



New Features Guide R2 2021

MAXIMIZERCRM ON-PREMISE



Overview of Version R2 2021

Maximizer CRM On-Premise version R2 2021 introduces several new features described in this section.

Improvements to the Word Add-in

The Word Add-in now comes with an improved user experience. They are as follows:

- The add-in is now browser agnostic and does not require ActiveX controls. You can now log on to Maximizer CRM using a browser of your choice. The session information will be captured by the Word Add-in, irrespective of the browser of access.
- The new Word Add-in supports the ability to preview documents, as well as switch between concurrent sessions.

i Note:

Unless otherwise mentioned, the functionality of the Word Add-in is as before.

Using the Word Add-in

To use the new Word Add-in, do the following in the order stated:

- 1 Upgrade your Maximizer CRM setup to version 2021 R2.
- 2 Install the Word Add-in following the instructions given in [Installing the Word Add-in](#).
- 3 Use the Word Add-in following the instructions in <https://maximizer.helpdocs.io/>

i Note:

If you have both the Outlook Add-in as well as the Word Add-in already installed, you must also upgrade the Outlook Add-in at the time of upgrading the existing Word Add-in to the new version of the Word Add-in.

i Note:

Sometimes, after installing the new Word Add-in, the Address Book tabs do not load quickly. This happens when the Redis server is down. If you observe this behaviour, ensure that your Redis server is up and running.

Improvements to Maximizer CRM On-premise

Version 2021 R2 introduces updates to merging address book entries. Going forward, case numbers from the source address book entry will be preserved in the target address book entry. This is a change from the earlier behaviour, where new case numbers were created every time address book entries were merged.

Additionally, the following other features are also introduced:

- Several bugs discovered earlier are now fixed.
- Security updates have been applied to this release.

Changes to Maximizer CRM On-Premise

With version 2021 R2, on-premise installations of Maximizer CRM require Windows Server version 2019 or later to support the Word Add-in infrastructure **in some scenarios**. Windows Server 2019 is **necessary** if the Word Add-in is installed on your current setup, and you want to continue to use it. It is **also necessary** if you plan to choose the **Install Linux services using WSL** option at the time of installing Maximizer CRM 2021 R2.

If you plan to use a version of Windows Server earlier than 2019, you must set up an [independent Linux server](#).

i Note:

If you have both the Outlook Add-in as well as the Word Add-in already installed, you must also upgrade the Outlook Add-in at the time of upgrading the existing Word Add-in to the new version of the Word Add-in.



Contacting Support

If you have problems with or questions about Maximizer CRM or Maximizer CRM Live, contact the Maximizer Support team. To do that, you can use one of the following channels:

Phone

- **North America:** 1-866-275-1254 (Monday through Friday, 5:00 AM to 7:30 PM, PST; Sunday 11:00 AM to 7:30 PM, PST)
- **Europe, Middle East, Africa:** +44 13 4476 6904 (Monday through Friday, 9.00 AM to 5.30 PM, GMT)
- **Australia & New Zealand:** + 61 2 9957 2011 (Monday through Friday, 5:00 AM to 7:30 PM, PST; Sunday 11:00 AM to 7:30 PM, PST)

Email

Write to the support team at:

- **EMEA:** techsupport@maximizer.co.uk
- **Rest of the world:** support@maximizer.com

Chat

The chat window can be accessed from within Maximizer CRM. Go to **Help Center > Support Chat**.