

WHAT'S NEW GUIDE 2019



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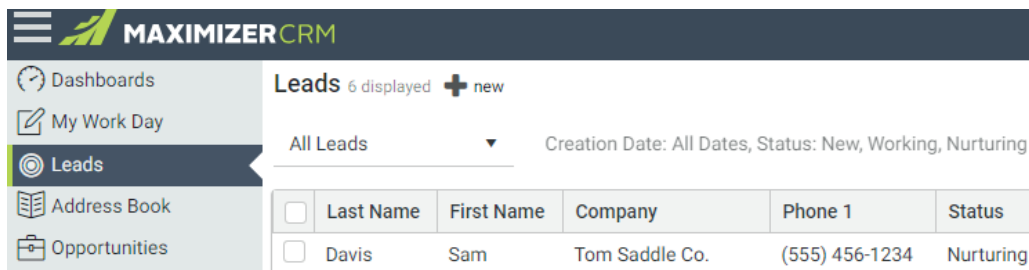
Lead Management

SUMMARY

With our new Leads Management Module you're able to manage and qualify leads in a single, easy-to-use workspace so you can focus on your most profitable targets.

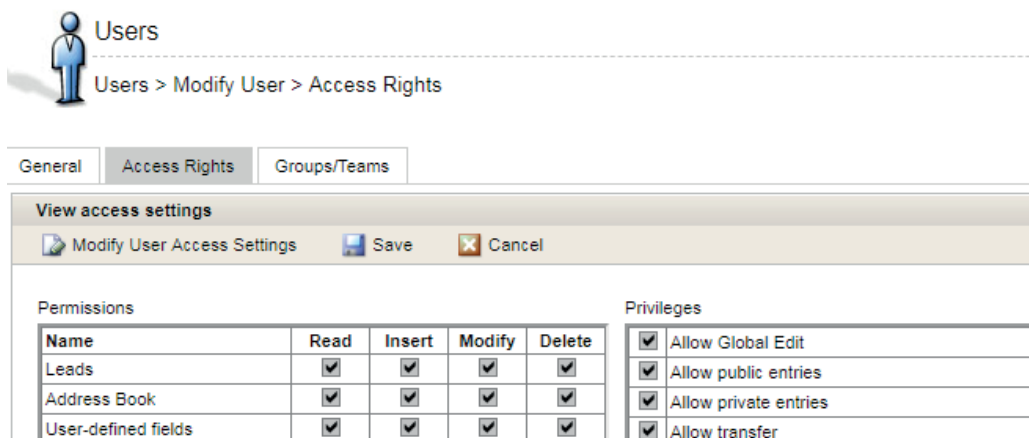
LEADS MODULE

To access the Leads module, click the icon in the Icon Bar.



Access rights

The administrator can specify which users have access to the Leads module, and their rights to add, modify and delete leads.



Name	Read	Insert	Modify	Delete
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Book	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User-defined fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

<input checked="" type="checkbox"/> Allow Global Edit
<input checked="" type="checkbox"/> Allow public entries
<input checked="" type="checkbox"/> Allow private entries
<input checked="" type="checkbox"/> Allow transfer

Address Book fields related to leads

The fields used to manage leads in Address Book have been renamed so they can be used for other purposes. For example, the Sales Lead field in Address Book is used to indicate whether an entry is a lead or not. When this field sets to Yes, a star will be displayed in the entry type icon. This field has been renamed to Starred Entries. You can use this field to mark important entries or the primary contact in a company.

PREVIOUS RELEASE	2019 RELEASE
Sales lead Lead status Lead source	Starred entries Rating Source


IMPORTING LEADS INTO MAXIMIZER

There are two ways for you to add leads to Maximizer. You can import leads using a spreadsheet and our mass import tool or create leads manually.

Import leads

In the Import Manager, the record types now includes leads. Navigate to Import Manager > Source screen and select the “Contains Lead information only” option for importing leads.

Import Manager > Source



 File Import

? By selecting the type of information your import file contains, you will be able to import multiple record types from a single row. Such as companies and contacts

✓ Upload a file The maximum file size for importing is 10 MB

Select a file...

✓ Done


 New Leads.csv
 0.36 KB

✓ What record type(s) does your import file contain?

Contains **Lead** information only

In the Mapping screen, you will need to map the fields in the spreadsheet with the lead fields and select at least one field for duplicate checking.

Import Manager > Source > Rules > Mapping

File Import

Match your columns to any Maximizer field to complete your import. The import you selected requires that you match at least 1 column to a corresponding Maximizer record type


Lead

Fields to be imported <small>Preview of data</small>	Destination Maximizer Fields <small>Location of the field within Maximizer</small>	Match on this <small>Use to determine if record exists within...</small>	Field Action	Field Format
<input checked="" type="radio"/> Company Name <small>ABC Wine Shop</small>	Company <small>Basic Fields</small>	<input type="checkbox"/>	Add when empty	As imported
<input checked="" type="radio"/> Last Name <small>Johnson</small>	Last name <small>Basic Fields</small>	<input checked="" type="checkbox"/>		As imported
<input checked="" type="radio"/> First Name <small>Ed</small>	First name <small>Basic Fields</small>	<input checked="" type="checkbox"/>		As imported
<input checked="" type="radio"/> Email Address <small>contact1@maximizer.com</small>	Email Address <small>Basic Fields</small>	<input checked="" type="checkbox"/>		As imported
<input checked="" type="radio"/> Phone <small>(604) 6018000</small>	Phone 1 <small>Basic Fields/Phone 1</small>	<input type="checkbox"/>	Add when empty	As imported
<input checked="" type="radio"/> Mobile <small>(778) 9991234</small>	Phone 2 <small>Basic Fields/Phone 2</small>	<input type="checkbox"/>	Add when empty	As imported
<input checked="" type="radio"/> Position	Position	<input type="checkbox"/>	Add when empty	As imported

In this release, Favorite Lists are not supported for leads. You cannot create a Favorite List to retrieve the leads after they are imported.

Adding leads manually

You can manually add leads into the Leads module by pressing the “new” button. When creating a new lead, please note the last name is a mandatory field.



- Dashboards
- My Work Day
- Leads**
- Address Book
- Opportunities

Leads 6 displayed + new

All Leads ▼ Creation Date: All Dates, Status: New, Working, Nurturing

<input type="checkbox"/>	Last Name	First Name	Company	Phone 1	Status
<input type="checkbox"/>	Davis	Sam	Tom Saddle Co.	(555) 456-1234	Nurturing

Owner field

The users who have the right to view the Leads module will be available in the drop-down list.

Status, Source, and Industry fields

The items in these fields cannot be modified in this release. They will be customizable in future releases.

VIEW AND EDIT LEADS

View entries in the Leads screen

The Leads module features a new interface design which doesn't have the following tabs. By default, the leads are sorted by creation date. You can change the sort order by clicking the header of a column. In this release, the column view cannot be changed.

Use the Owner drop-down to change the views. The following options are available:

- My leads – The leads where you have been assigned as the owner.
- All leads – All leads regardless of whether they have an owner assigned or not. This allows the manager to monitor the leads that the whole team is working on.
- Unassigned leads – These leads haven't been assigned to any user. This allows managers to find out which leads need to be assigned to sales reps.
- You can also select a user to view the leads assigned to that user.

Leads 6 displayed + new

All Leads ▼		Creation Date: All Dates, Status: New, Working, Nurturing ▼				
My Leads						
All Leads						
Unassigned Leads						
Daniel Brown						
Ed Johnson						
Joe Napoli						
		Company	Phone 1	Status	Owner	City
		Tom Saddle Co.	(555) 456-1234	Nurturing	Daniel Brown	Vancouver
		Lary Pardon Co.	(555) 888-9999	Working	Lou Jones	Vancouver
		Horizon Beverage C...	(604) 601-8000	Working	Joe Napoli	Vancouver
		ABC Wine Shop	(604) 601-8001	New	Lou Jones	Vancouver
		Arrow Wine & Spirits	(555) 601-8000	New	Lou Jones	Dayton

Leads 6 displayed + new

All Leads ▼		Creation Date: All Dates, Status: New, Working, Nurturing ▲				
Creation Date: All Dates ▼		Status: All Active ▼		✓ APPLY		
Last Name		First Name	Company	Phone 1	Status	Owner
Davis		Sam	Tom Saddle Co.	(555) 456-1234	Nurturing	Daniel Brown

Select All Active status to retrieve leads that are in New, Working and Nurturing status.

REFRESH LIST AND EXPORT LEADS

The list in the Leads module does not refresh if you switch to another module and come back again. If you want to check the updated data (e.g. other user changes a lead that is displayed in your screen), press the REFRESH button



Last updated at: October-09-18 12:31 PM  **REFRESH**  **EXPORT** 

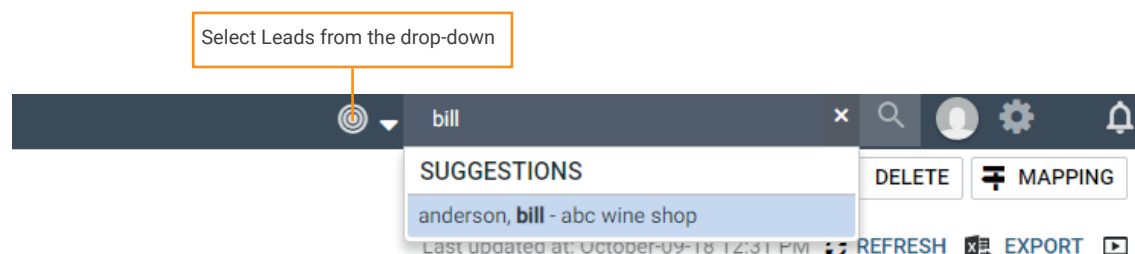
Note:

- If you edit a lead, the updated information will be displayed in the list right away. You don't need to refresh the list.
- If you change the filter and press the APPLY button, the list will be refreshed.

You can export the leads to an Excel file and create a report. Press EXPORT button to export the leads displayed on the screen.

SEARCH FOR LEADS

The Quick Search field supports searching for leads. Make sure you select Leads as the search type. Just like searching for Address Book entry, you will see suggestions while you are typing the search text. Selecting a suggestion or pressing the search button will perform a search for leads.



Editing entries from the Leads screen

To edit a lead in Leads screen, select an entry and press the EDIT button. If you want to change multiple leads at the same time, select the entries you would like to change and press the EDIT button. In this scenario, the Global Edit dialog will open. This allows you to update multiple entries quickly. For example, you can change the status of multiple leads from New to Working.

Use the EDIT button to modify leads. If one entry is selected, the Edit Lead screen will open. If multiple entries are selected, Global Edit dialog will open.



Last updated at: October-09-18 12:31 PM  **REFRESH**  **EXPORT** 

Owner of a lead

Everyone who has the right to edit leads can make changes in any lead. However, the Owner field is protected. Only the user who has been assigned as the owner of a lead or a sales manager can re-assign a lead to another user.

If a lead has no owner assigned, everyone can access it.

WORKING WITH LEADS

To work and qualify a lead, you will need to open the lead details screen. In this screen, you will see all the information about the lead, be able to link the lead with an existing Address Book entry, make a call, send an email, schedule activities and enter notes and documents into the lead.

The lead details screen includes five main components:

- Lead details – Display the data about the lead.
- Status bar – Allows you to change status while you are working through the process.
- Notes widget – Display notes created for the lead.
- Activities widget – Create appointments and tasks for the lead.
- Documents widget – Insert documents into the lead.

Press the arrow keys to go to the previous or next entry in the Leads screen.

< Back to Leads

EDIT LINK CONVERT ARCHIVE ↺ ↻ ↕

Anderson, Bill General Manager at ABC Wine Shop Anderson, Bill - ABC Wine Shop More

Phone: (604) 601-8001 (778) 999-8001 Email and Website: Bill.Anderson@abcwine.com www.abcwine.com Owner: Lou Jones Source: Event/Trade Show No. of Employees: 20

Unqualified **New** Working Nurturing SET STATUS

Notes + ADD All Selected

Manual Lou Jones October-9-18 9:40 AM

Bill called today. His manager will join our meeting. They would like to discuss following in the meeting:

- Their business needs
- Comparison with other products
- Price

Task Lou Jones October-9-18 9:39 AM

Appointment Created First meeting with Bill Appointment details: From: Octob...

Task Lou Jones October-9-18 9:39 AM

Hotlist Task Created: Prepare for the first meeting With: Anderson, Bill Schedul...

Outgoing calls Lou Jones October-9-18 9:38 AM

Called Bill today. He is very interested in our product. We will have a meeting n...

Email Lou Jones October-9-18 9:37 AM

Activities + ADD

First meeting with Bill Lou Jones October-15-18 1:00 PM

Prepare for the first meeting Lou Jones October-10-18

Documents + ADD

Thank you for your interest in our product Lou Jones October-9-18 9:37 AM

LEAD DETAILS

Detailed information about the lead is displayed on top of the screen. Phone numbers and email addresses are always visible so you can quickly make a call or send an email. Press the More button to see all the fields.

You can go to previous or next entry in the list by pressing the up / down arrow.

Pressing a phone number will open the Make a Call dialog. You can create a follow-up task and log a phone note after you finish the call.

Pressing an email address will open the compose email dialog for you to send an email to the lead. In this release, merge fields and email templates are not supported. The email will be saved to Notes widget and Documents widget.

LINKING A LEAD WITH AN EXISTING ADDRESS BOOK ENTRY

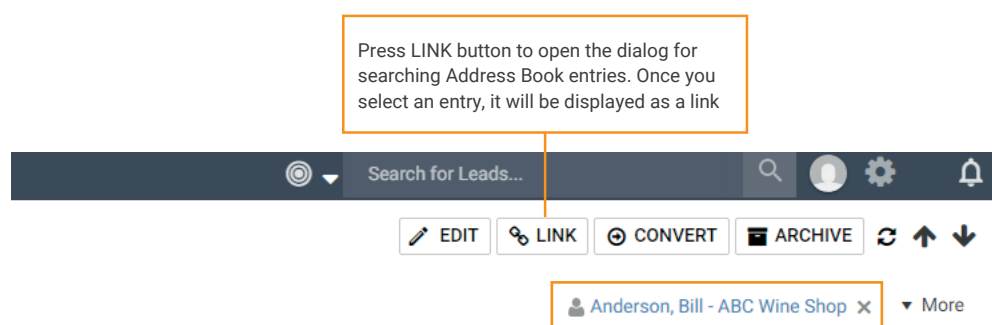
When working with a lead, you will need to know if the lead is a returning customer or not. If the lead is a returning customer, you can link it with the Address Book entry. It has the following benefits:

- The link to the Address Book entry is displayed in lead details screen. This allows you to view details about the entry.
- During lead conversion, no duplicate entry will be created.

You can link a lead with a contact or with a company. For example, the company is already a customer but the lead is a new person working in the company. In this case you should link the lead with the company record. During lead conversion, a new contact will be created for the company.

To find the existing Address Book entries, press the LINK button to open the search dialog for Address Book entries. The dialog will automatically perform an Address Book entry search by matching email or company name or first name and last name. If there are Address Book entries found, they will be displayed when the search dialog opens. If you don't see any entry or the automatic search returns too many entries, you can manually perform a search.

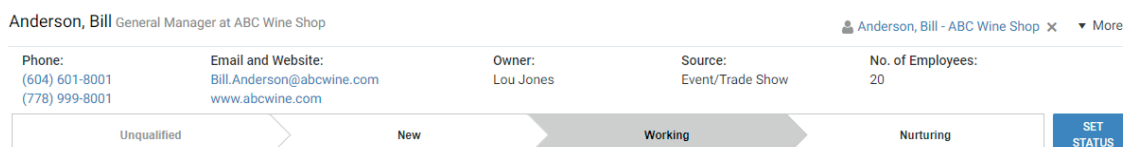
Once you find the existing customer and link it with the lead, the name of the Address Book entry will be displayed in the details screen. Clicking the link will show the entry in the Address Book module.



CHANGE STATUS

The lead status is displayed in the status bar which allows you to change the status easily. Simply select a status and press SET STATUS button to apply the change. You can go forward or move backward. You can also change the status in the Edit Lead screen.

Note that if you change the status from Unqualified to New, Working or Nurturing, you cannot set the status back to Unqualified again. You cannot set the status to Converted or Archived using the bar or in Edit Lead dialog. You will need to click the CONVERT or ARCHIVE button to change to the status.



Select a status and press SET STATUS button to change the status.

NOTES WIDGET

All the communication and activities with the lead are displayed in Notes widget, including manual notes, emails, phone logs and history notes. The notes are displayed with the most recent entry first.

Clicking a note will expand it and show all the contents of the note. You can click the arrow button in each row to show the drop-down menu where you can edit or delete the note. Use the filter to narrow down the list.

Notes

+ ADD

All Selected

Manual

Lou Jones

August-22-18 9:00 AM

Latest update:

- Paul is very happy with the documents.
- They would like to have a PS project to implement accounting integration.
- They like the idea of moving to cloud

Task

Lou Jones

August-22-18 8:57 AM

Hotlist Task Completed: Prepare documents for next meeting With: Ramirez, Pa...

Email

Lou Jones

August-22-18 8:56 AM

Subject: Documents for next meeting Body: Hi Paul: Here are the documents for...

Outgoing calls

Lou Jones

August-22-18 8:43 AM

Called Paul today. He is very interested in our product. We will have a follow-up ...

Manual

Lou Jones

August-22-18 8:36 AM

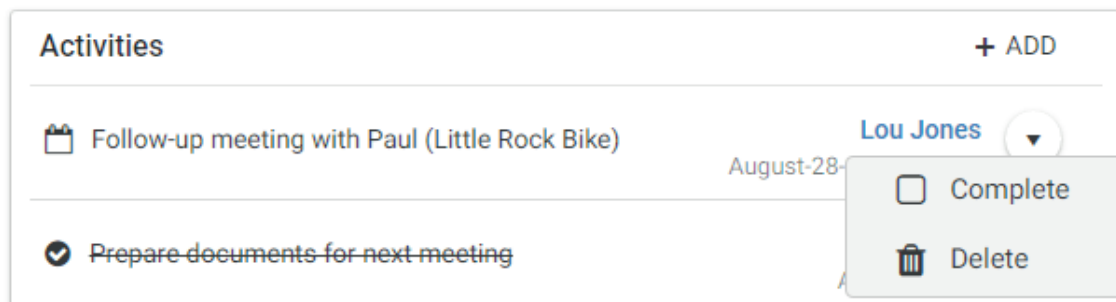
Paul called today and asked to present the 2 year product roadmap in next meet

ACTIVITIES WIDGET




The Activities widget shows the appointments and tasks created for the lead. Press the ADD button to create a new appointment or a new task. Clicking an appointment or a task opens the respective dialog for you to view details or modify the activity.

Note that once an appointment is created for a lead, you cannot invite Address Book entries to the appointment. You can however invite other leads or users.

Clicking the arrow button in a row will open the drop-down menu where you can complete or delete the activity.



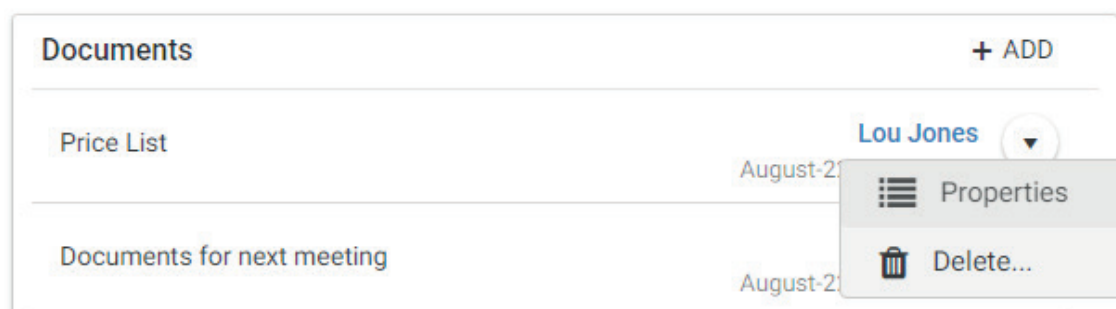
Activities + ADD

Activity	Date	User	Actions
 Follow-up meeting with Paul (Little Rock Bike)	August-28	Lou Jones	<input type="checkbox"/> Complete  Delete
 Prepare documents for next meeting			



DOCUMENTS WIDGET

You can insert the documents related to the lead into the Documents widget. The emails you sent to the lead will be saved to the Documents widget if you choose "Save copy to entry's documents" in the email compose dialog.

Clicking the arrow button in a row will open the drop-down menu where you can delete the document or edit the properties of the document such as name, description and access rights.



Documents + ADD

Document	Date	User	Actions
Price List	August-21	Lou Jones	 Properties  Delete...
Documents for next meeting	August-21		

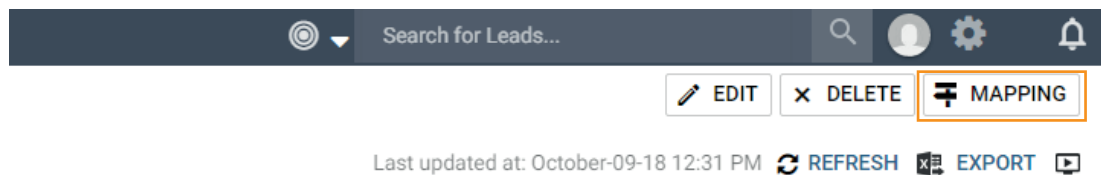
CONVERT LEADS

When a lead is qualified, you should convert it to Address Book entries and optionally create an opportunity. If the lead is new, you can create a new Address Book entry and opportunity. If the lead is a returning customer, you should link the lead with the existing Address Book entry, and only create an opportunity. The conversion process will copy all the notes and documents from the lead to the Address Book entry.

Field mapping

The lead fields should be mapped with Address Book entry fields. When new Address Book entries are created during the conversion, the data from the lead will be transferred to the Address Book entry.

Field mapping for conversion can be set up by the administrator. When the administrator logs in, the MAPPING button will be available in the Leads screen. Press the button to open the mapping screen.



In this release, most of the fields will be mapped automatically. For example, the Company field in a lead will be mapped to the Company Name field for a company or an individual. The administrator only needs to map two fields: Industry and # of Employees.

Lead Conversion Mapping

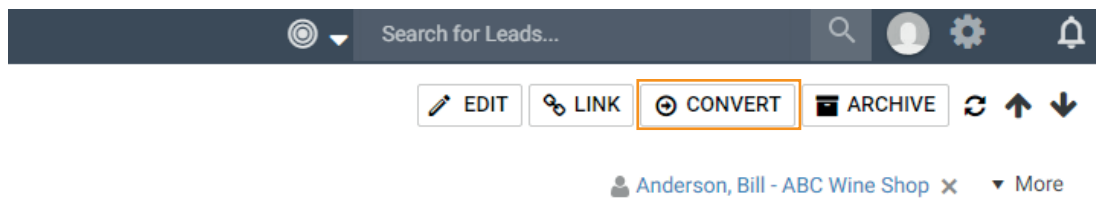
By matching to relevant Address Book fields, you will save yourself time when converting leads into Address Book entries. Mapped fields will be automatically copied over.

Lead Fields	Address Book Entry Fields
No. of Employees	Not Mapped ↔
Industry	Not Mapped ↔

Similar to field mapping in the Import Manager, clicking the field will open the field picker for you to select a field for Address Book entry. Only the fields with the matching type will be available in the field picker. When you map # of Employees, only the numeric fields will be available in the field picker. When you map Industry, only the single value table field will be available. The value in Industry and # of Employees fields will be transferred to the company or individual record. Please ensure the selected fields are available for companies or individuals. Also, the field mapped with Industry should have the same items. This will ensure that the lead can be converted successfully.

Converting a lead

To convert a lead, open the lead and click the CONVERT button. You can convert a lead regardless of which status the lead currently has.



Creating new entries

If the lead doesn't exist in the Address Book, you can create new company / individual and a new contact. The data entered in the lead will populate the fields automatically. The owner of the lead becomes the account manager of the company or individual. If the owner of the lead is not a sales rep nor a sales manager, the Account Manager will be blank. You will need to select another user.

Convert Lead

☒ Create new Company ▼ ☐ Choose an existing entry SEARCH

Company

Company Name:

Horizon Beverage Company

Account Manager:

Joe Napoli ▼

Create new contact

First Name:

Winifred

Last Name:

Pardon

Create new opportunity

☐ Do not create an opportunity

Objective:

Purchase 5 more license

Description:

CONVERT

CANCEL

Creating an opportunity is always optional during the conversion. If you don't want to create an opportunity, check the "Do not create an opportunity" checkbox.

When the lead is converted, the data from the lead will be copied into the newly created Address Book entry. The notes and documents in the lead will be copied into the contact. If no contact is created during conversion, the notes and documents will be copied to the individual. Tasks and appointments with the lead will still be associated with the lead.

Converting a lead that has been linked with an existing Address Book entry

If the lead has been linked with an existing Address Book entry, the conversion won't create new Address Book entries by default. When you open the conversion dialog, the linked entry will be displayed in the dialog as read-only.

If the lead is linked with a company, you can create a new contact for the existing company and a new opportunity. If the lead is linked with an existing contact, you won't need to create any new Address Book entry, simply create a new opportunity.

Convert Lead

☐ Create new

Company ▼

☒ Choose an existing entry
 SEARCH

Company

Company Name:

ABC Wine Shop

Contact

First Name:

Bill

Last Name:

Anderson

Create new opportunity
 ☐ Do not create an opportunity

Objective:

Description:

CONVERT
 CANCEL

When a lead is linked with an Address Book entry, the existing data in Address Book entries won't be overwritten by the data in the lead.

Converted lead

After a lead is converted, it becomes read-only. The associated Address Book entries and opportunity will be displayed as links. This allows you to access the opportunity so you can start the sales process quickly.

< Back to Leads

CONVERTED LEAD ↺ ↻ ↱

Pardon, Winifred District Manager at Horizon Beverage Company

▼ More

Phone: (604) 601-8000	Email and Website: Winifred.Kline@HorizonBeverage.com www.HorizonBeverage.com	Owner: Joe Napoli	Source: Digital Advertising	No. of Employees: 25
---------------------------------	---	-----------------------------	---------------------------------------	--------------------------------

Related Entries

Conversion date: October-9-18 1:35 PM

Company: Horizon Beverage Company	Contact: Pardon, Winifred - Horizon Beverage Company	Opportunity: Purchase 5 more license
---	--	--

Archiving leads

If a lead cannot be converted, you can archive it so you don't need to work on it anymore. Pressing the ARCHIVE button will open the dialog for archiving the lead. You will need to enter a reason why the lead cannot be converted. After the lead is archived, it becomes read only.

MANAGING LEADS IN OTHER MODULES

Tasks and appointments displayed in Hotlist

The tasks and appointments created for leads are displayed in the Hotlist screen. The name column now includes entry type icons to indicate whether the associated entry is a lead or an Address Book entry. Click the View in Leads button to retrieve the leads associated with the appointment or the task.

Hotlist All Users - 2 displayed + new

View in Leads button

Date	Time	Pr.	Activity/Subject	Name	Company	Phone 1
October-10-18			Prepare for the first meeting	Anderson, Bill	ABC Wine Shop	(604) 601-8001
October-09-18			To-do - Send pricing document	Kenwood Vineyards	Kenwood Vineyards	

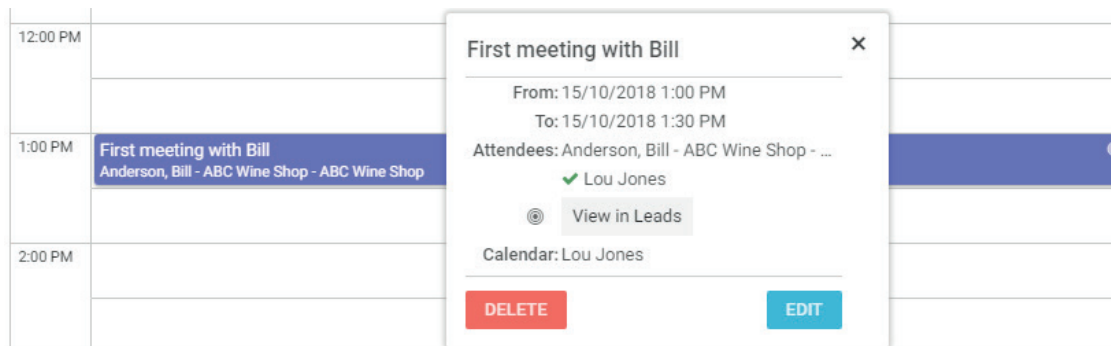
Entry type icons are displayed in Name column to identify if the entry is a lead or an Address Book entry.

Address Book Entry Details Contacts Customer Service Opportunities History Notes User-Defined Fields D > + ↕ ↻ ⌵

The current task or appointment is either personal, or has lead(s) or has multiple Address Book entries assigned. This following window only shows entries for tasks or appointments that have a single associated Address Book entry.

Appointments displayed in the Calendar

In the Calendar, the pop-up for an appointment with leads allows you to view those leads in the Leads module.



Web to Lead Forms

Web to Lead Forms have been renamed to Web Forms. In this release, it will continue working with the Address Book entries.

Quick Search Enhancement

CHANGES IN SEARCHABLE FIELDS

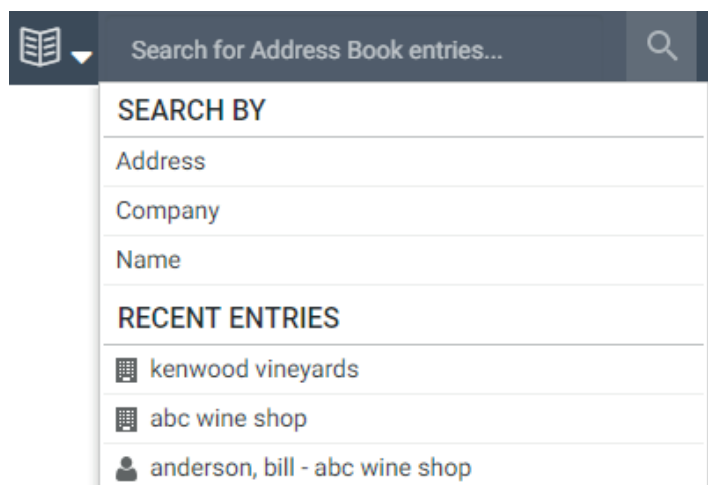
In the previous version, the searchable fields for Quick Search includes:

- Name fields: company name, first name, last name and middle name
- Address fields: address line 1, address line 2, city, state/province, zip/postal code and country
- Phone numbers and email addresses

The Quick Search function will search across all those fields, which can return some unexpected results. Most of the time, you will want to search entries by name, either a contact's name or a company name. For example, you are looking for a contact named "Ed Johnson". You type in Ed Johnson in Quick Search field but the search results include a contact named "Joe Smith". The reason is that Joe Smith lives in "Johnson Street". This entry is not what you expected to see.

To make the search result closer to your expectation, changes have been made in Quick Search such that only the name fields will be searched. Address fields won't be searched by default. To search entries by address fields, you need to use search parameters. See more details about the parameters below.

SEARCH ENTRIES BY PARAMETERS



The screenshot shows a search bar with the placeholder text "Search for Address Book entries...". Below the search bar is a dropdown menu. The menu has two sections: "SEARCH BY" and "RECENT ENTRIES". Under "SEARCH BY", there are three options: "Address", "Company", and "Name". Under "RECENT ENTRIES", there are three entries: "kenwood vineyards", "abc wine shop", and "anderson, bill - abc wine shop".

Search Address Book entries and leads

Quick Search Parameters have been introduced in the latest release. Through use of parameters, you can tailor your Quick Search to search by specific fields. You can also combine as many parameters as you need to further narrow your search.

For example, "Address: California" and "Company: ABC Bike Shop" can be combined in a single search string to look for contacts in a company from a specific state.

Address

Use this parameter to search entries by address fields including address line 1, address line 2, city, state/province, zip/postal code and country.

Say for example, you want to recall all your customers in California. Click Address in your auto-suggestion list and enter California. The search text should then look like this: Address:California or Address: California

To search for customers in a more specific area, you can try searching by city, zip code or postal code. For example, Address:V3B 6T2

Company

Use this parameter to search entries by company name.

For example, you want to retrieve all your contacts affiliated with ABC Bike Shop? Click Company and enter ABC Bike Shop. The search text should then look like this: Company:ABC Bike Shop

Note that your search will match each word in the search string but ignore the order in which the words appear. So, for example, if there is a company called Bike Shop ABC in your database, it will also be retrieved. To match a name exactly, just add quotation marks. For example: Company:"ABC Bike Shop"

Name


Use this parameter to search leads, contacts or individuals by first name, last name and middle name.


Remember: You can combine multiple parameters to target your search more precisely.

For example, if there are many contacts in your database named Ed Johnson, you can refine your search by "Company:" and or "Address:". Looking for the Ed Johnson who works for the ABC Bike Shop in the City of Vancouver? Just enter the following: Name:Ed Johnson Company:ABC Bike Shop Address:Vancouver

Search opportunities

Quick Search retrieves opportunities by searching objective and description.






SEARCH BY


Address


Company


Name

RECENT ENTRIES

 kenwood vineyards

 abc wine shop


 anderson, bill - abc wine shop


 little rock bike

To retrieve opportunities by Address Book entries, use the Quick Search Parameter. For example, if you want to retrieve all the opportunities with ABC Bike Shop, click Address Book Entry and enter ABC Bike Shop. The search text should look like this: ab:ABC Bike Shop.

You can combine multiple search parameters to narrow your search. For example, you can search objective and related Address Book entries together. The search text looks like this: bike to work week ab:beach cycle and sport. This will retrieve opportunities related to "Bike to Work Week" with Beach Cycle and Sport.

Search cases







SEARCH BY

Address Book Entry

Case Number

RECENT ENTRIES

 kenwood vineyards

 abc wine shop

Quick Search retrieves cases by searching subject and description.

To retrieve cases by Address Book entries, use the Quick Search Parameter, Address Book Entry.

You can also use the parameter to search a case by case number. For example, if you want to retrieve a case with a specific case number, select Case Number. The search text should look like this: caseno:00099.

Automatically change search types when switching modules

When you switch module, the search type for Quick Search will be changed accordingly. For example, you switch from Address Book module to the Leads module, the search type for Quick Search will be changed to Leads automatically. Then you switch to the Opportunities module, the search type will be changed to Opportunities.

Search type will be changed when you switch module.



Search for Opportunities...

Other Features

SEARCH NOTES IN NOTES FOLLOWING TAB

In the Notes following tab, you can now search for notes. Enter the text into the search field and press the Search button to search for notes in the selected entry.

ABC Wine Shop

Details Custom Tab Contacts History **Notes** User-Defined Fields Documents Customer Service

	Date	Time	Type	Text	Creator	Full Access	Read Access
<input type="checkbox"/>	April-20-1	10:00 AM	Manual	Called the customer today to confirm the meeting schedule.	Lou Jones	Public	Public
<input type="checkbox"/>	April-17-1	1:26 PM	Manual	Met with Bill to review the project status. The following documents need to be updated for next meeting:	Lou Jones	Public	Public

You can use the filter to specify other parameters such as date range and note types. When you open a note after a search, the text that matches your search string will be highlighted.

GLOBAL EDIT

Support global editing Process and Stage for opportunities

Global Edit in the Opportunities module now supports Process and Stage fields. These two fields need to be edited together. Selecting one field in the Field Picker will add both fields into the Global Edit dialog. You will need to select a process and then select a stage.

Global Edit - Opportunity

Field	Rule	Value(s)
Process	Replace	
Stage	Replace	

+ ADD ANOTHER

SUPPORT GLOBAL EDITING TERRITORY FOR ADDRESS BOOK ENTRIES

Global Edit in Address Book module now supports the Territory field. Please note, with these fields being supported, the legacy Global Edit dialog will be turned off permanently in 2019 release.

CUSTOM TAB


The Note List widget that has been created in Leads module is now available in Custom Tab in the Address Book module. You can view a list of notes, filter the notes and add / modify / delete notes. The previous Notes Widget has been renamed to Notes Timeline widget.


The Contacts widget now allows to expand all or collapsed all.


Press the button to expand
all contacts in the widget


Note list widget is now available in Custom
Tab in Address Book module.

Contacts


ABC Wine Shop
 Date Last Contacted: February-1-18
 info@maximizer.com
 sales@maximizer.com
 (604) 601-8000
 (604) 601-8001
 www.maximizer.com


Anderson, Bill
 General Manager
 Date Last Contacted: April-18-18


DuPont, Gail
 Project Manager
 Date Last Contacted: March-30-18


Johnson, Ed

Notes + ADD All Selected

Customer Service Lou Jones

September-19-18 12:17 PM

Case created: HQ-00010 Case subject: Broken product Compa...

Customer Service Lou Jones

April-20-18 8:27 AM

Case created: HQ-00007 Case subject: Wrong shipping addres...

Manual Lou Jones

April-20-18 7:00 AM

Called the customer today to confirm the meeting schedule.

Manual Lou Jones

April-19-18 12:09 PM

The customer is expanding into new territories and will open n...

Manual Lou Jones

April-17-18 10:30 AM

The company will have new offices opening in two locations n...

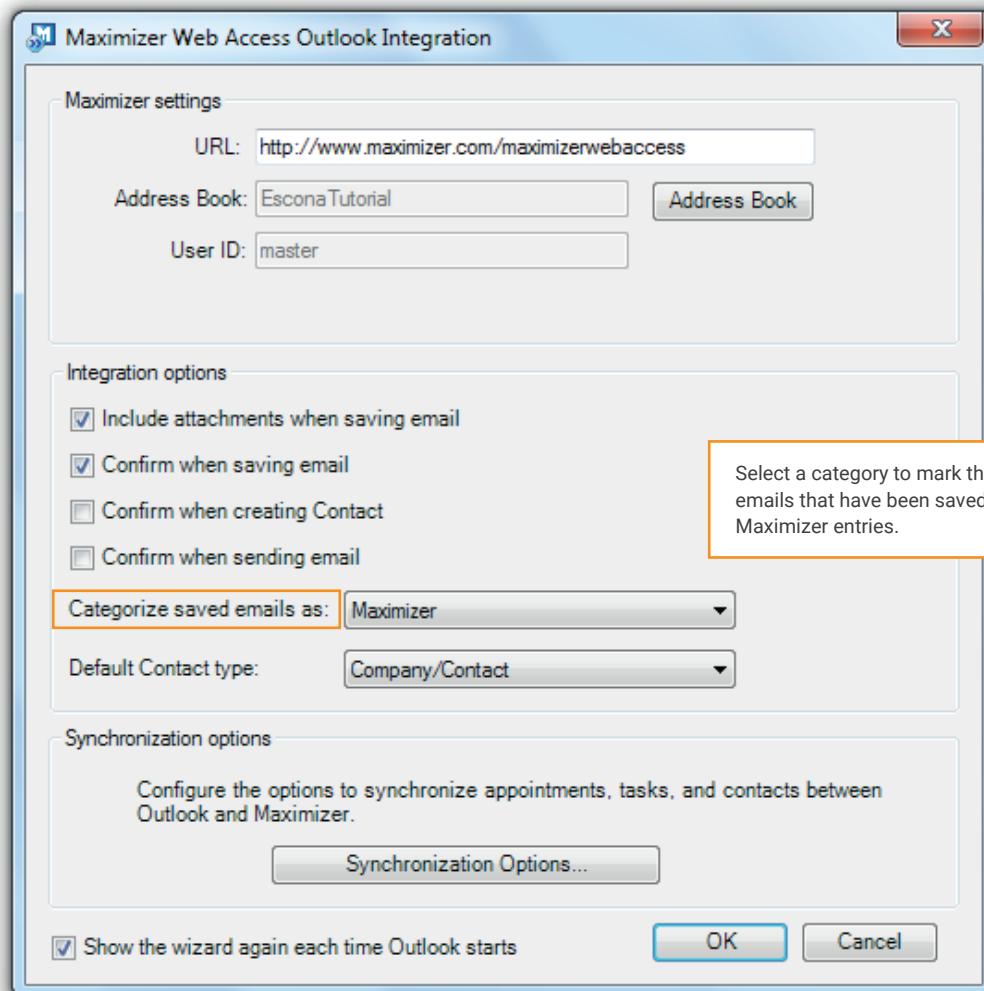
Manual Lou Jones

April-17-18 10:30 AM

OUTLOOK ADD-IN – INDICATION FOR EMAILS THAT HAVE BEEN SAVED TO MAXIMIZER

(New to On-Premise Customers: this feature was released to Maximizer CRM Live in April 2018)

In Outlook, now you can mark the emails that have been saved to Maximizer entries using an Outlook category. In the Preferences dialog for Maximizer Outlook add-in, a new option has been added which allows you categorize the saved email.








The image shows a Windows-style dialog box titled "Maximizer Web Access Outlook Integration". It contains three main sections: "Maximizer settings", "Integration options", and "Synchronization options".

- Maximizer settings:** Includes fields for "URL:" (http://www.maximizer.com/maximizerwebaccess), "Address Book:" (EsconaTutorial), and "User ID:" (master). There is an "Address Book" button next to the Address Book field.
- Integration options:** Contains four checkboxes:
 - ☒ Include attachments when saving email
 - ☒ Confirm when saving email
 - ☐ Confirm when creating Contact
 - ☐ Confirm when sending email
 Below these is a dropdown menu labeled "Categorize saved emails as:" with "Maximizer" selected. Below that is another dropdown menu labeled "Default Contact type:" with "Company/Contact" selected.
- Synchronization options:** Includes a text description: "Configure the options to synchronize appointments, tasks, and contacts between Outlook and Maximizer." and a button labeled "Synchronization Options...".

At the bottom of the dialog, there is a checkbox labeled "Show the wizard again each time Outlook starts" which is checked, and "OK" and "Cancel" buttons.

An orange callout box points to the "Categorize saved emails as:" dropdown menu with the text: "Select a category to mark the emails that have been saved to Maximizer entries."

All emails are saved to Maximizer, regardless of whether they are saved manually or saved by tracking. The category specified in the Preferences is displayed in the Outlook column view.

RECEIVED	SIZE	CATEGORIES	
Fri 06/04/2018 5:03 AM	6 KB	 Maximizer	
Tue 03/04/2018 9:32 AM	6 KB		
Wed 28/03/2018 4:49 PM on the status and what the follow-up actions are. There are some issues rel...	7 KB	 Maximizer	
Wed 28/03/2018 2:49 PM	25 KB		
Wed 28/03/2018 2:49 PM	26 KB	 Red Category	

The category selected in the Preferences dialog are displayed in Outlook to indicate that the emails have been saved.

Go to the App Directory to get the latest update of the Outlook add-in. Note that the latest version of Maximizer Outlook add-in doesn't work with Microsoft Outlook 2007.

NOTIFICATION MANAGER – ALLOW SENDING NOTIFICATIONS BY EMAILS

(New to On-Premise Customers: this feature was released to Maximizer CRM Live in April 2018)

You can now receive notifications by emails. In the Notification Manager go to the wizard page for setting up appearance of a notification, a new option "Send an email when this notification arrives" has been added. If you turn on this option, an email will be sent to you when the notification arrives.

In the email, you can click the link to open the entry in Maximizer.

Toast Type & Color



☐ Display this notification as a Toaster pop-up ☒

☒ Keep the Toaster displayed until I close it

☐ Play a sound when this notification arrives

☒ Send an email when this notification arrives

Your notification is ☒

CASE NOTIFICATION TEMPLATES

Now you can create notification templates for cases. The templates can be created in Web Access > Administration > Template Library. You can insert merge fields for cases into the template. Plain text and HTML formats are supported for the templates.

Template Library

Template Library		
Excel Report Templates	Document Templates	Appointment Email Templates
Case Notification Templates		
Add		
Template ▲	Action	
<Default Template>		
Case Creation Notification	Properties Delete	
Resolve Case Notification	Properties Delete	

Once the templates are created, they will be available in the Administrator module > Customer Service > Notification tab. You can select templates for case creation, assignment, escalation and resolving.

Preferences

for Customer Service Cases > Notification

Fields
Options
Monitoring
Notification

Modify Notification
Save
Cancel

Action Name	Customer Template	User Template
Create		<Default Template>
Assign		<Default Template>
Escalate		<Default Template>
Resolve		<Default Template>

☒ Notify the associated Address Book entry when the case is created
☐ Carbon Copy the associated Partner when notifying Customers

Press the button to select a template for the action.

DATA PROTECTION REGULATIONS - COMPLIANCE CONFIGURATION

With recent changes in Data Protection Regulations, such as the EU General Data Protection Regulation (GDPR), organisations are required to review and better manage personal information. CRM plays a vital role in helping meet requirements for data privacy, security, accuracy and accountability. Maximizer CRM can be easily customised and set up to help manage this process.

Please refer to our [Datasheet: Configuration for GDPR Compliance](#) for more information.

Release Notes

OUTLOOK AND WORD ADD-INS

A new version of Outlook and Word add-ins available in the 2019 release. It is a minor upgrade and you can continue using your existing add-ins. If you would like to use the new features, go to App Directory and download the latest version.

ICON BARS

To clean up the interface, some of the buttons in the Icon Bar that are not commonly used have been removed, including Video Tutorials, User Information and links.

Resolved Cases

If there is a large amount of incoming emails in Outlook, some of them may not be saved by the Outlook add-in automatic tracking function

If you already have many emails in your inbox, automatic tracking may not save some of the emails to or from the email addresses that you are tracking.

Formula field based on opportunity close date doesn't work

A formula field is based on the opportunity close date. If the opportunity close reason is suspended, the formula field doesn't work.

In the Import Manager, downloading the failed entries does not work when using the basic authentication for Web Access

If you configure Web Access to use basic authentication, you cannot download the failed entries after you complete an import.

Dates are changed by Daylight Savings Time during import

If the import file contains dates inside and outside the Daylight Savings date range, the dates inside the range will be shifted one day earlier after import.

Selected List Current function includes entries selected in previous search

You have selected entries on the screen, then you perform a search and select some entries in the search result. If you make the selected list current and perform an action (e.g. Global Edit), the action will be applied to the entries that you selected prior to the search.

Campaign statistics are not updated in Maximizer CRM Live

After an email has been sent to a subscriber and the subscriber opens the email, campaign statistics are not updated.

Related Entry dialog unmovable and blocks adding new relationship type

Unable to add or edit relationship types when adding in Add a Related Entry dialog.

Exception occurs when opening a Hotlist task in Activities screen in Mobile Access

When you open a Hotlist task in Activities screen in Mobile Access, you will get an exception.

Mandatory setting for Article # and Solution Note fields are not enforced

If you have set Article # and Solution Note as the mandatory fields, they won't be enforced if you resolve a case by using the right-click menu.

Email address field should not allow an empty space at the beginning

When editing an email address, an empty space shouldn't be allowed at the beginning. If you enter any spaces, they should be removed.

Related Entry dialog blocks the dialog for adding new relationship type

In the Related Entries following tab, you cannot edit the relationship types in Related Entry Description dialog as the dialog for editing the types is hidden behind the Related Entry Description dialog.

When editing a company, the contact switcher is not disabled

When editing a company, the drop-down for selecting a contact is still available. It should be disabled.

The user who does not have Modify System Tables privilege may see a blank subject field when editing an appointment

You don't have the privilege of modifying system table and you select the first item in the drop-down for the Subject field when creating an appointment. When you edit the appointment again, the Subject field is blank.

Adding hyperlink in email strips out letter "s" from the link text

You add a hyperlink in the email compose dialog. If the text of the link contains letter "s", it will be removed. For example, you type in "Download Files", highlight the two words and click the Hyperlink button. After you convert the text to link, you will see "Download File".

The emails saved by Outlook add-in have read access set to the first user in alphabetical order

You don't have the right to create public entries. If you save an email from Outlook to Maximizer, the default for full access is you. But the read access is the first user in alphabetical order. The read access should be set as default to you as well.

Last Modified Date for a Customer Service case is not updated if a note or document is added

If you add a note or a document into a case, the Last Modified Date is not updated.

The Audit Log report in Web Administrator is very slow when a large amount of opportunities have been changed

If a large amount of opportunities have been changed, the Audit Log Report displayed in Web Administrator will become very slow. This issue has been addressed by introducing paging into the report.

Audit Log Report cannot be loaded in 64-bit Maximizer Web Access

Audit log report cannot be loaded in 64-bit Maximizer Web Access.

Blank user-defined fields are not merged properly in case notification emails

If the user-defined fields included in an email template for Customer Service case notification are blank, the name of the field will be displayed.

Now, the field will be blank

Switching Key Field list in Opportunities changes the sales team leader

You already select a sales team and a team member who is not the default leader of the team. If you switch from a Key Field list that doesn't include Team and Leader fields to one that includes those two fields, the leader will be changed to the default leader.

Dashboard click-through should use a Search Catalog ID plus refinement criteria instead of passing a full search string

Create a saved search based on a table field with many items. If you use this saved search to create an indicator in a dashboard, you may see error when you try to click the indicator to retrieve entries.

Notes for a private entry are displayed in Activity Report

A public note is created for a private Address Book entry. It shouldn't be visible to other users. But in Activity Report, the note is visible to other users.

Latest version of Edge doesn't send email notification when assigning a new task to another user

In Edge browser, if you create a new task and assign it to another user, an email notification won't be sent to that user.

Error message displayed when sending or saving an email in Outlook add-in with Outlook 2016 using a POP3 account

When sending or saving an email in Outlook add-in with Outlook 2016 using a POP3 account, an error will be displayed: "The operation cannot be performed because the message has been changed".

Letters in a string will be removed if the string is converted to a hyperlink in email compose dialog

You add a string with letter s into email compose dialog. After you convert the string into hyperlink, letters will be removed.



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

Vivek Thomas, President

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