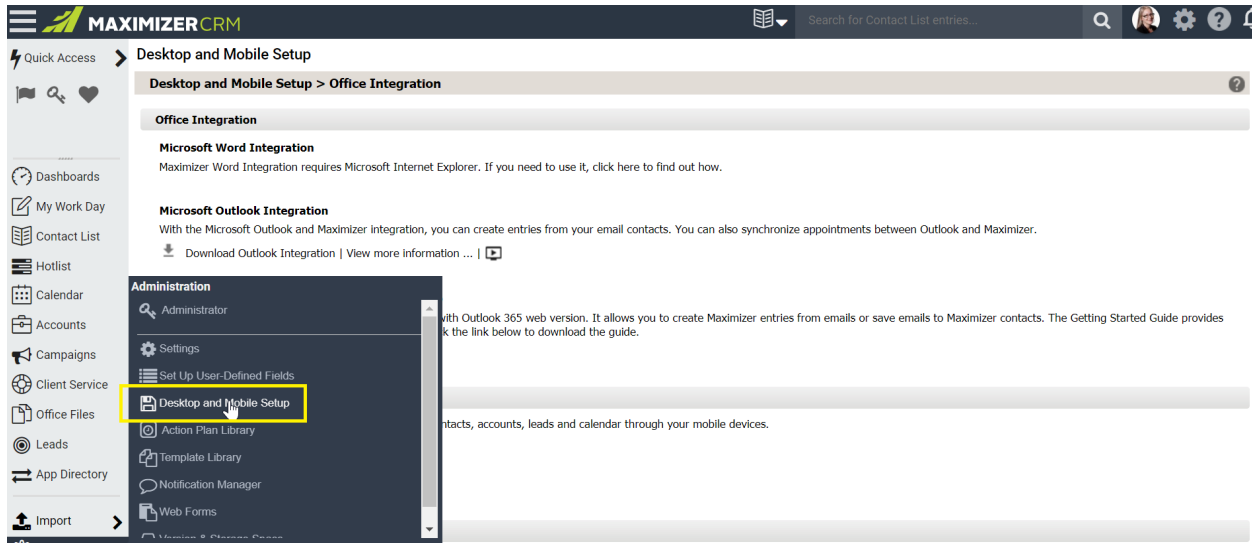


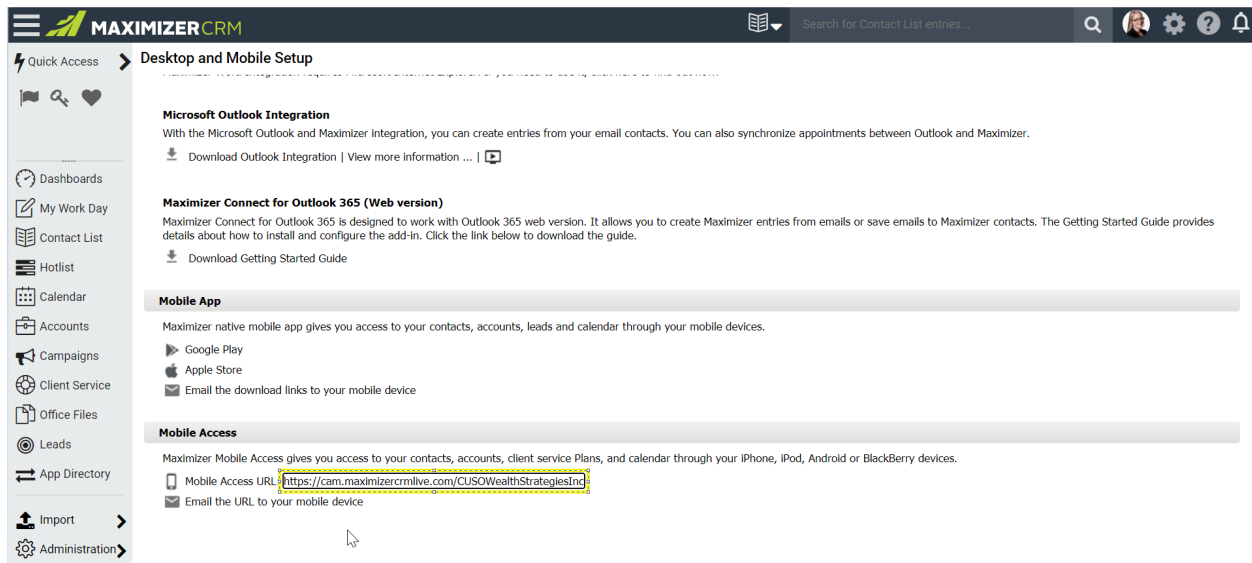
Maximizer Integration for Outlook

Prior to installing the Maximizer Integration for Outlook, please ensure that Outlook is CLOSED.

Step 1 – Log into Maximizer. Once in, hover over ‘Administration’ on the left-hand side and then click on ‘Desktop and Mobile Setup’.



Step 2 – Under Mobile Access, copy the Mobile Access URL (you will need this address during setup).



Maximizer Integration for Outlook

Step 3 – Under Microsoft Outlook Integration click ‘Download Outlook Integration’.

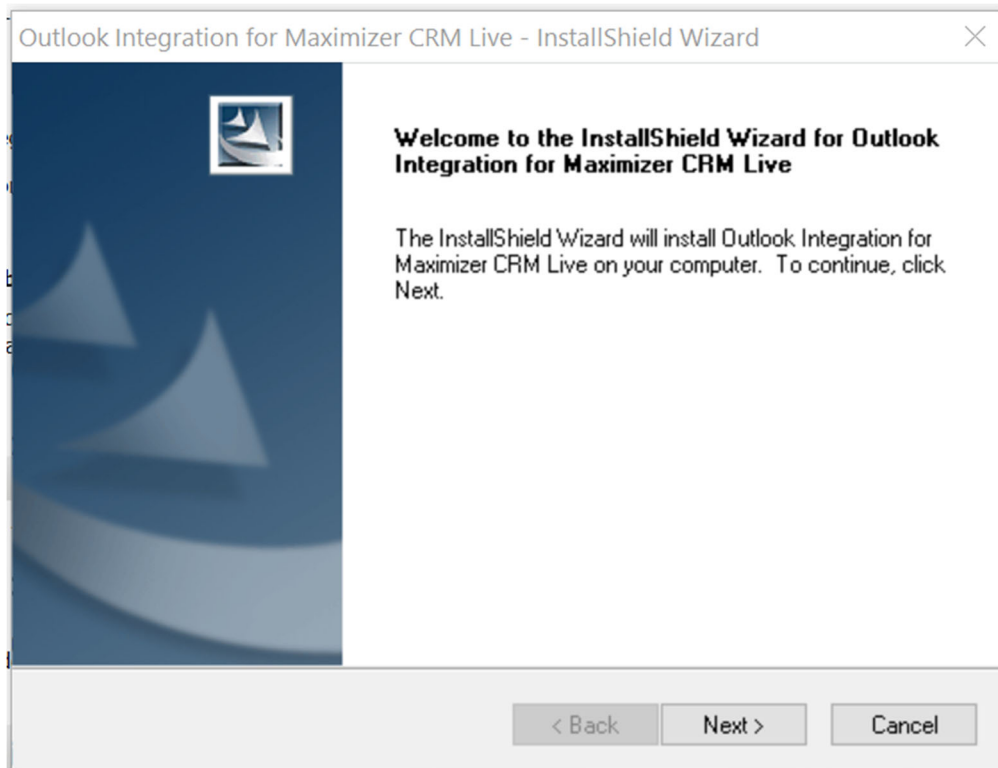
The screenshot shows the Maximizer CRM interface. The top navigation bar includes the Maximizer CRM logo, a search bar for contact list entries, and user profile icons. The left sidebar lists various dashboard and setup options. The main content area is titled 'Desktop and Mobile Setup' and contains an 'Office Integration' section. Under 'Office Integration', there are three sub-sections: 'Microsoft Word Integration', 'Microsoft Outlook Integration', and 'Maximizer Connect for Outlook 365 (Web version)'. The 'Microsoft Outlook Integration' section has a 'Download Outlook Integration' button highlighted with a yellow box. Below it, the 'Maximizer Connect for Outlook 365 (Web version)' section has a 'Download Getting Started Guide' button. The 'Mobile App' section lists links for Google Play, Apple Store, and an email option to receive download links.

Step 4 – Click on the ‘OutlookInt.exe’ in the bottom left-hand corner and then click ‘Open’.

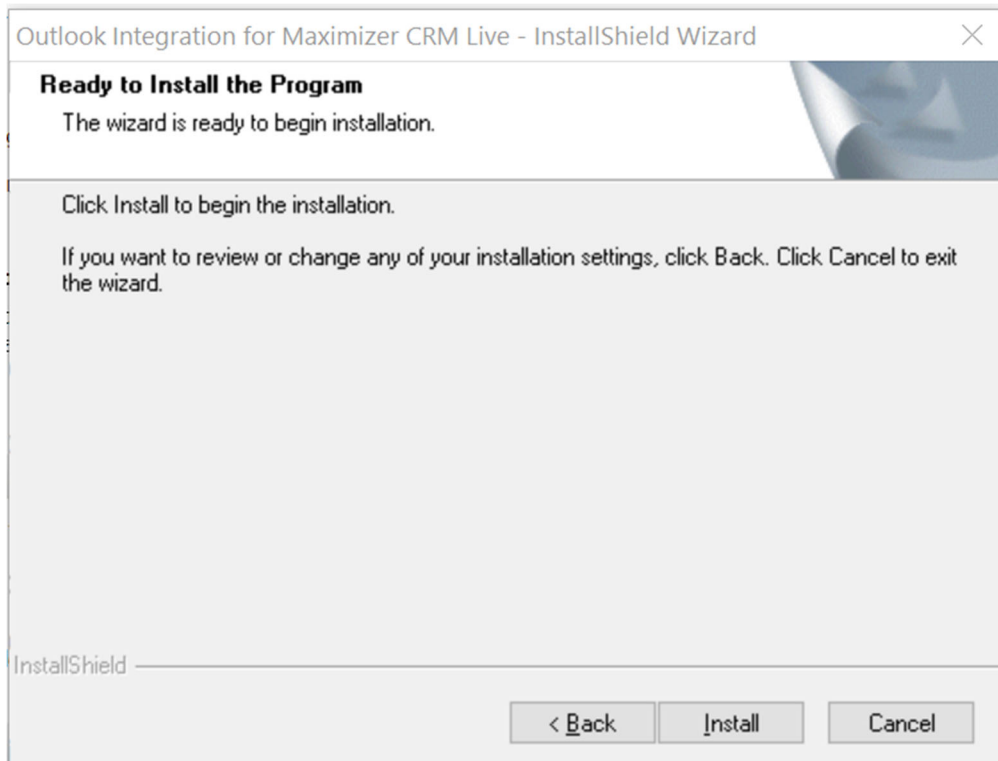
This screenshot is similar to the previous one but shows a context menu open over the 'OutlookInt (6).exe' file in the bottom left corner. The context menu has 'Open' highlighted with a yellow box. The file name 'OutlookInt (6).exe' is visible in the bottom left corner of the interface. The rest of the page content remains the same as in the previous screenshot.

Maximizer Integration for Outlook

Step 5 – Once open, click 'Next'.

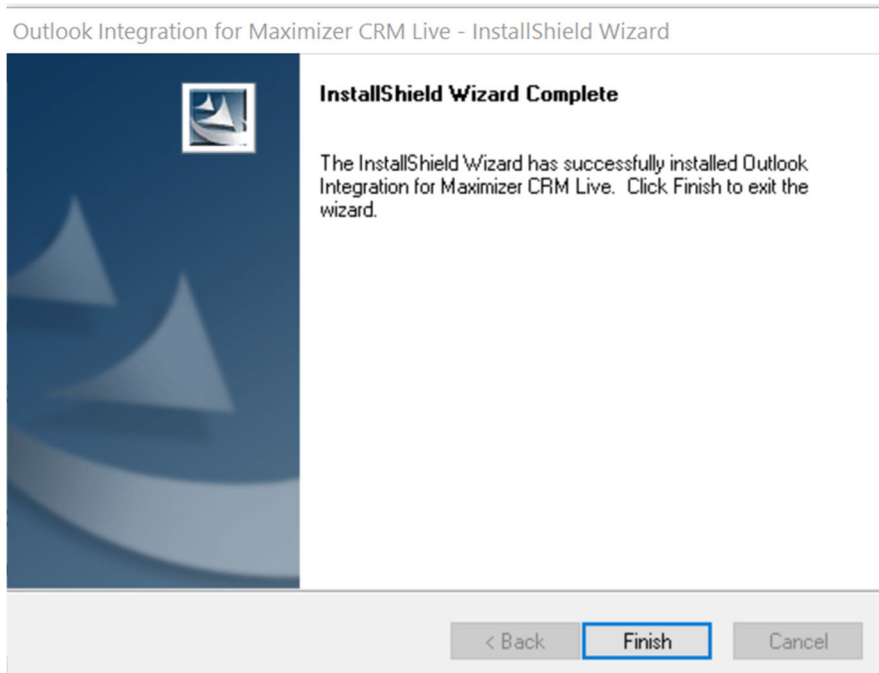


Step 6 – Click 'Install'.



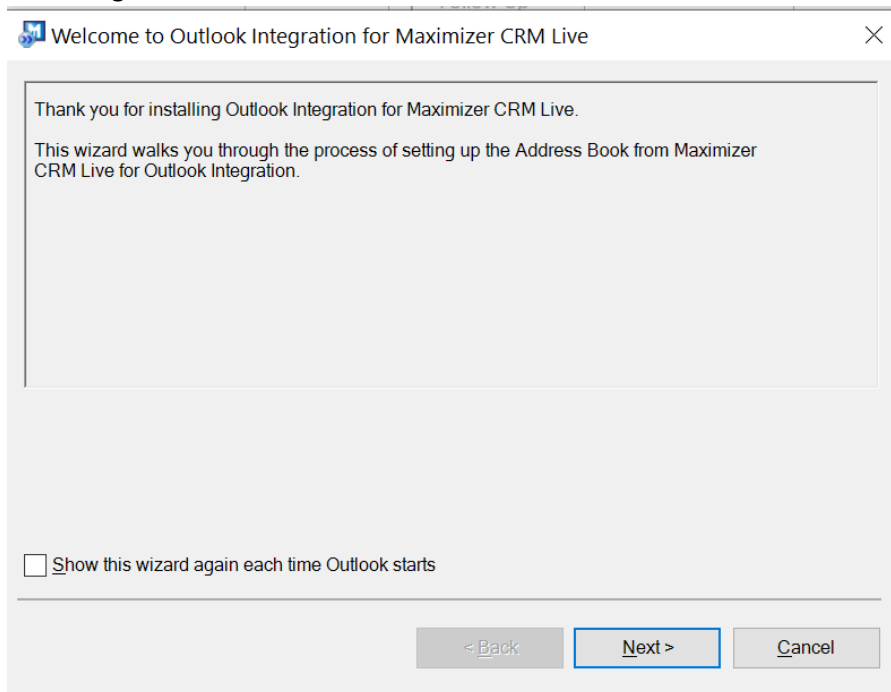
Maximizer Integration for Outlook

Step 7 – Click 'Finish'.



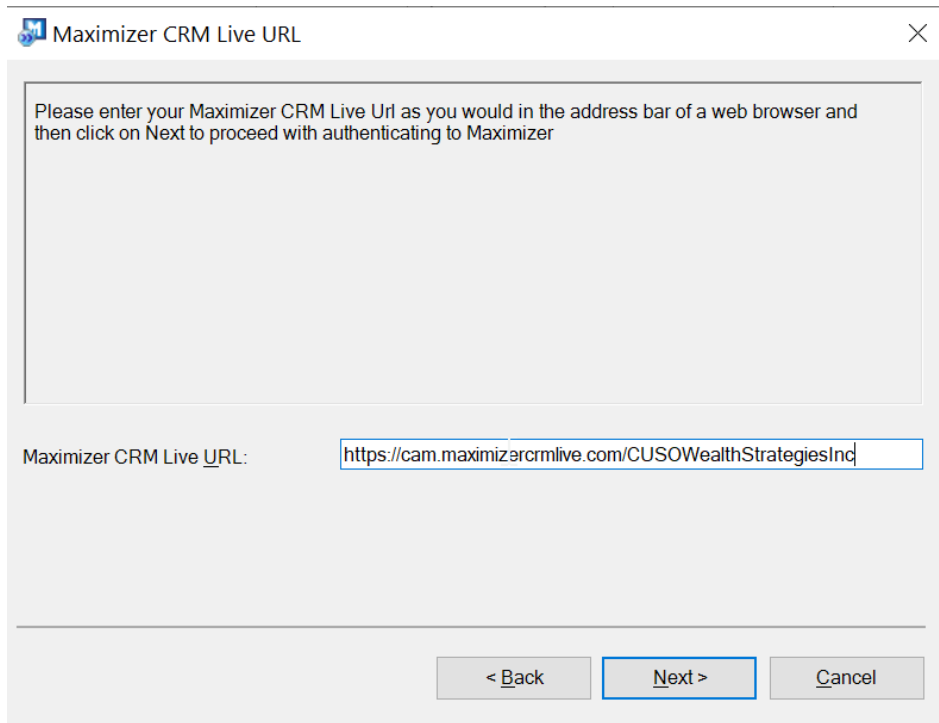
Step 8 – Open Outlook

Step 9 – The Maximizer Outlook Integration Wizard will open. Uncheck the checkbox for 'Show this Wizard again each time Outlook Starts'. Then click 'Next'.



Maximizer Integration for Outlook

Step 10 – Paste the URL address that you copied in Step 2.



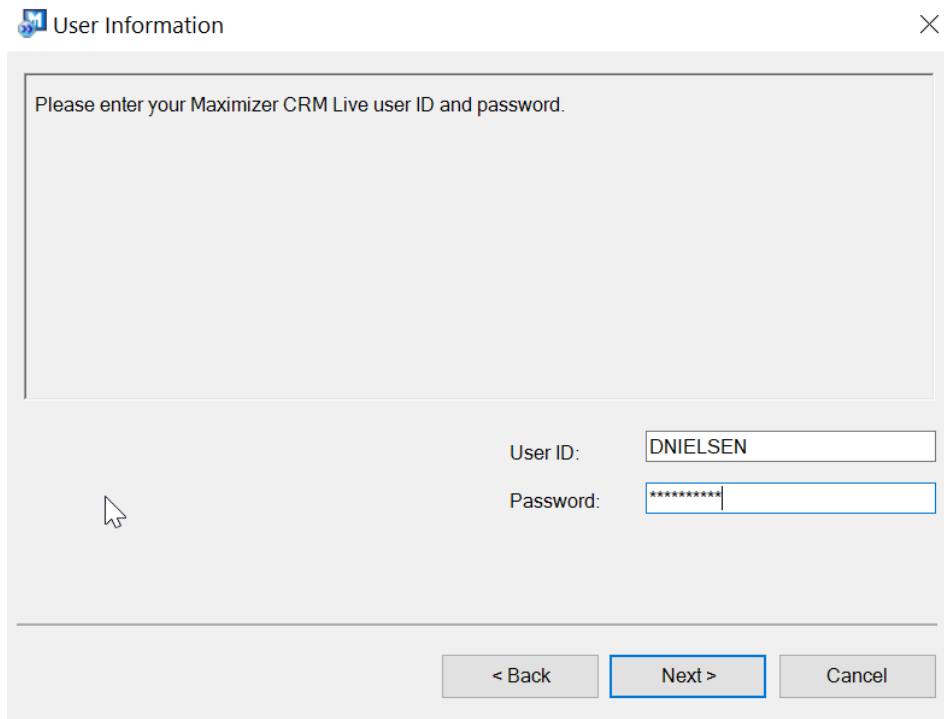
Maximizer CRM Live URL

Please enter your Maximizer CRM Live Url as you would in the address bar of a web browser and then click on Next to proceed with authenticating to Maximizer

Maximizer CRM Live URL:

< Back Next > Cancel

Step 11 – Enter your username (all in CAPS) and then your password and click 'Next'.



User Information

Please enter your Maximizer CRM Live user ID and password.

User ID:

Password:

< Back Next > Cancel

Maximizer Integration for Outlook

Step 12 – Ensure that the box is checked for including attachments. Click 'Next'.

Other System Options

Please set the other system options for Outlook Integration with Maximizer CRM Live.

Include attachments when saving email
 Confirm when saving email
 Confirm when creating Contact
 Confirm when sending email

Default Contact type: Company/Contact

< Back Next > Cancel

Step 13 – Ensure that for synchronization the box checked **NEVER** (manual synchronization). Click 'Next'.

It is **EXTREMELY IMPORTANT** that you do not synchronize anything as this will provide conflicts between Outlook and Maximizer and could result in you losing appointments, tasks etc.

Synchronization Frequency

Please configure the synchronization frequency between Outlook and Maximizer and conflict resolution.

Frequency

Synchronization every: 1 Hour(s)
 Synchronization daily at: 7:37:30 AM
 Never (manual synchronization)

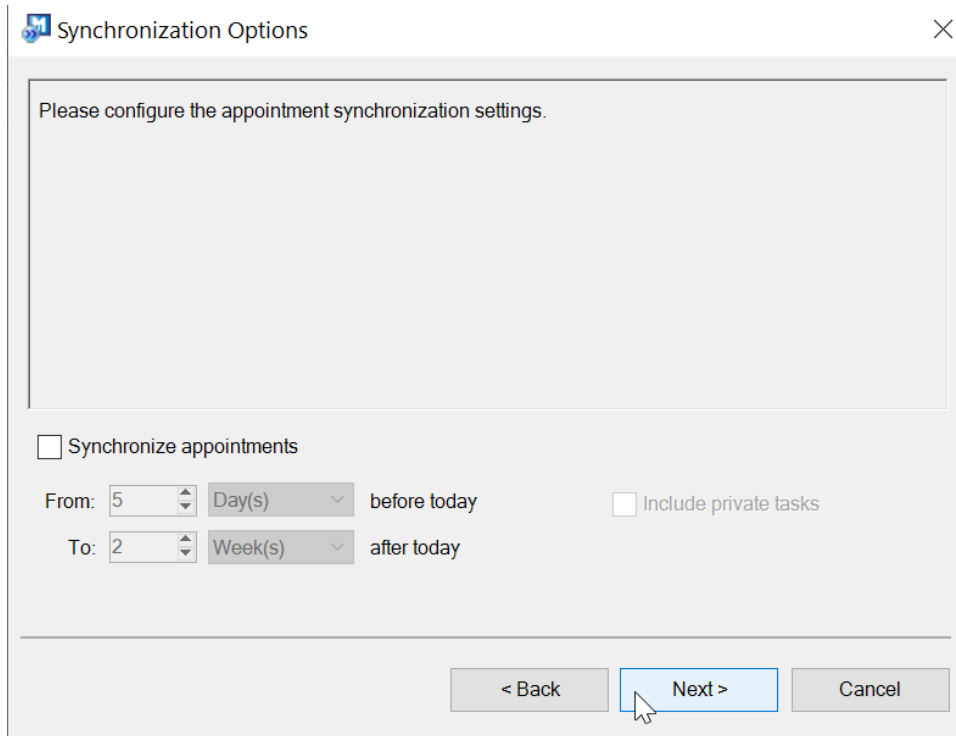
Conflict resolution

Maximizer CRM overrides
 Outlook overrides

< Back Next > Cancel

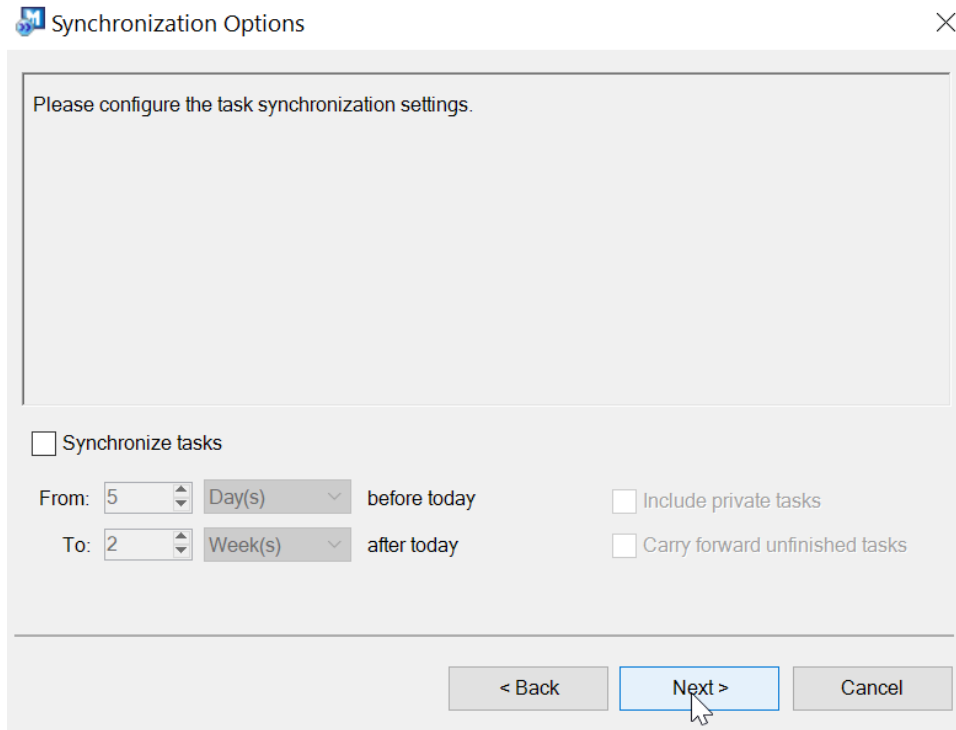
Maximizer Integration for Outlook

Step 14 – Ensure you **DO NOT** synchronize appointments.



The screenshot shows a dialog box titled "Synchronization Options" with a close button (X) in the top right corner. The main area contains the text "Please configure the appointment synchronization settings." Below this, there is a checkbox labeled "Synchronize appointments" which is currently unchecked. To the right of this checkbox is another unchecked checkbox labeled "Include private tasks". Below the "Synchronize appointments" checkbox, there are two rows of settings: "From: 5 Day(s) before today" and "To: 2 Week(s) after today". At the bottom of the dialog, there are three buttons: "< Back", "Next >" (which is highlighted in blue and has a mouse cursor over it), and "Cancel".

Step 15 – Ensure you **DO NOT** synchronize tasks.



The screenshot shows a dialog box titled "Synchronization Options" with a close button (X) in the top right corner. The main area contains the text "Please configure the task synchronization settings." Below this, there is a checkbox labeled "Synchronize tasks" which is currently unchecked. To the right of this checkbox is another unchecked checkbox labeled "Carry forward unfinished tasks". Below the "Synchronize tasks" checkbox, there are two rows of settings: "From: 5 Day(s) before today" and "To: 2 Week(s) after today". At the bottom of the dialog, there are three buttons: "< Back", "Next >" (which is highlighted in blue and has a mouse cursor over it), and "Cancel".

Maximizer Integration for Outlook

Step 16 – Ensure you **DO NOT** synchronize address book entries.

Synchronization Options

Please configure the Address Book entry synchronization settings.

Synchronize Address Book entries Phone Mapping...

Synchronize Address Book entries from Favorite List: Sample Data Entries

Synchronize Contacts from Outlook Category: Maximizer

Delete the matching Outlook Contact when the Maximizer entry is no longer synchronized

< Back Next > Cancel

Step 17 – Click 'Finish'.

Outlook Integration for Maximizer CRM Live

The process of setting up Outlook Integration for Maximizer CRM Live is complete.

< Back Finish Cancel

Maximizer Integration for Outlook

Step 18 – Open Outlook. You should see the Maximizer symbol beside New Email / New Items.

Now you will be able to click on an email and save it to your contact in Maximizer.

