Maximizer

Maximizer On-Premise 2023.1

Release Notes

March 13, 2023

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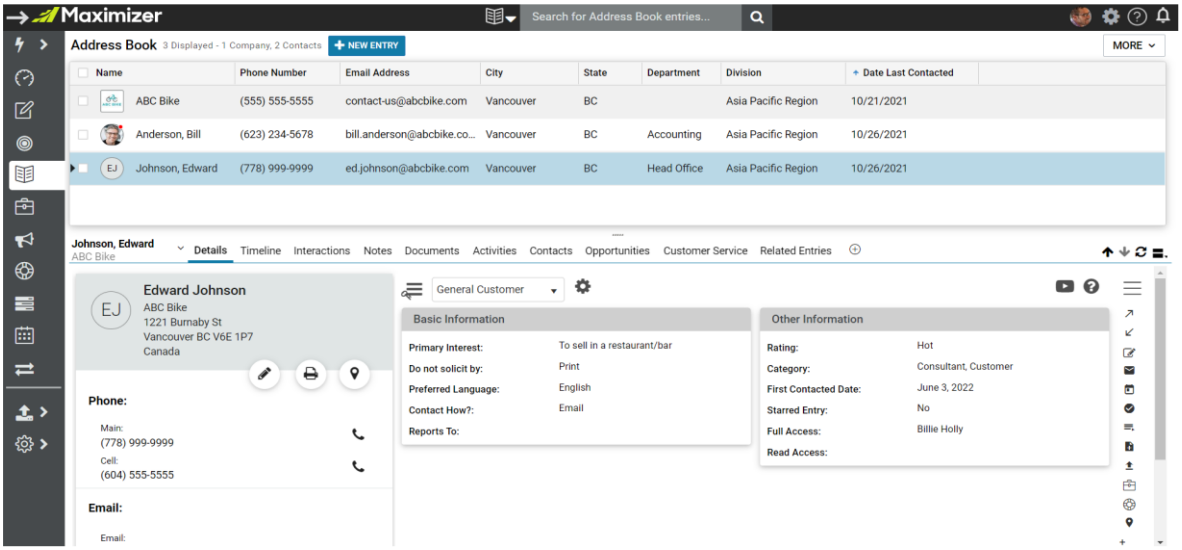
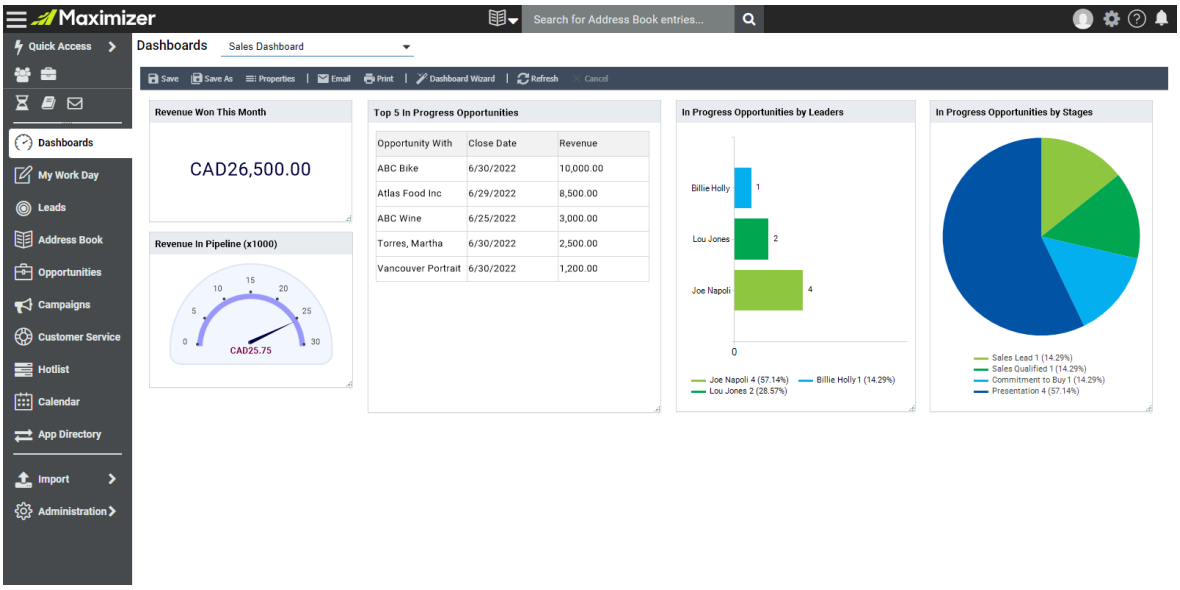
New user experience

A fresh new look

Here is an introduction to the new look and feel of our platform. We adopted material design guidelines to make our platform more accessible, inclusive, and delightful to use. Purely aesthetic, we made some small enhancements to the color and font with bigger icons and bold text.



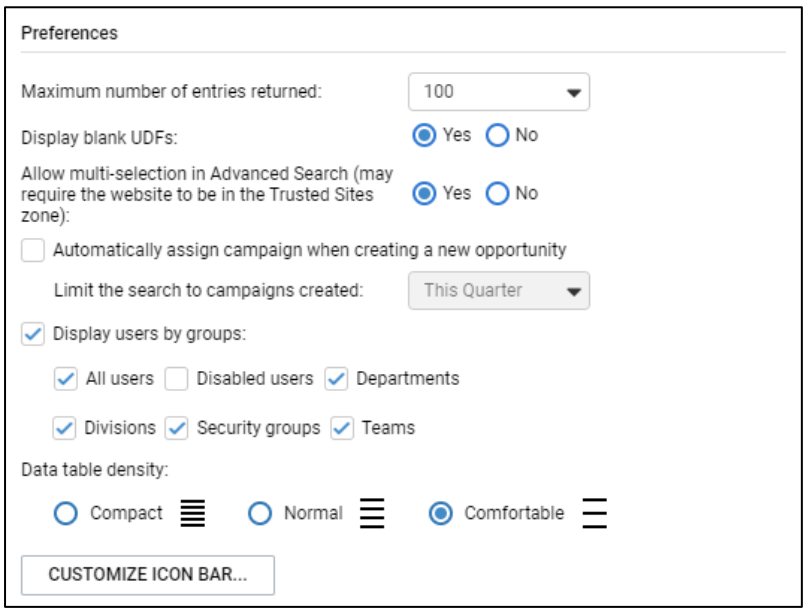
Here is an updated display of the Dashboards for a clean and simple look with no changes to your data. We separate the My Work Day tab from the Dashboards to create the My Work Day module. You can now turn on or off each module independently.



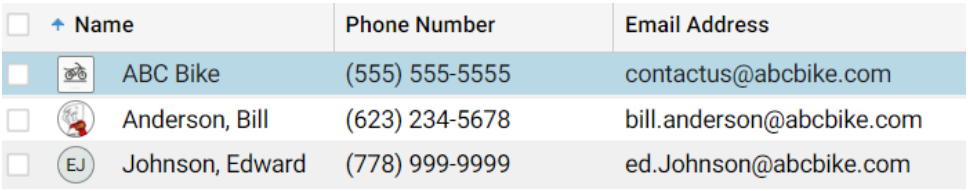
Customize your layout

Increase the default row height of the grids to provide more space and reduce clutter. We added a setting in the Preferences dialog (Personal Preferences) to allow the user to set the display density.

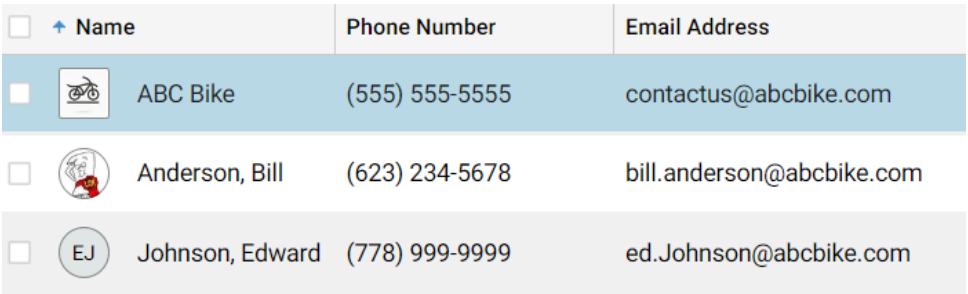
Preference settings



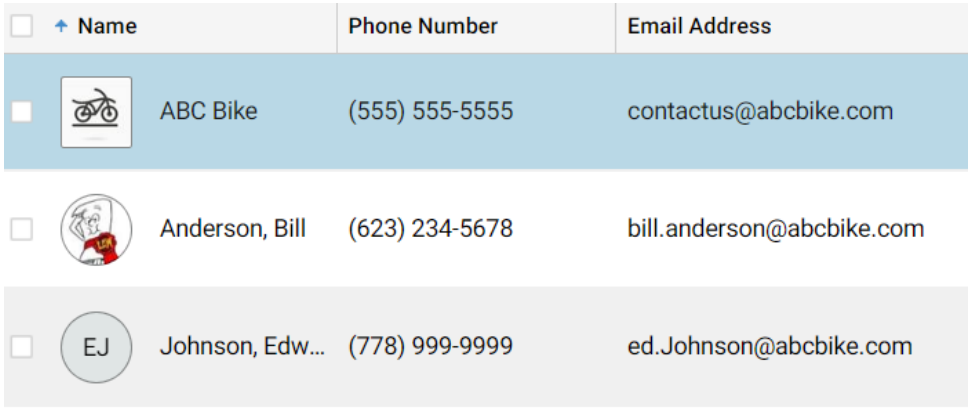
Compact



Normal (Default)



Comfortable



Put people front and center

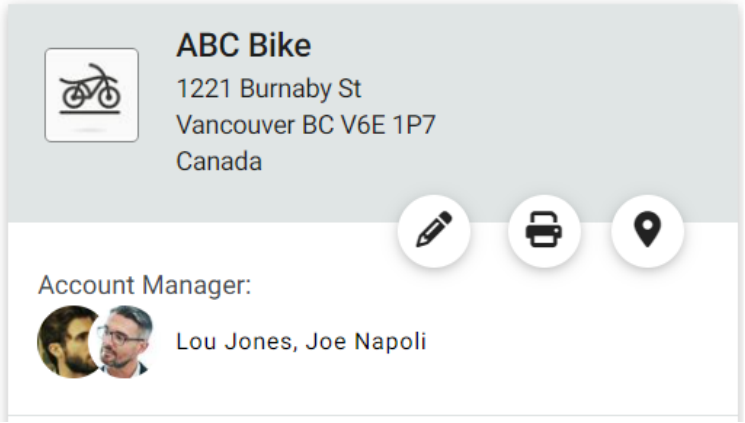
You can now easily find out who the Account Managers are for a specific client, who the Opportunity owner is, and which user is working on a Customer Service case.

Address Book entries highlight account managers

The Account Managers assigned to a company or an individual are displayed on the left-hand side panel in the Details tab.

Note:
If the users have not uploaded their profile photos, their initials will be displayed.

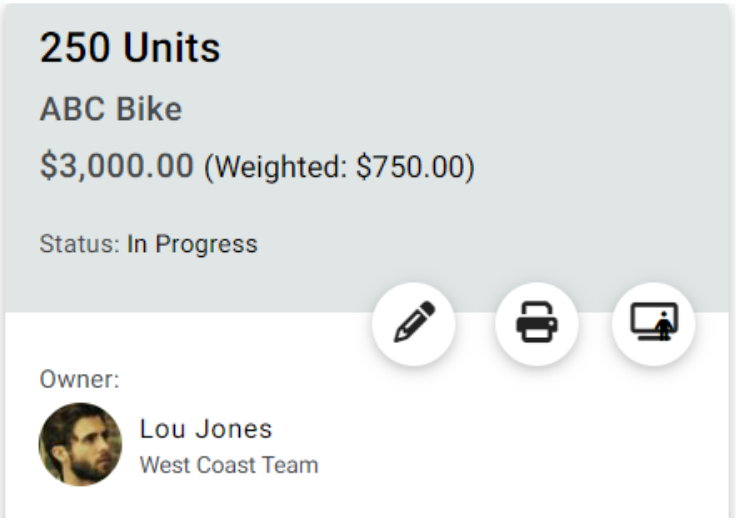
The Account Manager field is not available for Contacts.



Owner of an opportunity front and center

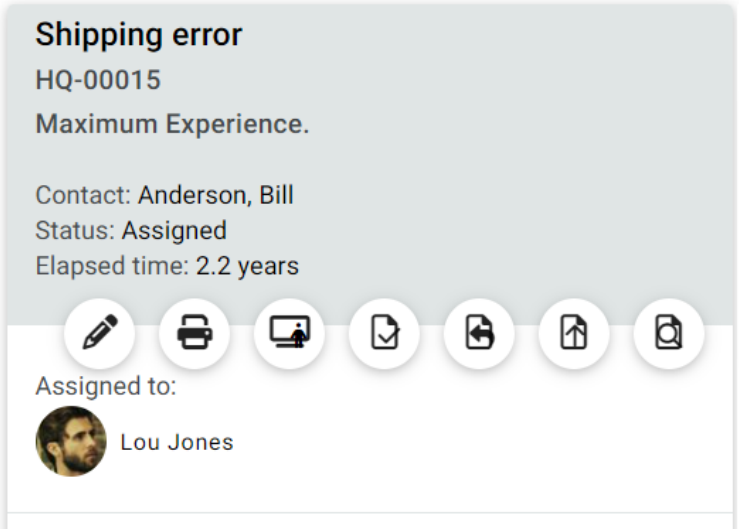
The user assigned as the Owner of an opportunity is displayed in the left-hand side panel in the Details tab of Opportunities. The name of the Sales Team is displayed below the owner's name. The expected revenue and the weighted revenue are also displayed here too.

Note:
The term "Leader" in Opportunities has been changed to "Owner" to be consistent with the industry standards.



The user of a Customer Service case is now top of mind

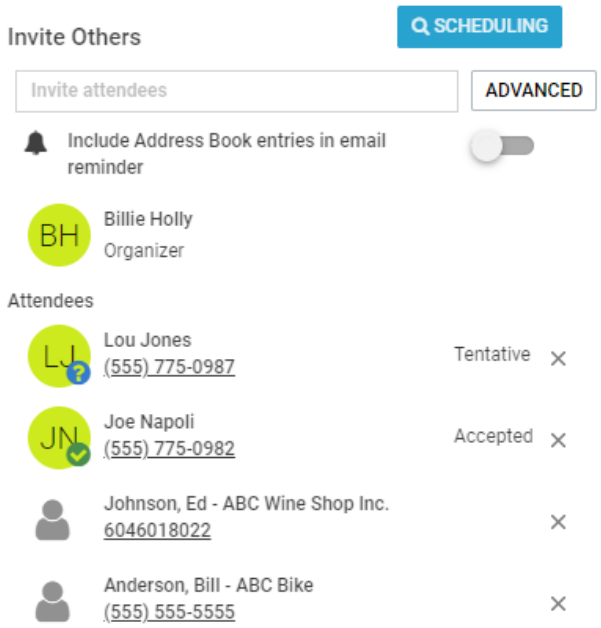
The user who has been assigned to work on a Customer Service case is now displayed in the left-hand side panel in the Details tab for cases.



Initial avatars added to Appointments

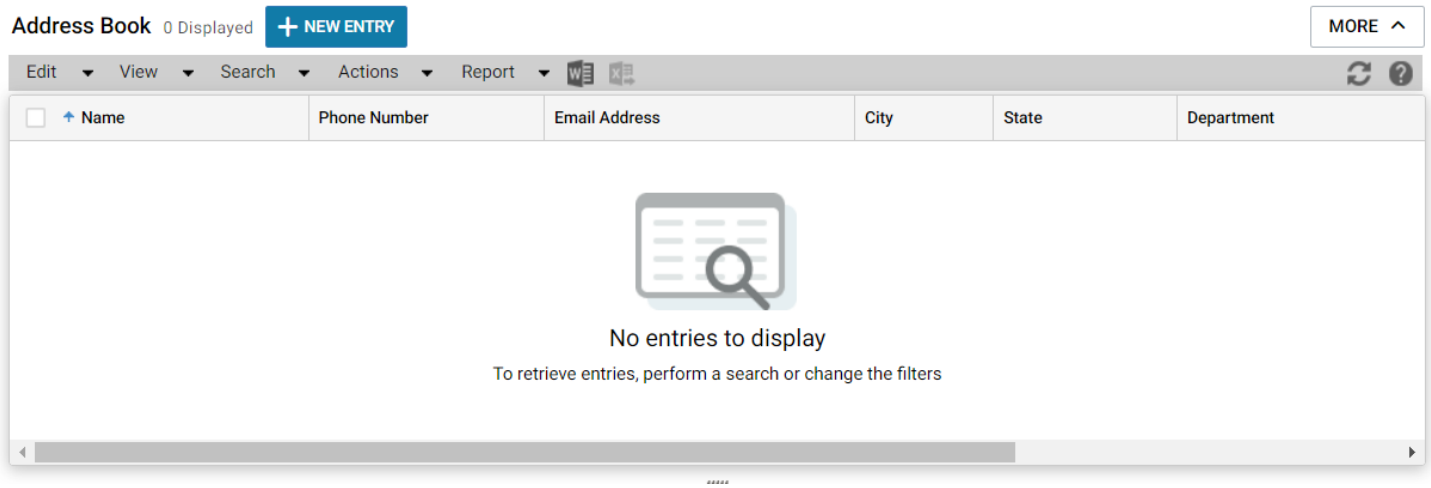
When users are invited to an appointment, their initials are displayed.

Note:
In Appointments, only the users' initials will be displayed. Displaying profile photos is not supported.



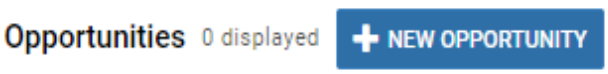
New blank screen display

When a screen is blank, a graphic with instructions will now be displayed.



New look for the Add New button

The button for creating a new entry has a new look. The buttons are prominent and will be noticed easily.

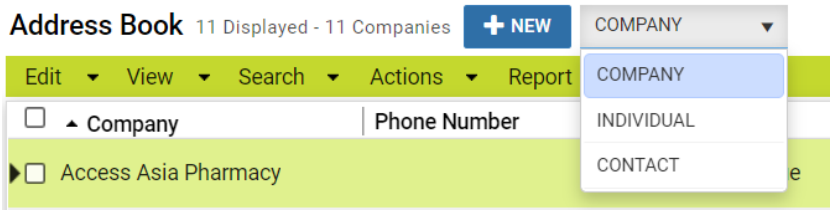


The changes have been made in Address Book, Opportunities, Customer Service, Leads, Hotlist, Calendar, Dashboard and Quotas modules.

New entry button and dropdown for creating Address Book entries

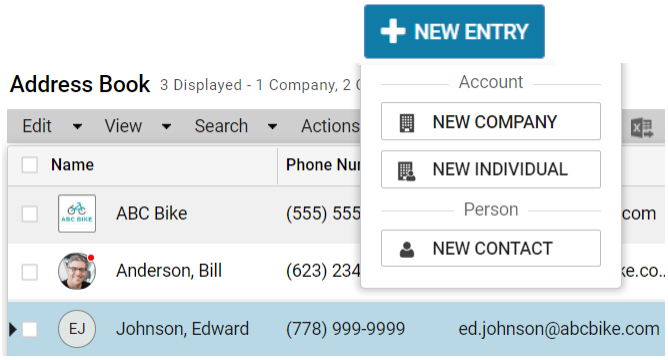
Before there was a drop-down for selecting an entry type, making you click the dropdown first, then the entry type and lastly the new button in order to create an entry.

Old



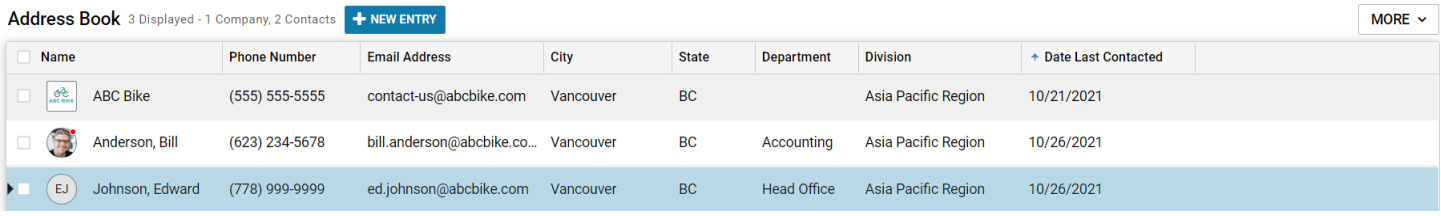
The drop-down is now shown only after clicking the New Entry button. The purpose of this change is to show the hierarchy of the entries. The Company and Individual are at the Account level whereas Contacts are under the Company or Individual level.

New

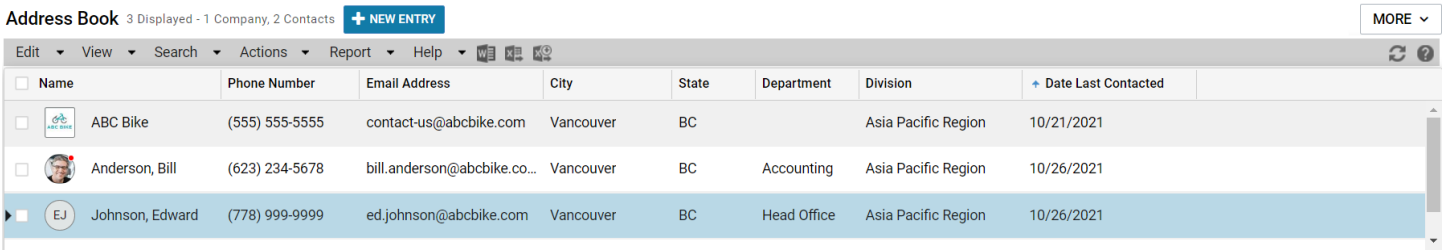


Hide the menu bar by default

The menu bar will now be hidden by default to create a clean and updated look.



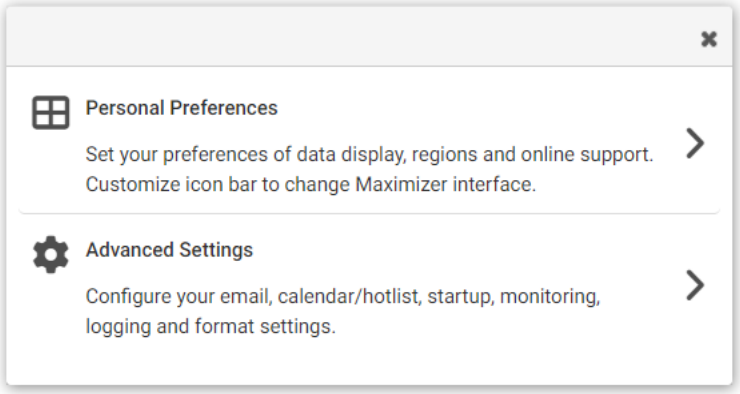
Click the MORE button to expose the menu bar. The purpose of this change is to simplify the UI. The menu bar is an old Windows-style interface that is not common in today's web applications.



The visibility of the menu bar however is sticky across the sessions. If the menu bar is exposed upon logout, the menu bar will remain open upon login of the next session.

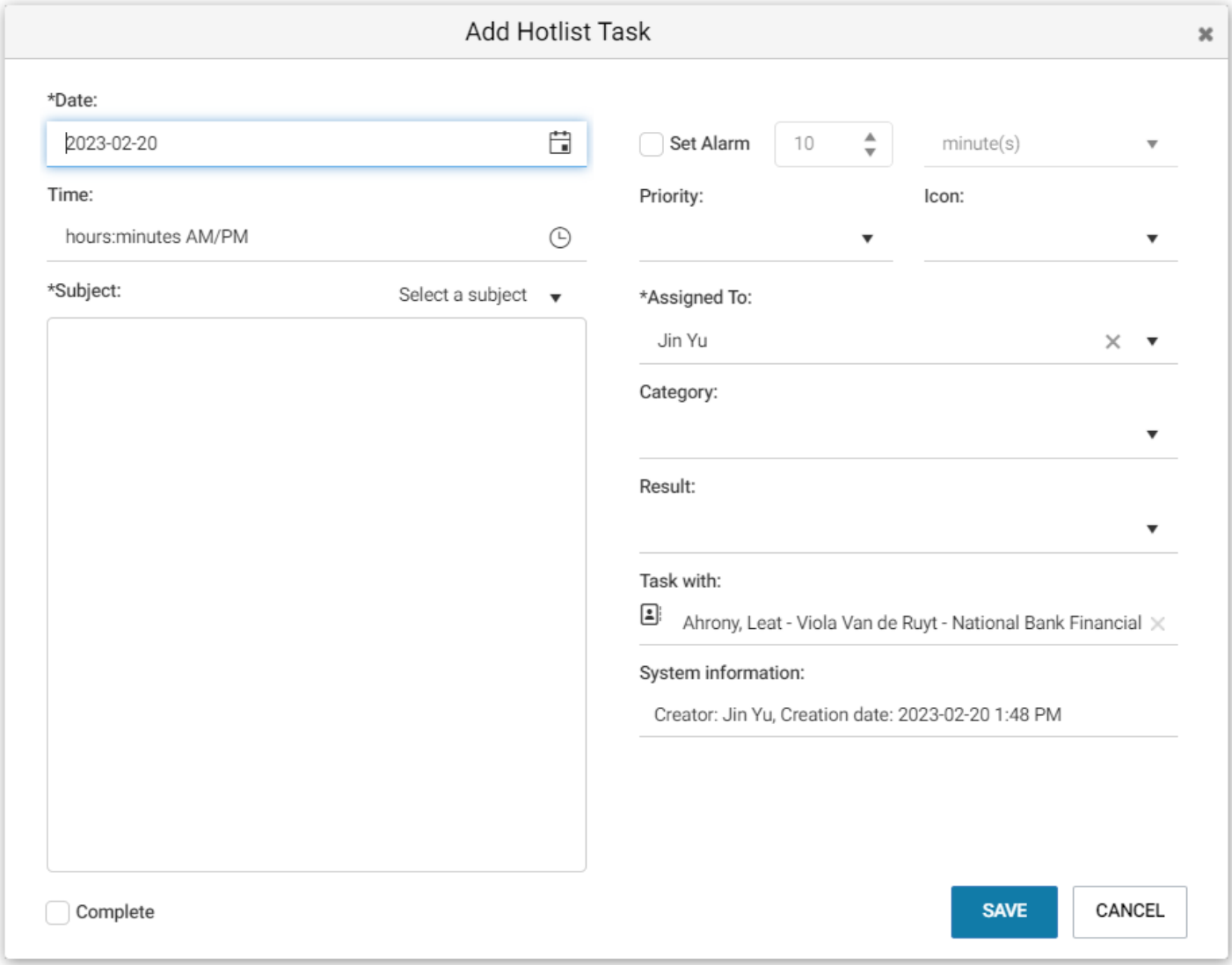
Options for preferences and settings

Clicking the Preferences icon will now open a pop-up. From the pop-up, the user can access the Personal Preferences dialog or the Advanced Settings dialog.



New interface for Hotlist task dialog

The task dialog has a completely new interface. It has a bigger Subject field for entering long text. It is easy to navigate. The new System Information section displays the creation and last modification information.



Interactions and Timeline

Interactions help you better manage customer communication

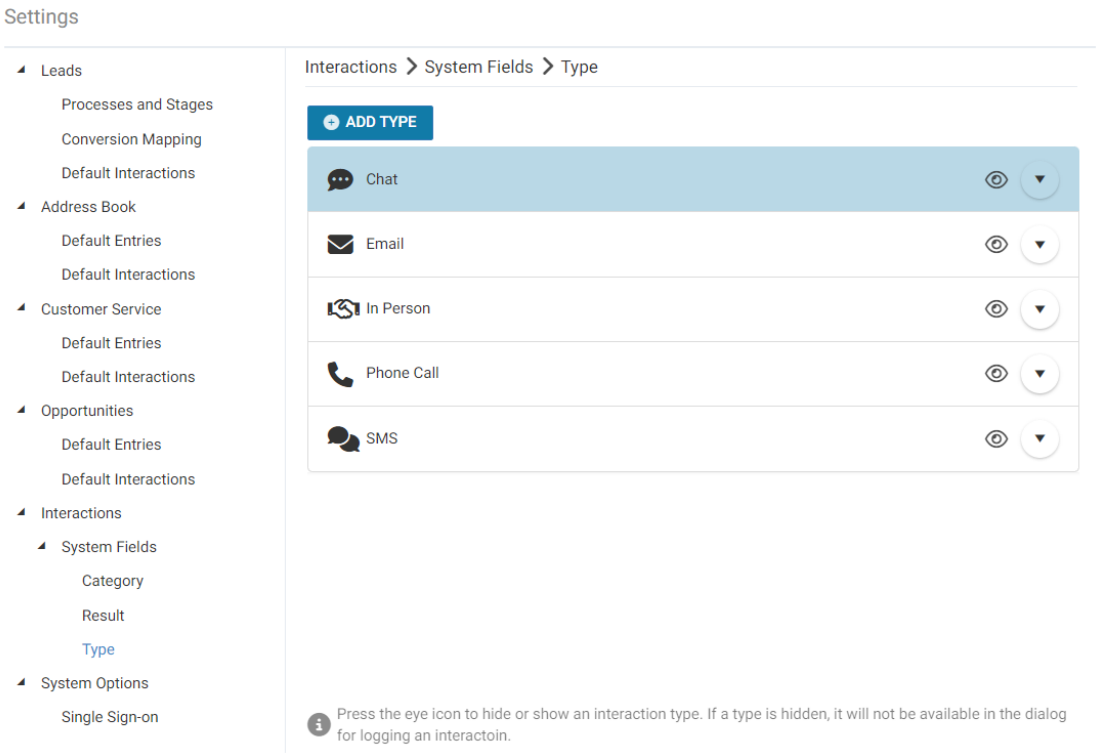
Maximizer introduces Interactions, a new way to manage customer communication. Interactions represent instances of communication between a company and a customer or prospect. In the CRM lifecycle, tracking interactions helps by providing additional details and context about a particular customer.

As an example, consider the following scenario: A potential customer recorded as an Address Book entry establishes communication via Twitter. This leads to an in-person meeting and then eventually concludes with a sale. With the Interactions feature, every communication instance with the customer is recorded.

Settings for Interactions

Maximizer provides the following interaction types: chat, emails, phone calls, and SMS. You can create more interaction types to meet your business needs. To set up custom interaction types, go to Settings screen > Interactions > System Fields > Type.

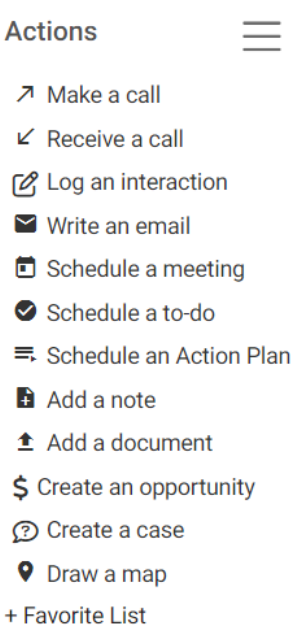
You can also categorize the interactions and track the results of the interactions for reporting purposes. You can create interaction categories and results in the Settings screen.

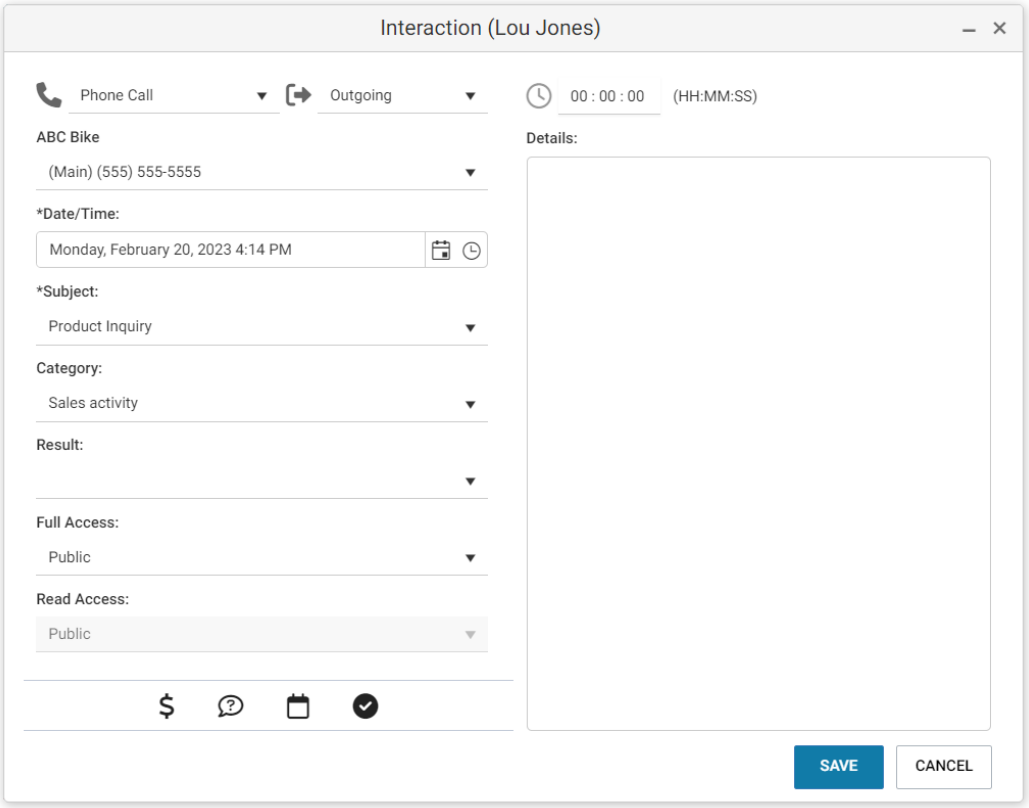


Log interactions

To log a phone call, use the "Make a Call" or "Receive a Call" menu item in the Actions panel. Alternatively, you can log an interaction manually using the "Log an Interaction" menu item.

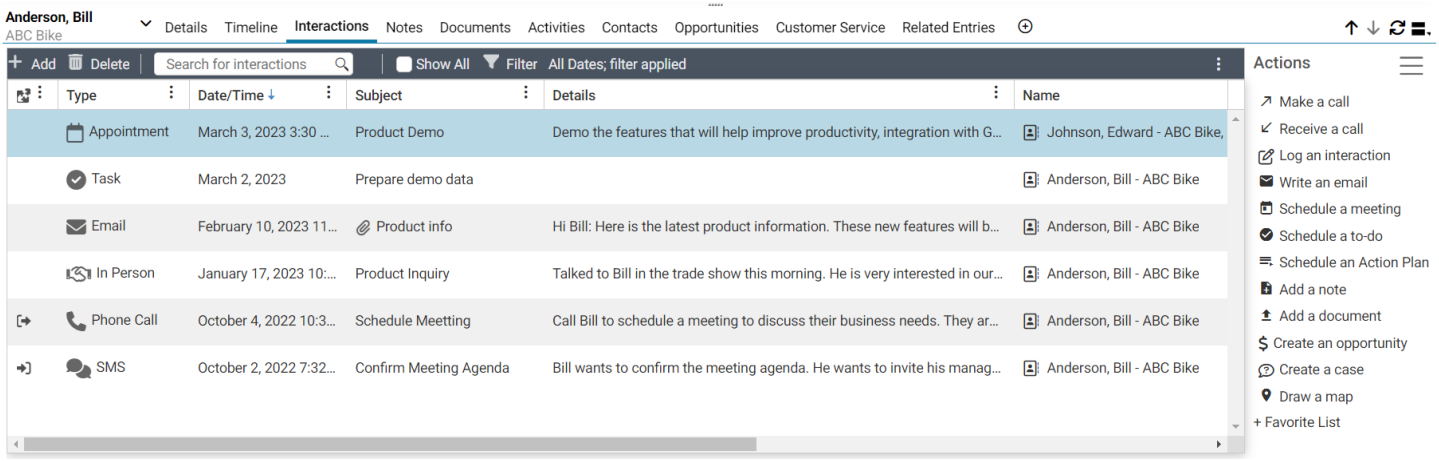
Each interaction log should have a subject. Use the Category field to categorize the interaction and the Result field to track the results. Within the Interaction Log dialog, you can create follow-up appointments and tasks, or link the log with an opportunity or Customer Service case. The Full and Read access fields control who can view and edit the log.



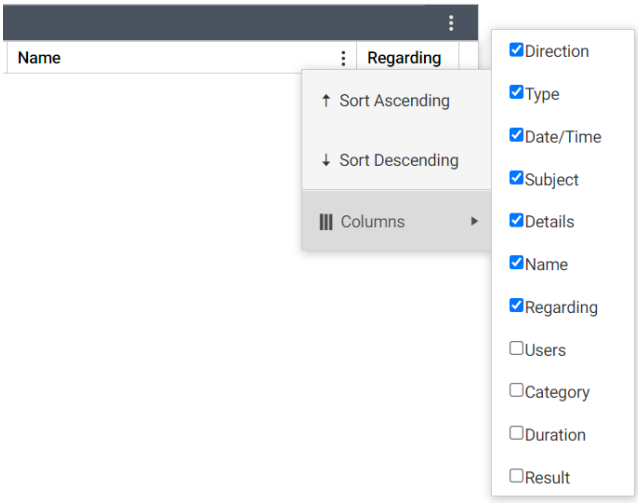


Interactions tab

The new Interactions tab displays appointments, tasks, phone calls, emails, SMS, chats, and all the custom interaction types. Use the search field to find the items in the list quickly. Use the filer to retrieve the items by types.



The column view of the Interactions tab can be customized. You can select the fields that are most relevant to you. To re-order the columns, simply drag and drop the column header.



Search entries by interactions

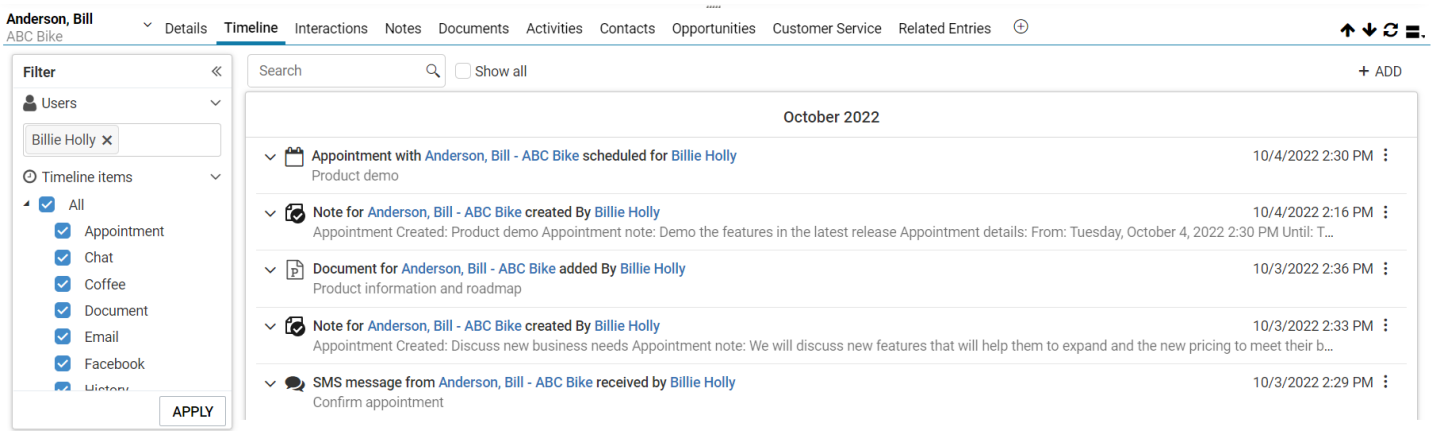
You can search records from the following modules using interactions as search qualifiers: Address Book, Leads, Opportunities, and Customer Service. Using a combination of the interactions fields, you can create the complex search queries to filter the records. Saving the search queries allows you to store the criteria for a search operation, which is helpful when the same complex search query might need to be created frequently. To access search by interaction function, go to Search menu > Interactions.

Default interaction

You can set default values for interactions as well as emails. Default entries represent the shared values of the fields across multiple interactions or emails. For example, The Subject and Result values might be the same for all the interactions, and therefore, specifying these values as "default values" saves time in creating interactions. Similarly, the default value for "Full Access" might be the same for all emails, and therefore, specifying it beforehand saves time in composing emails. To set up default interaction, go to the Edit menu > Default Interaction.

Timeline tab

The Timeline tab allows you to view a wider range of items. Grouped chronologically by month, you can now see everything you need in one place: notes, documents, emails, phone calls, appointments, tasks, and interactions. You can **expand** each item to see each its full details, **filter** through activity types and use the **search** bar to locate specific keywords. Timeline will also be available in the Leads, Hotlist, Opportunities, and Customer Service modules to keep your customer touchpoints organized and more accessible throughout your day.



Note that emails and phone calls are now categorized as interactions, and therefore displayed in Interactions and Timeline tab. Emails are no longer displayed in Documents tab. The emails and phone call notes in Interactions and Timeline tab are also searchable. Use the search field in these tabs to find the emails. An icon will be displayed to indicate the emails with attachments.

However, you must convert all emails and phone calls notes from previous releases to interaction logs in order for them to be displayed and searchable in the Interactions and Timeline tabs. To convert phone notes and emails, go to Icon Bar > Administration > Phone Note and Email Conversion.

Timeline report

The Consolidated Activity Report and Incoming vs Outgoing Call reports have been replaced by Timeline reports. The filter option is available for filtering by user and activity type if needed. Notes, documents, and any interaction will be displayed in the Timeline report to export your sales activities so you can easily prepare for your next meeting.

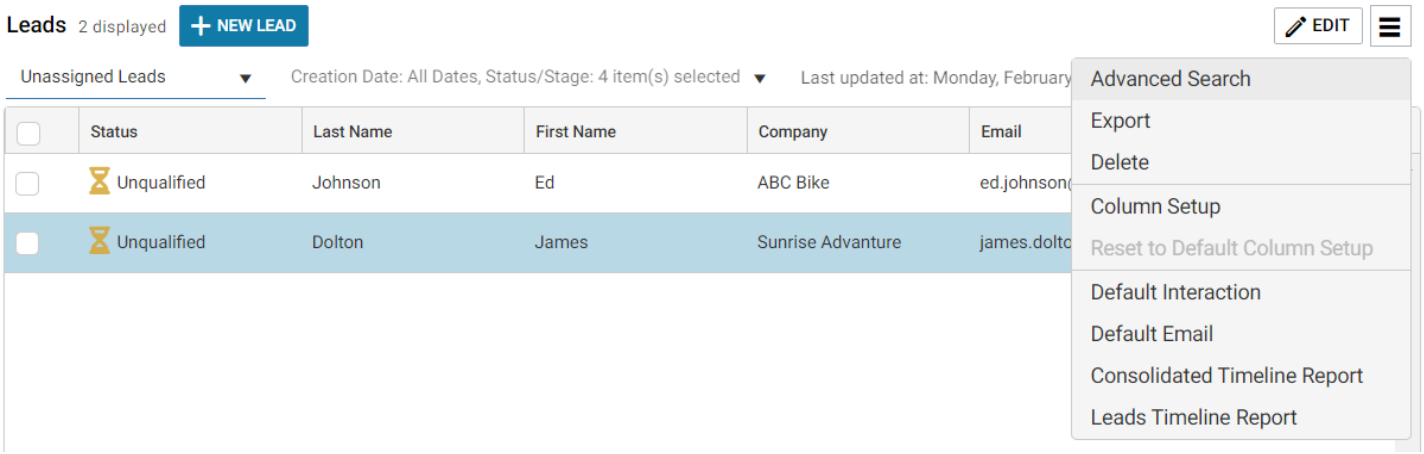
Changes in Hotlist task and appointment

In task and appointment, the Interaction Category and Result fields have been added. You can use these fields to categorize your tasks and meetings and track the results. The information about the categories and results will help you to create better reports.

Enhancements in Leads

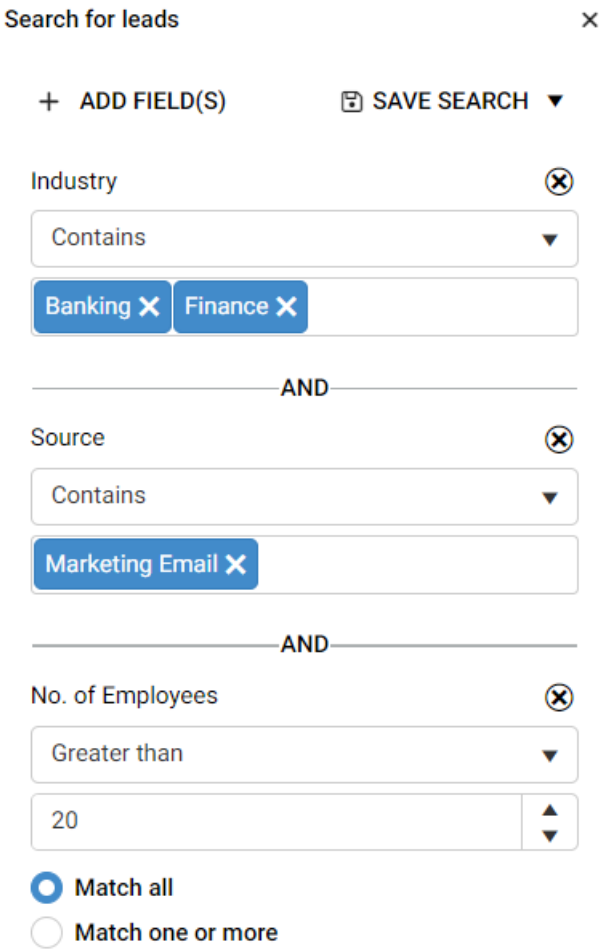
Perform advanced searches in the Leads module

Maximizer introduces advanced search capabilities for the Leads module. You can now specify additional fields and parameters to refine search results. Maximizer supports complex queries using default fields as well as user-defined fields and presents results that are the most relevant to you.



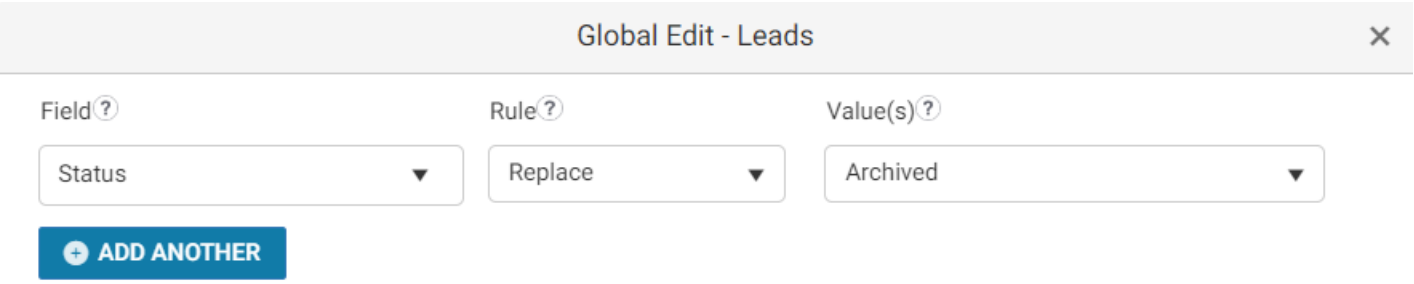
The Advanced Search feature is simple to use. A series of qualifiers, filter operators, and fields can be used in conjunction with Boolean operators to build effective search queries. The experience is like using search engines, thereby making the Advanced Search feature a powerful tool capable of searching through large volumes of data.

Search operations can also be saved using the Save Search option. This way, complex search queries that need to be run frequently do not need to be re-queried over and over.



Perform a bulk archive operation of leads

Maximizer introduces the ability to archive multiple leads at one time. This way, leads that you no longer need can be quickly cleared from the Leads list to reduce clutter. To bulk archive leads, use the Global Edit function and set status to Archived.

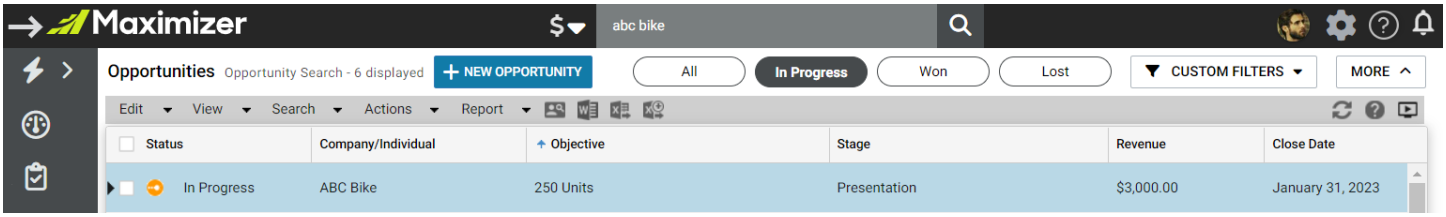


Enhancements in Opportunities

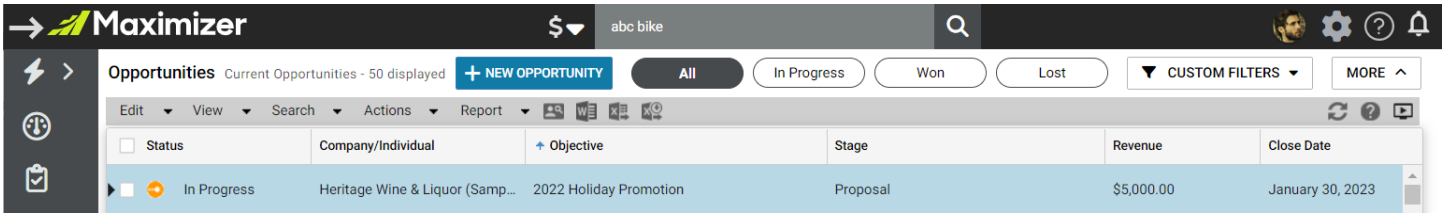
Opportunity status filter

The opportunity status filters are now available in the Opportunities module. You can quickly filter the search results by status.

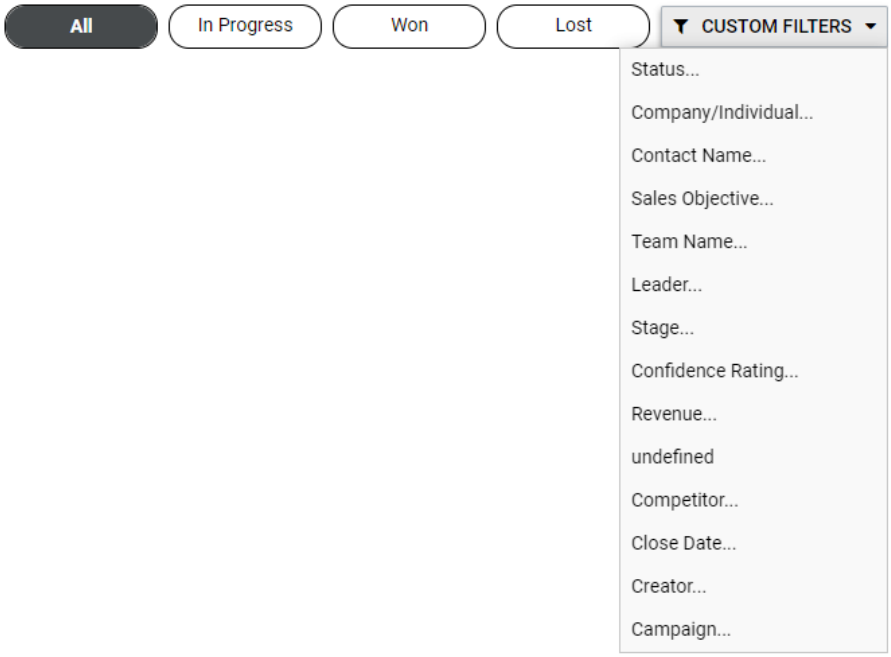
After you have performed a Quick Search to search for opportunities, In Progress is selected by default and you will see the In Progress opportunities in the search results. Click Won or Lost to see the opportunities in their respective states, or click All to see all available opportunities including those Abandoned and Suspended.



Note: If you perform an opportunity search by Owner, Advanced Search, or retrieve a Favorite List, All will be selected by default. You can click In Progress, Won or Lost to see opportunities in their respective states.

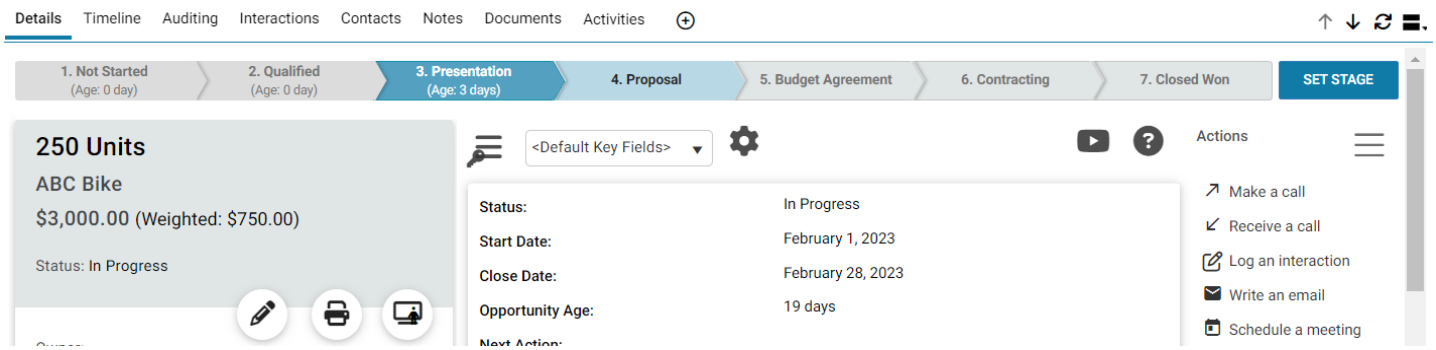


Clicking the Custom Filters button will present a drop-down. The items in the drop-down are the same as those under the Search menu. You can perform a search using one of the menu items seen below:

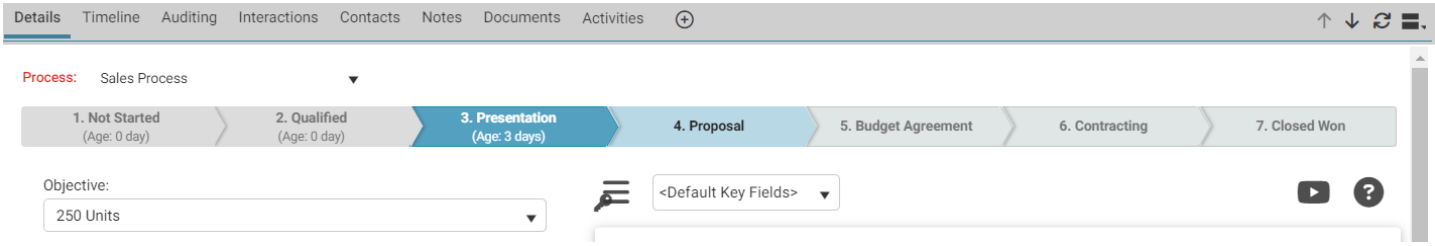


Change stages in the sales process

To move the sales stage forward, you can now simply click a stage in the process and click the Set Stage button.



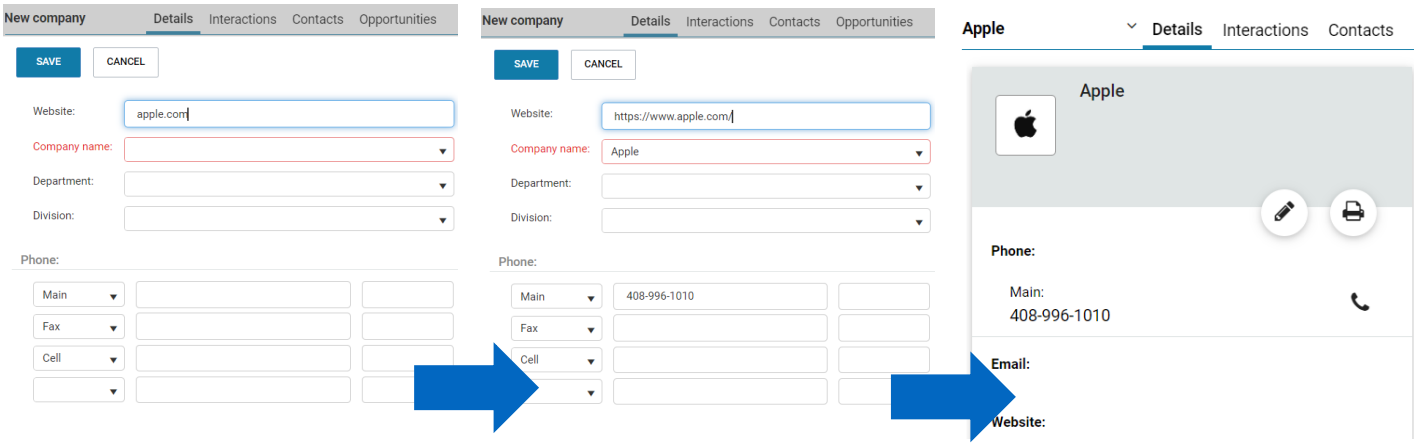
In the Edit Opportunity screen, the Process field has been moved to the top of the screen. You can change the stage by clicking the new desired stage in the bar.



Enhancements in Address Book

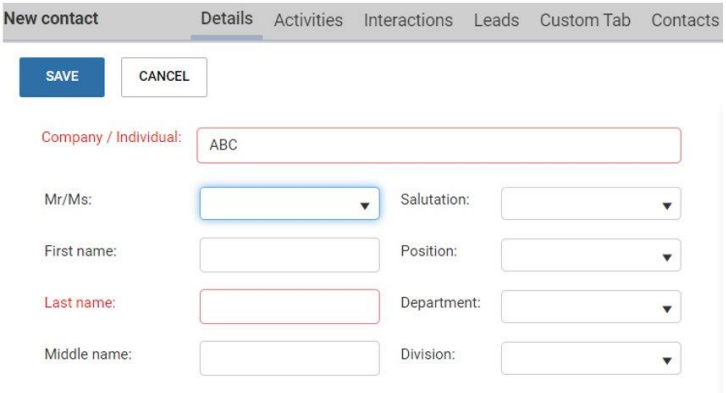
SmartFill makes data entry a breeze

When creating a new company, just start typing their website and leave the admin to us. SmartFill is our way of defining how some company details like company name and logo will automatically populate so that entering data has never been easier.



Easily create a new contact

Before, you were not able to create a contact without searching for the company first. Now, go straight to adding a new contact and search for the company inside the contact creation form.



Other features

Create your own unique campaign

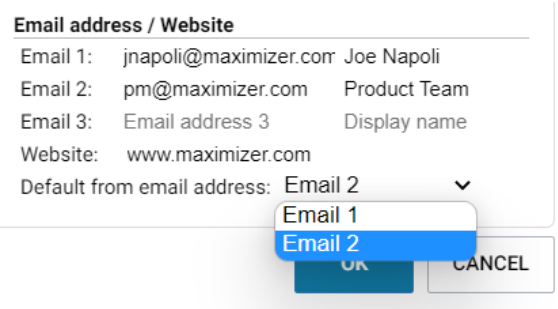
Maximizer introduces a new type of campaign, which is generic in nature and can be customized for your specific business needs. Previously, Maximizer only supported automated campaigns created using templates. An example of the new generic campaign is a pay-per-click (PPC) campaign for driving traffic to your website.

The new generic campaign can be analyzed for qualitative performance. You can determine the effectiveness of your campaign by tracking the number of leads arising from the campaign, as well as monitoring the conversion of these leads to opportunities and exporting the campaign for further analysis.

To create this type of campaign, go to Campaigns module > Edit menu > Add Campaign.

Choose a default email for your account

The ability to choose a default email for your account is now available. You can opt to set either Email 1, Email 2, or Email 3 as the default 'From' address. This is essential in scenarios when you share a common email with your team, and you require this email address to be the default From address.

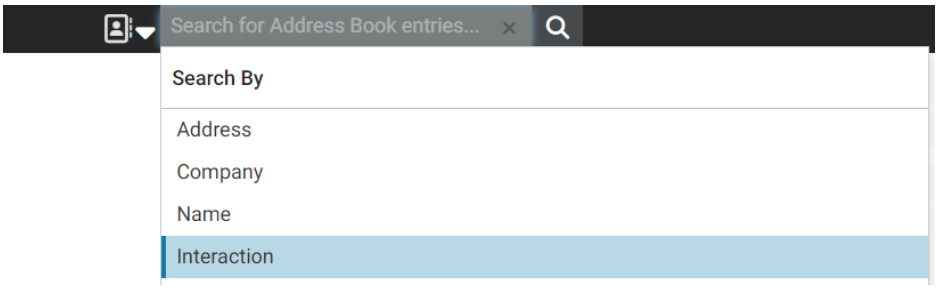


The character limit on the Activity field for a task in Action Plan templates

The character limit on the Activity field associated with hotlist tasks of Action Plan templates is now 9216 characters. Previously, it was only 255 characters.

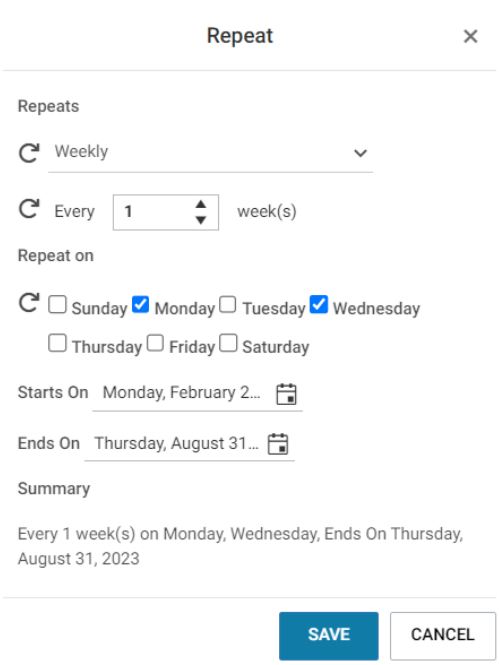
Search entries by interaction in the Quick Search bar

Now you can use Quick Search to retrieve Address Book entries by interactions.



Recurring appointments can now be added for multiple days in a week

Recurring appointments can now be added for multiple days in a week. For example, a meeting can be scheduled for Monday and Wednesday every week.



Discontinued features

- The History tab is no longer available.
- The following reports are no longer supported: Consolidated Activities Report and Incoming vs Outgoing Call Report. They are replaced by the Consolidated Timeline Report.
- Searching by text in documents.
- View menu > Phone Log