

## Maximizer Enterprise 9 Key Fields

Maximizer Enterprise 9 introduces the concept of **key fields**, **this is a way of setting up predefined lists of key fields for the different record types in Maximizer**, the purpose is to make it more convenient to get at key information in an easy to view manner.

Setting up the Key Fields requires an investment of time to begin with but it can provide a great benefit in later use. In order to have them used effectively you can set key fields for a variety of different record types, these types are:

- Company
- Company - Lead
- Contact
- Contact - Lead
- Individual
- Individual - Lead
- Opportunity
- Campaign
- Customer Service Case

As you can see this gives you considerable flexibility in which fields are displayed for each record type. The key fields can be chosen from any User Defined Field you have on your system. **The advantage of this is clear, rather than having to navigate through potentially many layers of folders to find the information you need in the User Defined Fields tab you can select the key information and have it displayed in one place** when you open a record.

The actual process of setting up the key fields is very easy, all you need to do is open the Maximizer Administrator and click File>>Preferences. Then go to the key fields tab, from here you can manage existing collections of key fields and you can create new collections.

To create a new collection just click the Add button and select the key fields you wish to display for each of the 9 possible record types (as listed above), the minimum number of fields for each record type is zero and the maximum is eight. Once this has been setup and you have exited the Administrator program the key field collection will be available for selection by your users. Maximizer stores the chosen key fields display as part of the users profile so it will be restored when the user logs back on.

**Key fields provide a useful way of summarising data for ease of access by almost any type of user.**