MAXIMIZER FOR FINANCIAL ADVISORS

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

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

HOW DO I KEEP TRACK OF MY CLIENTS?

Enter your Clients
Find your Clients
Use Favorite Lists to conveniently group your Clients

HOW DO I COMMUNICATE WITH MY CLIENTS

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

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

WHAT RESOURCES ARE AVAILABLE TO HELP ME?

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