Feature Updates – R1 2021

MAXIMIZER™CRM ON-PREMISE

Contents

SAML Based Single Sign-On

Single sign-on (SSO) is a user authentication service that permits a user to use one set of login credentials to access multiple applications. In this release, you can set up a 3rd party identity provider (IDP) that allows your users to log in to Maximizer through the IDP.

Setup Custom Identity Provider

To setup a custom identity provider, go to Icon Bar > Administration > Settings > System Options > Single Sign-on screen.

Maximizer is the default identity provider. To set up a custom IDP, click 'Add Identity Provider' button. In the screen for adding an identity provider, all fields are required. Once the settings have been saved, the custom IDP will be available. In this release, only one custom IDP can be created. Instruction on how to set up a custom IDP

The identity providers are specified at the database level. Each database in the same server can have different IDPs enabled. One of the following situations can be applied in a database:
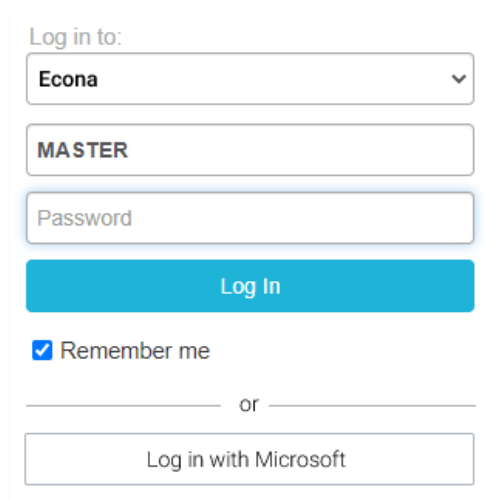
- Only Maximizer login is enabled – The users log in using Maximizer user ID and password.

- Both Maximizer login and a custom IDP are enabled – The users can log in using Maximizer login credential or log in through custom IDP.

- Only custom IDP is enabled – The users log in to Maximizer through the custom IDP. In this situation, when the users try to access Maximizer Login page, they will automatically be redirected to the Login page of the IDP.

Login Page

The login controls in the Login page will be enabled, disabled, or hidden based on the IDP specified for the selected database. SSO login also works in Administrator and Mobile Access.

Both Maximizer login and custom IDP are enabled for the database. The user can log in using Maximizer user ID and password or the custom IDP.
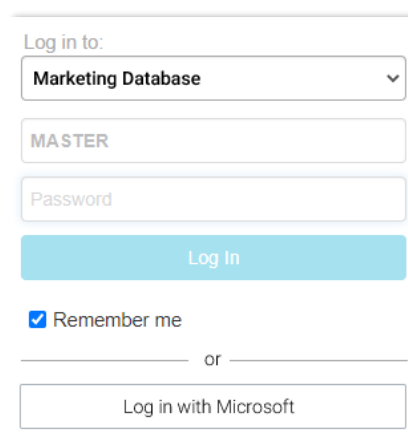
Maximizer login has been turned off. Only the custom IDP is enabled for the database. The fields for Maximizer user ID and password are disabled.
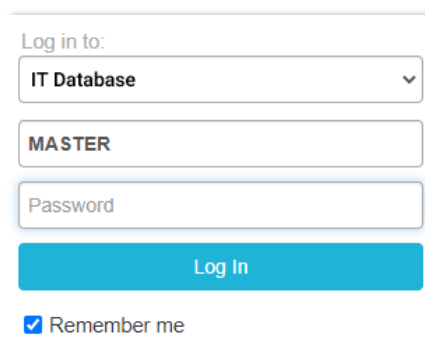
No custom IDP is enabled. Only Maximizer login is enabled for the database. The users can only log in using Maximizer user ID and password.

Note

If there is only one database in the server and only custom IDP is enabled in that database, when users try to access the Maximizer Login page, they will be automatically redirected to the Login page of the custom IDP.

Enhancements in Leads Module

Full and Read Access for Leads

Full and Read access for Leads have been introduced in this release. You can now control who can see your leads and who can edit them.

Full and Read access fields are available in add / edit lead screen and in the Lead Details widget. You can also change the access rights for leads using Global Edit.

Note

The Full and Read access fields for leads only support single user or group.

If you do not have full access to a lead, you will not be able to edit the lead. In Lead Details screen, you cannot link the lead to an Address Book entry, convert or archive the lead. You cannot apply a process to the lead or change the stage in a process.

To Convert or Archive a lead, you need to be the owner of the lead or a sales manager to have full access to the lead.

During lead conversion, the access rights of the leads will be copied to the Address Book entries following these rules:

- If a lead is linked to an existing contact, the Full and Read access of the contact will not be changed.

- If a lead is linked to a company or an individual but a new contact will be created during conversion, the Full and Read access of the company / individual will not be changed. The Full and Read access of the lead will be copied to the contact.

- If a new company or individual and a new contact will be created during lead conversion, the Full and Read access will be copied to both the Company / Individual and the Contact.

Set Opportunity Start Date When Converting a Lead

When you convert a Lead and create an Opportunity, the start date of the Opportunity will be set to today's date.

Enhancements in Notes Tab

New Notes Tab in Address Book, Opportunities, Customer Service, Campaigns and Hotlists

The Notes following tab has been re-written in this release. It looks similar to the previous tab but performs better and is responsive to fit in any screen sizes.

The new Notes tab has following changes compared to the previous tab:

- Date and time are displayed in one column to save space.

- A new column, Associated Entry, has been introduced. In Address Book, if Show All option is on, you can see which Address Book entries the notes belong to.

The new Notes tab is responsive. When the screen size is getting smaller, the buttons in the toolbar will be moved into the drop-down menu.

The Note filter has a refreshing new look.

View Address Book Entry Notes in Opportunities

When you are working on a sales opportunity, you need to know the history about the client and review the recent communications. In previous version, you needed to switch from Opportunities to Address Book in order to view the notes. Now you can review and edit the Address Book entry notes directly in Opportunities.

In the Note filter in Opportunities module, there are two options for displaying notes:

- Opportunity only

- Opportunity and Address Book entry

To view Address Book entry notes, select "Opportunity and Address Book Entries" option. It will display the notes for the opportunity and the notes belonging to the company/individual and all the associated contacts.

Note

- If the Contact of the Opportunity is from another Company, the Notes for this contact won't be displayed.

- Some of the history notes for Address Book entries, such as notes for Accounting, Customer Service, Opportunities, and Transfer Log, will not be displayed.

When you turn on the option to display Address Book entry notes, the selected note types will be applied to both opportunity and Address Book entry notes. In manual note section, you can select note categories for Opportunities and Address Book entries separately.

When the notes are displayed in the Notes following tab, you can use the Associated Entry column to identify which notes belong to the Opportunity and which one belongs to the Address Book entries.

View Address Book Entry Notes in Cases

In Customer Service module, the note filter works similarly to that in Opportunities module. There are two options for displaying notes:

- Case only

- Case and Address Book entry

You can view the notes for the selected case and the notes belonging to the company/individual and all the associated contacts.

Auto Complete Address and Geocoding

If you would like to ensure that the addresses you enter are correct and consistent, the new address suggestion feature will help you. A search field will be available in each address section in an Address Book entry. While you are typing in the search field, the suggestions from Google will appear. Selecting an address from the suggestions, the address fields will be populated accordingly.

Setting Up a Google Account

To enable the address auto completion feature, you need to create an account in Google Maps Platform. Click here for information about how to create the account. After you have created the account, get the API key and enter it into Maximizer. You also need to enable the following Google APIs: Places API, Geolocation API, and Geocoding API.

To enter Google API key in Maximizer, go to Icon Bar > Administration > Settings > Google Maps.
Enter the Google API key and press the Test button to verify the key and ensure all the required Google APIs have been turned on.

Once the Google API key is saved, go to Address Book and create or edit an entry. You will see a search box available in each address.

Entering an Address

While you are typing in the search field, the suggestions from Google will appear. You can select an address from the suggestions. The address fields will be populated accordingly.
If you create or edit an address using Google suggestions, the address will be associated with the geocodes.

The latitude and longitude of the address will be saved into database. This allows you to integrate with map apps and pinpoint the location of your customers in the maps.

When an address is associated with geocodes, two buttons will be available below the address. The Information button indicates that the address is linked to geocodes. Clicking the button will show a tooltip for more information. The Remove Geocodes button allows you to remove the geocodes associated with the address. It

will be useful if you try to change the address, but Google cannot find the new address. You can remove the geocodes and manually enter an address.

Note

- When an address is associated with geocodes, all the fields are editable. If you manually change part of the address such as street number or zip/postal code, it may cause the incorrect geocodes associated with the address. It is recommended to use the search field to find a new address. This will update the address and the geocodes.

- If you only select a city from the suggestion or if Google cannot provide Address Line 1, the Address Line 1 field will be blank. In this case, the address will not be associated with geocodes.

You can still create an address manually. If you do not use suggestions, the address will not be associated with geocodes.

The existing addresses will not be linked to geocodes automatically. If you would like to make sure an address is correct and linked to geocodes, you need to perform a search and select the same address from the suggestions.

Support Long or Short Date Format

The options for displaying a long or short date format are now available in Preferences. If you have many columns in a column view and wish to have more space to display data, you can use the short date format to save some space.

The setting for the date format is in Preferences > Other Preferences > Format tab. You can select a long format or a short format. The short date format will follow the locale setting you have selected in Preferences.

There are some places where the dates do not follow the Preferences setting, including:

- Details, Documents and Activities following tab.

- Notification panel

- Some dialogs such as document properties in Company Library, modify task date in Hotlist.
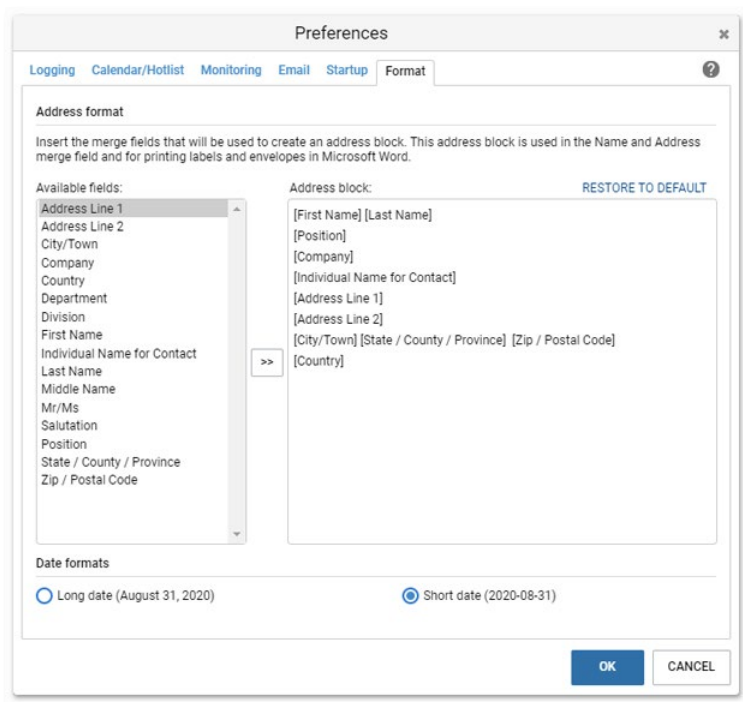
We will continue work in these places in the future release and make the dates displayed consistently across the whole product.

Accessibility

Keyboard Navigation

We continue to improve accessibility in the product. In this release, we focus on navigating to all the main areas using keyboard. For people who have impaired vision, it is hard to position the pointer to the precise location and click a button or open a menu. Now the users can use keyboard to navigate in the interface.

The interface is divided into several main areas. Press Tab key will move the focus from one area to next one in following order: Product Header > Icon Bar > Module Header > Menu Bar > Main Grid > Following Tab.

When the following tab gets focus, pressing Tab key will move the focus back to Product Header.
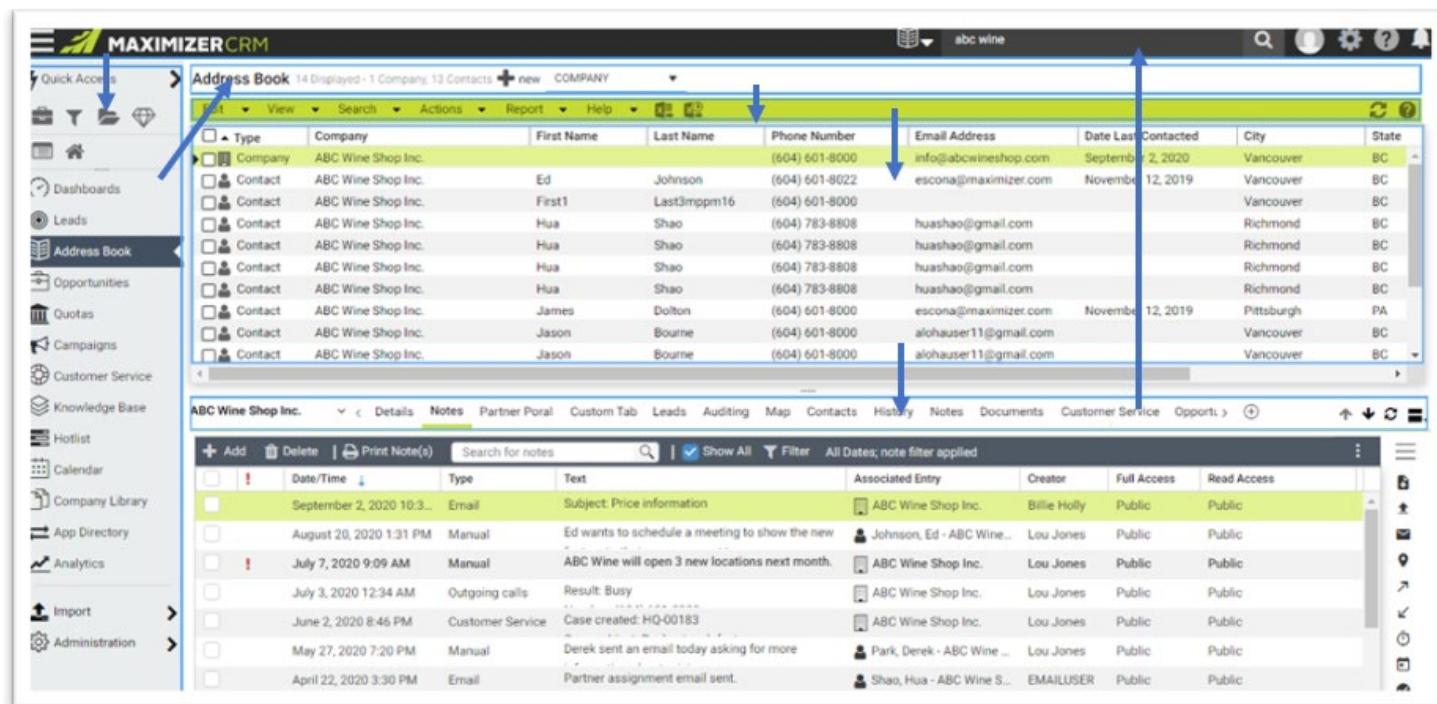
Click an empty space in any area to activate it. Pressing left or right arrow key will highlight the first item in the area. Continue pressing left / right arrow key to move the highlight to next item. When an item is highlighted, press Enter key to execute the command such as creating a new entry, opening a dialog or a drop-down menu, refreshing a list etc. To move to next area, press Tab key. To move to previous area, press Shift + Tab key.

Here is an example. You can start at the Product Header by clicking in the area. Press the left or right arrow key to show the highlight. Use the left or right arrow key to navigate to the items in the bar. Pressing Tab key will move the highlight to the Icon Bar. Use the up/down arrow key to select a module. Press Enter key to load the module and press Tab key to move the highlight to the header of the module. If you continue pressing Tab key, you will navigate to Menu Bar, Main Grid, Following Tabs and back to Product Header.

Note

- If the focus is on the Quick Search field, you need to press Tab key to get out the field.

- In Icon Bar, you will need to press the up / down arrow key. In other area, use left / right arrow key.

Support of Screen Reader (JAWS)

The users with impaired vision may not be able to read the text displayed in screen. With the help of a screen reader application, the users will be able to hear the text spoken by the screen reader. In this release, JAWS is supported. When you use the keyboard to move the focus around the screen, JAWS will read the label or description of the highlighted control.

Note

You need to have JAWS installed. Before you start to use keyboard to move the focus around, press Insert + z to turn the virtual PC cursor off.

Keyboard shortcuts

The following keyboard shortcuts for the commonly used commands have been introduced in this release.

Quick search	/
Add a note	Alt + Shift + n
Write an email to current entry	Alt + Shift + e
Write an email to selected entries	Alt + Shift + g
Schedule a meeting	Alt + Shift + m
Schedule a to-do	Alt + Shift + k

Pressing "/" key will set the focus into the Quick Search field and you can start typing in the search text. Select an entry in the main grid in Address Book, Opportunities and Customer Service module, pressing the shortcut keys for the commands will open the respective dialog.

Note

In Address Book, the action will be applied to the entry selected in the contact switcher.

Dashboard Wizard

In this release, the wizard screens for the Dashboard have been simplified.
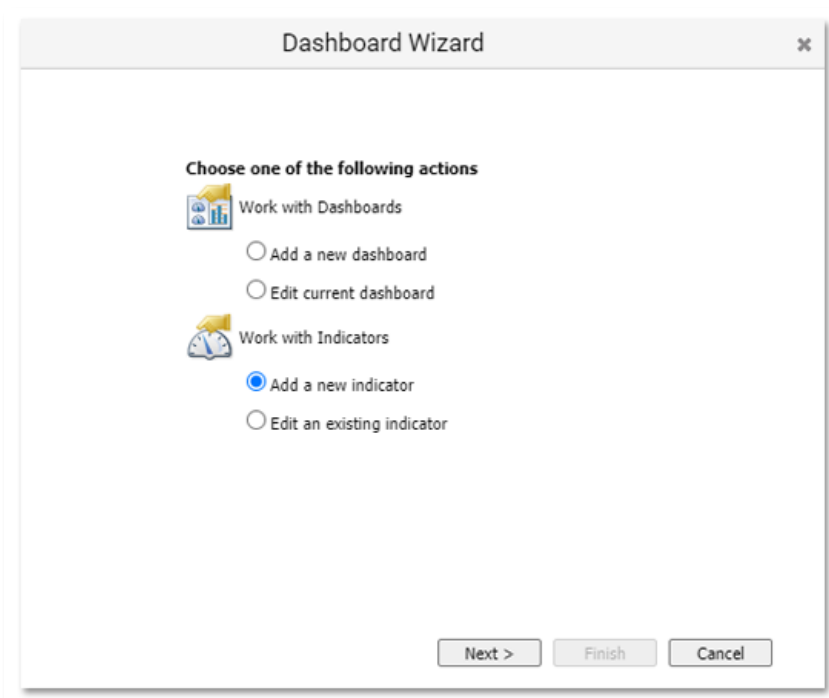
Enhanced Security of the Logging Note

If you turn on the logging notes for Opportunities or Cases, when you edit a user-defined field, a history note will be generated showing the name of the field and the changed values. Since the logging notes are set to public by default, this may cause security issues. For example, the field should only be visible to a specific group of users. But the logging notes expose the field to everyone.

In this release, you have an option to hide the values of the user-defined fields in logging notes. The option can be found in Administrator > System Options.

Help Center

Maximizer Help Center allows you to access the help articles and videos in Maximizer Academy, provides you a step-by-step guide on how to use the features, and informs you about the new features after you have upgraded to the new version. You can also chat with Maximizer support staff directly inside Maximizer CRM.

To access the Help Center, you will need to grant Maximizer the permission to collect some aggregated usage information anonymously. This will help Maximizer better improve its product and services.
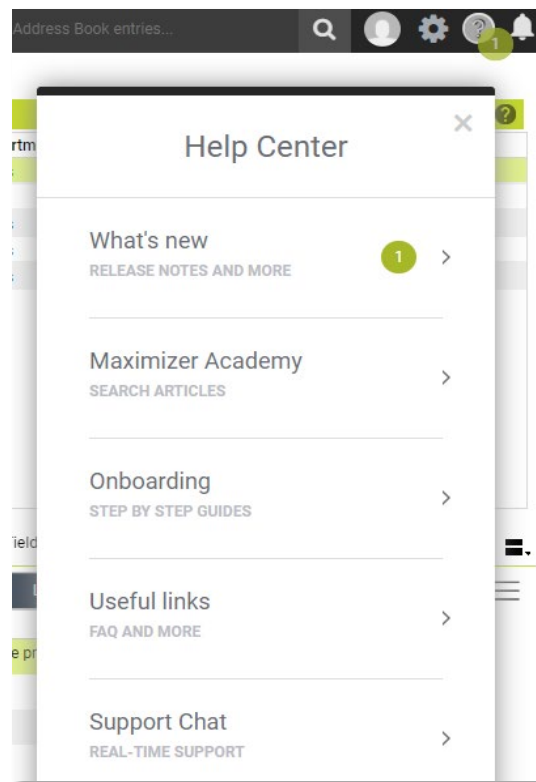
You can turn on the anonymous usage tracking during installation. The Help Center will be available after the installation. If you would like to turn it off later, you can go to Administrator module > System Options and turn off the Usage Tracking option.

Other Enhancements

View Opportunities and Customer Service in Hotlist

In Hotlist, if a task is associated with an opportunity or a case, you can now click a button to view the opportunity or the case in the respective screen. The View in Opportunities or View in Customer Service commands are available in the menu bar and in the right-click menu.

Search for Competitors in the Opportunities Module

When you assign a competitor to an Opportunity, the Competitor filter will be turned on by default.

The same change has been made in the dialog box when searching for a partner in Opportunities, Leads and Address Book modules. The filter for partner will be turned on by default.

Download mobile app from Mobile Access

If you are still using the Mobile Access, you can now easily download the native mobile app. The link to the app store is available in the Mobile Access login screen.

Outlook sync

The issue related to syncing recurring appointments that cross Daylight Savings Time boundaries has been fixed. Generally, the problem occurs when your server and workstations are in different time zones. In previous versions, the recurring appointments that crossed Daylight Savings Time boundaries would offset one hour after the Daylight Savings Time starts or ends. This issue has been fixed in this release.

Note

This fix only affects any new appointments created in Outlook and synced to Maximizer. The bug fix will not affect any existing appointments that are already in your calendar.

Mobile App

Document Management

You are now able to retrieve documents that are associated with Address Book entries, opportunities, services cases, and leads. Documents will download and open in the associated app on the mobile device. (Need Maximizer CRM 2019 R3 or above)

Documents associated with the record will be found on the Documents following tab.

If you are using Maximizer CRM 2020 R1, you can also attach files to records. Tapping the ADD button while on the Documents following tab or on the details tab of the record will present the following options:

- File (Android only) - browse the device for any file.
- Image (Android & iOS) - browse the gallery for images that you have previously taken.
- Camera (Android & iOS) - access the camera to take a picture and directly upload it.
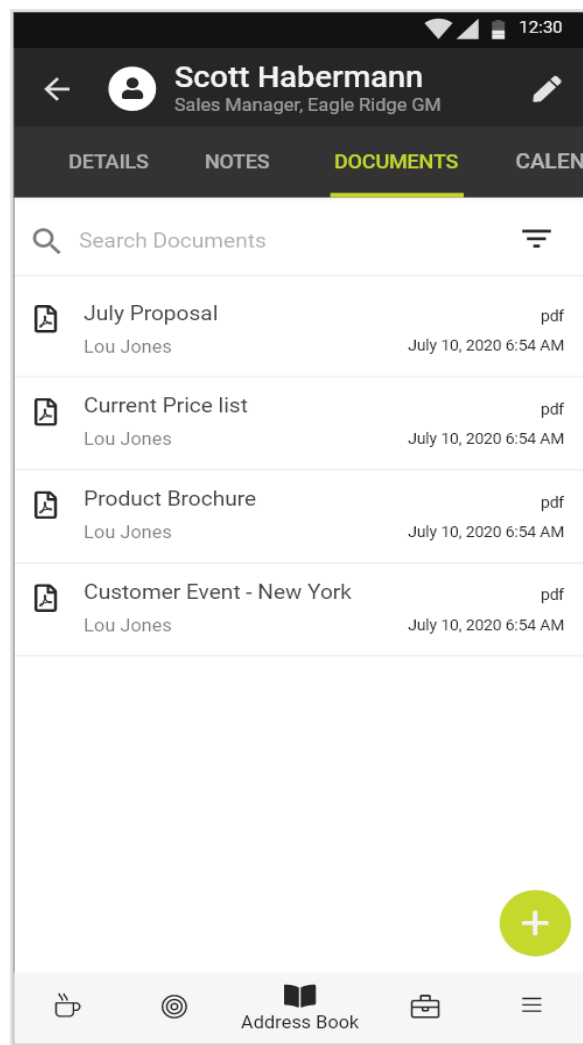
Duplicate Searches

Many times, there is a search that you regularly use and you want to make a copy of it in order to tweak it a bit without affecting the original. Each search will now have an arrow indicator that will expand to show the available options. Tapping the duplicate option will present you with a dialog to give the copy a new name.

Improved Login with Biometrics

If you have biometrics enabled for your device, we have also improved the biometrics feature of the app. When the feature is enabled (from the settings screen within the app) it will provide easy and secure access to your data.

- Tapping into the password entry area will automatically ask you for your biometric.

- If your biometric has not been registered with the Address Book, you will have to enter the password manually. After a successful password entry, the app will ask you for your biometric for future logins.

Note

Biometrics will not work for databases that have been setup as SSO.

Access to Insights

Customers that have enabled Insights will now have their dashboards accessible from main menu of the app.

Customization of Module Lists

From the settings you are now able to customize the list (up to 5 additional fields) display of modules so that you can see the information that is critical to your business quickly.
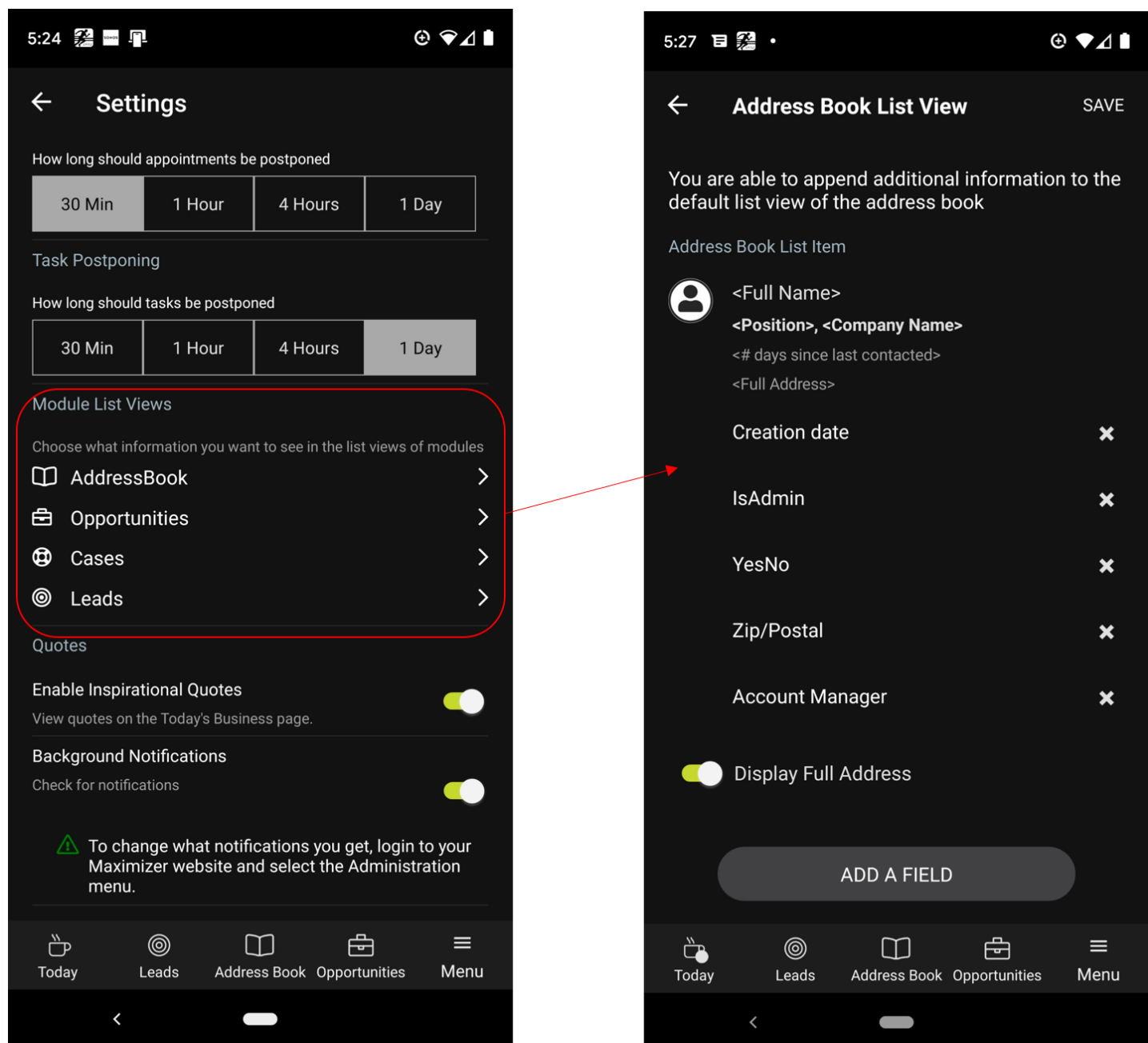
Ability to Filter on Any Field

By accessing the filter properties screen, via creating a new search or by the filter button, you will be presented with an ADD button. Tapping this button will allow you to add any field associated with the search type (i.e. Address Book fields if you're on the Address Book, opportunity fields if you're in the Opportunity module, etc.)

This is helpful for businesses that have made a custom field (UDF) that is essential for their business and you need to filter your results on it. For example, you have created a field that identifies a technical representative that is associated with an address book entry. This is in addition to the account manager. You are now able to filter records based on that field.
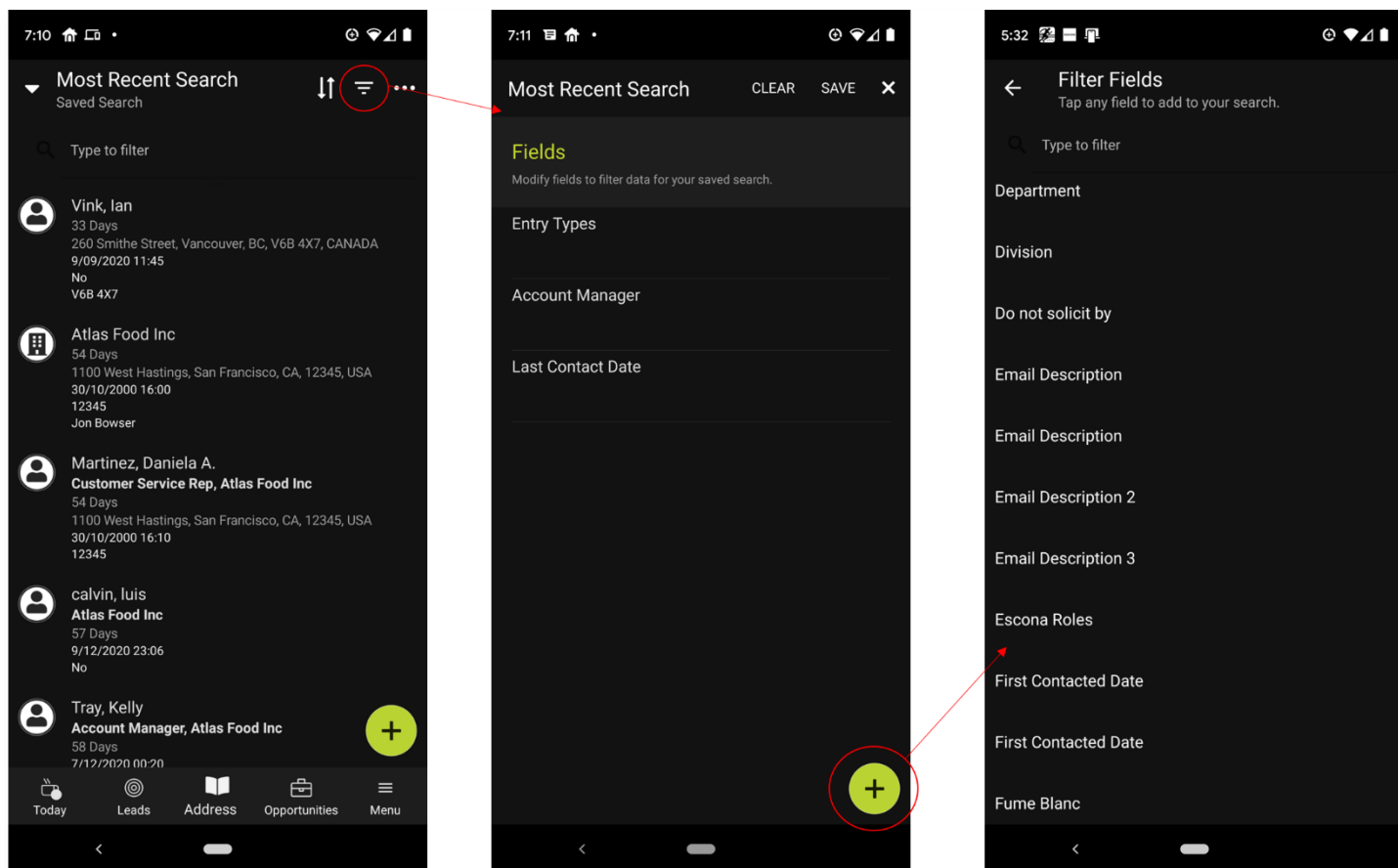
Additionally, you can remove fields from the filter by sliding right on the field you wish to remove. This allows you to only show the fields and their values that are applicable to that search. (This only applies to searches that are made on the mobile.)

Improved Access to Editing Records in Key Field Groups Directly

For those who edit their CRM data, we have added a second edit button directly on the Key Field grouping selection control. Tapping this button will take you directly to the edit screen of that Key Field grouping. This will reduce the amount of time needed to change the desired information.

In this example, tapping the second edit button on the Key Field grouping would take you directly to the "Partner" fields for you to edit.
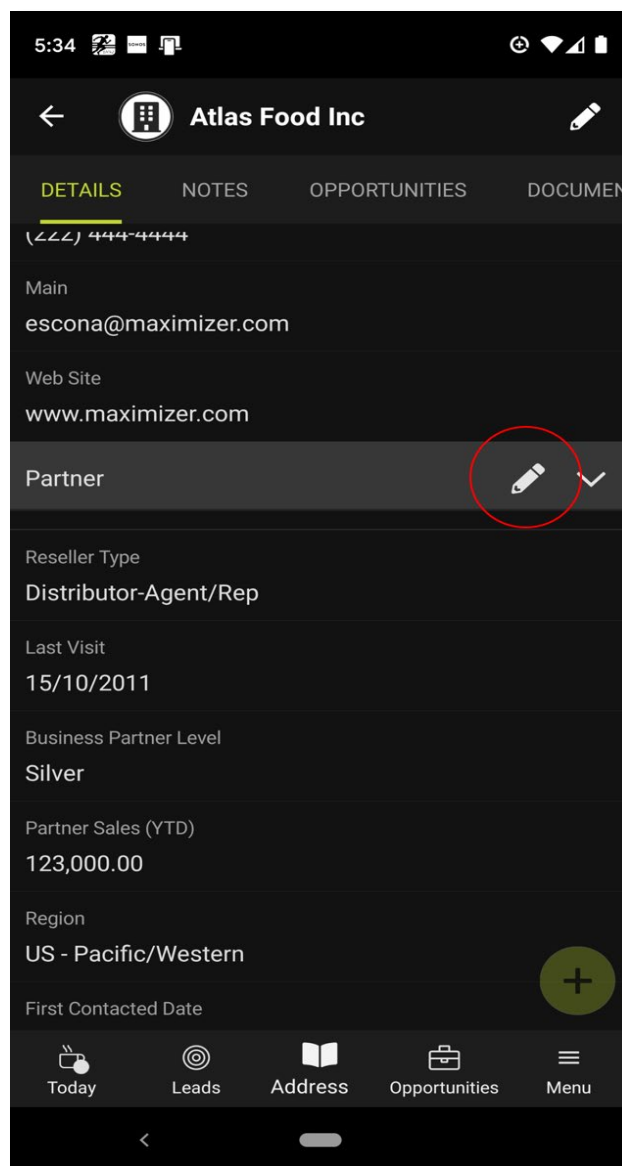
Insights

Insights is a Maximizer CRM analytics add-on that can be installed in the customer environment by Maximizer Professional Services.
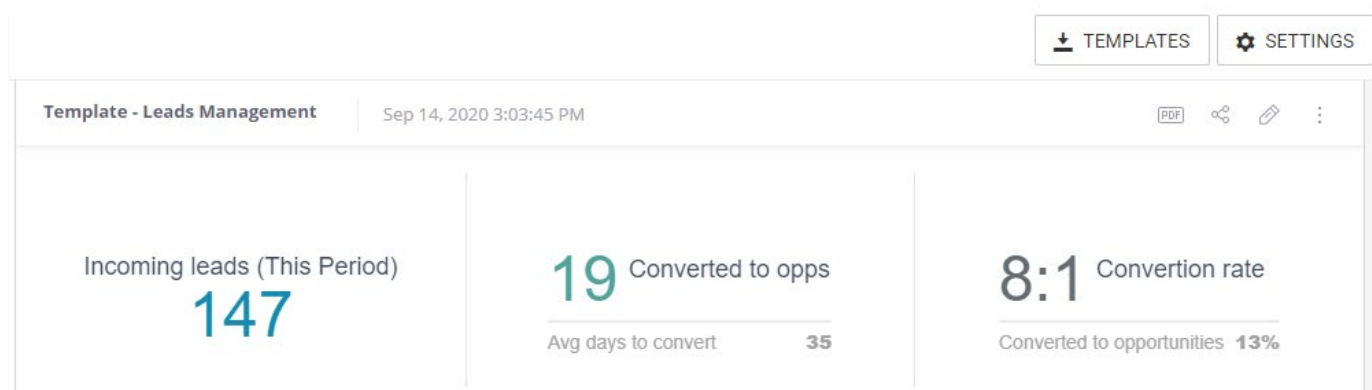
Insights comes with four Dashboard templates. These templates can be downloaded by clicking on the 'Templates' button. The person who downloaded and imported these dashboards automatically becomes a dashboard owner and can share the dashboard with others.

Note

Only Maximizer administrators have access to 'Templates' and 'Settings'.

Administrators can pick templates of their choice, download them, and import to Insights with a few clicks:
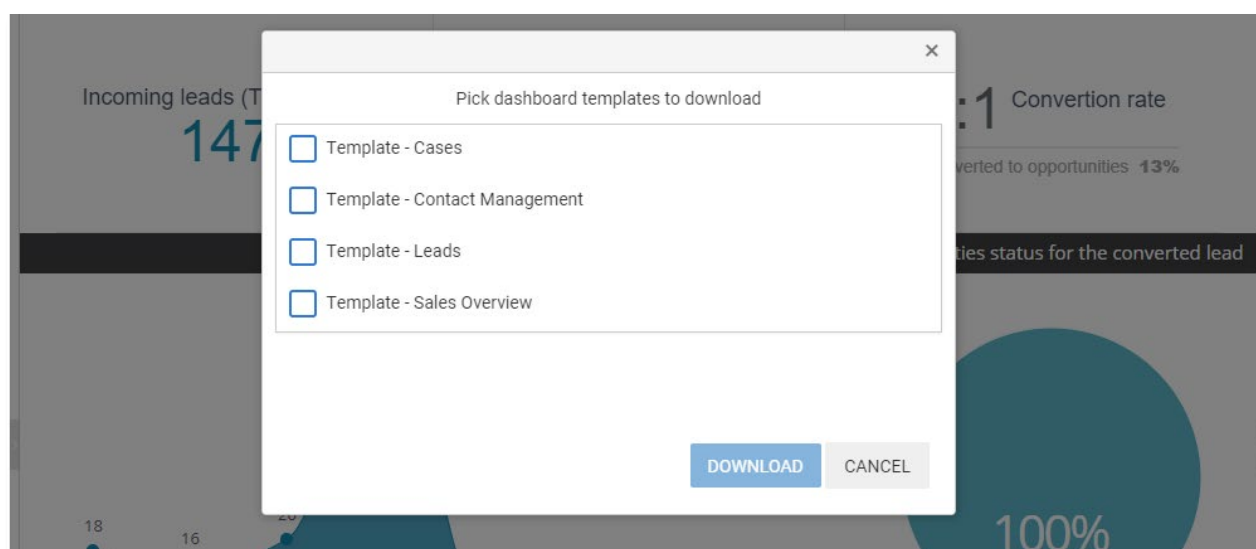
New Fields Accessible in Insights

- Forecasted Revenue (Opportunities)

- Comment for Completion (Opportunities)

- Partner (Leads)

- Stage (Leads)

Integration

QuickBooks

The new QuickBooks integration is being developed by one of Maximizer partners in the EMEA region. This will be a paid integration that allows users to view information from QuickBooks in the Maximizer following tab for any given Address Book entry. More information on a full set of features will be provided once the app has been released to the App Directory. The release date will be communicated in the near future.

MailChimp Sync Engine Enhancements

A new updated MailChimp integration will be available soon after the 2021 R1 has been released. The new MailChimp integration update will provide users with an added ability to synchronize records from Maximizer to MailChimp, but not the other way around. Except for a contact's subscription status in MailChimp, none of the other fields from MailChimp will be updated in Maximizer. The new update will also provide the ability for the user to start/stop the sync service.

Deprecation

- **SQL 2008 and SQL 2008 R2 will not work with 2021 R1**. If you are still using SQL 2008 or 2008 R2, **do not** upgrade to 2021 R1.

- Office 2010 will not be supported.

- Discontinued Insights features include forecasting add-on and save favorite formulas.

- Web search function (search menu > Web) has been discontinued.

- Draw a Map function has been discontinued. The intermedia dialog has been removed. Clicking the menu item will open Google Maps directly.

- As of 2021 R1, we will no longer support Maximizer CRM 2018 or earlier as per our official support policies.

- Support for Internet Explorer will end in August 2021. A new word add-in will be delivered prior to that date, which will remove the dependency on Active X and therefore Internet Explorer.

The following Cloud Elements based integrations have stopped working since January 15th, 2021:

- Amazon S3
- Box
- Dropbox
- OneDrive
- Gmail
- Google Calendar
- Google Drive
- Google People
- Gravity Forms
- HubSpot
- Marketo
- Facebook Lead Ads.
- QuickBooks
- SharePoint
- Twilio

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