Contents

Welcome

Figure 1: MaaxFrame Logo

Overview Welcome to MaaxFrame - All In One Application. Strong relationships are at the core of every organization's success. MaaxFrame brings ease and order to the creation, development, and maintainance of your organization's important relationships.

MaaxFrame consists of interrelated records in modules such as Accounts, Contacts, Opportunities, Events, Meetings, Emails, etc. and wraps your data in an intuitive user interface which helps make sense of these different elements of your business. Whatever your organization's focus - sales, marketing, support, or other ventures - MaaxFrame flexible modules bend to align with your business' models and practices. Manage your relationships from inception to fruition and beyond with MaaxFrame built-in modules and relationships as well as your custom modules and configurations available to MaaxFrame administrators.

Thank you for using MaaxFrame, the world's first advertisement driven and subscription based CRM service and software solutions provider. This is our User's Manual, which will assist you in using the hosted version of our software.

Our interface has been designed to make navigation and data entry as simple as possible. We have color-coded our menu items and our layout and design is simple and intuitive. Our system is a team sales and support tool, automating many procedures and providing a means of tracking sales and support issues in a collaborative environment.

The first step to using our software is customizing all of the settings and information for your particular business, which includes some decisions that you must make before using the software. We have developed a Quick Start Guide that is valuable for those of you who are already somewhat familiar with CRM software as a hosted service. Our system is very user friendly, those of you who are Internet savvy and use many web-based applications such as email or frequently use customer relationship management should be able to get up and going very, very quickly.

Core Features

Sales Automation

- Target, Lead, and Contact management to direct and organize efforts throughout the sales life cycle
- Account management to aggregate interactions with organizations and individuals
- Opportunity management to pursue new business, share sales information, and track deal progress
- Sales Forecasting to enable sales representatives and managers to understand upcoming business
- Quote management to prepare potential sale figures including multiple line items, currencies, and tax codes
- Product management to capture the details of your organization's goods and services

Marketing Automation

- Target, Lead, and Contact management to support the creation of new relationships
- Email marketing campaigns to present relevant email messages to groups of recipients
- Campaign management and reporting for tracking campaigns across multiple channels and analyzing the effectiveness of marketing activities

- Target List management to organize groups of recipients for ensuring campaign message relevance
- Web-to-Lead Forms to capture lead information directly from external web input

Customer Support

- Management to track service and resolution of customer issues
- Bug tracking to identify, prioritize, and resolve product issues
- Contact and Account management to track support history and enable continuity of service
- MaaxFrame to provide clients with self-service capabilities support activities
- Knowledge Base to manage information and share it externally

Record Keeping

- Email, Task, Call, and Meeting management to facilitate day-to-day work
- Note management to affix information and file attachments to other MaaxFrame modules
- Document management to track living documents and their changes
- Contract management to capture and maintain sales and service contracts
- Search capabilities to quickly and easily locate your data

Collaboration

- Shared Email and Calendar to provide visibility across individuals and teams
- Connectors and tools to leverage third-party information regarding your prospects and clients

Drill Down Reporting

- Report creation and management to gain insight into your organization's MaaxFrame data
- Home page dashlets to display important tables and reports

Introduction

One of the best investments you can make in your MaaxFrame success is to have a clear plan. Just as you wouldn't build a house without a blueprint, you don't want to start using MaaxFrame without a plan. A plan will help you to communicate with everyone, to do things in the right order, identify key resources, and keep a clear end date in mind.

As you plan and prepare to get MaaxFrame up and running, complete the following steps:

- Build your team
- Define your company's vision
- Define and prioritize your goals
- Develop your rollout plan
- Define key aspects of your process and diagram the process flow
- Map your process to MaaxFrame functionality
- Decide which reports you need
- Train your administrator
- Communicate with your end users

Build Your Team

To a small business with limited resources, the term "project team" may sound intimidating, but it doesn't take a huge team to implement MaaxFrame. You just need to cover the following key roles (and the same person can cover more than one role):

- An executive sponsor
- A project owner to get the application up and running
- An administrator to manage MaaxFrame day to day
- A power user who really knows your company's business processes

The **executive sponsor** lends his or her influence to the project by becoming its champion. Having that person's full support and participation—from the planning stage until the go-live date and beyond—is absolutely critical.

The **project owner**, who leads the implementation project, must understand the organization's business processes to map them to MaaxFrame.

The person is designated as the **system administrator** manages MaaxFrame day to day and makes new functionality available. It's also a good idea to have the administrator involved in the implementation. A technical background is not necessary, but may be helpful.

And to make sure that Salesforce CRM meets the needs of your end users, it is essential to involve key **power users** in the planning process.

Find the Right MaaxFrame Administrator

Software as a service (SaaS) makes system administration much easier that it was with traditional software. Setting up the application, customizing and maintaining it, training users, and "turning on" the new features that become available with each release are all just a few clicks away.

The system administrator is one of the most important people when it comes to making your MaaxFrame implementation a success. The role of the administrator for a small business is not necessarily a full-time position. In the initial stages of the implementation, the role will require more concentrated time (about 50%). After go-live, managing MaaxFrame day to day will require much less time (10–25%).

Find the right person for the job and continue to invest in that person's professional development. Here are some qualities to look for in an administrator:

- A solid understanding of your business processes
- Knowledge of the organizational structure and culture to help build relationships with key groups
- Excellent communication, motivational, and presentation skills
- The desire to be the voice of the user in communicating with management
- Analytical skills to respond to requested changes and identify customizations.

You may also want to take advantage of Premier Success & Administration to assist with key tactical responsibilities. Through this service, our experts can help your team with administrative tasks and serve as an extension of MaaxFrame internal team.

Identify Your Key Players

It's time to pick your team.

Define Your Vision

Every successful project starts with a clear vision of where you want to be as a result of the project. Your vision will define a clear purpose for the initiative, drive ongoing commitment, and provide a way to measure and prove results.

It's very important that your key executives are involved in defining this vision, that you document the vision, and that it is understood by everyone.

Action: This vision should be a key component of future communication with your users.

Define and Prioritize Your Goals

In addition to a clear destination, it also helps to have a plan that breaks down the journey into manageable steps. Setting your goals involves two key steps:

- Define the goals that support this vision
- Prioritize and document your requirements

Define Your Goals Determine which concrete goals support your vision. Keep in mind that different groups within your organization are likely to have different goals. For example:

- Executives want to improve sales and track top performers or customer issues.
- Sales managers want better visibility into their pipelines and reports that summarize key information.
- Sales reps want to easily access the sales materials they need and cut down on administrative work.

MaaxFrame provides various reports to help measure whether you've reached your goals.

Prioritize Your Goals Most people, and most organizations, want to take on more than they can handle at any one time. Clearly defining your goals and then prioritizing them will make it easier to decide what to put off, should that become necessary. Having some early "wins" is essential. When people experience the value of MaaxFrame first hand, they're more likely to support adding additional features.

Develop Your Rollout Plan

Customers typically take the approach of walking before they run. They focus first on a subset of the functionality available in MaaxFrame—allowing users to get comfortable with the application and adopt the most critical features—and then add more functionality during later phases.

It's important to build your plan around the key areas you want to introduce first, then build your roadmap on the additional areas you will expand later.

Here's an example of how one customer decided to approach their deployment, broken into three phases:

Phase 1: Import accounts and existing pipeline for general account and opportunity management Introduce a Chatter group for MaaxFrame training and project communication

Phase 2: Upload existing leads and begin tracking leads from various sources Introduce campaign management to track marketing initiatives

Phase 3: Begin tracking customer issues by onboarding the customer service team and using cases Launch forecasting to the sales team

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Define Key Aspects of Your Process and Diagram the Process Flow

When defining your process, it helps to follow these steps:

- Make sure you understand key MaaxFrame terminology
- Identify key characteristics of your business processes
- Define and develop a visual overview of your own process
- Clarify what happens at each step—what inputs are needed, who does what, and how to measure the results
- Map your business processes to MaaxFrame

Understand Key Salesforce CRM Terminology

- ***Leads*** – A lead is any person that may be interested in your products or services; for example, someone you met at a conference or who filled out a form on your website is a lead. If a rep qualifies a lead and decides to pursue it, the lead is "converted," which automatically transforms it into three objects: an account, a contact, and an opportunity.

- ***Accounts* -** An account is an organization, individual, or company that you want to track in MaaxFrame. An account can include customers, competitors, partners, or any other entities that make sense for your business. An account record contains—or connects to—all information about your interactions with the company, such as in-progress and completed opportunities, your points of contact, and records of past interactions.

- ***Contacts*** **-** The contact object stores information about people who work at the companies represented by the account object. A contact record contains all relevant information about the person, such as phone numbers, titles, and role in a deal, and much more. With contacts, you can capture all the personal information you need to develop the relationships that are so important in sales. When a sales rep converts a lead in MaaxFrame, the information in the lead is automatically transferred to the contact. As your engagement with the company widens and your reps meet more people, they can keep creating additional contacts associated with the corresponding account.
- ***Opportunities*** – The opportunity object contains the information for every deal you're tracking, such as deal size and expected close date. The opportunity object is at the core of your sales process. By adding an opportunity, you build a "pipeline" you can use for forecasting.
- ***Activities*** – Activities consist of the tasks, events, calls, and emails that make it possible to track every customer interaction.

Outline the Key Aspects of Your Sales Process

For most businesses, outlining their basic sales process includes gathering the following information:

- Generating leads – Where do leads come from? How do they get into MaaxFrame? What happens next? What information do you want to measure about leads?
- Optimizing lead flow – How do you manage open leads? How do you check for duplicates? How do you work through leads? How do you measure conversion and top performers?
- Closing deals – How do you manage the sales funnel? How can you measure top deals, closed business by month, and month-to-date trending?

Create Your Process Overview

The goal of this step is to come up with a visual overview of your processes. Here's an example of a sales process:

[! Sales Process]img/sales_process.jpg)

Discuss the sample process with your project team and modify it to fit your organization. If you don't have a defined sales process, a CRM implementation is a good time to set one up.

To set up your own sales process: * Start at the point where a lead is qualified as an opportunity. * On a whiteboard, draw each step as you ideally want the information to flow.

Map Your Process to MaaxFrame Functionality

The next step is to map your ideal process to MaaxFrame and establish the names you give to your data elements and the fields in MaaxFrame. For example, you may call a customer "Company," while the corresponding field in MaaxFrame is "Account."

To start the mapping process, review the fields associated with the Opportunity process—which includes the fields for Leads, Accounts, Contacts, and Opportunities—and answer the following questions: * Do you need all the fields? Review the fields and decide which can be removed. * Do you need to rename standard fields so they make more sense; for example, change "Account" to "Company"? * Do you need custom fields that are unique to your business?

Decide Which Drill Down Reports You Need

Decide which reports you need to generate based on the goals you defined earlier. MaaxFrame provides dozens of standard reports with drill down feature. Here are a few of the most commonly used reports:

- ***Account Revenue by Industry***: Shows revenue accounts categorized by industry
- ***Account Owner***: Who owns which account
- ***Lead by Status and Industry***: Created leads in last six months categorized by lead status
- ***Leads with last activity > 30 days***: Which leads need attention
- ***Sales Forecas***: Estimate of your sales for the forecast period
- ***Opportunity by Source***: How effective are all opportunity sources
- ***Campaigns***: Active
- ***Contact Distribution***: Global Distribution of contacts
- ***Sales trend for current year***: Total and average revenue per year

For a list of additional reports, navigate to the Reports tab in MaaxFrame; on the left side, you will see a list of report folders organized by function (CRM Reports, Adhoc Reports, etc.). Click into the folder to view these standard reports. You can modify these reports or create your own from scratch. Thinking about what information you want to capture is a critical step before you begin customizing the application. Remember: The system is only as good as the information you can pull into a report.

Train Your Administrator

Investing in your administrator is the best way to ensure success. MaaxFrame offers both virtual self-paced training with full support. The self-paced support are available with your licenses around the clock at no additional charge included in Dedicated Edition. During the implementation, you may want to consider getting help from our certified managers. They can assist with all aspects of the implementation, and many customers find it useful to leverage managers' expertise and technical skills.

Communicate with Your End Users

With clear goals set, you can now engage your users. User adoption is critical for MaaxFrame success.

You want the introduction of MaaxFrame to come as a surprise to users. As it, start building enthusiasm and keep your users updated as your go-live date approaches. For the highest impact, these communications should come from the executive sponsor. Here are some approaches that have worked for other customers:

- Build anticipation by enlisting the help of your marketing staff in treating the MaaxFrame implementation like a product launch.
- Focus on two or three aspects of MaaxFrame that will make your users' lives easier.
- Reach out to users who seem particularly enthusiastic and give them a role in helping other users once you're "live."
- Sponsor contests and offer incentives to help build excitement.

One of the best ways to get people on board is to get them involved. Give them a voice and be sure to make changes based on their feedback. Then, communicate the difference their input made on the project's launch.

Recommendation: Create a group to share information about your MaaxFrame deployment. You can consolidate all materials, training resources, and conversation into one central location. You can also share key milestones and achievements related to your MaaxFrame deployment. Make sure that your executive sponsor is engaged and posting updates and feedback to your users.

Summary and Checklist: Prepare

Careful preparation and planning will help make the remaining steps in implementing MaaxFrame go smoothly.

Setup MaaxFrame

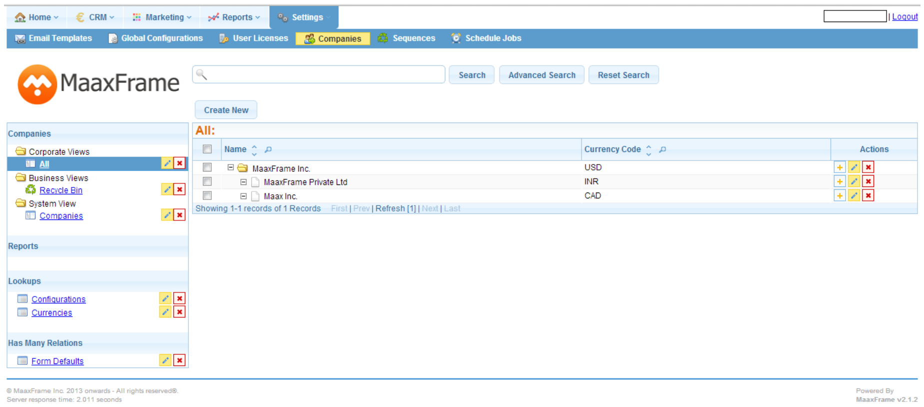
This section tells you how to take the next steps by outlining the key areas to begin setting up MaaxFrame, including:

- Company profile
- User access and permissions
- Customization
- Adding users
- Importing data

Set Up Your Company Profile

The company profile information determines basic settings related to time zones, language, and how the fiscal year is defined. You can leave the default settings as is; however, it's important to know where to find and change this information.

- Company profile – These settings use your local time for setting the time zone, default language, and the default currency.
- Fiscal years – The fiscal year definitions are used in reporting, opportunities, and forecasting. The default fiscal year setting is a 12-month calendar year, with the first day of the fiscal year starting on any first day of the month. However, you can choose custom fiscal year periods.



Establish User Access and Permissions

There are some key components that determine users' access to data as well as what they can do with the data they have access to.

Data Access

When setting up MaaxFrame for the first time, you need to make some decisions about who will have access to what data. In MaaxFrame, there are four ways to control data access:

- ***Organization-wide defaults*** – Configure the baseline access users will have to your data.
- ***Role hierarchy*** – Determine the level of visibility users have to data.
- ***Sharing rules*** – Extend access to data if you've restricted access through your organization-wide defaults.
- ***Manual sharing*** – Provide the flexibility to allow record owners to manually give access to other users.

Organization-Wide Defaults These settings, which determine the default level of data access for different types of information, are referred to as "organization wide defaults." These include:

- ***Private*** – Users can access (view and edit) their information and that of those below them in the role hierarchy.
- ***Public Read Only*** – Users can view all data, but can edit only their information as well as that of those below them in the role hierarchy
- ***Public Read Write*** – Users can view and edit all data

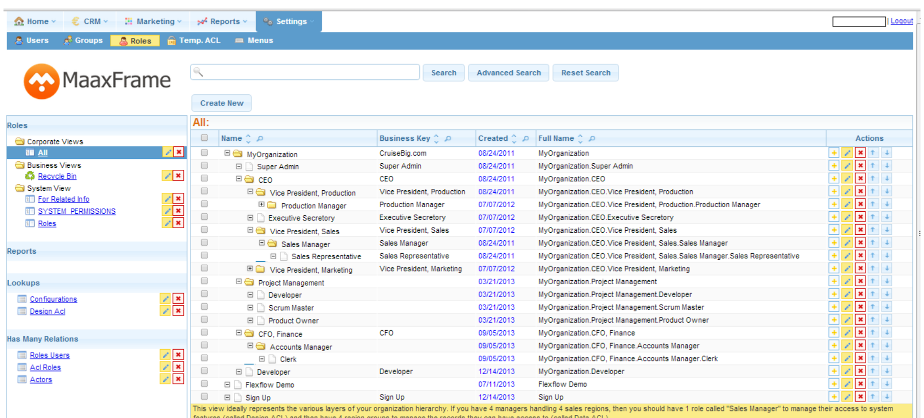
For smaller organizations, we recommend granting at least Public Read Only access to create a collaborative working environment.

Examples:

- To allow all users to see everyone's accounts, but not everyone's opportunities, set access for account records to Public Read Only and for opportunity records to Private.
- To allow the operations team to calculate commissions, they need to see opportunities. However, you don't want them to edit the opportunities. To allow read-only access, set opportunity records to Public Read Only.
- To set up organization-wide-defaults, please refer to our techincal guide.

For an overview of user access and permissions, view our Techincal Guide : Setup.

Role Hierarchy The role hierarchy looks similar to an organization chart, but it has a different purpose. Because the role hierarchy is based on who needs to work with what data to do his or her job, role hierarchies usually have fewer layers and the people at the top are not necessarily those at the top of the org chart.



The person in the top role (i.e Admin) has full access (view ,edit and delete) to his or her data as well as the data of anyone lower in the hierarchy. Two common ways to set up role hierarchy are by region or by product.

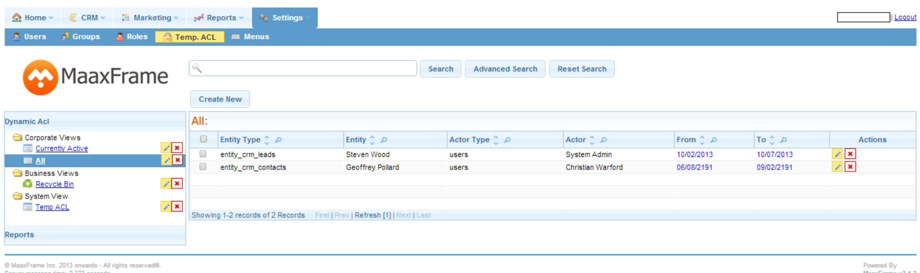
There are three basic steps to setting up a successful role hierarchy:

1. Define the basic roles, such as sales representative, director of sales, and CEO. It's not necessary to create individual roles for each title; the idea is to simply define a hierarchy that gives users in higher-level roles access to the information entered by users in the lower-level roles.

2. Build the role hierarchy based on how information should roll up for reporting and on who should see what data.
3. Assign individual users to the roles.

Sharing Rules

Sharing rules let you make automated exceptions to your organization-wide defaults for particular sets of users, so you can give them access to records they don't own or can't normally see. Sharing rules, like role hierarchies, are only used to give additional users access to records—they cannot be stricter than your organization-wide default settings.



Manual Sharing

Sometimes it's impossible to define a consistent group of users who need access to a particular set of records. In those situations, record owners can use manual sharing to give read and edit permissions to users who would not normally have access to the record. Although manual sharing isn't automated like sharing rules, it gives record owners the flexibility to share particular records with users that need to see them.

Permissions Profiles control what users have permission to do with the data they have access to, and how they view the information.Please refer to our technical guide.

Understand Profiles A profile is a collection of settings and permissions that defines how users with particular profile access records, how they see their data, and what they can do within the application. For MaaxFrame Premium Editions, you can use the standard MaaxFrame profiles but you can't create custom profiles. Even so, it's important to understand profiles and how they work together with the organization-wide defaults and the role hierarchy. The most important profiles include:

- System Administrator – Can configure and customize the application
- Standard User – Can run reports and create and edit records

When you add users as you prepare to go live, you will assign one of these profiles to each user.

Customization

When you sign on with MaaxFrame, it's ready to use as is. But you can also easily modify MaaxFrame so that it's an even better fit for your business and your users. In fact, the more you customize the application to fit your specific users, the more comfortable they're likely to be—and customization can do great things to boost your adoption rates.

In this section, you'll learn about customization and get links to step-by-step procedures for making MaaxFrame your own.

- Customization tips & tricks
- What can you customize
- Whether to use the lead functionality
- Capturing leads from your website

Use Customization Tips & Tricks

Customizing MaaxFrame is so easy that there's a tendency to create lots of fields that end up not being used. For that reason, it's important to take a step back before you dive in.

Here are the top five things to think about before starting to customize:

- ***Think before you build*** – Start with the end in mind by identifying your end goal. Think about what information you want to pull out of the system, and then make sure you have the fields to match. At the end of the day, MaaxFrame is only as good as what's in your reports.

- ***Ask for input*** – Talk to your users to find out what's critical for them to know. Then capture that information to run your business.

- ***Seed and grow*** – Start with the basic fields you need and then identify new fields that could make your business run even better. This approach ensures you don't turn off your users.

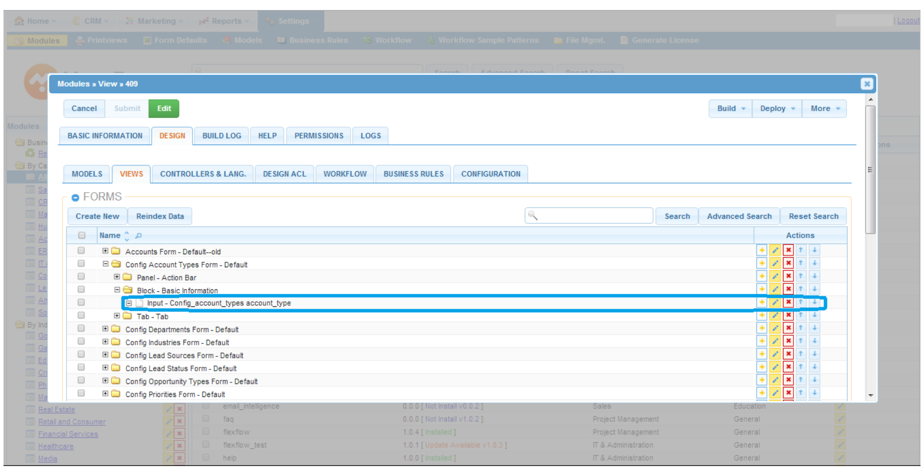
- ***Run reports*** – Run reports about one month after you go live to find out which fields are not being used. Use the opportunity to survey users about what could be improved.
- ***Make changes on the fly*** – In response to feedback, make changes immediately to gain instant credibility. Make sure you communicate any changes, because users don't like it when anything that affects their work happens "magically."

Know What Can You Customize

You can customize many different MaaxFrame components; however, most customers customize three things:

- Fields
- Page layouts
- Reports

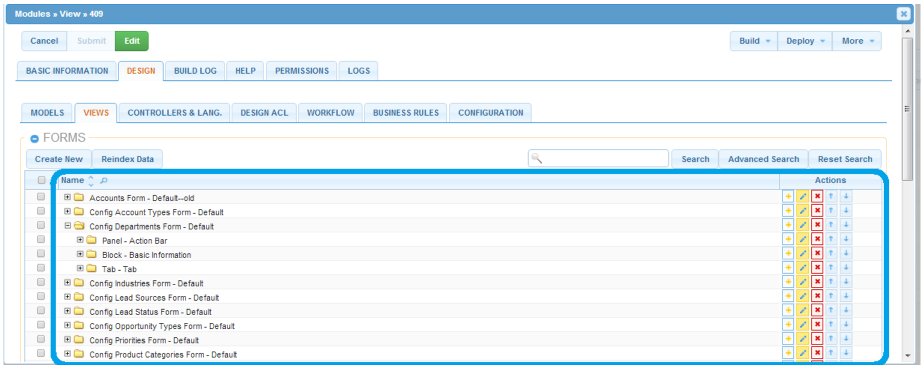
Customize Fields Because fields hold the data you want to capture and report on, it's important to make sure you have fields for important data elements and that those fields have names that make sense to your users. Here are common approaches to customizing fields:



- Modify the standard MaaxFrame fields – MaaxFrame provides commonly used fields for standard records such as accounts, contacts, opportunities, and leads.

- For example, the Lead object has a standard field called “Lead Status,” which has existing values of “Attempted to Contact,” “Cold,” “Hot,” “Pre-Qualified,” “Warm,” and few more. You can easily add a new value called “Dukewarm.”
- Create fields from scratch – If a standard MaaxFrame field that you need doesn’t already exist, you can easily create a custom field. For example, you can add a new picklist to capture “Lead Type” and track the main competitor in the sales cycle.
- Do both! Combine standard fields and custom fields to create the best experience for your users.

Customize Page Layouts Page layouts define how fields—standard and custom—look to your users and which fields are required; that is, they can’t be saved unless the user enters a value. You’ll want to customize your layouts so that they’re attractive and easy to use. It may be tempting to create many required fields to force users to enter data; however, keep in mind that user satisfaction tends to suffer when there are too many required fields.



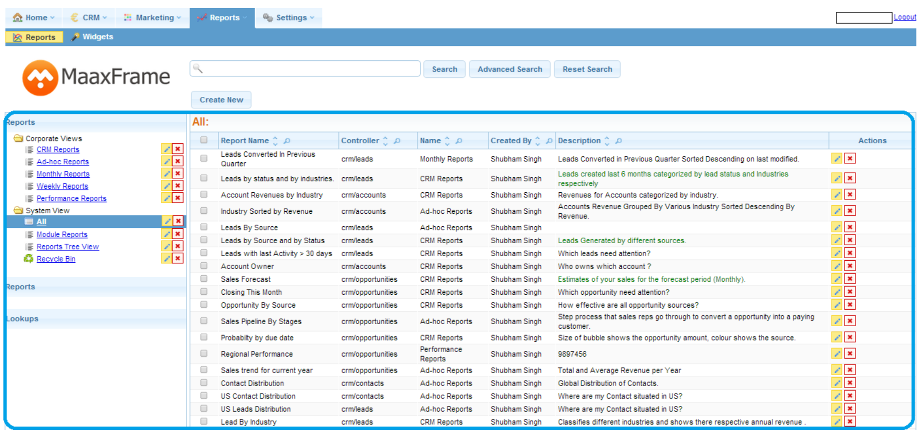
Here’s what you can do to customize page layouts:

- Remove unnecessary fields
- Change field locations
- Create new sections
- Determine if filling in a field is required before saving

Customize Reports

- Being able to easily generate reports containing the information that’s most important to you is one of the great things about MaaxFrame. With a large number of standard reports available out of the box, you can be reporting in no time.

- In the planning process, you determined what information you would need to pull from MaaxFrame based on your current business needs. Then you customized the application based on those needs.
- After you add the custom fields to MaaxFrame, it's time to re-evaluate if you have all the information you need to pull the proper reports.



Now you're ready to start creating your reports. Here's what you can do with reports:

- Customize the standard reports to better fit your business needs.
- Create custom reports from scratch and determine which fields they contain, how they're laid out, sorting options, date ranges, and charting options.
- Leverage pre-built dashboards that contain all the underlying reports tied to the dashboard.

To Lead or Not to Lead?

An important step in setting up MaaxFrame is to decide whether or not to use lead functionality. Leads are a critical part of the sales cycle of most businesses, and MaaxFrame includes a lot of very useful lead functionality, such as analyzing how leads convert or finding your best channels. Some companies decide not to use lead functionality because it requires an additional step to turn a prospect into an opportunity. What's right for you depends on your business processes.

Take Advantage of Lead Functionality Leads are unique among MaaxFrame records because they come with special functionality, including:

My Leads:

Name	Company	Office Email	Office Phone	Lead Status	Created	Actions
Abraham Lawrence	Molestie Tellus Associates	at.augue@arcueuodio.ca	1-899-944-2526	Closed Won	09/12/2013	
Steven Wood	Nam Porttitor Industries	blandit@turpisIncondimentum.edu	1-735-954-7679	Closed Won	09/12/2013	
Hayden Hogan	Magnis Dis Parturient Corporation	elit@senectus.org	1-291-827-8005	Closed Won	09/12/2013	
Bell Baker	Ut Molestie In Industries	malesuada.fames@Cras.co.uk	1-919-654-3402	Closed Won	09/12/2013	
Sylvia Mercer	Vitae Dolor Donec Incorporated	dolor.dapibus.gravida@senectusetnetus.ca	1-536-270-4882	Closed Won	09/12/2013	
Calvin Fox	Non Massa Inc.	lobortis.ultrices@enimgravida.com	1-633-118-4604	Closed Won	09/12/2013	
Lacota Bradshaw	Quisque Purus Sapien Industries	nibh.Phasellus.nulla@eulacusQuisque.com	1-448-389-7071	Contacted	09/12/2013	
Molly Ware	Hendrerit Consectetuer Associates	faucibus.orci.luctus@neque.ca	1-683-987-5092	Junk Lead	09/12/2013	
Lila Short	Malesuada Consulting	Ut.semper@SednequeSed.org	1-576-644-4536	Attempted to Contact	09/12/2013	
Imani Watkins	Lorem Donec Corporation	quis@elitpharetraut.co.uk	1-424-975-0553	Closed Won	09/12/2013	
Austin Pena	Mattis Integer LLP	vehicula.Pellentesque.tincidunt@non.net	1-821-592-5750	Not Contacted	09/12/2013	
Steven Perkins	Mi Lorem Corp.	rutrum.non.hendrerit@eratSed.net	1-988-996-7186	Closed Won	09/12/2013	
Alyssa Fowler	At Lacus Ltd	malesuada.fames.ac@Donec.net	1-704-963-6327	Not Contacted	09/12/2013	
Laura Terrell	Fringilla Consulting	Donec@vitaeeratvel.co.uk	1-239-833-2312	Closed Won	09/12/2013	
Wesley Delaney	Ipsum PC	dui@aliquam.net	1-896-154-4710	Cold	09/12/2013	
Forrest Holloway	Convallis Convallis LLP	Suspendisse.eleifend@loremvehiculaet.co.uk	1-656-531-5446	Not Contacted	09/12/2013	
Blair Hurst	Maecenas Malesuada Fringilla Industries	auctor.odio@augueporttitorinterdum.edu	1-251-626-3506	Closed Won	09/12/2013	
Kathleen Carr	Velit Egestas Lacinia Company	Mauris.vestibulum@Loremipsum.co.uk	1-744-743-1898	Closed Won	09/12/2013	
Alec Ellison	In Tempus Eu Ltd	libero.at.auctor@utaliquam.co.uk	1-461-267-8281	Cold	09/12/2013	
Donna Levine	Vitae Erat Limited	sed@Crasvulputate.co.uk	1-790-148-4840	Closed Won	09/12/2013	
Geoffrey Pollard	Ullamcorper Corp.	vitae.erat.vel@nec.co.uk	1-643-782-7641	Closed Won	09/12/2013	
Erich Colon	A LLP	Sed.malesuada.augue@nibh.net	1-918-980-4072	Closed Won	09/12/2013	
Whilemina Baldwin	Dolor Associates	et.magnis@sapien.com	1-404-511-0806	Closed Won	09/12/2013	

- ***Lead Conversion*** – A benefit of using leads in MaaxFrame is that it creates a separate area in which you can keep information in any kind of format to track anyone who ever expressed interest. This approach keeps a clean distinction between leads and contacts, so you don't have to worry about "dirty" data or duplicates. If you don't use leads, you can't run an analysis of how leads convert or the best channels for creating leads.
- ***Reports*** – Available reports show conversion rates, the time required to convert a lead, and lead channels that are the best performers when it comes to bringing in deals.
- ***Web-to-Lead*** – Getting leads from multiple channels is critical to any business. By using the Web-to-Lead functionality, you can easily create forms that capture leads from your website.

To learn more about leads, take a look at our tip sheet within the Help & Training portal refer to our techical guide.

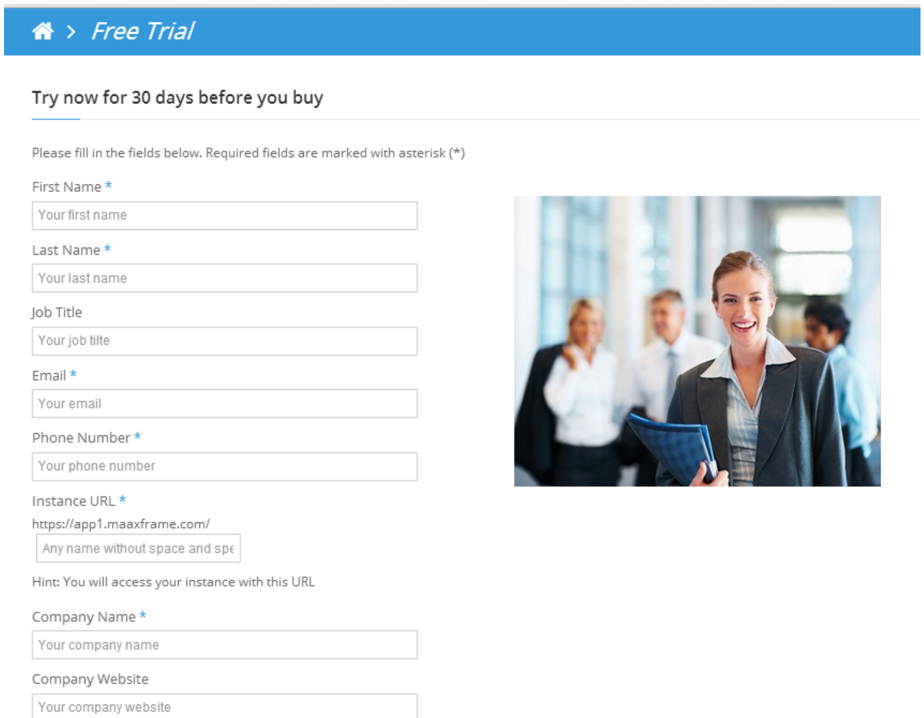
Capture Leads from Your Website

If you have decided to use leads, it makes sense to also evaluate the Web-to-Lead functionality. You probably have a website that lets prospects contact you te your product or service.

To make the most of your website:

- Customize MaaxFrame to use Web-to-Lead functionality to capture leads when prospects fill in a form.
- Bring that information right into MaaxFrame.

Setting up this functionality is as simple as deciding which fields to include on the Web-to-Lead form, creating a URL as a landing page (such as a "thank you"



page), and clicking a button to generate the HTML code. Your webmaster will jump for joy when you deliver HTML code that's ready to deploy immediately.

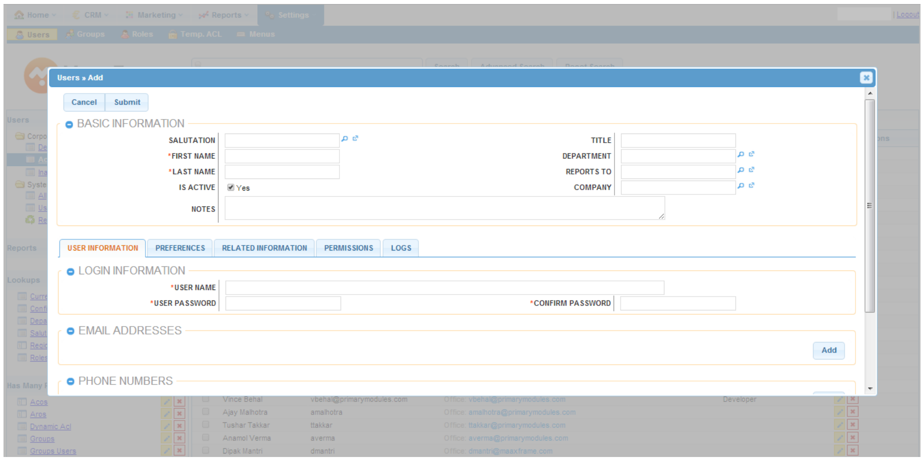
Add Users

When MaaxFrame is set up the way you want it, you're ready to add users.

Adding users is a fairly easy task. Earlier we covered profiles and setting up your organization's role hierarchy. When you add users, you associate actual users with those profiles within your role hierarchy, so users can log in and access the data that's appropriate for them.

Adding users serves three important purposes:

- Once you add users, you can import data and automatically associate that data with the correct users.
- By associating roles and profiles with all users, you can determine how they see data, what they can do in the application, and how their data rolls up.
- When you add a user, MaaxFrame uses that user's record to generate an invitation to log into the application.



> Tip: If you want to notify users to reset password, be sure to “Reset New password” button when you go through the process of adding users. And then You can edit the user records and generate usernames and passwords whenever you’re ready for users to actually log in.

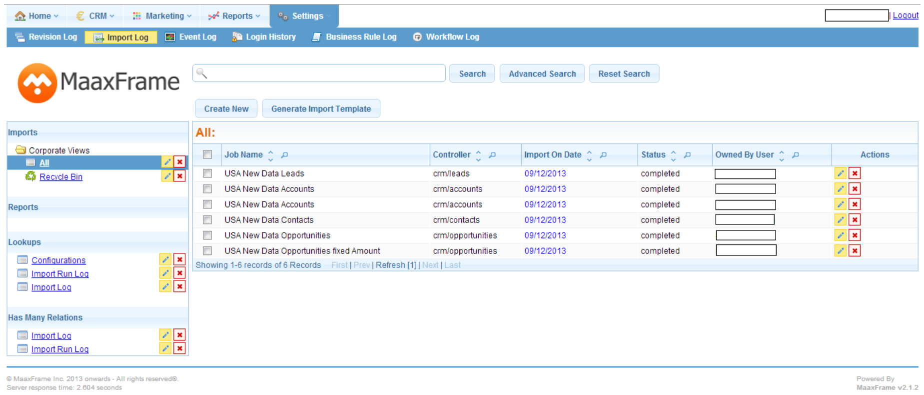
Import Data

The final task before you’re ready to go live is to import your data into MaaxFrame. To help you, MaaxFrame has wizards to walk you through the process and provide some tips along the way. When the import is complete, you’re can start to train your users and announce that MaaxFrame is ready for business.

> Note: This import step is probably the most complex task in any other platforms bur not in MaaxFrame , it’s ease to use.

Most companies already have account and contact information stored somewhere—usually in Act!, Goldmine, or Microsoft Outlook, as well as in spreadsheets, on sticky notes, or in the heads of their sales reps. Getting that information out of Outlook and off the sticky notes and into your organization’s knowledge base is one of the most important steps in the implementation process.

Although you could collect all these resources and enter them one by one, it’s obviously not efficient to enter hundreds or even thousands of records by hand. MaaxFrame provides a step-by-step data import wizard that walks you through the process of importing leads, accounts, and contacts.



Prepare to Import Your Data

Best practices for importing your data include having a well thought-out plan, properly preparing the data, and doing a test run. Planning your data import includes the following steps:

- Identifying your data sources data sources: Is your data in spreadsheets?
- Listing fields in your current data records.
- Mapping your current fields to the MaaxFrame fields.

Prepare Your Data

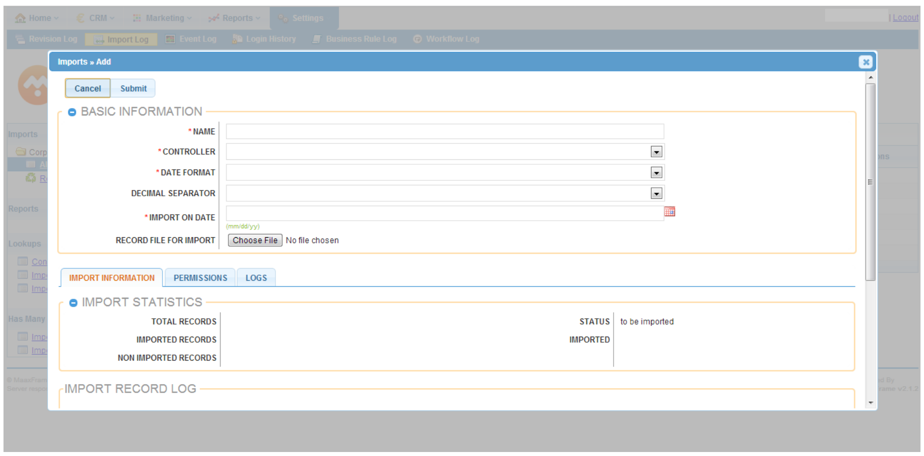
We suggest you "scrub" your data before importing it into MaaxFrame because starting with clean data really pays off. Remember: "Garbage in, garbage out."

Here are some tips for preparing your data:

- The MaaxFrame import wizard was designed to work with Microsoft Excel. If necessary, export your data from any other data sources to Excel first.
- Now is a good time to standardize naming and clean up your data. For example, set standards for company names (such as International Business Machines instead of IBM) or the way countries are listed (USA instead of United States).
- Take time to weed out "dirty" data and de-duplicate people who may be in the system multiple times.
- Review your Excel file to see if you missed any critical data elements for which you haven't yet created custom fields. For example, if your sales reps are tracking the number of employees at each account, you'll need a field to store that information in MaaxFrame.
- Map your data columns to the MaaxFrame field names. For example, the Company field in Microsoft typically maps to the Account field in

MaaxFrame. Consider renaming the column headers in your Excel file so they match the field names in MaaxFrame exactly. This step will simplify the mapping step in the wizard.

- Wherever possible, assign the correct owners to records. If you don't have all the records assigned, the default owner is the administrator who performs the import.
- Now start importing your data.



Test the import: Test a small sample—approximately 5 to 10 records—before going ahead with the full import. When you analyze the results of your test, try this approach:

- Build a custom report or custom view that lets you see at a glance whether the data is laid out correctly.
- Open a record and compare it against the import file. Confirm that the record's fields show what you want them to show.
- Validate the test results with selected stakeholders or power users.
- Make changes to the import file or make changes to MaaxFrame based on the test results. For example, data could import incorrectly because it was mapped to the wrong field.
- Delete the test records and test again after making your changes. Repeat this process until you're sure the data was imported accurately and that it is displayed correctly in the reports and views your users will see.

Import Your Final Data

Once your test results meet your expectations, you're ready to import your file or files. Here are a few suggestions for importing data: * Consider importing data during non-working hours – If the system is live for some groups before others, this approach helps avoid confusion. * Give yourself some cushion for error – Don't try to import your data the day before sales training, for example. * Validate your data – Run key reports and display important screens to make sure all the data was imported into the fields where it belongs and in the format you want.

Home

MaaxFrame Home page houses the dashboard and activity stream which allows users to view pertinent record information via various dashlets and activity stream posts. Every user in MaaxFrame can configure their dashlets based on the display options and filters available from their dashboard. User's can also personalize their activity stream to only view posts specific to records that are important to them. This documentation will go over the basics of the Home page as well as the various options available to customize the Home page to best fit your individual needs.

This is your new sales automation home page, where you can manage your customer relationships and interact with your MaaxFrame.You will see your Dashboard and a quick list of upcoming events for the week. You can also see your task list and any email if any are active.

There are quick view on the screen to the dashboard, which is a standard view, pie chart view and tasks for the team members. Also, you may schedule events, create a task, or create a email.

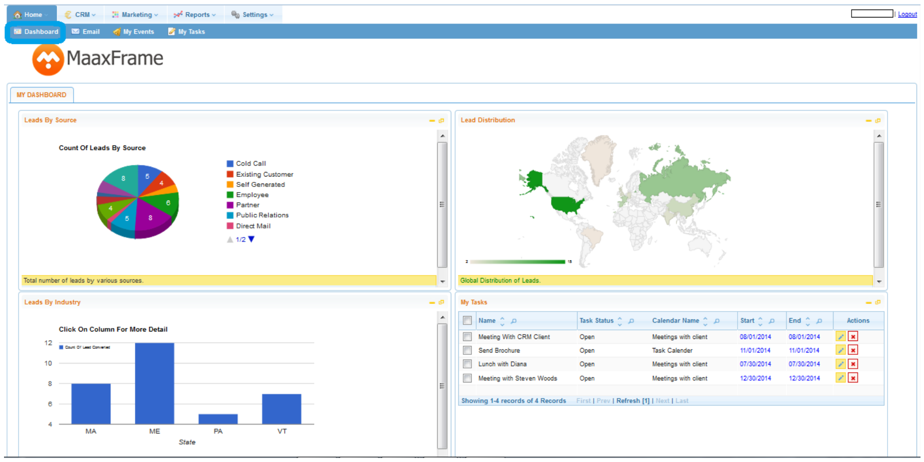
On the top bar there are menus under Home, which are links to important functionality tabs for your MaaxFrame . Some of these features can only be make visible to the administrator account of your organization.

Top Menu Home Involves:

- Dashboard: this is default the page which opens when a user logged in.
- Email: this show functionality for sending emails through MaaxFrame.
- My Events: this will show future events which are created or which will be going to held.
- My Tasks: this will show the tasks which are done and creatin the new tasks.

Dashboard

It will be the default view which will be shown to the user as logged in, this will show the widgets such as Lead by source, Lead by industry, Opportunities pipeline, Leads Distribution and many more.



View of dashboard can be changed by using the widgets sequence and widgets by default can be changed under settings, detailed information can bee seen in MaaxFrame techincal guide.

Email

Overview MaaxFrame's Emails module allows users to receive and send email through the application using their personal email address or a group inbox. Users have the ability to view email through MaaxFrame and also the ability to store email in MaaxFrame. Email stored in MaaxFrame may then relate to other MaaxFrame records such as contacts, cases, accounts, and many others. This documentation will cover how to use the MaaxFrame module as well as the various actions and options available from within the module.

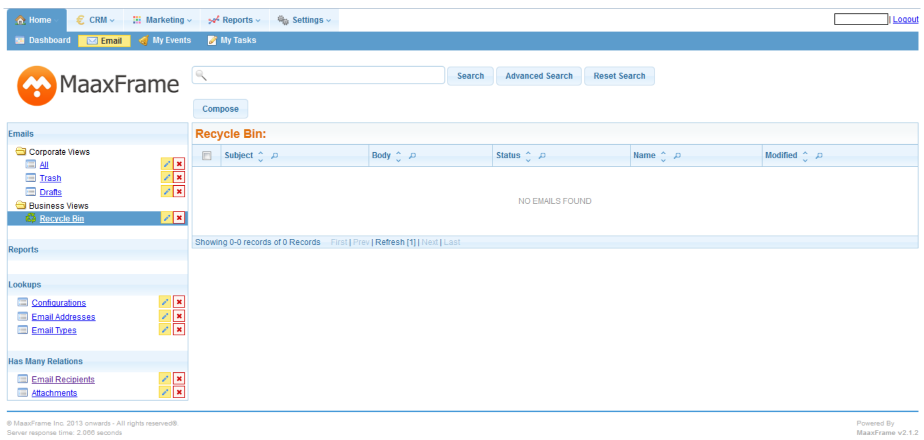
Email Module Tab The Emails module tab is typically located under the Home tab on the navigation bar at the top of MaaxFrame screen. Click the tab to access the Emails list view. You may also hover on the top tab to display the menu, which allows you to perform important actions within the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Send An Email	Opens the list view layout to search and display my send emails
Create Drafts	Opens the list view layout to the list of draft created.

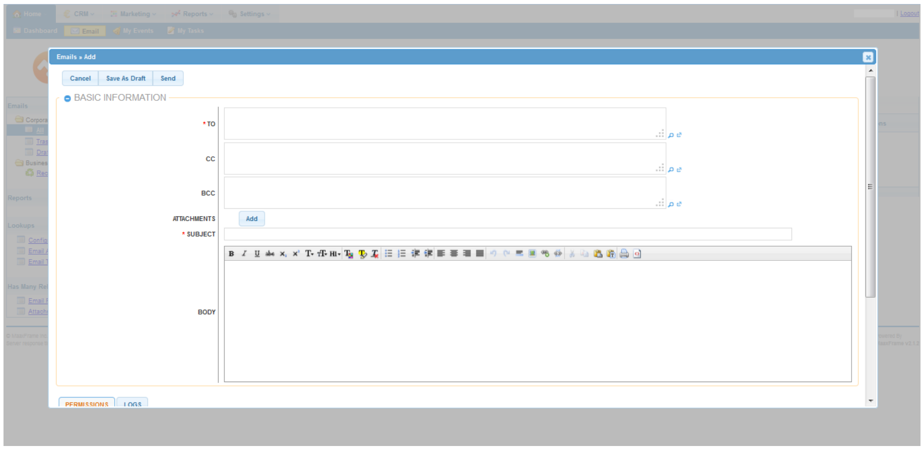
Menu Item	Description
Attachments	Inculde attachments from the system of the user.

NOTE: MaaxFrame allows you to use your eMail client of choice and syncs to your server in the background. It also interfaces with your client on your mobile and/or PC to pass messages to the email client. While sitting in the background maax links all your emails to CRM clients / leads and auto creates tickets and replies to all your support emails.

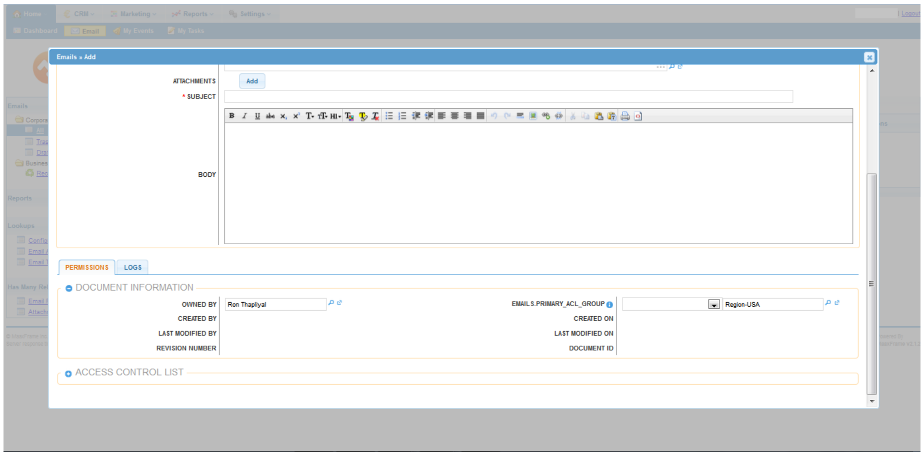


Email Quick View

- Email Fields
- The Emails module contains a number of stock fields which come out-of-the-box with MaaxFrame. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.
- Composing Emails
- One of the most common methods of composing email is via the Compose button in the Emails module. This opens up the compose layout which allows you to enter in all the relevant information for the email.
- Adding Recipients



- When composing an email, you can select email recipients from the address book, which lists existing users, contacts, leads, targets, and accounts. By default, all of these individuals are listed in the address book; however, you can filter the list if you want to view a specific group such as contacts or users. You can also search for an individual by first name, last name, email address, or account name.
- Adding Attachments
- MaaxFrame allows you to send attachments along with your email. Attachments can be files from your local computer or documents from within MaaxFrame.Alterative way to Add attachments is to go through the "Email Addresses" list viewand can easily attach the files.



- Saving Drafts

- As an alternative to sending an email right away is to saving it as a draft. You can save an email as a draft so you can continue composing it at a later time. To save an email as a draft while composing, simply click "Save As Draft". Any emails saved as drafts can be retrieved from the folder pane under "Corporate Views" > "Drafts". Any recipients added, and signatures used on the email are all saved in the draft.
- Sending
- To send an email to the recipients added on the To, Cc, and Bcc fields, simply click "Send".

My Events

Overview MaaxFrame Events allows users to easily schedule, view, and manage their activities (e.g. calls, meetings, calendar) in one place. The calendar will show your calls, meetings, are an invitee on the call or meeting. You can also view other user's scheduled activities via the calendar option. This documentation will cover how to use the Calendar module as well as the various actions and options available from within the module.

My Events Module Tab The Emails module tab is typically located under the Home tab on the navigation bar at the top of MaaxFrame screen. Click the tab to access your events actvities. You may also hover on the top tab to display the menu, which allows you to perform important actions within the module.

The Actions menu allows you to perform the following options:

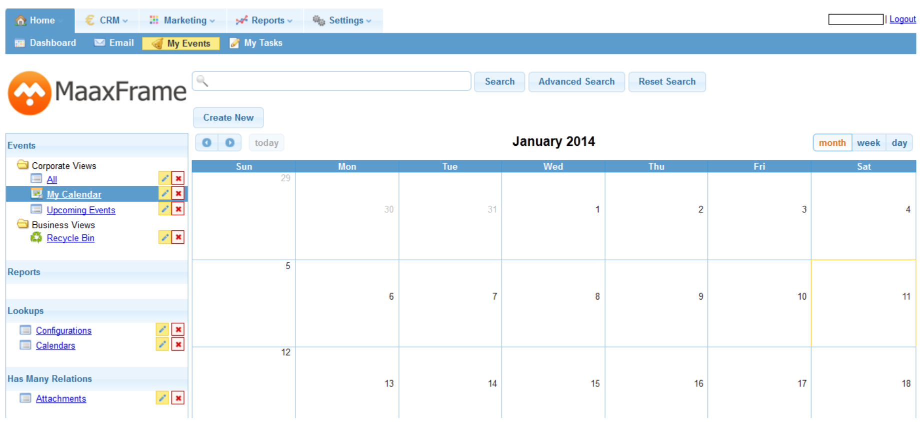
Menu Item	Description
Schedule Meeting	Schedule a new meeting via the Meetings edit view
Upcoming Events	Schedule the events which can be related with any source

NOTE: Maaxframe supports unlimited days "recycle bin" feature. It works like your machine's recycle bin. All deleted documents are there untill you manually "delete forever" from the recycle-bin in every module.

My Events Quick View

- Calendar Actions

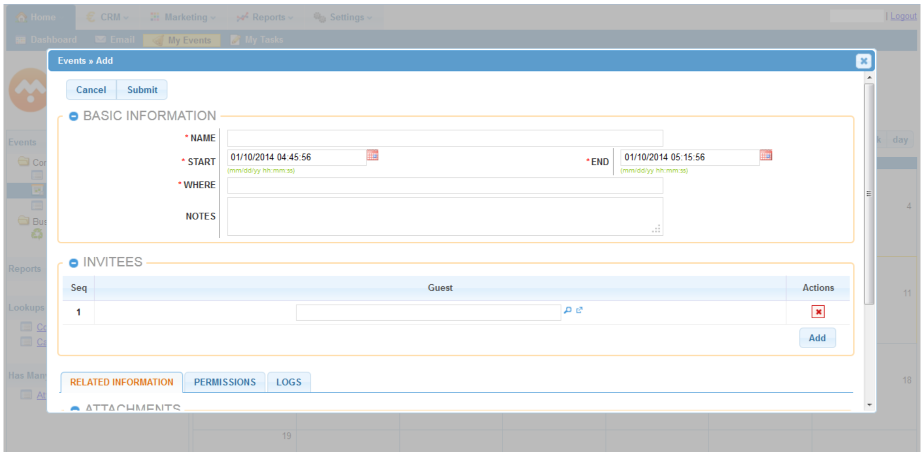
- When viewing your calendar, there are several options across the top of the calendar to help you navigate the calendar and increase the functionality available. These buttons are accessible from any calendar screen, with some notable exceptions. Most of the buttons are used to change the view of the calendar to show a specific time period, or jump to a specific period. The buttons are defined as follows:



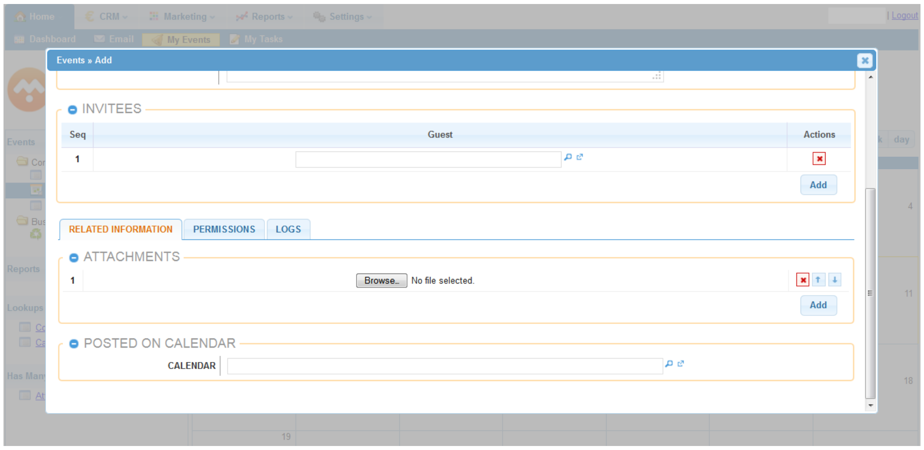
Options	Description
Month	View the current month on the calendar
Week	View the current week on the calendar
Today	View the current day on the calendar
User List	Select events that will be show on the calendar.

- Creating My Events Activities
- The methods for creating the different activities available in MaaxFrame, the My Events module's actions menu. The full edit view layout opens when creating the activity from the actions menu or directly from the individual module. For more information on configuring layouts, please refer to the Technical documentation in the Administration guide. To create an activity is via the create options in the My Events module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the activity.
- Adding Invitees
- Users have the option of adding additional invitees (i.e. Contacts, Leads, Users) to meetings via the Add Invitees Meetings . Please note that the user creating the meeting as well as the contact or lead selected in the

Related To field will automatically be added as invitees to the call or meeting.



- Adding Calendars
- MaaxFrame includes the ability to include different time calendars. Calendars can be presented to users by a popup window that will appear within your MaaxFrame window or by an email being sent to all of the invitees. By default, reminders have to be manually added to meetings upon creating or editing the activity. Users can update their calendars to be specific times for each type of events through the preferences.



- Viewing Via Calendar

- The Calendar module allows users to schedule, view, and manage various activities (Meetings) in MaaxFrame. The Calendar module can be accessed by clicking the Calendar module tab.

Tasks

Overview MaaxFrame Tasks module consists of individual tasks throughout your organization. Task records can be related to one record in most modules via the flex relate field and can also be related to a single Contact. There are various ways you can create tasks in MaaxFrame such as via the Tasks module, duplication, etc. Once the task record is created, you can view and edit information pertaining to the task via the Tasks record view. Depending on the details on the task, you may also be able to view and edit the task information via the Calendar module. Each task record may then relate to other MaaxFrame records such as accounts, contacts, opportunities, and many others. This documentation will cover how to use the Tasks module as well as the various actions and options available from within the module.

Task Fields The Tasks module contains a number of stock fields which come out-of-the-box with MaaxFrame. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Fields	Description
Name	Description for the task created
Start and End Date	Starting and Ending date of task
Priority	Low, Medium, High priority of the task
Status	Define the status for the task
Related to entity	defined to connect with the leads, contacts, accounts
Posted on Caledar	different caledar types are there

*** NOTE: For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.***i

Tasks Module Tab The Tasks module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The Recently

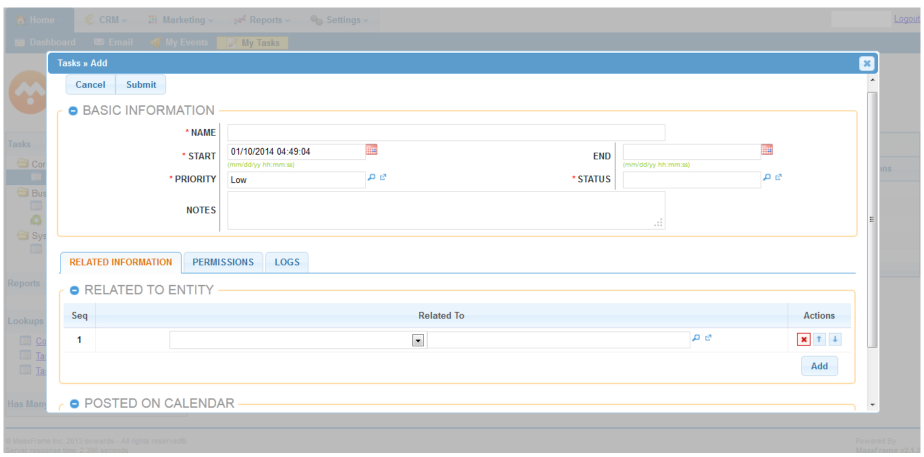
Viewed menu displays the list of tasks you last viewed in the module. The Favorites menu displays the list of tasks you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

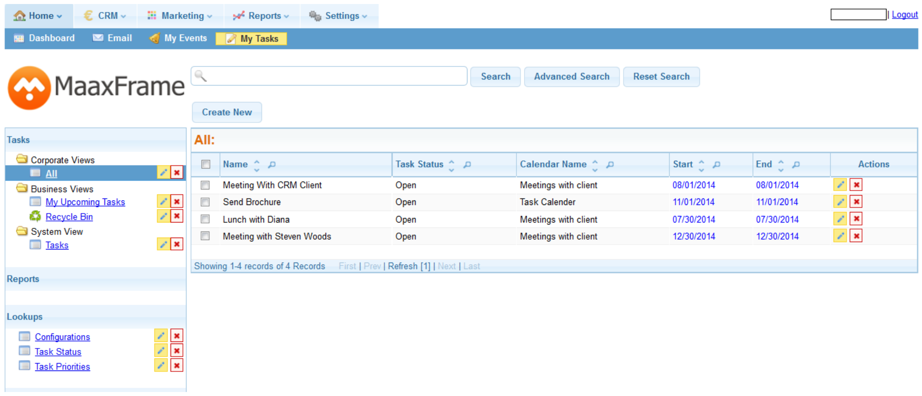
Menu Option	Description
Create Tasks	Opens the record view layout to create a new task
View Tasks	Opens the list view layout to search and display tasks

Tasks Quick View

- Creating Tasks
- The methods for creating tasks in MaaxFrame including via the Tasks module, Tasks dashlet. The same record view layout opens when creating the task directly from the Tasks menu and includes all of the relevant fields for your organization. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.



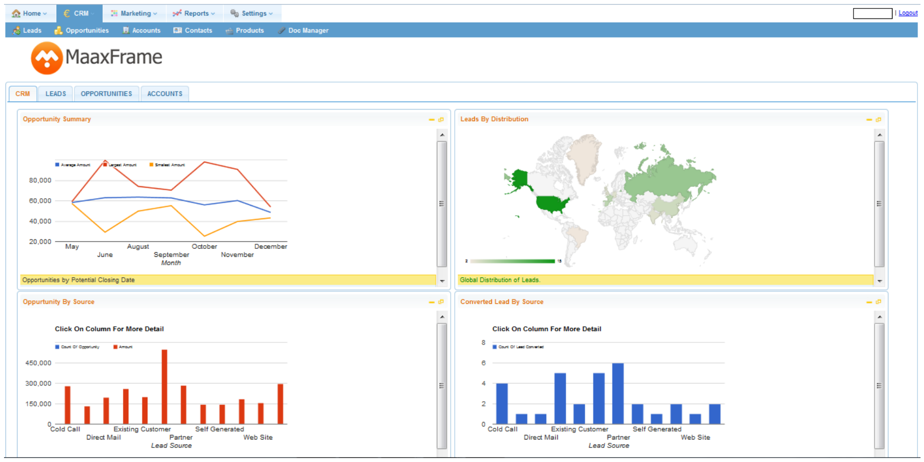
- Viewing Tasks
- There are various options available for viewing task records in MaaxFrame including via Tasks list view, Tasks record view, dashlets, reports, and calendar. Please note that you will only be able to see task records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.



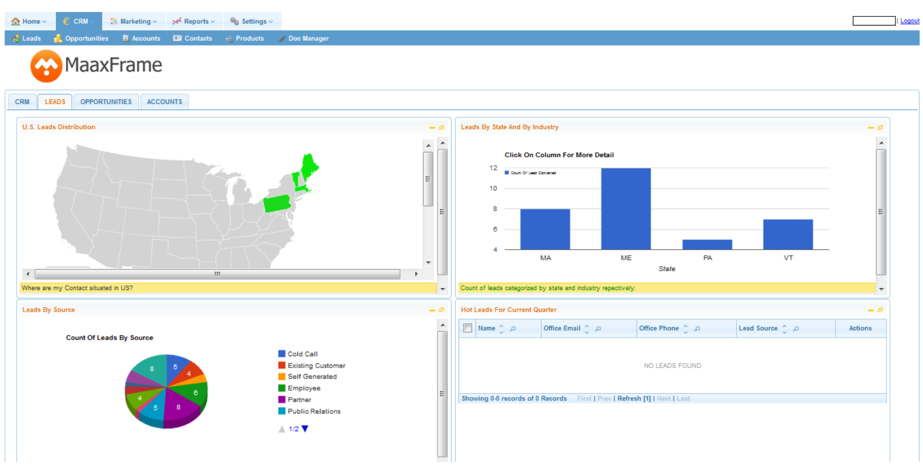
- Editing Tasks
- Tasks may be edited at any time to update or add information to the record. You can make changes to existing task records via the Tasks module . The record view is available within the Tasks module and includes all of the Task fields you should need.
- Deleting Taks
- If a task record is invalid or should no longer appear in your organization's MaaxFrame instance, it may be deleted from either the Tasks record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions. Deleting task records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records. Please note that your ability to delete tasks in MaaxFrmae may be restricted by a role.
- Closing Tasks
- Tasks in MaaxFrame have a status field which indicate whether a task is Open, In Progress,Waiting for Response, Closed. There are various ways users can close tasks in MaaxFrame: directly from the Tasks record view as well as from the Tasks list view.

CRM Dashboard

Overview MaaxFrame CRM Home page houses the dashboard and activity stream which allows users to view pertinent record information via various dashlets and activity stream posts. Every user in MaaxFrame can configure their dashlets based on the display options and filters available from their dashboard. User's can also personalize their activity stream to only view posts specific to records that are important to them. This documentation will go over the basics of the Home page as well as the various options available to customize the Home page to best fit your individual needs.



MaaxFrame's Home page dashboard is where certain dashlets are grouped together based on the information that users would like to view. The "My Dashboard" comes out-of-the-box with MaaxFrame and will display when users initially access their CRM Home page. Users have the option to modify the dashboard layout, rename dashboards, delete dashboards, as well as create new dashboards if they wish. There are different dashlets which can be seen under CRM such as Leads, Opportunities, Accounts, etc.



Please note that administrators can restrict users from modifying their Home page layouts. For more information on how administrators can prevent Home page customizations, please refer to the Admin-Set Limitations section of this documentation.

Admin-Set Limitations Users may find that some of the options described in this documentation (e.g. adding and moving dashlets) are not available when configuring their dashboards. Please note that administrators in MaaxFrame have the ability to limit how users may modify their dashlets via Settings > Groups. Reach out to your system administrator if you are not able to customize your dashboard or would like to increase the maximum number of dashlets allowed in the dashboard. Keep in mind that the changes made in Settings > Groups will be systemwide and cannot be done on an individual account basis. For more information on system settings, please refer to the System documentation in the Administration guide.

Leads

Overview MaaxFrame Leads module consists of individual prospects who may be interested in a product or service your organization provides. Once the lead is qualified as a sales opportunity, leads can be converted into contacts, opportunities, and accounts. There are various ways you can create leads in MaaxFrame such as via the Leads module, duplication, importing leads, etc. Once the lead record is created, you can view and edit information pertaining to the lead via the Leads record view. This documentation will go over the basics of the Leads module as well as the various options available in performing the actions related to the module.

Lead Fields The Leads module contains a number of stock fields which come out of the box with MaaxFrame. The below definitions are suggested meanings for the fields, but the fields can be leveraged to best meet your organization's needs.Users with administrator or developer access have the ability to alter, remove, or add fields via Settings > Users. For more information on adding or modifying fields, please refer to the documentation in the Administration guide.

Fields	Description
Name	Lead's full name with salutation
Job Title	The lead's business title
Lead No.	This is automatically created when the lead is generated
Company	Company name of the lead is filled here

Fields	Description
Annual Revenue	it is the total cost of revenue
Load Demo Data	gives a checkbox for the demo data
Lead Status	The source from which this lead originated
Website	website related to lead
No. of Employess	lead company employees

Tabs	Description
Contact Information	Information related to lead contact
Related Information	Lead Industry, Lead type, Lead source, Product
Activites Information	Related tasks and calendar with it

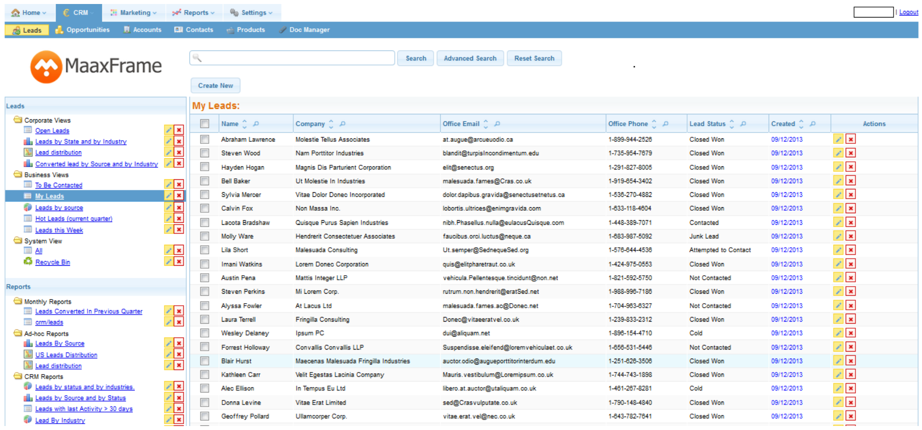
Leads Module Tab The Leads module tab is typically located under the CRM tab on the navigation bar at the top of MaaxFrame screen. Click the tab to access the Leads list view. You may also hover on the top tab to display the menu, which allows you to perform important actions within the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Lead	Opens the record view layout to create a new lead
View Leads	Opens the list view layout to search and display leads
View Lead Reports	Displays existing drill down reports based on the Leads module

If you do not see the Leads module tab in MaaxFrame, please check the following:

- The Leads module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of MaaxFrame), click the settings tab, and check the modules section. If you see the Leads module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Administration documentation.



- The administrator may have disabled the Leads module for your entire MaaxFrame instance. Reach out to your MaaxFrame administrator to have the Leads module displayed. For more information on displaying and hiding modules throughout MaaxFrame, please refer to the Developer Tools documentation in the Administration guide.

Leads Quick View

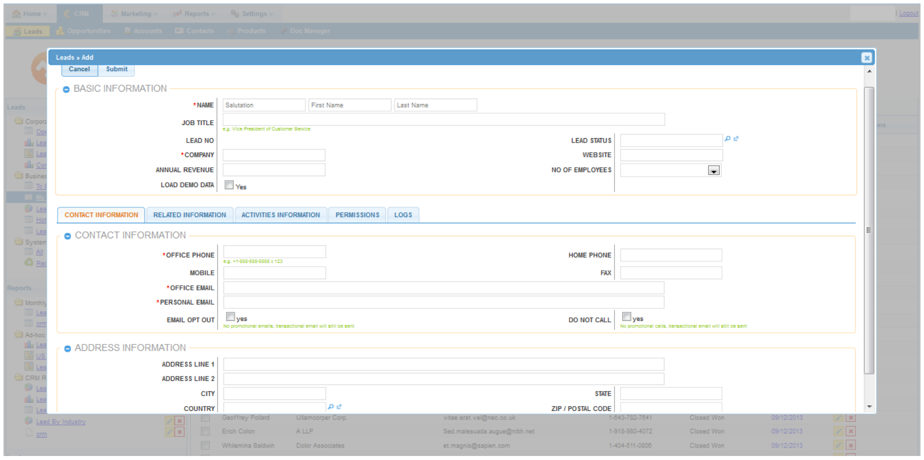
- Creating Leads

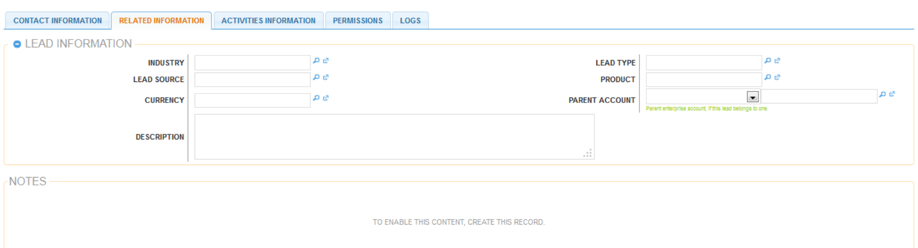
- There are various methods for creating leads in MaaxFrame including via the Leads module, quick create, duplication, web-to-lead form. The same record view layout opens when creating the lead directly from the Leads menu and includes all of the relevant fields for your organization's leads. Please note that administrators can configure the Record View layout. For more information on configuring layouts, please refer to the documentation in the Administration guide.

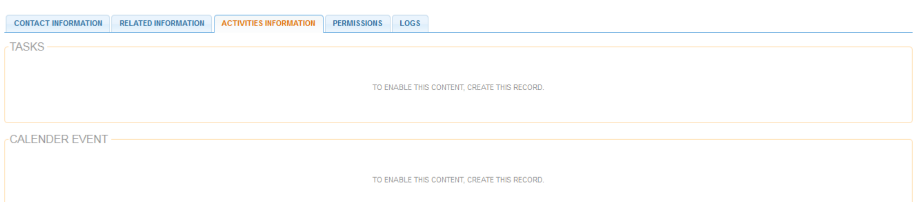
Creating Via Web-to-Lead Form : MaaxFrame provides a simple way to allow visitors to your website or other online location to become leads in your MaaxFrame instance. You can create a web-to-lead form in MaaxFrame and place the form on an external website. Then when a visitor to your site completes and submits the form, their information is entered into MaaxFrame as a new lead record. For more information on creating and managing web-to-lead forms, please refer to the Web-To-Lead Forms documentation.

- Viewing Leads

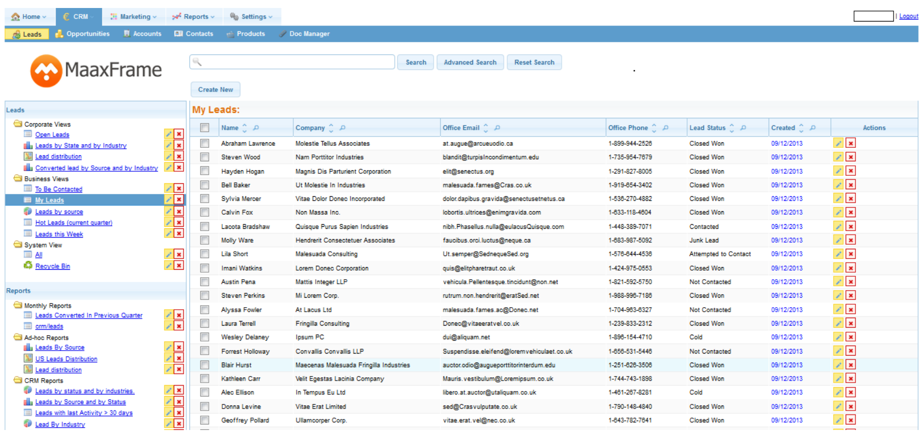
- There are various options available for viewing lead records in MaaxFrame including via Leads list view, Leads record view, dashlets, and reports.


Leads » Add
Cancel
Submit
BASIC INFORMATION
*NAME
Salutation
First Name
Last Name
JOB TITLE
LEAD NO
*COMPANY
ANNUAL REVENUE
LOAD DEMO DATA
Yes
LEAD STATUS
WEBSITE
NO OF EMPLOYEES
CONTACT INFORMATION
RELATED INFORMATION
ACTIVITIES INFORMATION
PERMISSIONS
LOGS
CONTACT INFORMATION
*OFFICE PHONE
MOBILE
*OFFICE EMAIL
*PERSONAL EMAIL
EMAIL OPT OUT
yes
HOME PHONE
FAX
DO NOT CALL
yes
ADDRESS INFORMATION
ADDRESS LINE 1
ADDRESS LINE 2
CITY
COUNTRY
STATE
ZIP / POSTAL CODE


CONTACT INFORMATION
RELATED INFORMATION
ACTIVITIES INFORMATION
PERMISSIONS
LOGS
LEAD INFORMATION
INDUSTRY
LEAD SOURCE
CURRENCY
DESCRIPTION
LEAD TYPE
PRODUCT
PARENT ACCOUNT
NOTES
TO ENABLE THIS CONTENT, CREATE THIS RECORD.


CONTACT INFORMATION
RELATED INFORMATION
ACTIVITIES INFORMATION
PERMISSIONS
LOGS
TASKS
TO ENABLE THIS CONTENT, CREATE THIS RECORD.
CALENDER EVENT
TO ENABLE THIS CONTENT, CREATE THIS RECORD.

Please note that you will only be able to see lead records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.



- Searching Leads
- The Leads list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Leads list view below. Global Search allows users to search for information across their entire MaaxFrame database as opposed to restricting search within a specific module. Please note that MaaxFrame automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %smith). This will pull up any record that has the word “smith” in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

- Leads List View
- The Leads list view displays all lead records meeting the current search criteria to which your user has access. You can view the basic details of each lead within the field columns. Please note that you will only be able to see lead records as allowed by your team membership, user access type,

and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

- Leads Record View
- The Leads record view displays thorough lead information including all lead fields. Beneath the fields you can toggle between viewing a lead's subpanels of related records (Campaigns) and the lead's activity stream. The record view can be reached by clciking a lead record's link from anywhere in the application including from the Leads list view.

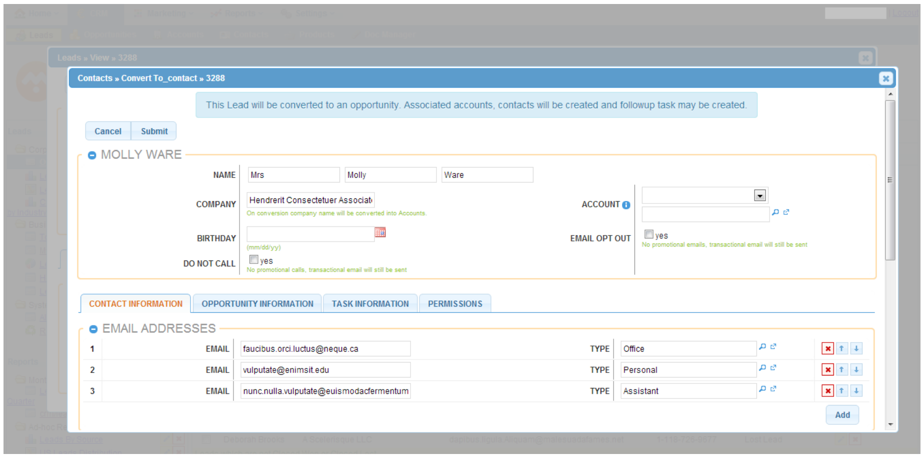
Please note that you will only be able to view a lead record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

- Deleting Records
- If a lead record is invalid or should no longer appear in your organization's MaaxFrame instance, it may be deleted from either the Leads record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions. Deleting lead records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete leads in MaaxFrame may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

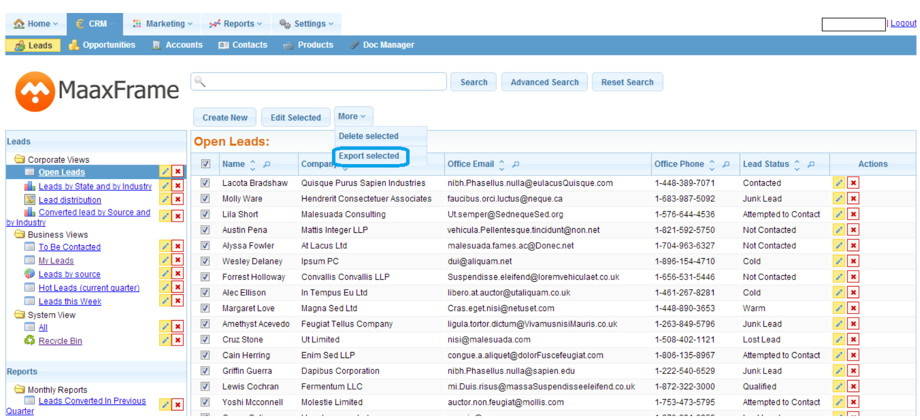
- Converting Leads
- MaaxFrame enables you to convert leads into contacts as you determine they qualify for your organization's definition of a contact (e.g. after an evaluation/qualification process or upon entering into business with the individual). When the lead is converted, a new contact record is created in MaaxFrame with a relationship to the original lead record. The Convert Lead page also gives you the option to create an account and opportunity record.

- Exporting Leads



- MaaxFrame's Export option allows users to download all fields for the selected leads to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Lead data with other software such as Microsoft Excel or to update existing records by exporting. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of lead records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Leads may be exported from the Leads list view by selecting "Export Selected" from the More menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for leads and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in MaaxFrame, please refer to the Export documentation.



Please note that your ability to export leads from MaaxFrame may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

- Viewing Lead Change Logs
- Changes made to each lead record are tracked over time, and users are able to view the history of changes via the change log in each lead's record view. To view the change log, navigate to a lead in record view and select "Logs" inside the Actions menu. For more information on designating for audit, please refer to the documentation in the Administration guide.