



Release Notes – August 2022

MAXIMIZER CRM CLOUD



It's All About the People

The Maximizer August update focuses on people. 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.



ABC Bike
1221 Burnaby St
Vancouver BC V6E 1P7
Canada



Account Manager:



Billie Holly, Joe Napoli

Phone:

Main:
[\(555\) 555-5555](tel:(555)555-5555)



Email:

Main:
contactus@abcbike.com



Leader of an Opportunity Front and Center

The user assigned as the Leader 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 leader's name. The expected revenue and the weighted revenue are also displayed here too.

Purchase product

ABC Bike
CAD10,000.00 (Weighted: CAD7,500.00)

Contact: Anderson, Bill
Status: In Progress

Leader:
 Billie Holly
West Coast Sales

Products / Services:
Accessories, Cab Franc

Categories:
Australia, France, South Australia

The User of a Customer Service Case 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.

Packaging defect

HQ-00331
ABC Wine Shop Inc.

Status: Assigned
Elapsed time: new

Assigned to:
 Billie Holly

Description:
The packages have been broken during shipping.

Products / Services:
Accessories



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.

Invite Others

Q SCHEDULING

Invite attendees

ADVANCED

Include Address Book entries in email reminder

Billie Holly
Organizer

Attendees

Lou Jones
(555) 775-0987 Tentative

Joe Napoli
(555) 775-0982 Accepted

Johnson, Ed - ABC Wine Shop Inc.
6046018022

Anderson, Bill - ABC Bike
(555) 555-5555

New Look to 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 and Quotas modules.

Address Book 0 Displayed COMPANY

Opportunities 0 displayed

Calendar



Customize your Layout View

In July's release, we adjusted the row height of the grids to create more space and reduce clutter. We received feedback that some users prefer to have a compact view, so we added a setting to allow the user to set the display density in the Preferences dialog (click the Settings wheel in the top right corner of MSI).

Preferences

Maximum number of entries returned:

Display blank UDFs: Yes No

Allow multi-selection in Advanced Search (may require the website to be in the Trusted Sites zone): Yes No

Automatically assign campaign when creating a new opportunity

Limit the search to campaigns created:

Display users by groups:

All users Disabled users Departments

Divisions Security groups Teams

Data table density:

Compact Normal Comfortable

Compact

<input type="checkbox"/> ▲ Name	Phone Number	Email Address
<input checked="" type="checkbox"/> ABC Bike	(555) 555-5555	email1@max.com
<input type="checkbox"/> All The Best Spirits	(604) 601-8001	
<input type="checkbox"/> Anderson, Bill	(555) 555-5555	bill.anderson@abcwine.com
<input type="checkbox"/> Bell, Kate	(555) 564-8583	kate-bell@mac.com
<input type="checkbox"/> Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com

Normal

<input type="checkbox"/> ▲ Name	Phone Number	Email Address
<input checked="" type="checkbox"/> ABC Bike	(555) 555-5555	email1@max.com
<input type="checkbox"/> All The Best Spirits	(604) 601-8001	
<input type="checkbox"/> Anderson, Bill	(555) 555-5555	bill.anderson@abcwine.com
<input type="checkbox"/> Bell, Kate	(555) 564-8583	kate-bell@mac.com

Comfortable

<input type="checkbox"/> ▲ Name	Phone Number	Email Address
<input checked="" type="checkbox"/> ABC Bike	(555) 555-5555	email1@max.com
<input type="checkbox"/> All The Best Spirits	(604) 601-8001	
<input type="checkbox"/> Anderson, Bill	(555) 555-5555	bill.anderson@abcwine.com



Contacting Support

If you have problems or questions, contact the Maximizer Support team. To do that, 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**.