

Maximizer Assessment

Please check off the amount of knowledge you have with each topic listed. Make additional notes if required.

Name:		Company Name:	
Position:		Email:	

How many years have you used this program?	What version are you using? Desktop or Web-based (cloud)
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Topic	Answer as best you can
What is the purpose of your Maximizer database? What are you keeping track of?	
What information do you see on your screen?	
What Column Setup do you use?	
Do you sort your data? If so, in what order(s)?	
What type of searches have you done?	
Have you created Search Catalogs?	
Have you created Favorite Lists? If so, for what purpose?	
What specific information do you need to keep track of - besides name, address & phone numbers?	
Have you created any User Defined Fields? If so, what are they called & what type are they?	
What type of Notes do you type into Maximizer?	
Do you use the Phone Call feature & Phone Log? Why or Why Not?	
Do you record your appointments in Maximizer's calendar?	
Are all of your Appointments linked in Maximizer?	
Do you record your tasks in Maximizer?	
Do you send email thru Maximizer? Do you save these emails to notes or documents?	
Do you know how to select multiple address book entries? How?	
Have you used Global Edit? To do what?	
Do you print Reports?	

Send Completed Forms to mission@xplornet.com

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Topic	Answer as best you can
Have you created letters in Word that are linked to Maximizer?	
Do you know how to link files for clients into Maximizer? ie. can you link a word or excel document to a contact?	
In Outlook, do you Save lots of emails in folders that are named by the person (Customer, Prospect or Supplier) who sent the email to you?	
In Outlook, do you use the Calendar? Describe how much...	
In Outlook, do you use Tasks?	
In Outlook, do you use Contacts? Why are these people saved as Contacts & not in Maximizer?	
Do you use Word or Excel to keep track of lists of people (people that are already entered in Maximizer – eg. Customers)? If so, what type of lists do you create and save or print?	

Other Notes, areas that you want to specifically learn more about:

From time to time we send out a Newsletter with valuable tips and tricks. This is a great way to extend your learning. Please check this box & sign below to authorize us to include you in our mail-outs.

Signature