MAXIMIZER CRM

2016

What's New Feature Guide
(For Maximizer CRM 2016 Release 2)

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Web Access

Auditing for opportunities and customer service cases

The Auditing tab is now available in Opportunities and Customer Service module. You can track the changes made in individual opportunity or case, including changes in basic fields, user-defined fields, notes and documents.

Auditing tab for Opportunities

The settings for opportunities and cases auditing are available in the Auditing screen in Administrator. You can also generate system auditing reports to view the changes made across all opportunities or cases. The result of the reports can be exported to Excel files for archive.

Auditing screen in Administrator

Settings for turning on auditing for opportunities and cases

Select Opportunities or Customer Service from the drop-down to generate a system report that shows the changes made across all opportunities or cases.

Conditional mandatory fields for customer service cases

Conditional mandatory fields are now supported in customer service module. When you work with cases, you can specify that user-defined fields are mandatory if a rule is matched. The mandatory rule is a formula using the same syntax as formula user-defined fields. It can contain basic fields and user-defined fields.

When you save a case, Maximizer will check if any mandatory rule is matched and make the associated user-defined fields mandatory.

Setup user-defined fields for cases
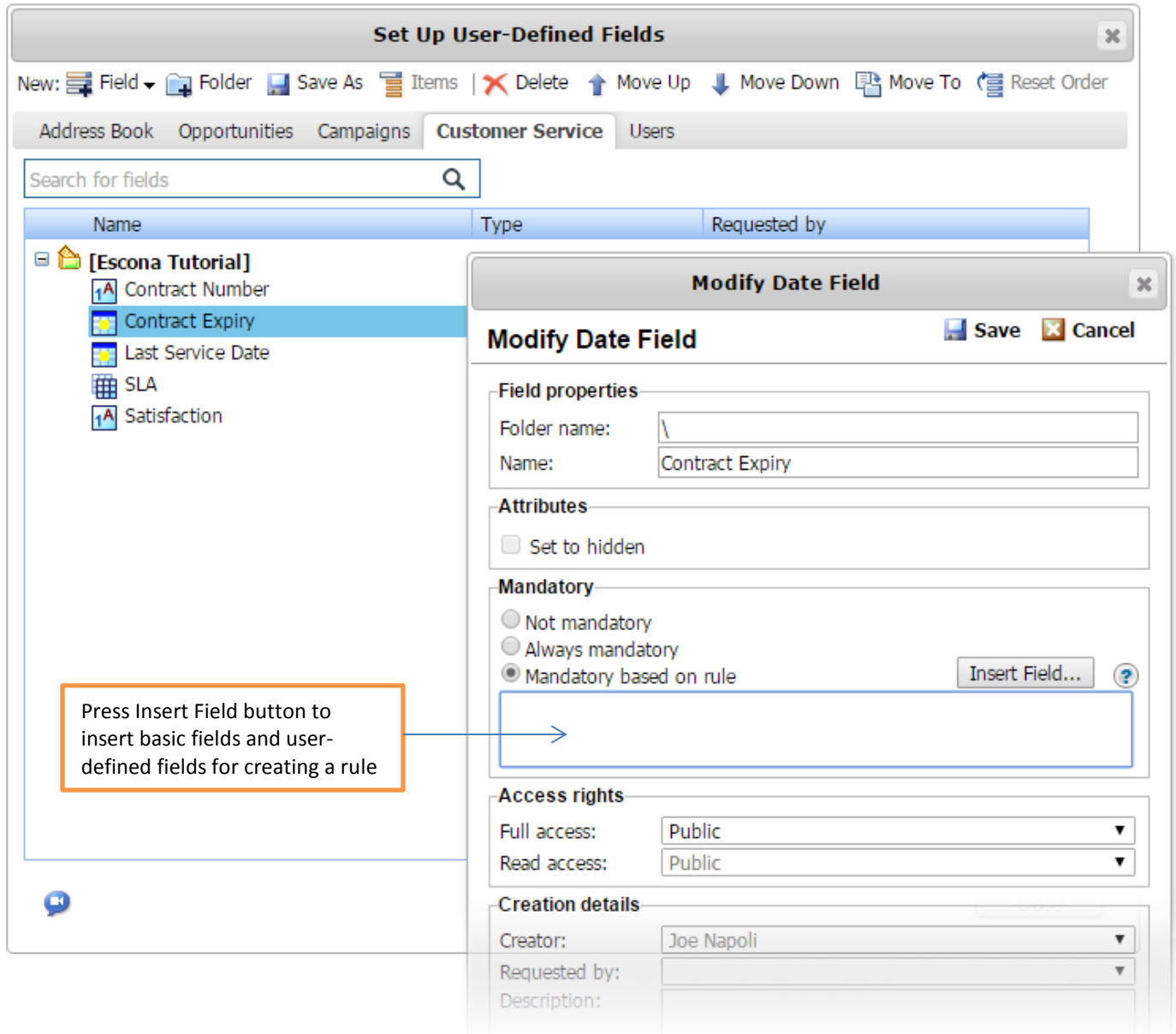
Upload multiple files at the same time in Documents following tab

You can now upload multiple files at the same time in Documents following tab. In the Add Document dialog, you can select multiple files by pressing the Browse button or by dragging and dropping files into the dialog directly. In on premise version, the default maximum file size for each selected file is 10M and maximum number of files is 10. You can change the settings through the configuration file. In CRM Live, the maximum file size for each selected file is 50M and maximum number of files is 10.

Dialog for Add Document
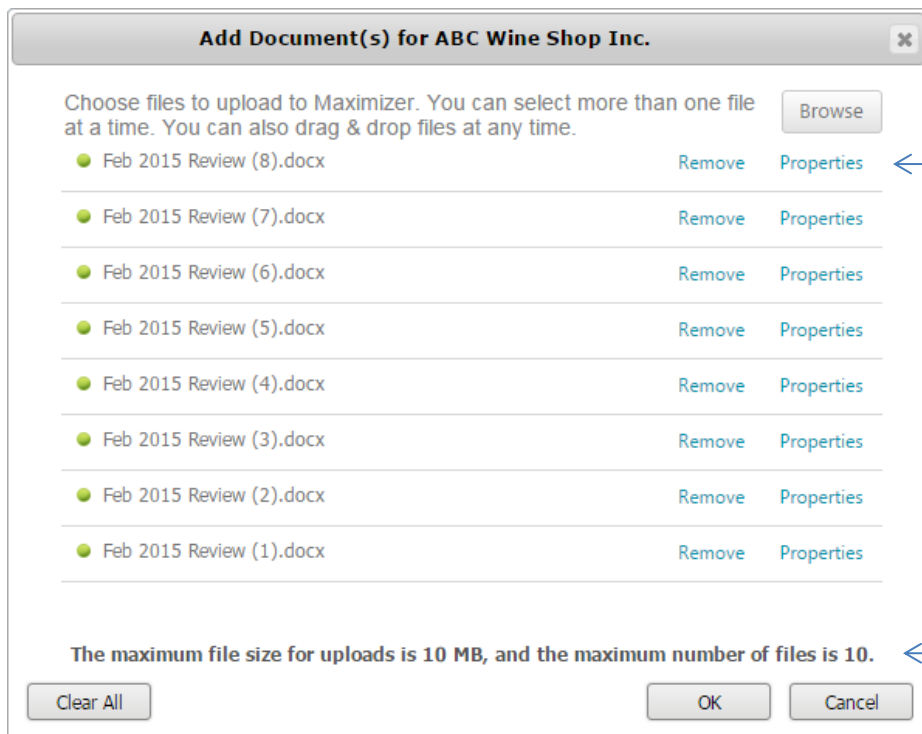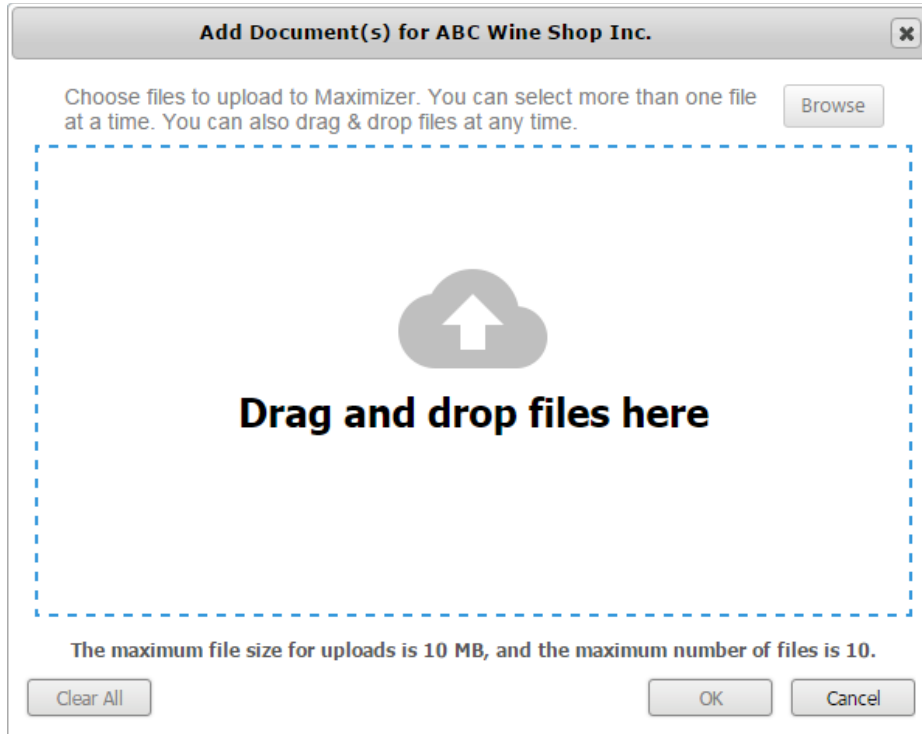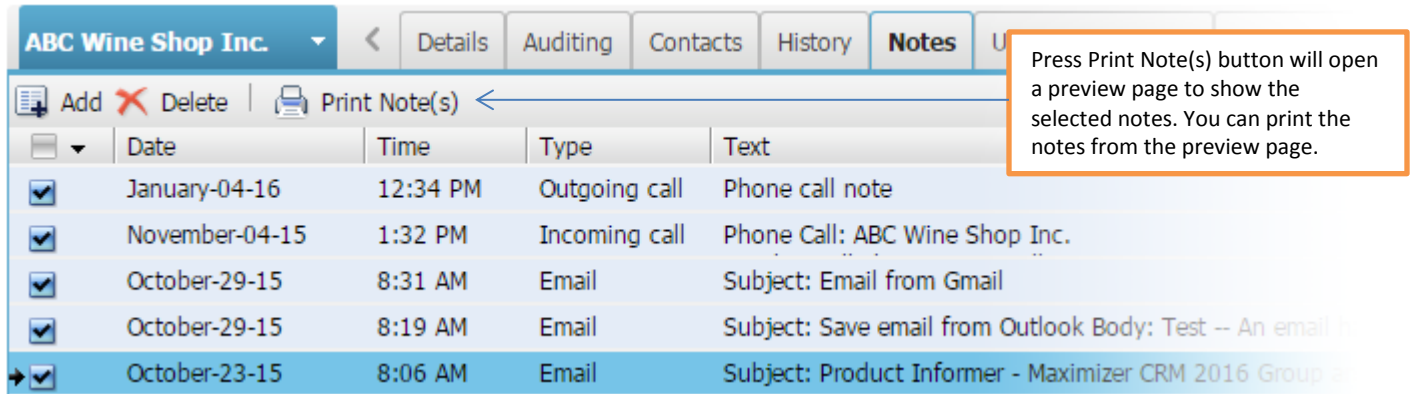
By default, the file name will be used as the document name. Press the Properties button will open a dialog that allows you to enter a new name for the document, specify full access and read access, and select a category.

The maximum file size applies to each file.

Allow printing multiple notes at the same time in Notes following tab
You can now select multiple notes in the Notes following tab and print them in a report.
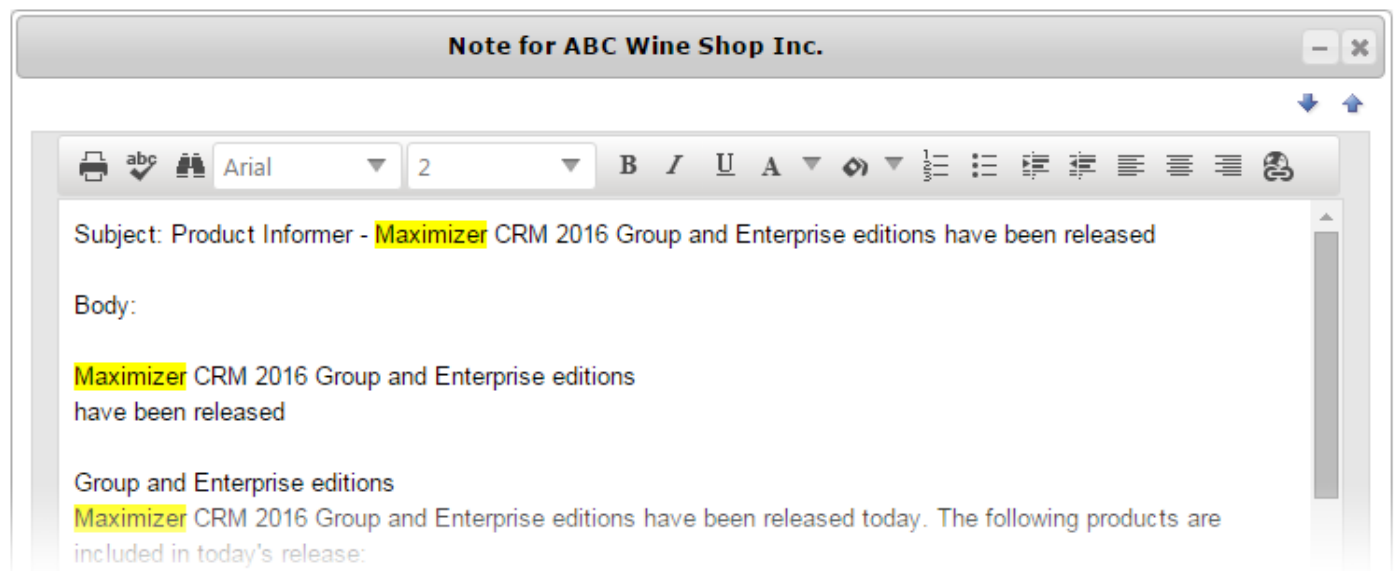
Press Print Note(s) button will open a preview page to show the selected notes. You can print the notes from the preview page.

Note search – Highlight the text that matches the search string
You search entries by notes. The notes that match the search criteria will be displayed in the Notes following tab. When you open a note, the note text that matches the search string will be highlighted.

Note filter - Allow check all / uncheck all note types

There are many checkboxes for the note types in the note filter. You may want to unselect all of them and select only a few that are relevant to you. Now you can easily select all or unselect all the checkboxes.

Filter the entries you would like to be displayed

Date range

Show notes for: All Dates ▼

Notes

Select the notes that you would like to be displayed

Check All   Uncheck All

☐ Accounting   ☐ Customer Service   ☑ Email
☑ History   ☑ Incoming calls   ☑ Mail-outs
☒ Manual [+]   ☐ Opportunity   ☐ Other
☐ Outgoing calls   ☐ Task   ☐ Timed notes
☐ Transfer log

OK   Cancel

The dash symbol in the checkbox for Manual note indicates that not all the categories are selected.

Quickly locate a field in various dialogs

If you have many user-defined fields, it can be difficult to find a field for creating a saved search or inserting a merge field. Now the search field is available in the dialogs for advanced search, column setup, insert merge field, formula user-defined field, coloring rule, and Key Fields. The field allows you to quickly locate fields in the tree structure.

Select Fields for Search

Available fields:

promo

☐ Combined Partner and Internal Sa
2011-2012 Campaigns and Sales
☐ Received 2011-2012 Email Ca
☐ Accepted Winter Promotions
Sales
Marketing
☐ Promotions
☐ Subscription
☐ Heard About
☐ Promo level
Customer Service
Partner (Retail-Reseller) Info
Customer Profile
Discount Levels
Wine Preferences
Wines of Interest
☐ Customer Interests

3 result(s) found.

Selected fields:

OK   Cancel

The search field that allows you to search for a field in the tree structure

After a search has been performed, the folders that contain the matching fields will be expanded. The fields that match the search string will be highlighted.

Search for a specific field in User-defined Field tab

The search field is available in User-defined Fields following tab. It allows you to search for a field and change the value quickly.

Print the details of an Action Plan in Action Plan Library

Now you can print the detail report for an Action Plan. This will make it easy for you to review a plan and decide what improvement you can make.

Outlook Add-in

Allow selecting multiple entries in search dialogs

When you search for Maximizer entries for saving an email, you can select multiple entries in the search dialog. This will make it easy for saving an email to multiple contacts in the same company. You can also view details of the selected entries in Maximizer.

Allow sorting in email tracking list

The email tracking list can be sorted now. You can easily find those people who you would like to remove from the list. Last name is sorted by default.

Allow download the latest version in the warning message

When a new version of Word or Outlook add-in is available, you will be prompted with a message. Now you can download and install the new version from the message.
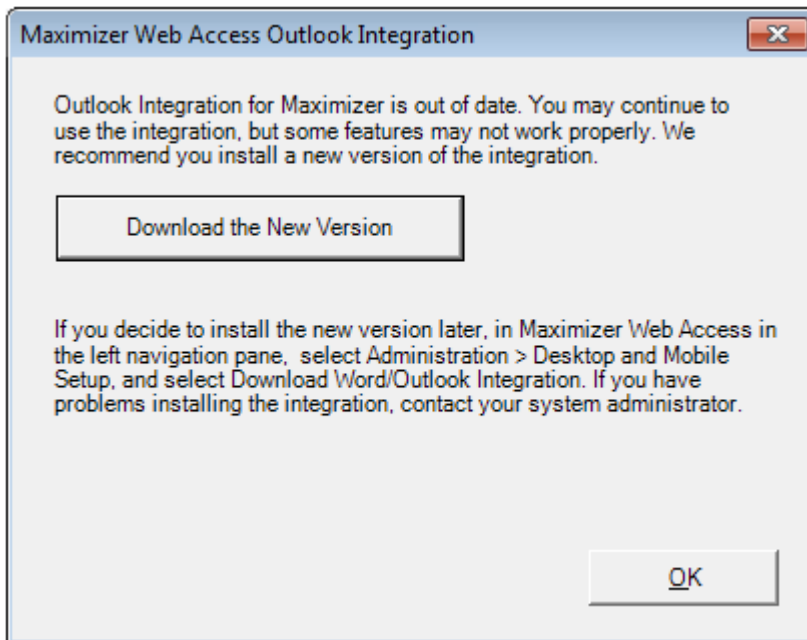
Press the button to download the new version. You can install the new version on top of the existing version.

Display email address when saving an email

When you try to save an email to a Maximizer entry but no entry with matching email address can be found, you will be prompted with a message. Now the email address and the contact name will be displayed in the message. This will help you to avoid accidently saving or tracking a wrong email such as an email from a colleague.

Email address and the contact name are displayed.
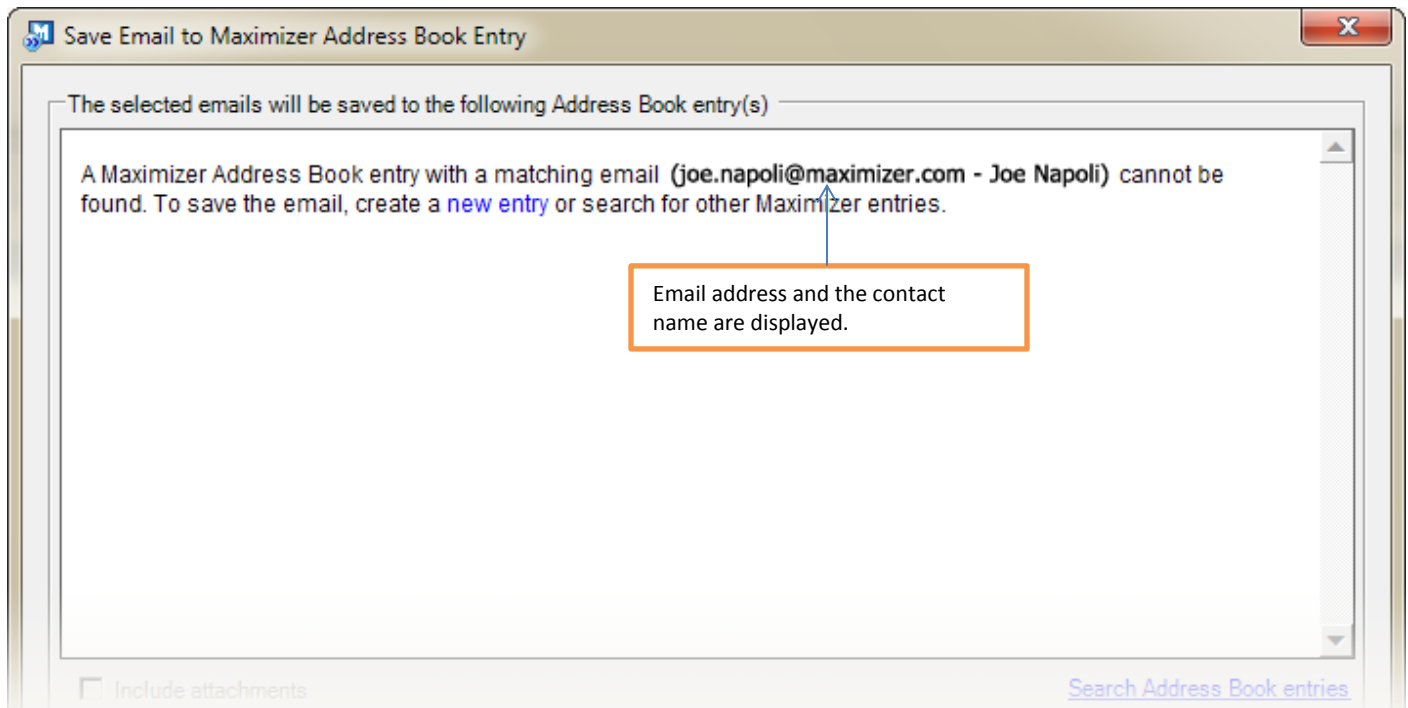
Outlook sync improvement

Improvements have been made in Outlook add-in for syncing appointments with Maximizer. The main improvements include:

- Corrupted Outlook appointments will no longer cause the sync to stop, leading to duplicates being created on the next sync session
- Syncing on multiple machines assuming it is exactly the same MS Exchange account being used on each won't cause duplicate entries to be created. This does NOT work with if the profile is using pop3 or some other type of mail.
- Additional logging available for customer service reps to try and diagnose problems that may occur.

Wealth Manager CRM

Changes in Wealth Manager CRM

The updated Wealth Manager CRM includes following changes:

- Opportunities module has been renamed to Accounts.
- Office Documents has been renamed to Office Files.
- Documents following tab has been renamed to Files.

Note that all the new features implemented in Maximizer CRM 2016 R2 are also available in Wealth Manager CRM.
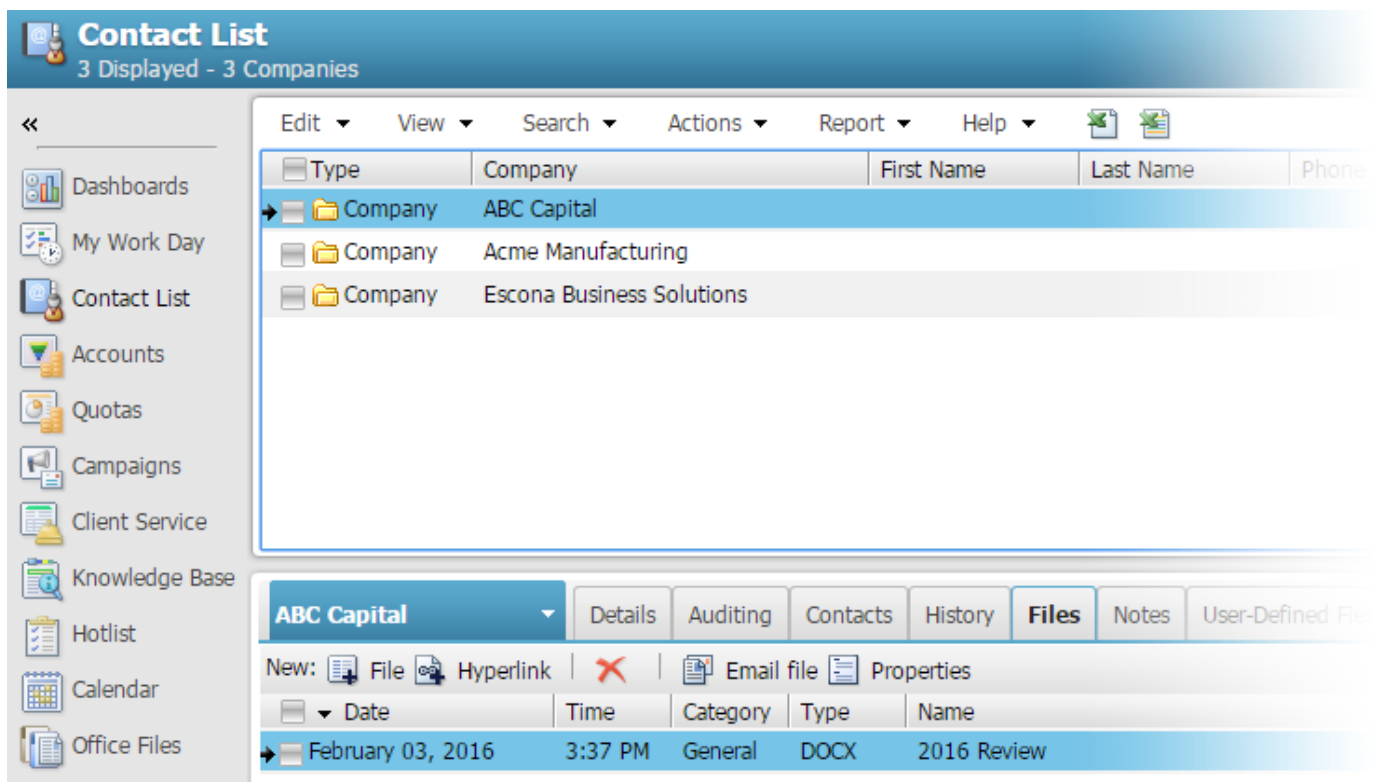
French version for Maximizer CRM 2016 R2

Maximizer CRM 2016 R2 will include a French version. It will be available for on premise and CRM Live.

Issues fixed since Maximizer CRM 2016

Searching by close date in last fiscal quarter returns all opportunities from the last fiscal quarter and the previous quarters
Category: Windows Access - Opportunity, Searching
In Windows Access, if you are doing a search by opportunity close dates in the last fiscal quarter, instead of returning just the opportunities with the close dates in last fiscal quarter, the opportunities in the fiscal quarters before the last quarter will also be retrieved.

Basic field's drop down items shouldn't allow hidden items
Category: Details tab
If you are trying to add items to basic field drop downs such as Position, Department, Division etc., you are given the option to make the Item hidden which actually isn't supported for those fields. This checkbox should be removed in this case.

Forwarding message saved to Documents tab by Outlook add-In adds extra spaces and changes font
Category: Email
If you have saved an email in HTML format to the Documents following tab of an entry using the Outlook Add-in and you choose to forward the email to someone else via Web Access after opening it, extra spaces are added to the forwarded message and some fonts will be changed as well.

Outlook sync (Web Access): Recurring appointment for March 29 in Maximizer causes error and sync failure
Category: Outlook add-In
If you create an appointment in Maximizer that recurs yearly for 2 years and the start date is March 29, 2015, you will get the message "The recurrence pattern is not valid" when attempting to sync appointments to Outlook using Maximizer Web Access Outlook sync.

Large number of alternate addresses causes performance problem when editing Address Book entry in Web Access
Category: Web Access - Address Book
In Web Access if you have an Address Book entry that has a large number of alternate addresses, it takes a very long time to load the edit screen or save the changes. This severely affects performance.

After perform quick search in IE then add a note, text in Quick Search field cannot be changed
Category: Searching
Using Web Access in IE, perform Quick Search to look for Address Book entries. After you get the results and add a note to an Address book entry, you can't click into the Quick Search field again.

Last Modify Date not updated in Address Book entry when email saved via Outlook add-In
Category: Outlook Add-In
You are using Outlook add-in to save an email to an Address Book entry in Maximizer. After it is saved, the Last Modify Date of the Address Book entry is not updated.

Windows Access not treating searching by rolling date range correctly

Category: Searching

If you search by a date field in Windows Access via a rolling date range (such as 6 months from now), it doesn't start from today.

In the French version for Web Access, "Rappel d'alram" (snooze) button doesn't work

Category: Web Access - Alarms, Localization

In French version for Maximizer CRM 2015 R2 Web Access, an alarm comes up and you click "Rappel d'alram" (snooze). When choosing how long to snooze, the button shows "Rappel d&#39alram". The apostrophe is not displayed and the button is inactive.

iCalendar attachments not following iCalendar standard in email notifications

Category: Calendar, Email

Email notifications sent out with iCalendar attachment don't follow the standard properly. If MS Exchange server is not involved, they come in as plain text.

Runtime error happens when trying to open Preferences in Web Administrator

Category: Administrator, SaaS, Users Dialog

Sometimes when you open the Web Administrator module and go to Users screen, select one user and click Preferences, you will get an error page which shows 'Runtime Error'.

Outlook Sync (Windows Access): "Accepted" removed from group appointment

Category: Appointment

You are using Windows Access to perform synchronization of appointments to Outlook. If you create a group appointment then sync it to Outlook, it will show your response as Accepted. After the next sync, your response will no longer be shown as "Accepted".

Greek characters added into the manual notes are displayed incorrect in Note report

Category: Web Access - Reports

In on -premise Web Access and in CRM Live, you have configured your database to accept Greek characters. If you add a manual note with Greek characters in it, this will cause problems in note reports. The Greek characters look right in the UI, but the report shows the codes instead.

The font in the printed note is really small in IE11

Category: SaaS, Web Access, Notes

If you are using Web Access in IE and you open a note to print it, the font in the printed copy is very small. This doesn't happen in FireFox or Chrome.

Import MXI / XML file in Web Access fails if importing documents with Category tag

Category: SaaS, Web Access - Import / Export

When importing an MXI/XML file into Web access / CRM Live and it contains documents assigned to the entries that also include a Document Category, such entries won't be imported.

Last search returns no results if the previous search was searching for an AlphaNumeric UDF

Category: SaaS, Searching, Web Access

In Web Access Advanced Search if you search for an Alphanumeric UDF but leave the search criteria blank, it will return all the records with something in that field as expected. After you re-open Advanced Search and click Last Search and search again, no result is returned.

Export to Excel for opportunities

Category: Export to Excel

Export to Excel for opportunities is not optimized in Maximizer Web Access. This causes exporting a large number of entries to be very slow.

Print preview for a note containing table adds extra space

Category: Web Access - Notes

You add a note to an entry, copy a table from Excel into it then save the note. When you reopen the note, it will still look properly. However, if you decide to print it, in the preview screen there will be extra spaces added and sometimes the cells are misaligned.

Interface Customization not showing entry type in column setup changes

Category: Customization

You use the Customization Suite to customize field names. The Entry Type which is a field and can be displayed in column setup won't show the custom name for Company, Individual and Contact. Also Account Manager is not changed if customized using the Interface Customization tool.

In IE11, a note cannot be added to History tab after adding note in Notes tab

Category: Web Access - History, Notes

In IE11, you go to the Notes tab, add a new manual note. Then go to the History tab and try to create another note. When you click in the text field, you can't type anything as the cursor doesn't appear there.

Editing note "jumpy" if bigger than the editing window

Category: Web Access - Notes

In Web Access or CRM Live, you create a note for an entry and the text is longer than the editing window such that a scroll bar is necessary to scroll through the note text. After you save it and come back to edit it later, it will "jump" from where you are editing to the top or bottom of the field.

In print preview for some notes, text formatting (bolding or color) is not displayed correctly

Category: Web Access - Notes

If you have text with special format such as bold or different colors in the middle of the notes, all the text after those text will have the same format. For example, you will see bolded text from the middle of the note all the way to the end.

Some emails sent twice when sending separately from Web Access or CRM Live

Category: Web Access - Email

When sending the email separately to a list of entries and also sending a copy to yourself, it will send the mail twice to some of the entries in the list.

Sometimes phone note cannot be saved in CRM Live or Web Access

Category: SaaS, Web Access - Notes, Phone Calls

In CRM live or Web Access if you start a phone note and try to save it when you are done, clicking Save sometimes will look like it is doing something but it will just come back again. It will not save, forcing you to close the dialog without saving the note.

Advanced Search for date UDF with Ignore Year option doesn't allow February 29

Category: Searching

If you do a search in Advanced Search including a date UDF and you set Ignore Year option, you can't choose Feb 29 as it is shown as invalid.

User with "Modify other users' private entries" can't delete opportunities if the user is not a member of the team that is assigned to the opportunity

Category: Opportunity

In Web Access, if you have a user such as MASTER that has the privilege of "Modify other users' private entries" that user should be able to delete any Opportunity. However, unless the user is either a team leader of a team assigned to an opportunity or a member of a same team with Edit rights, the user can't delete the opportunity.

Can't save an email address in Web Access with an & sign in it

Category: Email

In CRM Live and Web Access if you have an email address with an "&" sign in it, it is considered an invalid email and won't be saved.

Sort order of Key Fields in right column doesn't work properly if there are too many fields

Category: Key Fields

When you set up a Key Field list with over 30 fields in the right column, the sort order will not be saved properly but should be.

Outlook add-in saves email to client with creation date instead of send date

Category: Outlook add-In

In Outlook you start to create an email then save it as a draft. Days later you come back and finish writing it. You use the Outlook add-In to send the email and save it to Maximizer. When you check the email in the Documents tab of the Address Book entry it was saved to, it will have the date you created the email in Drafts not the date it was sent.

Email service can hang if certain invalid email address assigned to campaign subscriber

Category: Campaign Manager, Email

If you have a certain type of invalid email addresses assigned to Address Book entries, and you subscribe that entries to a campaign without validating the email addresses, when the email service tries to send campaign email to those addresses, the service will hang and use up a lot of CPU. You must end the process to stop it.

Saved plain text emails containing accented characters not shown properly

Category: Email

If user sends a plain text email and enters some accented characters in the email, the saved email will not show the characters properly when the email is opened.

Edge browser: Revenue field value removed

Category: Opportunity

If a user opens an opportunity with a value in Revenue field in the Details tab, the value is not shown. If user saves the opportunity without entering some value, the previous value is removed.

Showing Quotas by Quarter shows wrong in Web Access If Fiscal Year doesn't start in January

Category: Quota Management

In Web Access if you have set up quotas and you have set the fiscal year to start in August for example, when you look at your Quotas in the Quotas window, it will show it properly for Monthly and Yearly view. However in Quarterly view, it still shows as if the fiscal year ran from January to December.

Can't move a contact to a company/individual if the target Address Book entry has an apostrophe in the name

Category: Address Book / Clients

In Web Access, if you are trying to move a contact to another company/individual, if that target Address Book entry has an apostrophe in the name you can't select it to move the contact to. (E.g. O'Connors Manufacturing)

Save and Track in opened email in Outlook saves wrong email if on different email in Inbox

Category: Outlook Add-In

In the Outlook Add-In if you are in Outlook, and you open an email then go back to the inbox in Outlook and move to a different mail, then return to the open email and click Save and Track within that window it will try and do that action to the mail in the inbox highlighted instead of the one you have open.

Merge Fax field in Word Add-in not merging in Address Book entry phone number marked as Fax

Category: Word Macro

If you are using MS Word to make a template to merge Address Book entries in Web Access with, one of the available fields is called Fax. Traditionally this field is used to merge in whatever phone number in Maximizer corresponds to its Description field having the following in it: Fax, FAX, Facs or FACS. However regardless of which of those four is in there, it still does not merge a number in.

Internet Explorer browser: Performance issue with multi-value control in Details tab

Category: Details tab

If a user-defined field with huge number of items, in thousands is in Key Fields list in Details tab, and a user expands the item list it takes very long time for the list to populate. Even worse is trying to type to search for the item. Other browsers are much faster.