

Feature Review Guide April 2019



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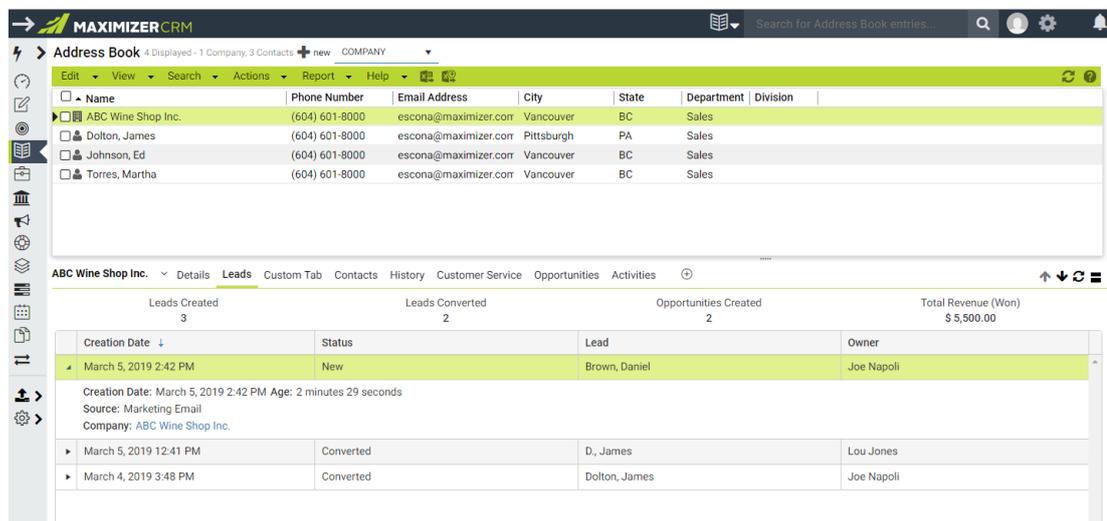
Enhancement in Leads

VIEW LEAD HISTORY IN ADDRESS BOOK ENTRY

(New in Maximizer CRM 2019 and Maximizer CRM Live)

When you review a customer, you would like to know how many times they have become a lead, how many leads have been converted and how much revenue is generated from the leads. The Leads following tab allows you to view the whole history of the leads.

The Leads tab includes a summary section and a list of leads that are linked to a company/individual or any contact in the company/individual.

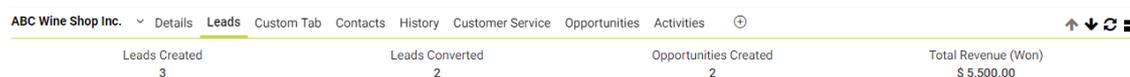


The screenshot shows the 'Address Book' interface for 'ABC Wine Shop Inc.'. The 'Leads' tab is active, displaying a summary section and a list of lead history.

Leads Created	Leads Converted	Opportunities Created	Total Revenue (Won)
3	2	2	\$ 5,500.00

Creation Date	Status	Lead	Owner
March 5, 2019 2:42 PM	New	Brown, Daniel	Joe Napoli
March 5, 2019 12:41 PM	Converted	D., James	Lou Jones
March 4, 2019 3:48 PM	Converted	Dolton, James	Joe Napoli

The summary information is displayed in the top section of the tab, including # of leads created, # of lead conversions, # of opportunities created from conversion, and total revenue generated from the won opportunities. Note that the total revenue is calculated based on the opportunities converted from leads. If you convert a lead without creating an opportunity and later on create an opportunity in Address Book entry, that opportunity won't be considered as generated from leads.



Leads Created	Leads Converted	Opportunities Created	Total Revenue (Won)
3	2	2	\$ 5,500.00

The lead history is displayed below the summary information. You can expand each row to see more information about the lead by pressing the arrow button. If a lead is still in progress (status is New, Working or Nurturing), you will see the creation date and the age of the lead. The age is calculated from the creation date to today's date. If a lead has been closed (status is Converted or Archived), you will see creation date, close date and the age. Age is calculated from the creation date to the close date.

Show associated entries

In the Leads tab, you can access all the linked entries. Clicking the name of a lead will show the entry in the Leads module. Clicking the contact name or opportunity will link the entry in the respective module.

If a lead is a new contact in an existing company and the lead is linked to the company, the company name will be displayed.

The lead is a new contact in the company. It is linked to the company in Leads module. Company name is displayed in lead history.

Clicking the name of a lead will switch to Leads module and highlight the entry.

Leads Created 3	Leads Converted 2	Opportunities Created 2	Total Revenue (Won) \$ 5,500.00
Creation Date ↓	Status	Lead	Owner
March 5, 2019 2:42 PM	New	Brown, Daniel	Joe Napoli
<p>Creation Date: March 5, 2019 2:42 PM Age: 23 minutes 57 seconds Source: Marketing Email Company: ABC Wine Shop Inc.</p>			
March 5, 2019 12:41 PM	Converted	D., James	Lou Jones
<p>Creation Date: March 5, 2019 12:41 PM Close Date: March 5, 2019 2:44 PM Age: 2 hours 3 minutes Source: Social Media Contact: Dolton, James Opportunity: Additional 5 Licenses (In Progress, \$1,000.00)</p>			
March 4, 2019 3:48 PM	Converted	Dolton, James	Joe Napoli
<p>Creation Date: March 4, 2019 3:48 PM Close Date: March 5, 2019 12:40 PM Age: 20 hours 51 minutes Source: Chat Contact: Dolton, James Opportunity: Purchase 5 New Licenses (Won, \$5,500.00)</p>			

Clicking the contact or opportunity will switch to the respective module and show the details of the entry.

Currency

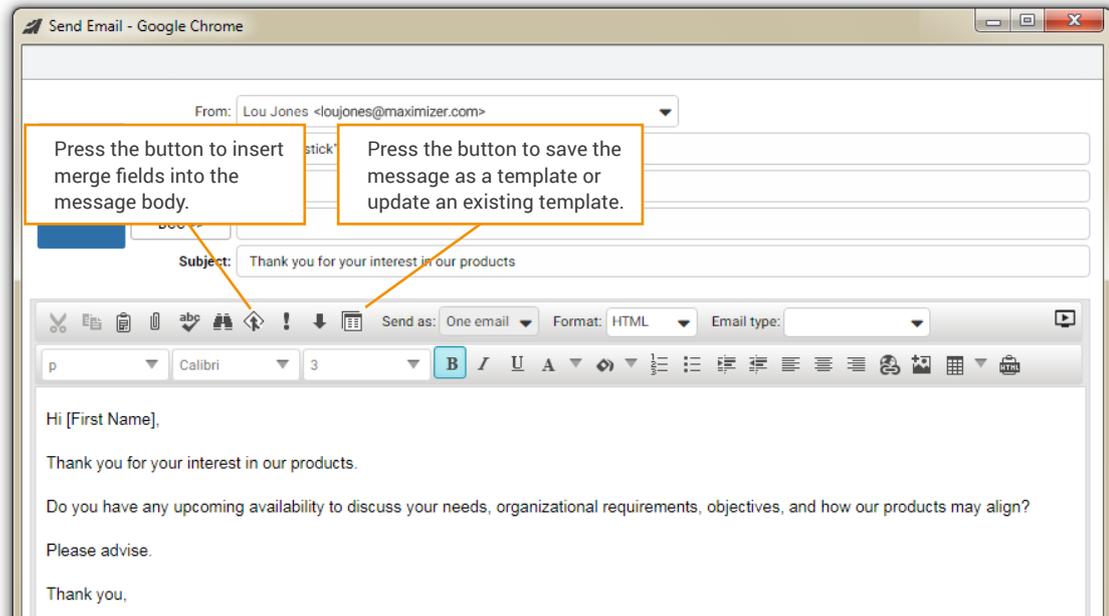
If your database doesn't use multiple currencies, the currency symbol will be displayed. If you have multiple currencies enabled, you will see currency code in each opportunity. The total revenue will be calculated based on your corporate currency.

SUPPORT MERGE FIELDS AND EMAIL TEMPLATES

(Already available in Maximizer CRM Live; new in Maximizer CRM)

You can now create email templates for working with leads. This will make it easy to communicate with the prospects and ensure your messages are consistent.

In email compose dialog, the buttons for inserting merge fields and access to templates have been added. You can insert lead fields and edit the email message. You can then save the message as a template.



Note that if you have created email templates for Address Book entries and the merge fields in the templates are available in leads, you can use the same templates for leads. For example, if you have an email template that includes First Name, Last Name, Email 1 and Phone 1. This template works for both Address Book entries and leads.

UNARCHIVE LEADS

(Already available in Maximizer CRM Live; new in Maximizer CRM)

You may be working with a lead for a while and then the lead stops responding. You archive the lead. A few weeks later, the lead contacts you again. You would like to re-activate the lead so you can view all the notes and documents you have created for the lead. Unarchive function has been added into this release. Pressing the Unarchive button will activate the lead again and enable the Edit, Link and Convert buttons. All the notes, documents and activities created for the lead will be visible. The status of the lead will be set to New.

< BACK TO LEADS

Archived lead

UNARCHIVE



Johnson, Ed General Manager at ABC Wine Shop Inc

▼ MORE

Phone:
6046018000
6046018001

Email and Website:
ed.johnson@abcwine.com
www.abcwine.com

Owner:

ALLOW ASSIGNING MULTIPLE LEADS TO A PARTNER AT THE SAME TIME

(Already available in Maximizer CRM Live; new in Maximizer CRM)

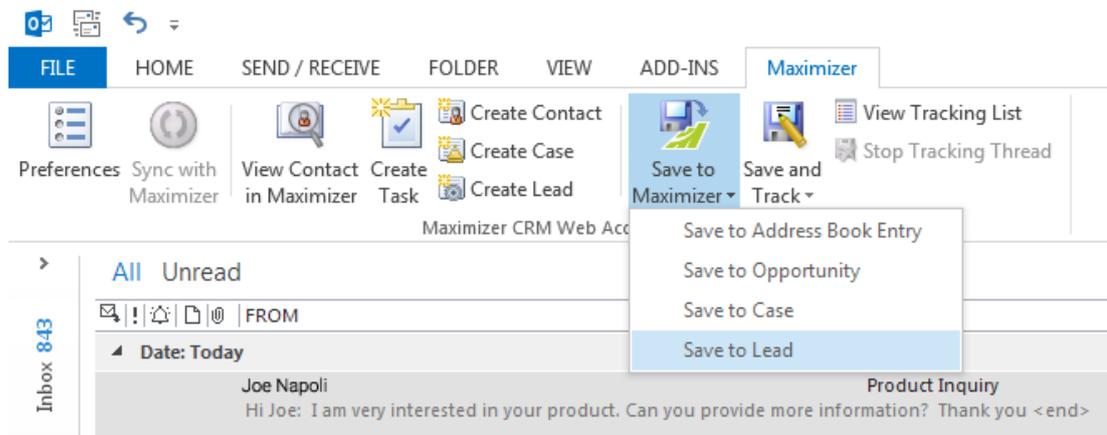
If you are working with your channel to qualify leads, you would like to quickly assign leads to the partners. The Partner field is now available in the Global Edit for leads.

Outlook Add-in

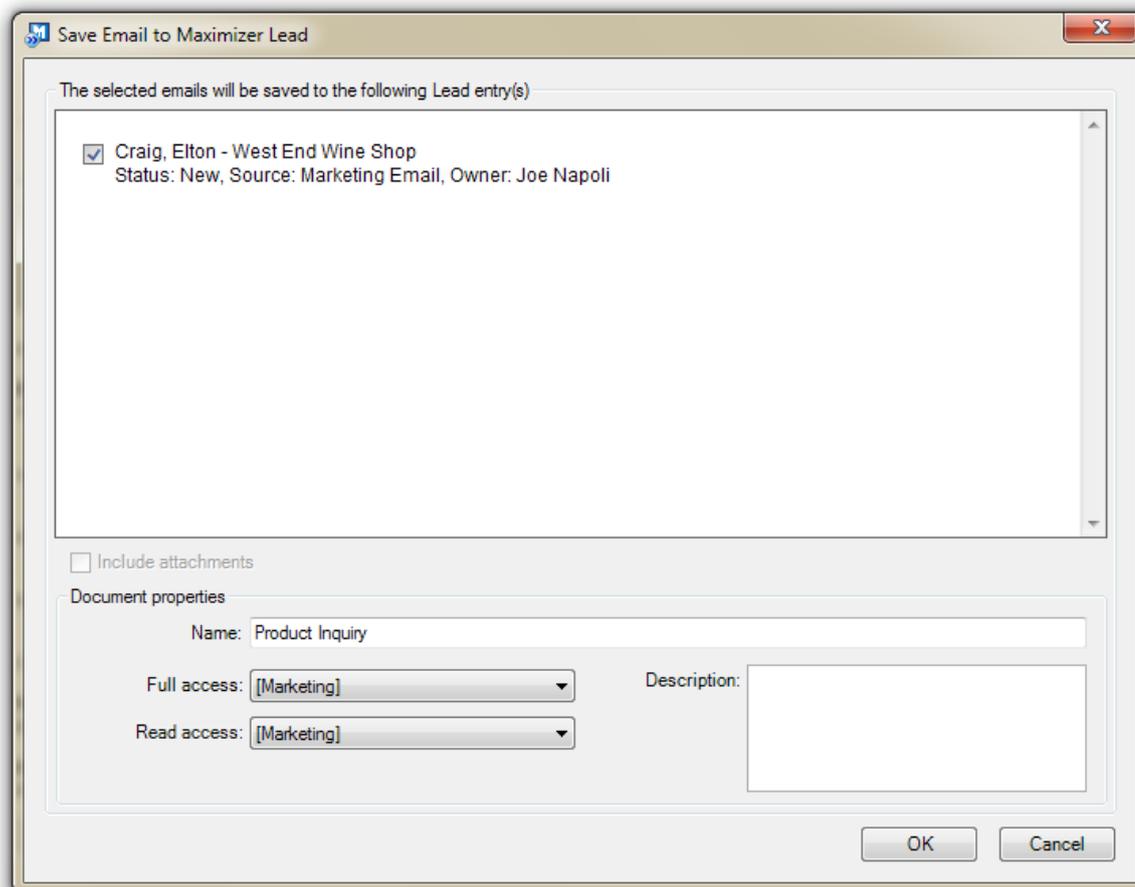
SAVING AN EMAIL TO A LEAD

(Already available in Maximizer CRM Live; new in Maximizer CRM)

Now you can save an Outlook email to a lead in Maximizer. In Outlook add-in, press Save to Maximizer button to open the drop-down and click on Save to Lead.



If you turn on the option “Confirm when saving email” in Outlook add-in Preferences, you will be prompted with a dialog that shows all the leads with matching email address.

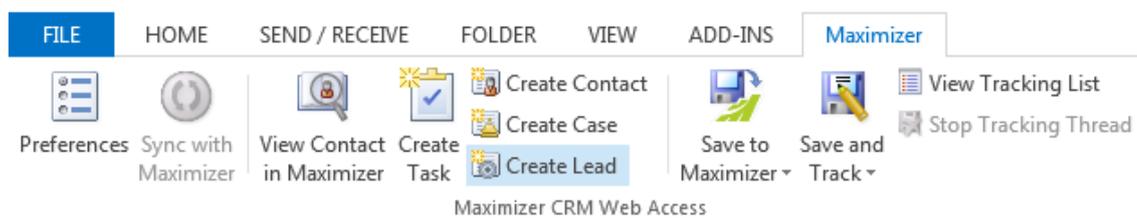


Select a lead and press the OK button to save the email to the lead. You can specify the name, Full Access and Read Access, as well as Description for the document. If you don't have "Confirm when saving email" turned on, the email will be automatically saved to all leads with a matching email address.

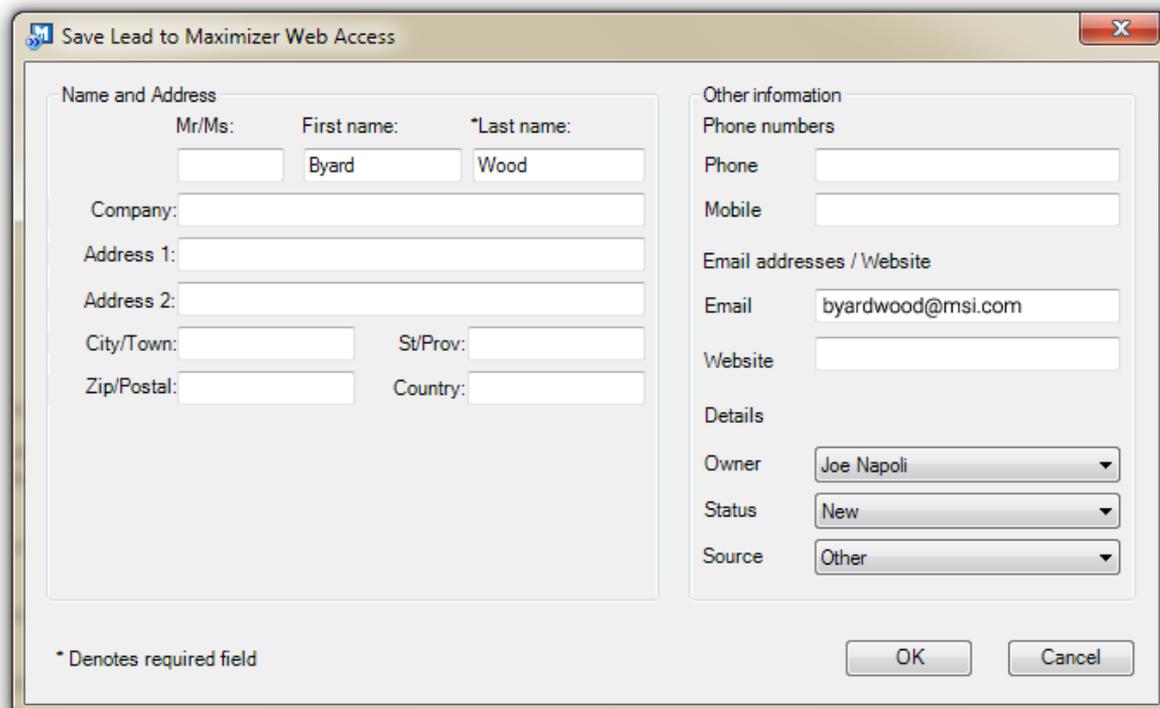
CREATE A LEAD BASED ON AN EMAIL

(Already available in Maximizer CRM Live; new in Maximizer CRM)

You can now create a new lead based on an email. In Outlook add-in, press Create Lead button to open the dialog for creating a new lead.



In the dialog for creating a lead, First Name, Last Name and Email Address fields will be populated automatically. You can enter other information and specify owner, status, source for the lead.



The dialog box is titled 'Save Lead to Maximizer Web Access'. It contains two main sections: 'Name and Address' and 'Other information'.

Name and Address:

- Mr/Ms:
- First name:
- *Last name:
- Company:
- Address 1:
- Address 2:
- City/Town: St/Prov:
- Zip/Postal: Country:

Other information:

- Phone numbers:
 - Phone:
 - Mobile:
- Email addresses / Website:
 - Email:
 - Website:
- Details:
 - Owner:
 - Status:
 - Source:

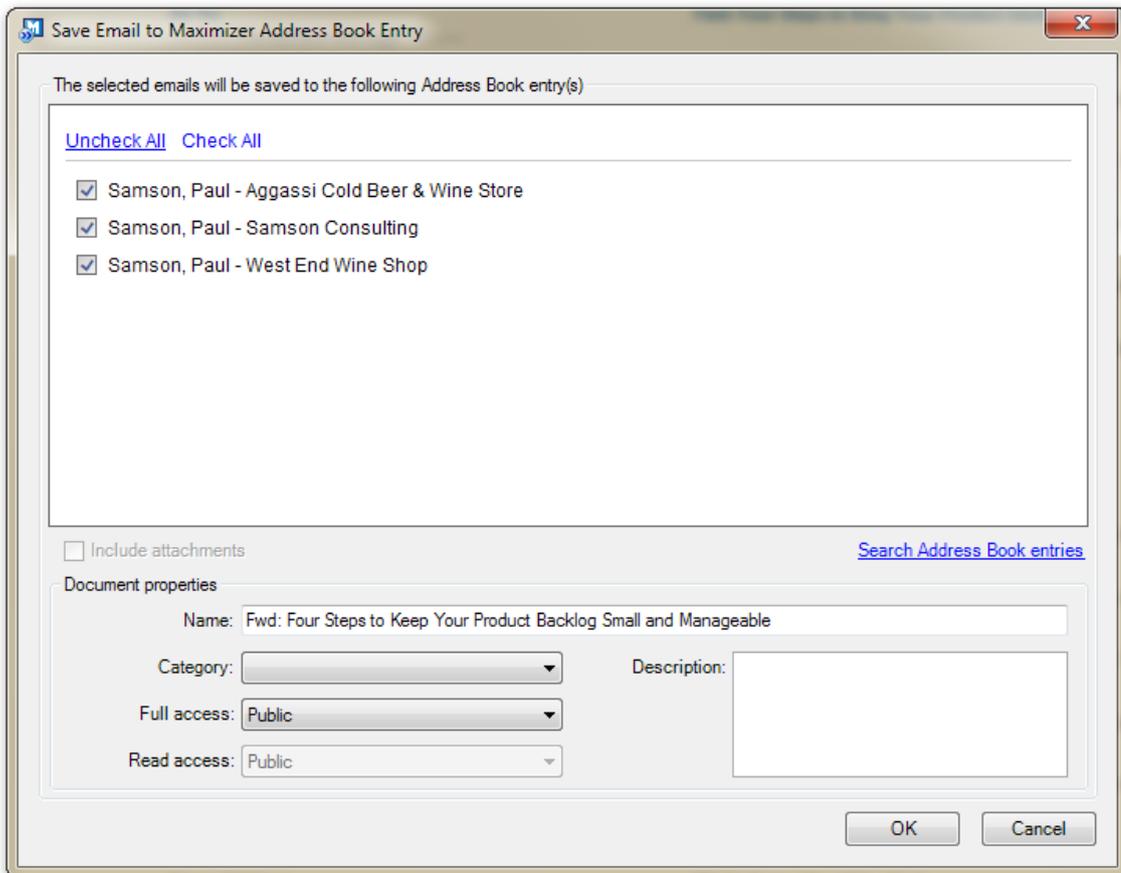
* Denotes required field

Buttons: OK, Cancel

UNCHECK ALL BUTTON IS AVAILABLE IN THE DIALOG FOR SAVING AN EMAIL TO MAXIMIZER ENTRIES

(New in Maximizer CRM 2019 and Maximizer CRM Live)

Check All and Uncheck All buttons are now available in the dialog for saving an email to Maximizer entries. If multiple entries are found with a matching email address e.g. a business partner is a contact in multiple companies, you can press the Uncheck All button to de-select all entries and check the one you want to save the email.



Note: you need to update your Outlook add-in in order to get the new functions.

Interface and User Experience Improvement

USE KEYBOARD SHORTCUTS FOR NAVIGATION AND COMMONLY USED COMMANDS

(New in Maximizer CRM 2019 and Maximizer CRM Live)

If you are a power user, you would like to navigate to different modules quickly using the keyboard keys.

The following keyboard shortcuts for navigation have been introduced in this release.

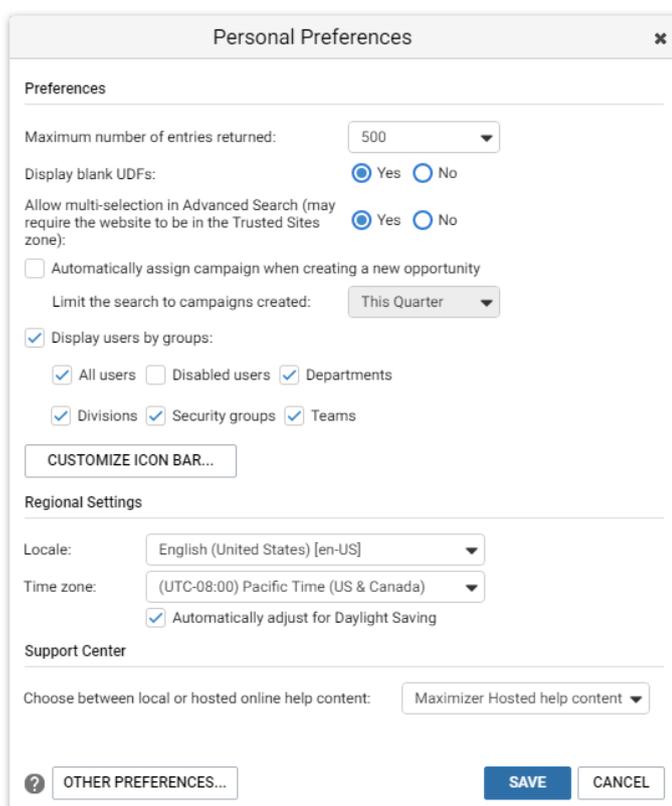
Address Book	Shift + a	Knowledge Base	Shift + k
Leads	Shift + l	Calendar	Shift + c
Opportunities	Shift + o	Company Library	Shift + i
Quotas	Shift + q	App Directory	Shift + p
Campaigns	Shift + g	Dashboard	Shift + d
Customer Service	Shift + s	My Work Day	Shift + m
Hotlist	Shift + h		

Some commonly used commands also support keyboard keys. If you are editing an entry in the Details tab in Address Book, Opportunities or Customer Service, you can press “Ctrl + Shift + s” to save; press “Shift + Esc” to cancel. In all the modules where you can use the “+ new” button to create a new entry, you can press “Ctrl + Shift + a” to create a new entry.

MODERNIZING THE LOOK AND FEEL OF THE PRODUCT

(New in Maximizer CRM 2019 and Maximizer CRM Live)

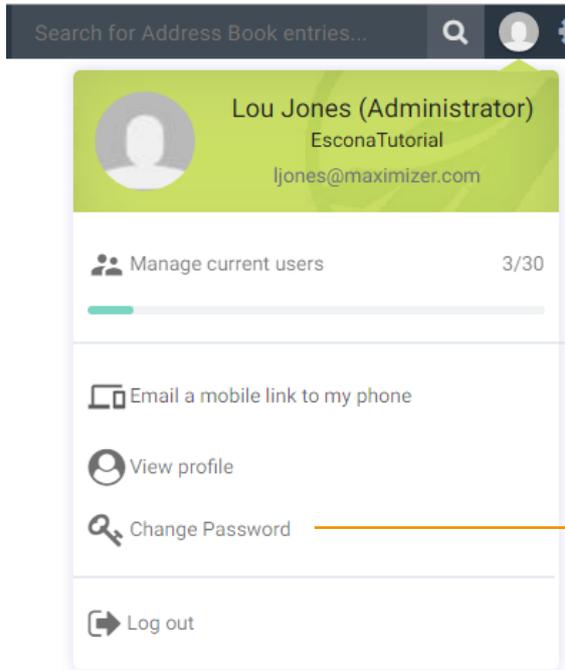
Maximizer gets a facelift in this release. Our goal is to make the interface look clean and modern. In this release, we focus on making all the buttons, checkboxes, radio buttons and drop-down lists look consistent throughout the product.



Preferences dialog

The Windows style group boxes have been removed. The Password button used to be placed at the bottom of the dialog, this has been removed. The dialog for changing password can be accessed from the User Profile menu.

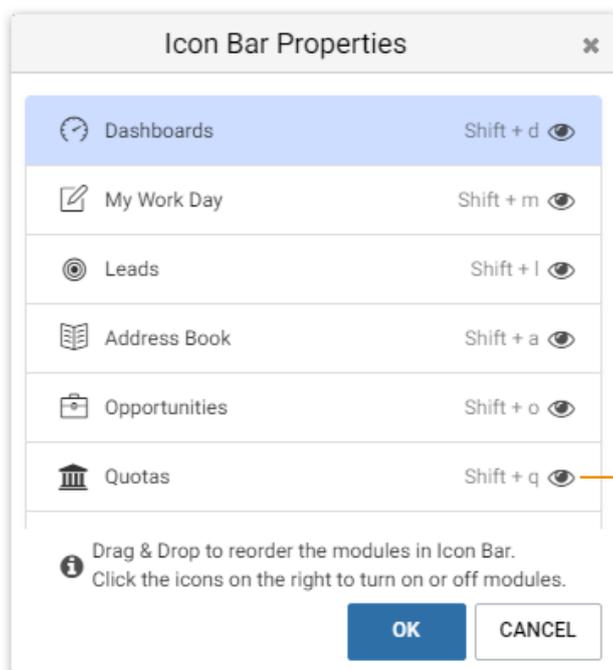
The look and feel of the Other Preferences dialog and the Template Library screen have also been changed.



The dialog for changing password can be accessed from the User Profile menu.

NEW DIALOG FOR CUSTOMIZING MODULES AND FOLLOWING TABS

(New in Maximizer CRM 2019 and Maximizer CRM Live)



The dialog for customizing the modules in Icon Bar has been rewritten. The new dialog allows you to re-order the modules by drag and drop. You can turn on or off modules by clicking the eye icon.

You can also use the keyboard key to move or turn on/off the modules. Pressing Shift + up/down arrow to move an item up or down. When an item is highlighted, press the Enter key to turn on or off the module.

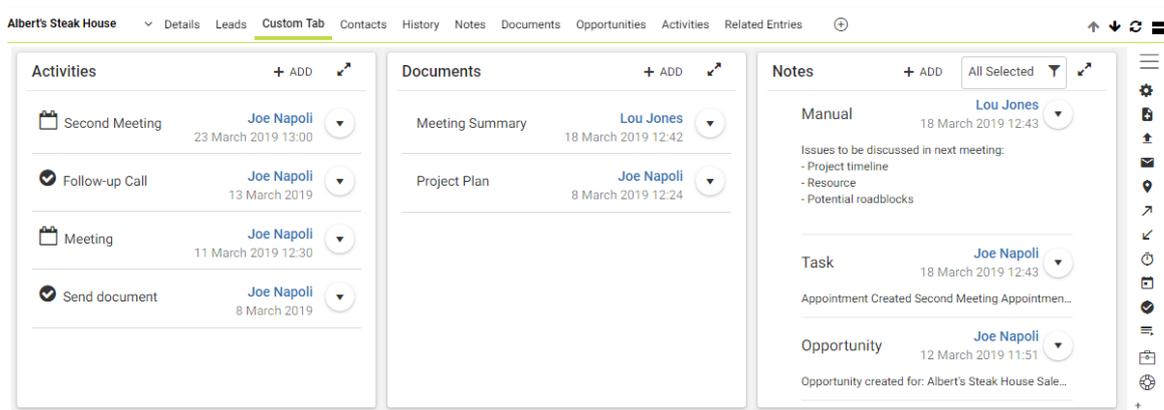
Press the eye button to turn on or off the module

More Widgets in Custom Tab

DOCUMENTS AND ACTIVITIES WIDGET

(New in Maximizer CRM 2019 and Maximizer CRM Live)

Documents and Activities widgets are now available in Custom tab in the Address Book module. In the Activities widget, you can add or modify appointments and tasks. In the Documents widget, you can add or download documents.



Other Improvements and Changes

OPPORTUNITY PROCESS AND STAGE FIELDS CAN BE SET AS MANDATORY

(New in Maximizer CRM 2019 and Maximizer CRM Live)

If your organization requires that each opportunity must follow a process, you can now set process and stage fields as mandatory. This will ensure that when you create a new opportunity or modify an existing opportunity, the process and stage fields cannot be blank.

OPPORTUNITY LOGGING NOTE INCLUDES VALUE OF PROCESS AND STAGE FIELDS

(New in Maximizer CRM 2019 and Maximizer CRM Live)

The opportunity logging notes now show the value of process and stage fields.

OPPORTUNITY STRATEGY HAS BEEN REMOVED FROM THE PRODUCT

(New in Maximizer CRM 2019 and Maximizer CRM Live)

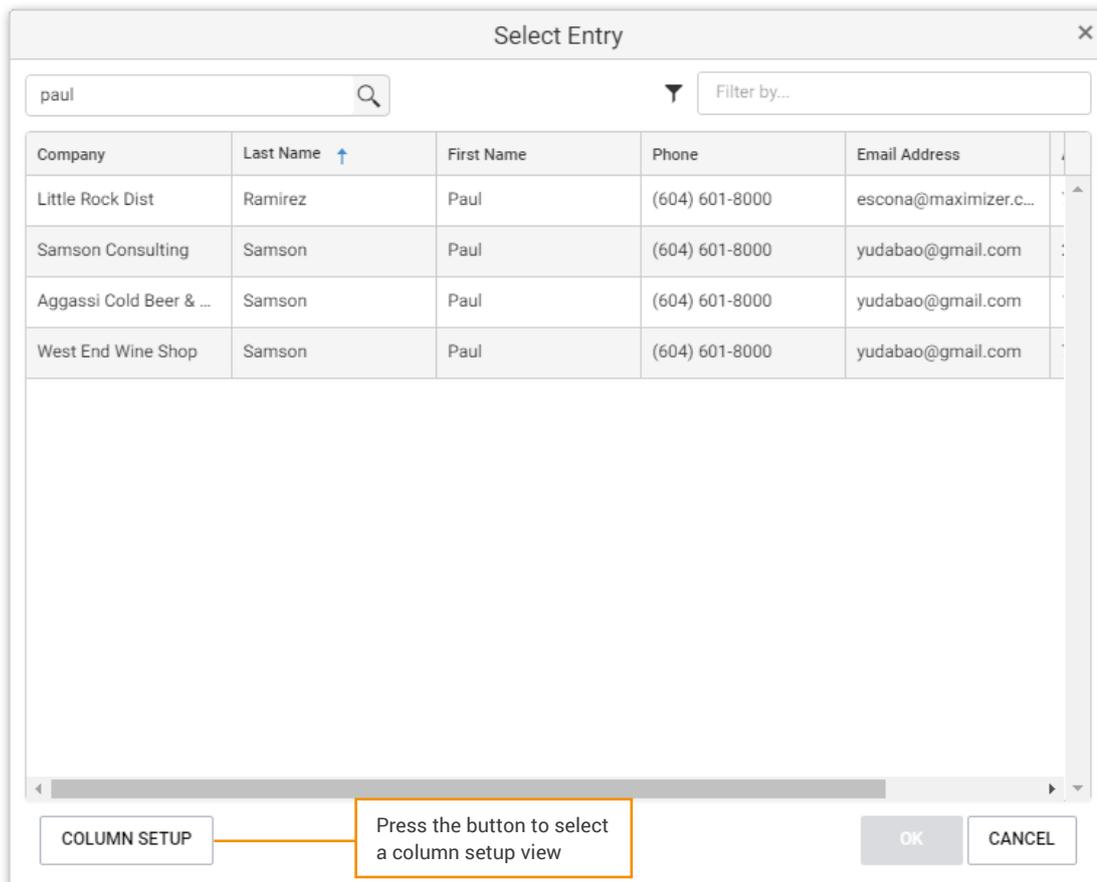
Strategy field has been removed from the following places:

- Merge field in email compose dialog, column setup and Word add-in.
- Select field for formula user-defined field, conditional mandatory rule and coloring rule.

SUPPORT COLUMN SETUP IN THE DIALOG WHEN SEARCHING FOR ADDRESS BOOK ENTRIES

(New in Maximizer CRM 2019 and Maximizer CRM Live)

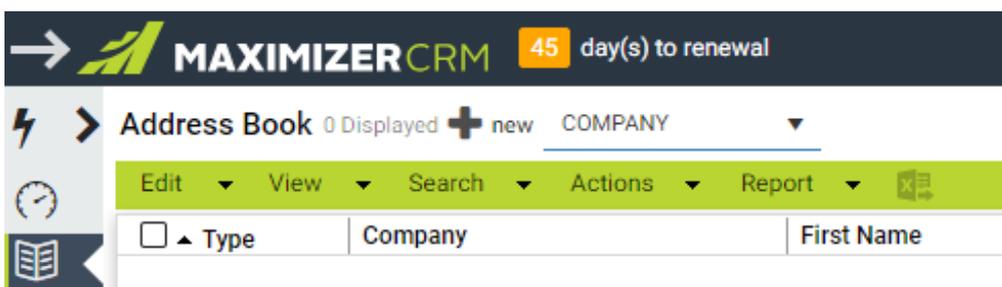
In the dialog when searching for Address Book entries, such as the dialog for assigning a partner or a contact, you can now specify a column setup view which will help you to identify the right entry. The column setup selected in one dialog will be applied in all other dialogs when searching for Address Book entries. For example, if you select a column setup view in the dialog for assigning a partner, the column setup will be the same in the dialog for assigning a contact to a case.



COUNTDOWN TO SUBSCRIPTION EXPIRY DATE

(New in Maximizer CRM Live)

To help you renew the subscription on time and prevent any disruption caused by overdue payment, countdown will appear 45 days before the subscription expiry date.



CHANGES RELATED TO APPOINTMENT NOTIFICATION AND REMINDER

(New in Maximizer CRM 2019 and Maximizer CRM Live)

The email notification and reminder for appointments include contact's personal information, including address, phone numbers and email addresses. The following changes have been made in the notification and reminder fields to comply with data privacy regulations.

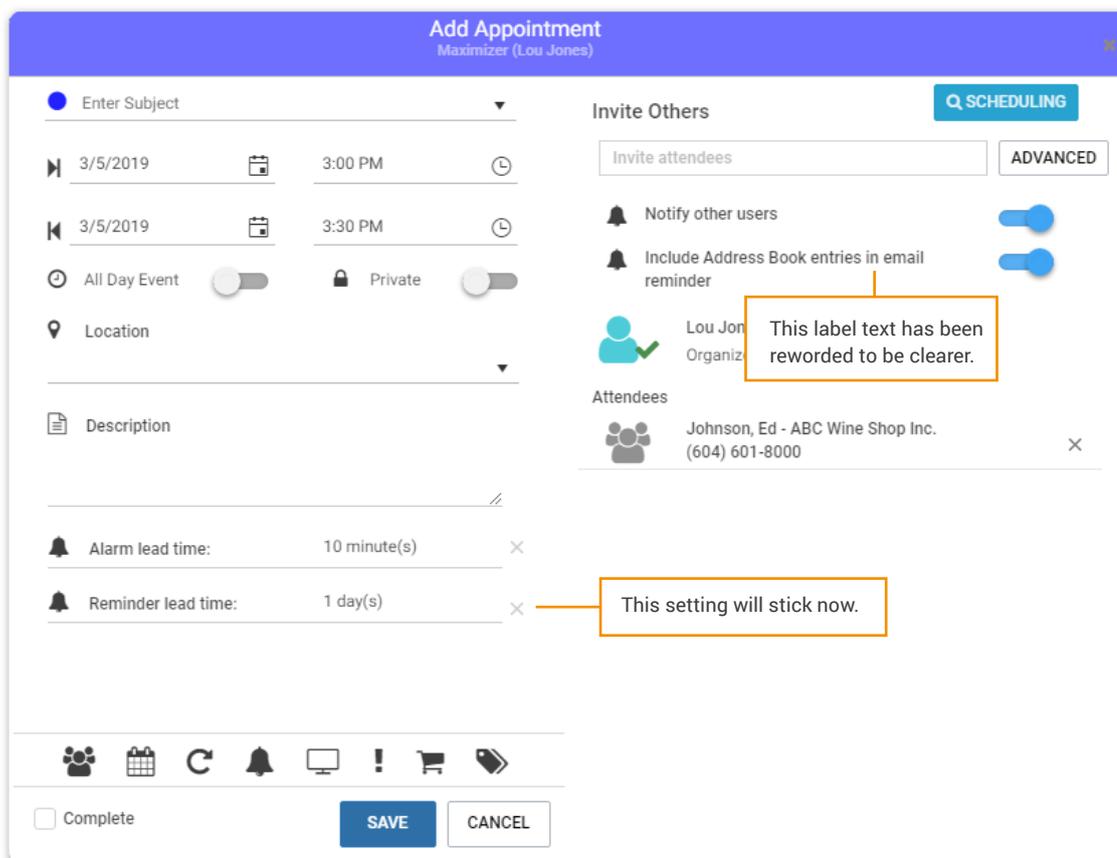
In email notification, the Address Book entries invited to the meeting will be placed in Bcc field. The contact's personal information used to be displayed in the "With" section has been removed. The personal information in iCal has also been removed.

In email reminder, "With" section has been removed to prevent personal information being visible to other people.

Reminder lead time

Now the setting of the reminder lead time will stick. After you set the lead time when creating a new appointment (e.g. change from 6 hours to 1 day), the setting will be remembered.

Note that the option "Include Address Book entries in appointment email reminder" in Preferences dialog has been removed.



Add Appointment
Maximizer (Lou Jones)

Enter Subject

3/5/2019 3:00 PM

3/5/2019 3:30 PM

All Day Event Private

Location

Description

Alarm lead time: 10 minute(s)

Reminder lead time: 1 day(s)

Invite Others Q SCHEDULING

Invite attendees ADVANCED

Notify other users

Include Address Book entries in email reminder

Lou Jones
Organizer

Attendees

Johnson, Ed - ABC Wine Shop Inc.
(604) 601-8000

This label text has been reworded to be clearer.

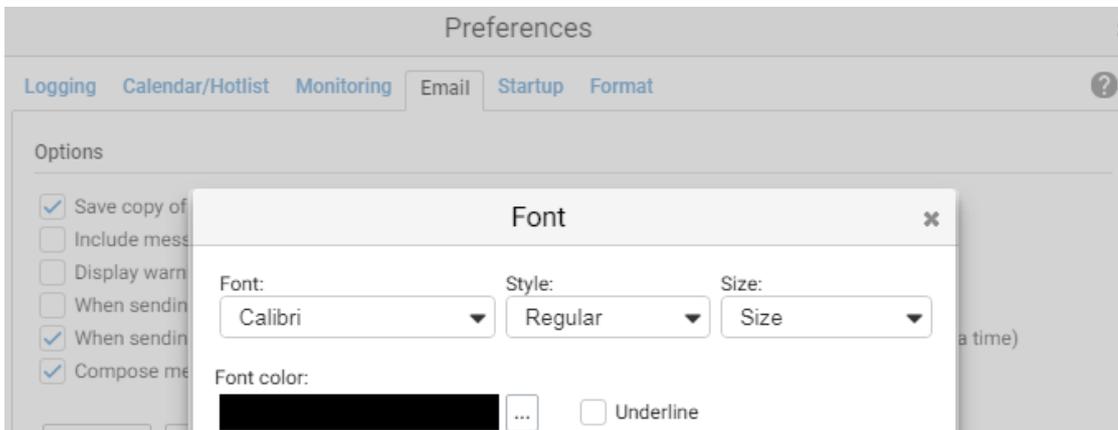
This setting will stick now.

Complete SAVE CANCEL

CALIBRI IS AVAILABLE FOR SETTING UP EMAIL DEFAULT FONT

(New in Maximizer CRM 2019 and Maximizer CRM Live)

In Preferences > Other Preferences > Email tab > Font dialog, Calibri is now available for setting the font for new messages and reply messages.



CREATION DATE AND LAST MODIFIED DATE

(Already available in Maximizer CRM Live; new in Maximizer CRM)

The creation date and last modified date displayed in column view now include time.

Opportunities Current Opportunities - 2 displayed + new

Status	Company/Individual	Objective	Revenue	Creation Date	Last Modified Date
<input type="checkbox"/> In Progress	Albert's Steak House	Sell Escona Wine	CAD5,000.00	December-17-18 10:12 AM	December-17-18 10:15 AM

TABLE FIELD ITEMS DISPLAYED IN COLUMN VIEW OR KEY FIELDS FOLLOWING CUSTOM ORDER

(Already available in Maximizer CRM Live; new in Maximizer CRM)

In the previous release, if you have a custom order for the items in the table fields, the order won't be followed when the field is displayed in a column view or in Key Fields.

ADD ALTERNATE ADDRESS

(New in Maximizer CRM 2019 and Maximizer CRM Live)

If a company has many alternate addresses and you try to add a new contact with a new address, you need to scroll multiple times to reach the bottom of the addresses in order to press the Add New Address button. This can be inconvenient and annoying.

Now the Add New Address button is available on top of the address section. Pressing this button will automatically scroll down and add a new address.

Add new address button is added on top of the address section. Pressing this button will automatically scroll down and add a new address.

Address + Add new address

Selected address

Description:

Address 1:

Address 2:

City/Town: St/Prov:

Zip/Postal: Country:

Use this address for the entry X Delete

Description:

Address 1:

Address 2:

City/Town: St/Prov:

Zip/Postal: Country:

Use this address for the entry X Delete

Description:

Address 1:

Address 2:

City/Town: St/Prov:

Zip/Postal: Country:

Use this address for the entry X Delete

Description:

Address 1:

Address 2:

City/Town: St/Prov:

Zip/Postal: Country:

+ Add new address

Integration

The following new integrations are now available in Maximizer CRM Live.

- Google Drive
- OneDrive
- OneDrive Business
- Dropbox
- Dropbox Business
- Box

Resolved Cases

Cannot duplicate an user-defined field if its name has more than 71 characters

If you try to duplicate a user-defined field with at least 72 characters in its name, you will see the error message. Now you are allowed to enter 79 characters.

Cannot add an item into a table user-defined field if the field's mandatory rule is based on a deleted field

If you try to add an item into a table field which has mandatory rule based on a deleted field, nothing will happen. The issue has been fixed to allow you add a new item in this situation.

Cannot print merged document in 64-bit version of Microsoft Word

If you try to print a merged document using Maximizer Word Add-in in 64-bit version of Word, nothing will happen. Now the document can be printed.

Company name displayed twice in appointment dialog

If you created a company and then schedule a meeting with this company, the company name in appointment dialog is displayed as [Company Name] - [Company Name]. Now the company name is displayed correctly.

Importing MXI file fails In Maximizer CRM 2019

In Maximizer CRM 2019, importing a proper MXI file will cause error. MXI file can now be imported.

Interface issue in Custom Date Range dialog in Hotlist module using IE11

The interface issue in the Custom Data Range dialog in the Hotlist module has been fixed. The issue only exists in IE11.

Quick Search field doesn't respond if there is no recent entry in the drop-down

If you open a database which has no recent entry (e.g. no Address Book entry has been open). The Quick Search field doesn't respond when you type in letters. Now you can type in the field and get suggestions in this situation.

In IE 11, items in a table user-defined field are not displayed completely

In IE 11, if a table field has many items, the item at the bottom of the drop-down is cut off. Now it is fully displayed and can be selected.

Dashboard indicators time out if running longer queries from saved searches

If a dashboard indicator uses a saved search that takes a long time to run the query, the indicator will time out. Now the timeout period has been increased to avoid the problem.

In CRM Live, Address Book startup option View Empty List cannot be saved

If you set the startup option for Address Book to View Empty List, it cannot be saved. Now this setting will be saved.

The field picker in Global Edit doesn't load fields if there is a mandatory field that is based on rule with a Ref_Data_Machine_Id greater than 2147483647

The field picker in Global Edit is empty if there is a mandatory field that is based on a rule and has a Ref_Data_Machine_Id greater than 2147483647. Now the fields will be loaded in this situation.

Drilldown doesn't work properly if an indicator displays opportunities grouped by stages

You have the same stage in multiple processes and there are opportunities in those stages. If you create a bar chart or a pie chart indicator to show opportunities grouped by stages, clicking a piece in the chart will retrieve wrong opportunities.

When IMAP is used, creating a new Address Book entry in Outlook adding fails when performing Send and Save to Maximizer

Setup the Maximizer Outlook Add-In with an Outlook profile using IMAP. You try to send an email and save it to an Address Book entry. If the entry doesn't already exist in Maximizer and you try to create a new one, the action will fail.



“Since 1987, more than 1 million users and over 120,000 companies have trusted us to help boost the bottom line”

Vivek Thomas, President

Grow with Confidence Grow with Maximizer Personalised CRM

We make enabling your success our top priority. That's why we're committed to helping each of our customers achieve outstanding results.

With top-rated tools for contact management, lead management and customer service, Maximizer CRM gives businesses everything they need to grow – all in one place.

Today, Maximizer is a global company with offices in five countries plus an international network of Certified Solution Providers. We constantly innovate to ensure our customers can become more successful.

Time and time again, they tell us that our exceptional service sets us apart as a market leader in CRM. And that feedback keeps us focused on making planning, selling and management ever easier – to help our customers get rapid results.



#GrowWithConfidence

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