable disk systems. To bypass the check on a specific drive, add the following two lines to your MAXWIN.INI file:

[SHARE]	
Bypass Share Check on Drive=#	Where # represents the drive number to be skipped: 0=A, 1=B, 2=C, 3=D, etc.



GLOSSARY

Application	A program or software package.
Back up	The process of preserving data by copying it from your hard drive to diskettes or another hard drive.
Browser	See WWW Browser.
Calendar	In Maximizer Personal, an electronic appointment book.
Cascade	A way to arrange windows in Maximizer Personal so they overlap with only the title bars showing.
Checkbox	A small icon in a dialog box, used to turn an option on or off. An X appears in the checkbox when it is selected.
Click	To quickly press and release the mouse button. Clicking selects the item you are currently pointing at, such as a menu.
Client	A company or business you deal with.
Clipboard	In Windows, a temporary storage place for cut or copied text.
Column setup	A format for displaying Client fields and data in the Clients window.
Conflict checking	A Maximizer Personal feature that warns you when you have overlapping appointments.
Default	A setting that is used unless you tell the system otherwise.

Default Client	A special Client record that is used as a template to copy data into new Clients.
Dialog box	A temporary window where you can enter information. A menu option followed by three dots (...) leads to a dialog box.
Dialog box tab	A section of a dialog box, which is accessed by a tab button.
Document	A text file created with MaxEdit or another Windows application.
Double-click	To quickly press and release the mouse button twice. Double-clicking performs a certain action, such as starting a program.
Draft quality	A printing option that prints faster but with less quality.
Drag and drop	A way to quickly move information from one window to another. It consists of selecting an item, holding down the mouse button, moving the mouse, and then releasing the button.
Drop-down list or calendar	A table that is accessed from a dialog box field using the right mouse button.
Eagle	An Internet database of North American residential, business and demographic information
Explorer	A program that comes with Windows 95 that helps you view and manage files.
Font	A design for displaying numbers and characters. Common fonts include Times Roman and Helvetica.
Folder	A directory that can contain files, programs, and other folders.
History	Logging of activities in the Notes windows.
Hotlist	A list of reminders and things to do.
Icon	A small graphic that represents an element of your computer system, such as a disk drive or an application.

Internet	A “network of networks.” It is composed of high speed networks linked together around the world that contain vast amounts of information that you can access.
Internet Provider	A company that provides access to some or all types of Internet information.
Log in	To access a program by using a password.
Logging	Automatic tracking of activities.
Maximize	To enlarge a window to its maximum size. This is done using the Maximize button at the right end of the title bar.
Menu	A list of available commands. A menu is opened by clicking on it with the mouse.
Menu bar	The horizontal bar just below the title bar that contains command menus.
Merge	To join a list of addresses with a form letter or fax.
Microsoft Exchange	A program that comes with Windows 95. It is an advanced application that retrieves messages into one inbox from many kinds of messaging service provider, including your MAPI-compliant mail system, Internet service provider, and fax.
Minimize	To reduce a window to an icon. This is done using the Minimize button at the right end of the title bar.
MultiActive Eagle	An Internet database of North American residential, business and demographic information. You can use your Internet access and World Wide Web browser to transfer prospective Clients from Eagle’s directories. You can also import numerous business letters and forms that can be easily modified and printed in Maximizer Personal.
Notes	A log of Client/Contact activities and personal comments.
Object	An item—such as a spreadsheet, diagram, or document—from another application.
Port	A socket on your PC where you connect other devices, such as a printer or external modem.

Preferences	Setup options for various Maximizer Personal features.
Program Manager	A Windows tool you can use to start applications, or to organize applications and files into logical groups.
Ribbon bar	The horizontal bar below the toolbar that contains buttons for common window commands. Buttons change for each window.
Scroll	To move up or down in a window. You can scroll with the mouse and the scroll bar or with the arrow keys.
Scroll bar	The bar that appears along the right side of a window.
SHARE	The DOS command that allows file sharing. It is required for running Maximizer Personal.
Tile	To arrange your workspace so each window fills up an equal part of the screen with no overlap.
Title bar	The horizontal bar at the top of a window or workspace that indicates the name of the window or database.
Toggle	To flip from one state to its opposite, like a switch that turns a light on and off.
Toolbar	The horizontal bar below the menu bar that contains window and utility command buttons.
User-Defined Field (UDF)	A tag used to classify a Client (by interest or type of business, for example). These classifications are useful for sorting or grouping Clients.
Utility	A program or group of features that provide a particular function.
Wildcard	A character that replaces another character or text string. Maximizer Personal includes two wildcards that can be used in a search. The question mark (?) replaces a single character; the asterisk (*) replaces a word, phrase, or character string.

Workspace	The main screen in Maximizer Personal where you use the windows and command bars.
WWW Browser	A program used to find, display, and retrieve information from World Wide Web sites (home pages) on the Internet. Examples of web browsers include Netscape, Microsoft Internet Explore, and Mosaic.

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