

MAXIMIZER CRM LIVE

Advanced Training Agenda

HOW DO I SEGMENT MY DATABASE?

Use Advanced Search to generate dynamic lists
Post your best advanced searches to Quick Access
Attach column setups to all your searches and lists

HOW DO I CREATE AND USE EMAIL TEMPLATES?

Set up an email template
Set up the CASL Protection to go with it
Follow best practices for email templates

HOW DOES THE WORD INTEGRATION WORK?

Create Word templates to save time and effort
Convert important documents into templates
Use Word for mailing labels and envelopes too

HOW DO I REPORT ON WHAT I'VE BEEN DOING?

Export to Excel for quick and easy reporting
Use Dashboards for strong visual messages
Use other built-in reports as needed

HOW DO I USE THE ADVANCED TOOLS IN MAXIMIZER?

Set up Auditing for compliance and tracking database changes
Use the Import Tool to easily add entries
Use Global Edit to easily change multiple entries

WHAT ELSE CAN I DO IN MAXIMIZER?

Set up "Date Last Contacted" to track customer contact
Convert one entry type to another
Find and merge duplicates