

# MAXIMIZER CRM LIVE

## *Basic Training Agenda*

### **HOW DO I GET STARTED?**

- Enter the URL we sent you to log in
- Create a shortcut for logging in
- Change your password after you log in

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### **WHAT AM I LOOKING AT ONCE I LOG IN?**

- Let's take a quick tour around the main window
- Take a good look at the tabbed following windows
- Look at the drop down menus and modules

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### **HOW DO I KEEP TRACK OF MY CUSTOMERS?**

- Enter your customers
- Find your customers
- Use Favorite Lists to conveniently group your Customers

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### **HOW DO I COMMUNICATE WITH MY CUSTOMERS**

- Set up the Outlook Integration; send email
- Make and track a phone call
- Add a note and a document, a task and an appointment

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### **HOW DO I CONTROL HOW MAXIMIZER WORKS FOR ME?**

- Set your Preferences; choose how to start your day
- Change column setups to view things differently
- Use Quick Access to save time

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### **WHAT RESOURCES ARE AVAILABLE TO HELP ME?**

- Video Tutorials, In-Product Videos, the User Guide
- Customer Service and Tech Support
- The Maximizer Community