



Maximizer CRM 2017 R2

Feature Review Guide

Published By |



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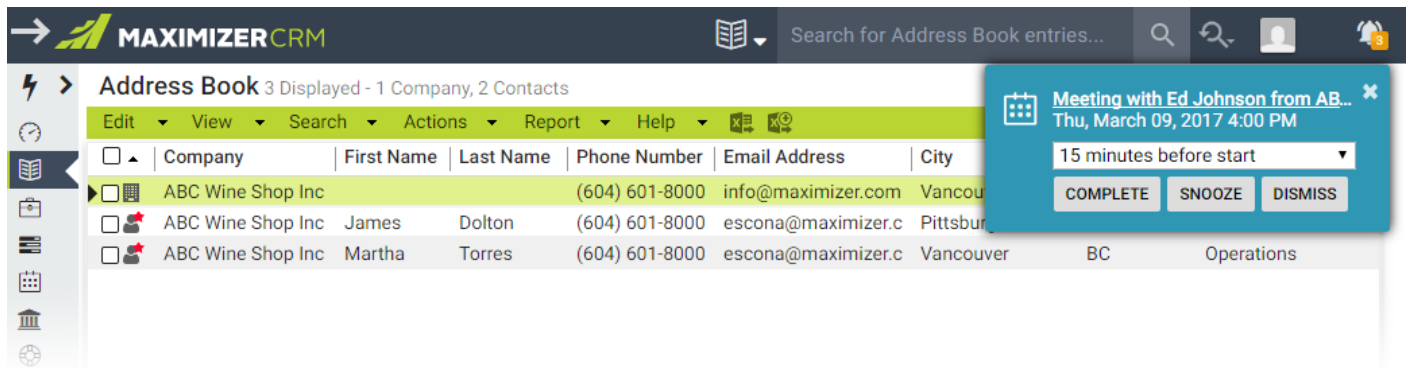
Contents

CONDITION-BASED NOTIFICATIONS	4
Setup Notifications	5
Notification Manager	5
Enable Notification Service	6
Enable Audit Log	8
Setup Notifications for Each Module	9
Display Notifications	14
USER EXPERIENCE IMPROVEMENTS	16
Unlimited Quick Access Shortcuts	16
Searching for User-Defined Fields in Global Edit Dialog	18
Deletion Protection	18
Moving Multiple Entries from Following Tabs to the Main Grid	19
Actions Panel in Following Tabs	20
Maximize Following Tabs	21
ENHANCEMENTS FOR CALENDAR AND APPOINTMENT DIALOGS	22
Expand Timeslot Height to Show More Information of an Appointment	22
Select Pre-defined Appointment Subjects	23
Automatically Expand the Height of the Description Field	23
Conflict Checking when Rescheduling an Appointment by Drag and Drop	24
QUICK SEARCH ENHANCEMENT	25
MOBILE ACCESS	27
User Interface Refresh	27
View Other Users Calendar	28
OUTLOOK ADD-IN SYNCHRONIZING CONTACTS	30
TECHNICAL FEATURE	31
Support 64-bit in On Premise Environment	31
RESOLVED ISSUES IN MAXIMIZER CRM 2017 R2	32

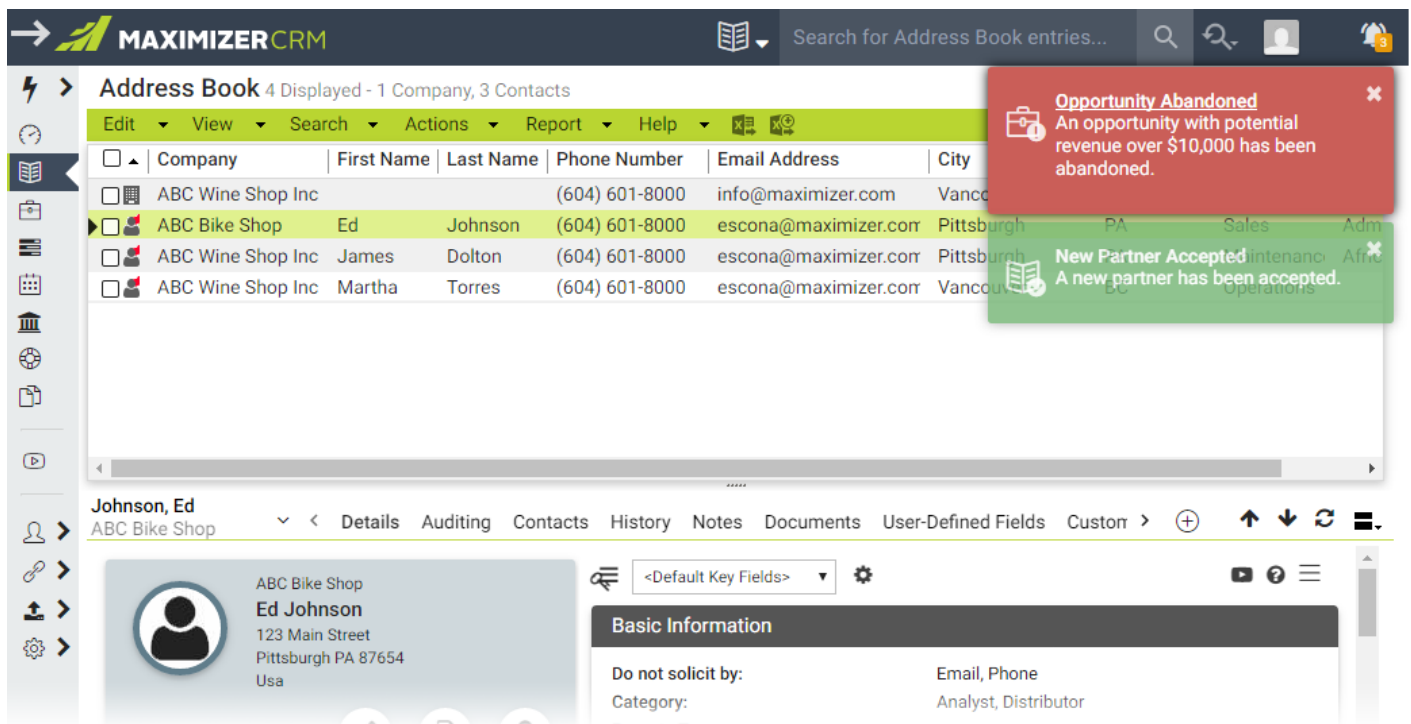
Condition-Based Notifications

Maximizer CRM 2017 R2 allows you to set up condition-based notifications for Address Book entries, opportunities or Customer Service cases. These notifications will appear within your Notifications Panel, where historically only alarms and meeting notifications appeared.

The notifications will appear when entries have been created or modified that match criteria you've defined. You can optionally display these notifications as Toasters, which will automatically pop-up making the condition-based notifications much more evident and noticeable.



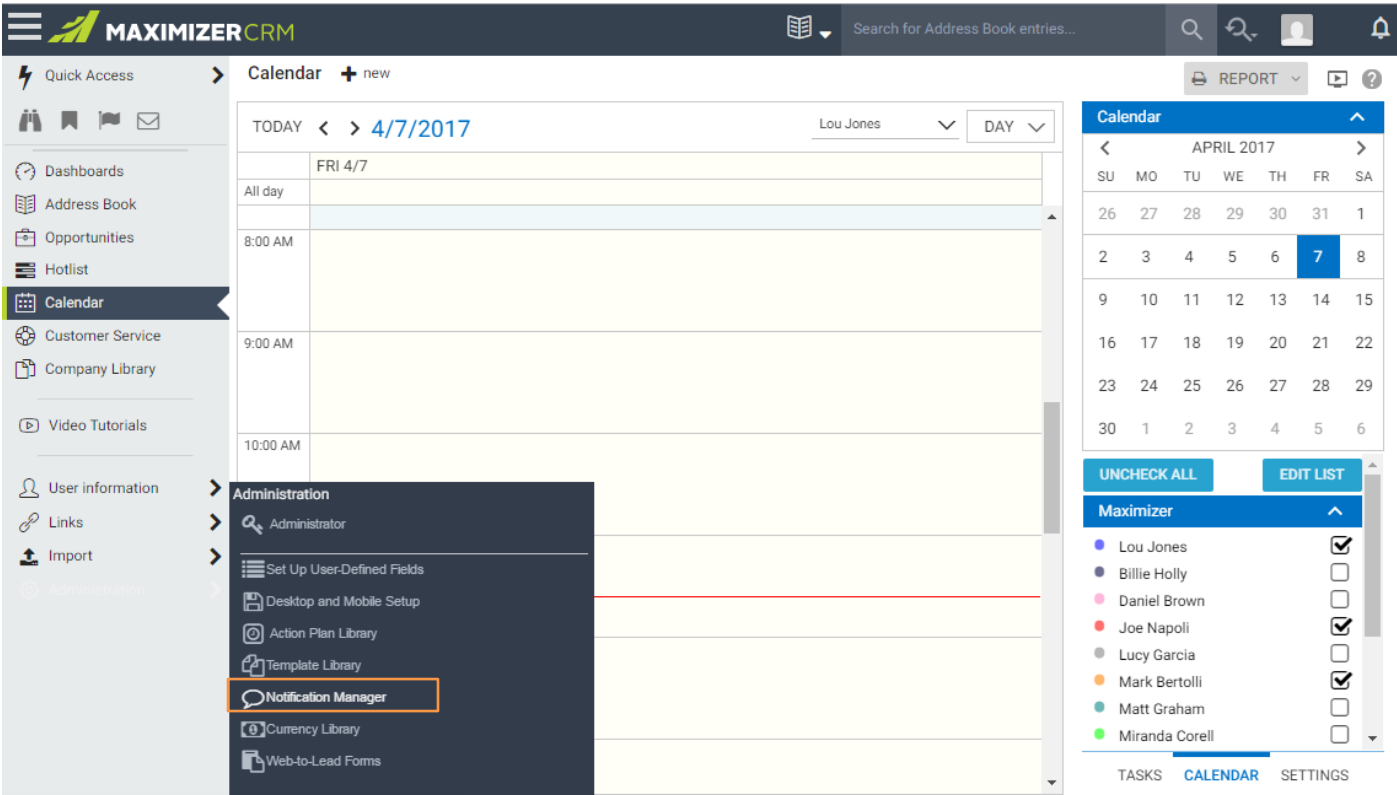
Example Toaster Notifications for an abandoned opportunity and a new Address Book entry.



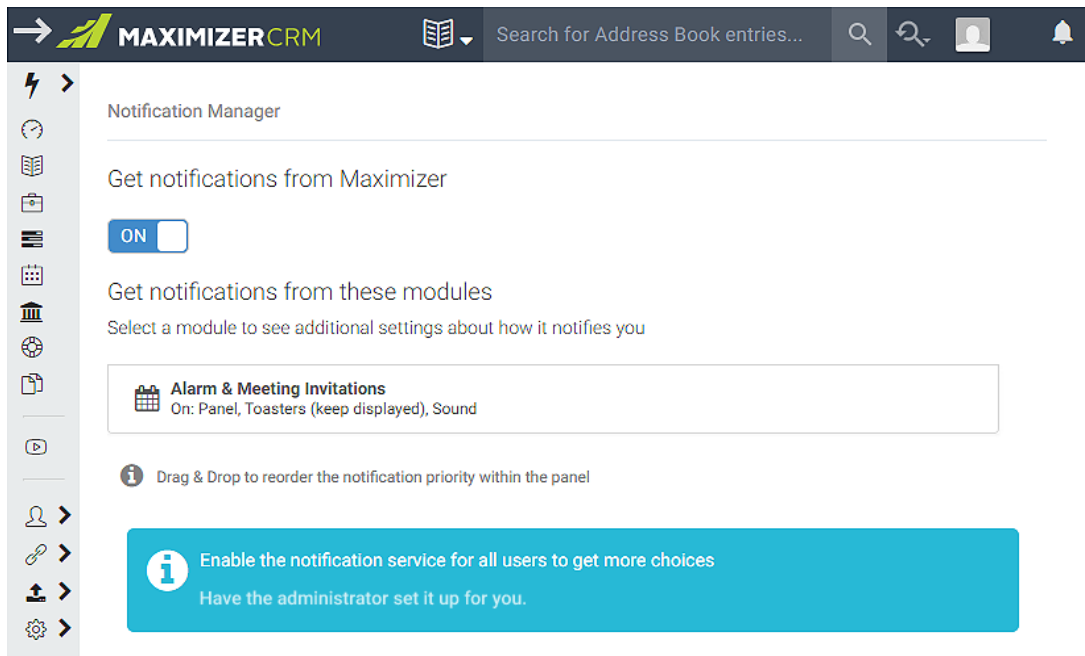
Setup Notifications

Notification Manager

The Setup of your notifications is managed through the Notification Manager. To access the Notification Manager, hover over Administration in the bottom left corner, and then click on Notification Manager to bring up the interface.

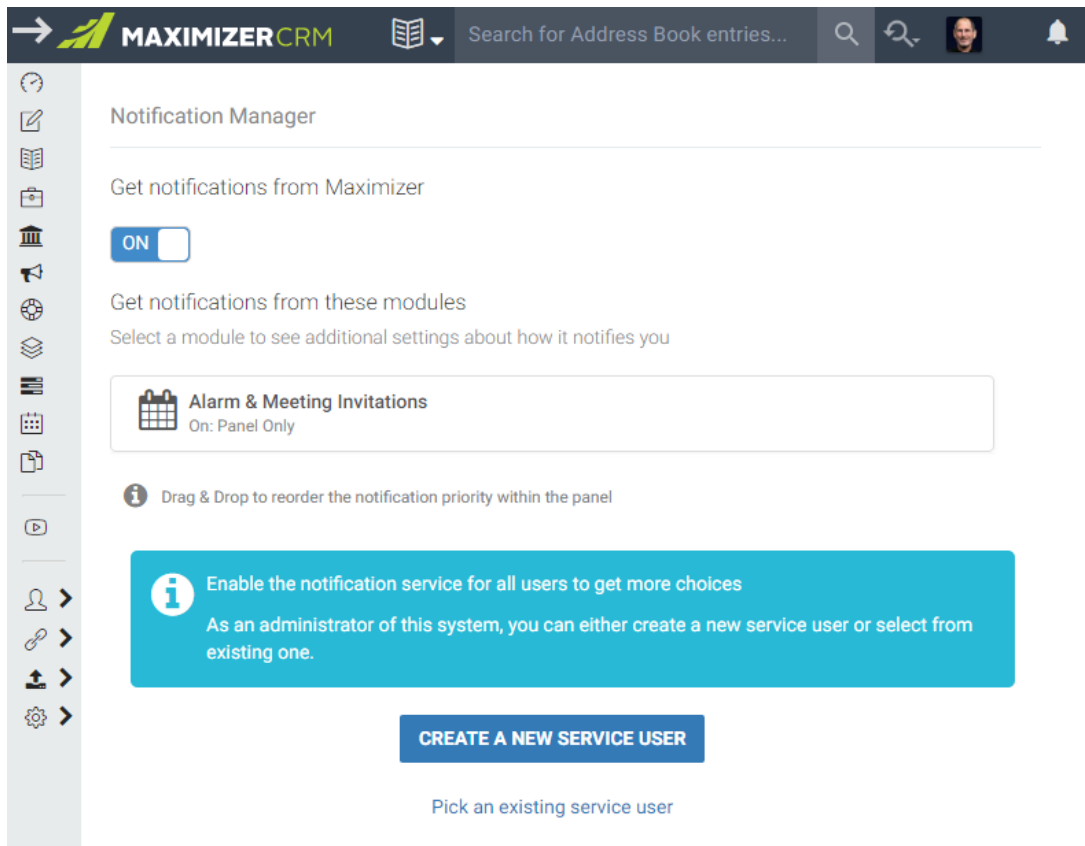


If you are not the **Maximizer Administrator**, you will see the screen below. You can enable notifications for alarms and meeting invitations, but you cannot create notifications for other modules until your Administrator enables this functionality.



Enable Notification Service

Before notifications for Address Book entries, Opportunities or Cases can be created, the **Maximizer Administrator** needs to enable the Notification Service by creating a New Service User or selecting an existing service user.



Clicking on Create a new Service User will present the Administrator with this dialog. The User ID will default to the above illustrated name. Create and confirm a Password for the Service User and save.

Create a new Service User

This will create a new service user to monitor the activities of all users. It is a necessary piece of the notification module.

User ID

NOTIFYSRV

Enter the user ID of the service user

Password

Create a password

Password Confirmation

Retype your password

SAVE

CANCEL

Enable Audit Log

The Administrator will next be presented a screen to enable the Audit Log.

The screenshot shows the Maximizer CRM interface. At the top is a dark header with the Maximizer CRM logo, a search bar, and user profile icons. A left sidebar contains various navigation icons. The main content area is titled 'Notification Manager' and includes a toggle for 'Get notifications from Maximizer' set to 'ON'. Below this, it says 'Get notifications from these modules' and 'Select a module to see additional settings about how it notifies you'. A table lists four modules: 'Address Book' (On: 2, Off: 6, ACTIVE), 'Opportunities' (On: 3, Off: 2, ACTIVE), 'Customer Service' (On: 4, Off: 0, ENABLE), and 'Alarm & Meeting Invitations' (On: Panel Only). A blue information box at the bottom states: 'Administrator: If a module is not ACTIVE then notification are not being collected for your users. You can either click to ENABLE the module or activate the audit log from the administration module.'

Module	On	Off	Status
Address Book	2	6	ACTIVE
Opportunities	3	2	ACTIVE
Customer Service	4	0	ENABLE
Alarm & Meeting Invitations	On: Panel Only		

The audit log for the module in which you want to generate the notifications must be enabled by your Maximizer Administrator.

Only the Maximizer Administrator can view the status of the audit log. If the audit log is enabled for the desired module, a checkmark will be displayed. If the audit log for the module is not enabled, you will see the Enable button. Press the button to enable the audit log. Enabling the Audit Log is required because any module for which the Audit Log is not enabled will not be available for your users. As a result, users will not be able to create notifications for that specific module.

Setup Notifications for Each Module

Once the Administrator has completed the setup for Notifications, you will be able to set up your Notifications via the Notification Manager.

The main switch on top of the screen controls whether you will see notifications or not. If it is off, the Notification Panel will be hidden. You won't see any notifications.

Click on each module to create notifications for that module.

Notification Manager

Get notifications from Maximizer

ON

Get notifications from these modules

Select a module to see additional settings about how it notifies you

Module	Notifications On	Off
Opportunities	3	2
Address Book	2	6
Customer Service	4	0
Alarm & Meeting Invitations	On: Panel Only	

Drag & Drop to reorder the notification priority within the panel

Administrator

If a module is not ACTIVE then notification are not being collected for your users. You can either click to ENABLE the module or activate the audit log from the administration module.

Notifications
Thu, Mar 09, 2017

Opportunity

Opportunity Abandoned	2:06 PM
An opportunity with potential...	

Address Book

New Partner Accepted	3:16 PM
A new partner has been acce...	

Alarms

Meeting with Ed Johnson f...	24mir
Thu, March 09, 2017 4:00 PM	
Project Planning Meeting	Wed
Wed, March 08, 2017 9:00 AM	

You can re-order the modules by drag & drop. In Notification Panel, the modules will be displayed in the same order.

Setup notifications for alarm and meeting invitations

The setup of notifications for alarms and meeting invitations in Maximizer CRM 2017 R2 is consistent with earlier builds. The R2 release offers the option to display the alarms and invitations in Toasters.

Notification Manager > Alarm & Meeting Invitations



Alarm & Meeting Invitations

Options for ALL alarms & invitations

General settings for Alarm & Meeting Invitations notifications

Number of notifications visible in the panel

The Alarm & Meeting Invitation notifications are system generated at this time. Individual notification cannot be edited.

Get Notification for All Alarms & Invitations

☒ ON

This switch is linked with the setting in Preferences. (Preferences > Other Preferences > Calendar/Hotlist > Ignore all alarms and notifications)



Display this notification as a Toaster pop-up

☒ YES

☐ Keep the Toaster displayed until I close it

If you would like to see toasters for alarms and invites, turn on this switch. By default, the toasters will be displayed for a few seconds and then fade away. If you check "Keep the Toasters displayed until I close it", the toasters won't fade away automatically. You need to manually close the toasters.



Play a sound when notification arrives

☐ OFF

◀ BACK

Setup notification for Address Book entries, opportunities or cases

You can create notifications for Address Book entries, opportunities or cases. Go through the wizard to define the trigger, conditions and appearance for each notification.

General settings

Notification Manager > Opportunity Module

Opportunities

General settings for Opportunity notifications

Number of notifications visible in the panel

This setting defines how many notifications will be displayed in Notification Panel. If there are more notifications than this number, you need to press a button to reveal them.

+ ADD NOTIFICATION

Press the button to create a notification

Opportunity Created
On: Panel, Toaster, Sound

ON

- Edit
- Rename
- Copy
- Delete

◀ BACK

Create a notification – Step 1: Select trigger

In the first step, you need to determine what will trigger a notification, whether a new entry is created or a field has been changed to the value that you specify.

Notification Manager > Opportunity Module > Create

Opportunity Abandoned

Click in this field to edit the name for the notification

Select Trigger

Select Conditions

Appearance

Whenever Something Changes

- ☒ Create a rule that will send a notification whenever it newly matches the criteria you specify
for example, "someone changes the status to a specific status"

☐ When a NEW Opportunity gets created

This trigger fires whenever an opportunity gets created

☐ Notify even if I made the change


NEXT: CONDITIONS

Create a notification – Step 2: Select conditions

In this step, you specify the conditions for the notification. You will select a field and define condition. You can add multiple conditions.

The supported field types include Alphanumeric, Numeric, Table, and Boolean (for basic fields and user-defined fields).

Notification Manager > Opportunity Module > Create

 Opportunity Abandoned

✓ **Select Trigger**
Changed Field

Select Conditions

Appearance

IF

Field to watch
Status ▼

➔

Trigger on this value
Contains ▼

Abandoned ×

Whenever this field changes...

...to match this condition, send a notification.

AND

Revenue ▼

➔

Greater than or equ... ▼

10,000.00 ▲▼ ⊗

⊕ ADD ANOTHER CONDITION


PREVIOUS: TRIGGER SELECTION

NEXT: NOTIFICATION APPEARANCE

Create a notification – Step 3: Set appearance

In this step, you will decide the look and feel of the notification. You can enter description, select a color and decide whether you want to see the toaster or not. You can also play a sound when the notification arrives.

Notification Manager > Opportunity Module > Create

 Opportunity Abandoned

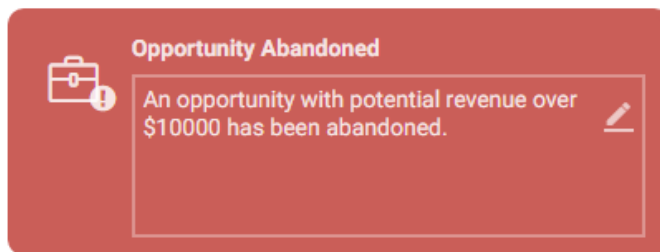
✓ **Select Trigger**
Changed Field

✓ **Select Conditions**

Appearance

Preview


Directly edit the notification message within the display area. The title is the name of your notification (at the top of this screen)





Toast Type & Color



Select one of these options will change the color and icon displayed in the toasters.

 Display this notification as a Toaster pop-up ☒ YES ☐ NO

 ☐ Keep the Toaster displayed until I close it

 Play a sound when this notification arrives ☐ YES ☒ NO

Your notification is ☒ ON ☐ OFF

PREVIOUS: CONDITIONS

+ ADD ANOTHER

FINISH

Display Notifications

Toasters have been introduced in Maximizer CRM 2017 R2 to make notifications more noticeable.

To dismiss the toaster notification, click the X. The toaster won't be displayed again in the current session, but it will return if you log out and log in again.

MAXIMIZER CRM

Search for Address Book entries...

Address Book

4 Displayed - 1 Company, 3 Contacts

Edit	View	Search	Actions	Re	Company	First Name	Last Name	(604) 601-8000	info@maximizer.com	Vancouver	BC	Sales	Adm
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ABC Wine Shop Inc			(604) 601-8000	info@maximizer.com	Vancouver	BC	Sales	Adm
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ABC Bike Shop	Ed	Johnson	(604) 601-8000	escona@maximizer.com	Pittsburgh	PA	Sales	Adm
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ABC Wine Shop Inc	James	Dolton	(604) 601-8000	escona@maximizer.com	Pittsburgh	PA	Maintenance	Afr
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ABC Wine Shop Inc	Martha	Torres	(604) 601-8000	escona@maximizer.com	Vancouver	BC	Operations	

You can click the title of the toaster to open the associated entry.

Opportunity Abandoned
An opportunity with potential revenue over \$10,000 has been abandoned.

New Partner Accepted
A new partner has been accepted.

Meeting with Ed Johnson from ABC Bike Shop
Thu, March 09, 2017 4:00 PM
10 minutes before start
COMPLETE SNOOZE DISMISS

Johnson, Ed
ABC Bike Shop

< Details Auditing Contacts History Notes Documents User-Defined Fields Custom >

ABC Bike Shop
Ed Johnson
123 Main Street
Pittsburgh PA 87654
Usa

Main: (604) 601-8000
Home: (604) 639-3571

<Default Key Fields>

Basic Information

Do not solicit by: Email, Phone
Category: Analyst, Distributor
Reports To:

Dates

Birthday: November 30, 1972
Age: 44 years

Dismissing toaster notifications will not permanently delete your notifications from the Notification Panel. Only when you dismiss the notifications from within the Notification Panel will they be permanently deleted.

abc wine shop inc

Reports ▾ Help ▾

First Name	Last Name	Phone Number	Email Address
		(604) 601-8000	info@maximizer.com
James	Dolton	(604) 601-8000	escona@maximizer.com
Martha	Torres	(604) 601-8000	escona@maximizer.com

You can click the title of the notification to open the associated entry. Press the X button to dismiss the notification.

Contacts

History

Notes

Documents

User-Defined Fields

Custom

<Default Key Fields>

Basic Information

Do not solicit by:

Category:

Reports To:

Phone

Key Account

Notifications

Fri, Mar 10, 2017

Opportunity

Opportunity Abandoned

An opportunity with potential...

Thu

Address Book

New Partner Accepted

A new partner has been accepted...

Thu

Customer Service

High Priority Case Assigned

There is a case assigned to me...

X

Alarms

The follow-up deadline is approaching

Thu, March 09, 2017 5:11 PM

11:00 AM

Meeting with Ed Johnson for...

Thu, March 09, 2017 4:00 PM

Thu

Project Planning Meeting

Wed, March 08, 2017 9:00 AM

Thu

User Experience Improvements

Unlimited Quick Access Shortcuts

Quick Access shortcuts allow you to quickly access your most commonly used Saved Searches or Favorites Lists. In previous versions of Maximizer, you could add up to 6 Quick Access shortcuts. Maximizer CRM 2017 R2 allows you to save unlimited Quick Access shortcuts making it easier than ever to quickly find what you need.


To facilitate the ability to have unlimited shortcuts, Maximizer CRM 2017 R2 includes an increased number of easy to recognize Icons that can be used to help you better organize their shortcuts into groups.

Select a group to add the shortcut.

Create a shortcut above the Icon Bar to retrieve the Saved Search

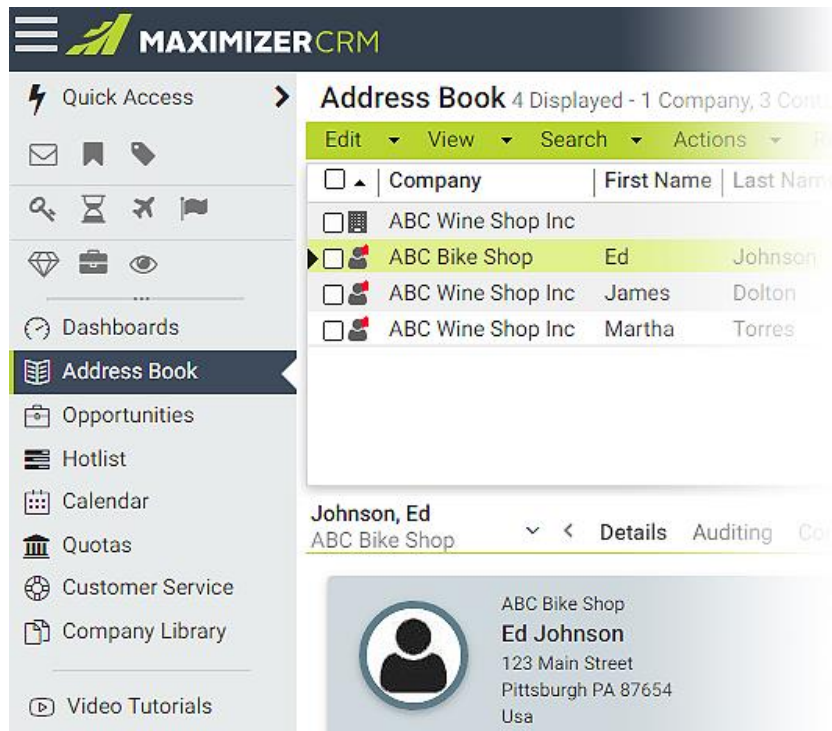
Name:
Retrieve Saved Search - Address Book - My Account

Icon:



My Clients

Save Cancel



MAXIMIZER CRM

Quick Access

Address Book 4 Displayed - 1 Company, 3 Contacts

Company	First Name	Last Name
ABC Wine Shop Inc		
ABC Bike Shop	Ed	Johnson
ABC Wine Shop Inc	James	Dolton
ABC Wine Shop Inc	Martha	Torres

Johnson, Ed
ABC Bike Shop

Details Auditing

ABC Bike Shop
Ed Johnson
123 Main Street
Pittsburgh PA 87654
Usa

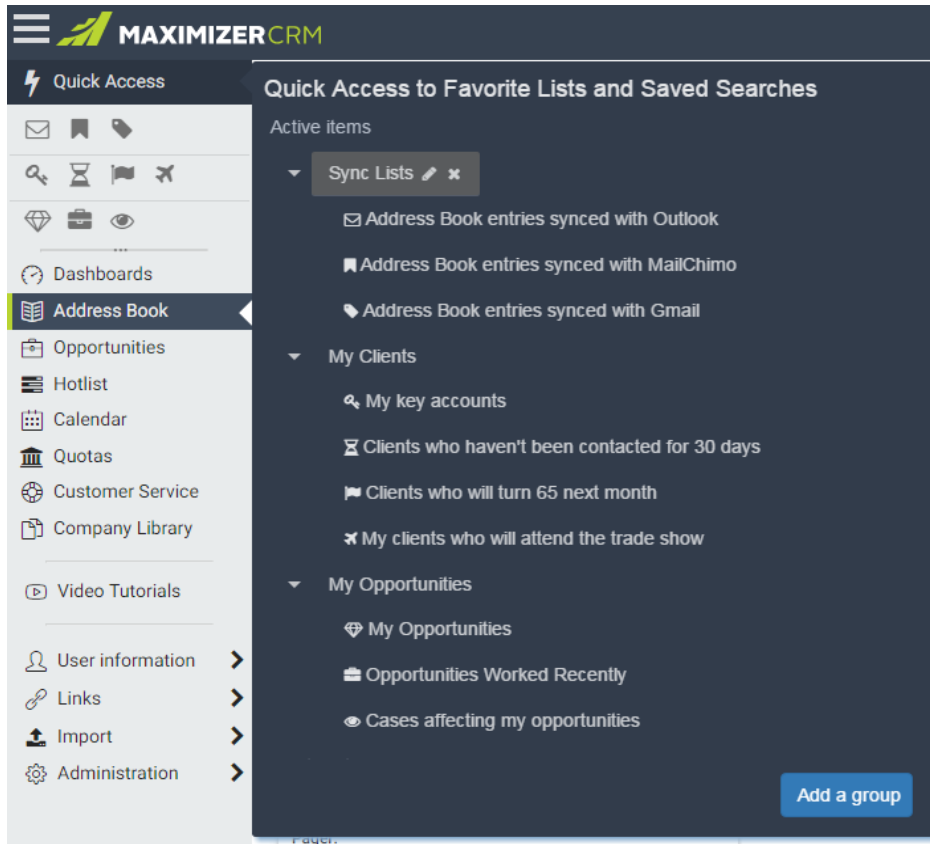
Quick Access icons in Icon Bar

You can re-organize the icons by drag and drop.

Quick Access Panel

You can also manage shortcuts using the Quick Access panel. Access the panel by hovering your mouse over Quick Access. You can edit the name of a group or the name of a shortcut. You can re-order the icons inside one group, or move icons from one group to a different group by drag and drop.

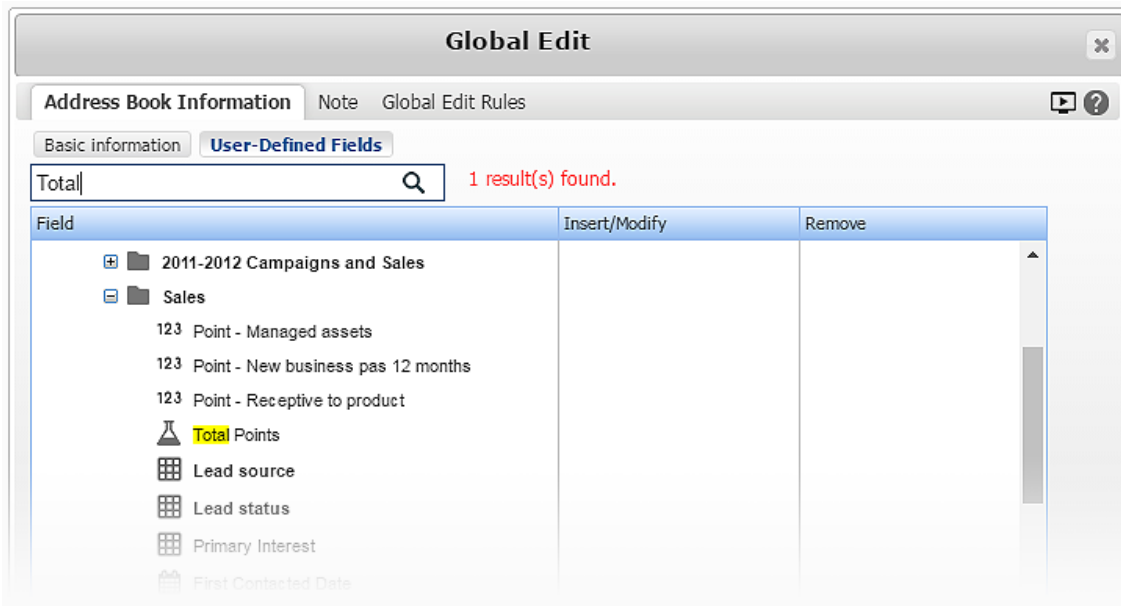
You can delete a group or a shortcut from the panel. If you delete a group, all the shortcuts inside that group will be moved to the Trash group at the bottom of the panel. Deleting the shortcuts from the Trash group will permanently delete them.



Press the pencil button will allow you to edit the name of the group. Press the cross button will remove the group.

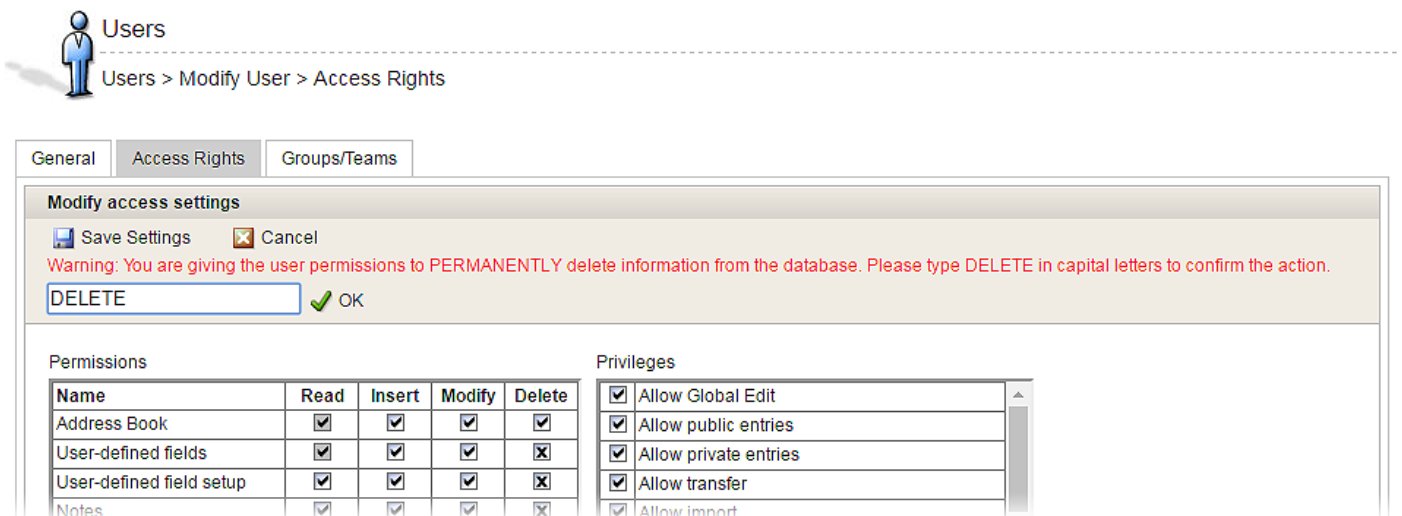
Searching for User-Defined Fields in Global Edit Dialog

When you try to edit multiple entries at the same time by using the Global Edit dialog, you can now search for user-defined fields. The matched fields will be highlighted. The number of search result matches will be displayed on top.



Deletion Protection

In Maximizer CRM 2017 R2, the Maximizer Administrator will determine whether users have the ability to delete items. If the Administrator gives a user or a security group the delete right for any items, the Administrator will be prompted with a warning message, and will be required to type in the word DELETE in capital letters to confirm the action.



To prevent accidental deletion of items by users who have been given delete-rights, Maximizer will prompt the user to confirm the deletion by requiring them to type DELETE in capital letters.

Are you **ABSOLUTELY** sure?

2 Address Book entry(s) selected for deletion

This action **CANNOT** be undone. This will **PERMANENTLY** delete **ALL** related information to entry(s)

Type "DELETE" to confirm

If you are working with Favorite List and would like to remove entries from the list, go to **View** menu and select **View > Remove from Favorite List**

Delete

Cancel

Moving Multiple Entries from Following Tabs to the Main Grid

When you are working within either the Customer Service or Opportunity Following Tabs and you want to learn more about a particular Customer Service case or Opportunity, clicking on the relevant case or opportunity will automatically open that item within its associated module.

In previous versions of Maximizer you could only open a single case or opportunity for viewing. In Maximizer CRM 2017 R2, the user can now view the details associated with multiple cases or opportunities in the main grid. The user will select the opportunities or cases that they wish to view in the main grid, and click on the new Show icon as illustrated below.

Address Book 3 Displayed - 1 Company, 2 Contacts

Edit View Search Actions Report Help

<input type="checkbox"/>	Type	Company	First Name	Last Name	Phone Number	Email Address	City
<input checked="" type="checkbox"/>	Company	ABC Wine Shop Inc			(604) 601-8000	info@maximizer.com	Vanco
<input type="checkbox"/>	Contact	ABC Wine Shop Inc	James	Dolton	(604) 601-8000	escona@maximizer.com	Pittsbi
<input type="checkbox"/>	Contact	ABC Wine Shop Inc	Martha	Torres	(604) 601-8000	escona@maximizer.com	Vanco

ABC Wine Shop Inc < History Notes Documents User-Defined Fields Customer Service

Columns: *Default Customer Service View

<input checked="" type="checkbox"/>	Case Number	Company/Individual	Subject	Assigned To	Status	Priority
<input checked="" type="checkbox"/>	HQ-00033	ABC Wine Shop Inc	Packaging defect		Resolved	Medium
<input checked="" type="checkbox"/>	HQ-00067	ABC Wine Shop Inc	Ship error, refund requested	Celine Dancer	Resolved	Medium
<input checked="" type="checkbox"/>	HQ-00088	ABC Wine Shop Inc	Ship		Resolved	Medium

Show selected Case(s) in Customer Service

Selecting multiple cases and pressing the button will bring all the cases to Customer Service module.

Actions Panel in Following Tabs

The Actions Panel allows the user to initiate certain actions from within a record contained in the Address Book, Customer Service and Opportunities Modules. Maximizer CRM 2017 R2 displays the Actions Panel while users are working in the Following Tabs (excluding the History and User Defined Fields tabs). This allows you to perform actions without switching tabs. For example, a user checking the Activities tab for information about appointments that have been scheduled with a client can simply click on Write an email to send a message to that client. In previous versions of Maximizer, the Actions Tab only existed within the Details Tab.

The screenshot shows the Maximizer CRM interface with the 'Activities' tab selected. The 'Actions Panel' is open on the right side, displaying a list of actions such as 'Add a note', 'Add a document', 'Write an email', 'Draw a map', 'Make a call', 'Receive a call', 'Time a task', 'Schedule a meeting', 'Schedule a to-do', 'Schedule an Action Plan', 'Create an opportunity', 'Create a case', and '+ Favorite List'. A tooltip message states: 'You can write a note or send an email from the Activities tab.'

Tasks and Appointments	Date/Time	Assigned To	Pr.	Complete
<input type="checkbox"/> Ensure delivery was made	October 02, 2015	Lou Jones		<input type="checkbox"/>
<input type="checkbox"/> Meeting	March 17, 2016 4:00 PM	Lou Jones, Joe Napoli		<input type="checkbox"/>

Users may optionally collapse the Actions Panel to display only the associated Icons for each action, to increase workspace on the screen.

The screenshot shows the Maximizer CRM interface with the 'Activities' tab selected. The 'Actions Panel' is collapsed, displaying only the associated icons for each action. The interface also shows the 'Basic Information' and 'Dates' sections for the record.

Robertlan Bennington
Owner
Albert's Steak House
10 Camino del Inca
Suite 200
Albuquerque NM 89393
USA

Main:
(604) 601-8000

Fax:
(604) 601-8001

Basic Information

Do not solicit by:
Category:
Reports To:

Dates

Birthdate: August 25, 1950
Age: 66 years
Date Last Contacted: November 18, 2016
AB Duration UDF: 4 months 2 days
AB Formula UDF: -5745

Maximize Following Tabs

If you have many fields inside a Key Field list, you may want to enlarge the height of the following tab to view them easily. Now, there is a button for you to easily maximize the height of the following tab.

Address Book 5 Displayed - 2 Companies, 3 Contacts

Type	Company	First Name	Last Name	Phone Number	Email Address
Contact	Arrow Wine & Spirits	Jefferey	Cash	(604) 601-8000	escona@m
Company	Colonial Spirits			(604) 601-8000	escona@m
Contact	Colonial Spirits	Maritza	Ewing	(604) 601-8000	escona@m
Company	Albert's Steak House			(604) 601-8000	escona@m
Contact	Albert's Steak House	Robertlan	Bennington	(604) 601-8000	

Bennington, Robertl...
Albert's Steak House

Details Customer Service Contacts History Notes Activities Docu >

Robertlan Bennington
Owner
Albert's Steak House
10 Camino del Inca
Suite 200
Albuquerque NM 89393
USA

Basic Information

Do not solicit by:
Category:
Reports To:

Press the button to bring up the pop-up where you can maximize or minimize the following tabs. When it is maximized or minimized, you cannot move the separator between the main grid and the following tab. Click the Adjustable will make the separator adjustable again.

Enhancements for Calendar and Appointment Dialogs

Expand Timeslot Height to Show More Information of an Appointment

You can now increase the row height of the time slots to see more information about appointments. To change the height, go to the Settings tab in the side panel of the Calendar and change the value in the Timeslot Height field.

Calendar + new

TODAY < > 3/8/2017 Lou Jones DAY

	WED 3/8
All day	
6:00 AM	
7:00 AM	
8:00 AM	
9:00 AM	<div>Project Planning Meeting This meeting is to discuss the scope of next project and the start date.</div>
10:00 AM	
11:00 AM	
12:00 PM	
1:00 PM	
2:00 PM	
3:00 PM	
4:00 PM	
5:00 PM	

REPORT

Calendar

Notification Options

Display Options

Work hours

Start Time 8:00 AM

End Time 5:00 PM

Working week

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Default icon for Address Book contact

First day of week: Sunday

Default view on startup: Weekly

Default interval (minutes) 60

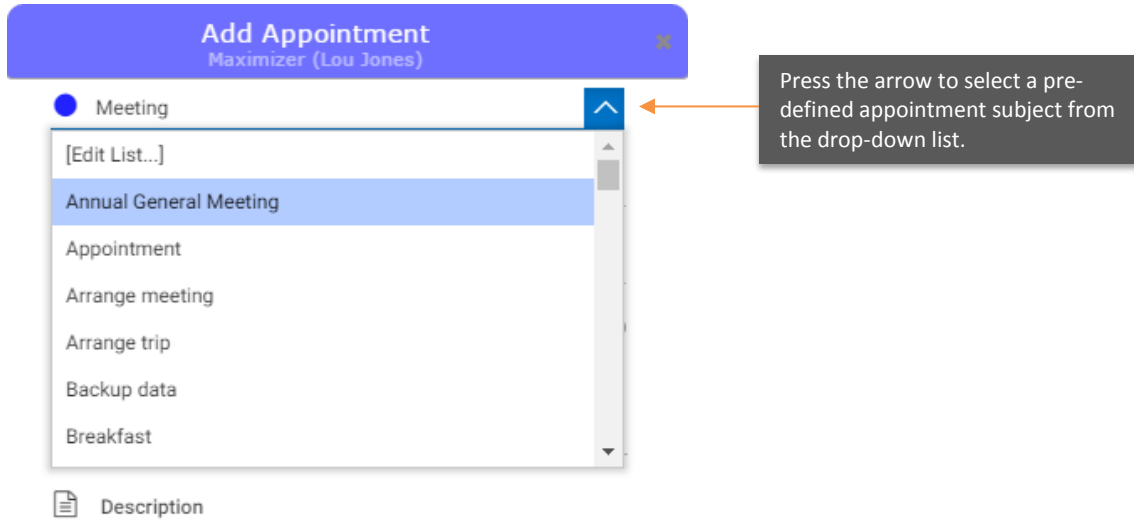
Timeslot height (weekly & daily views) 4

Show non-work days in weekly view

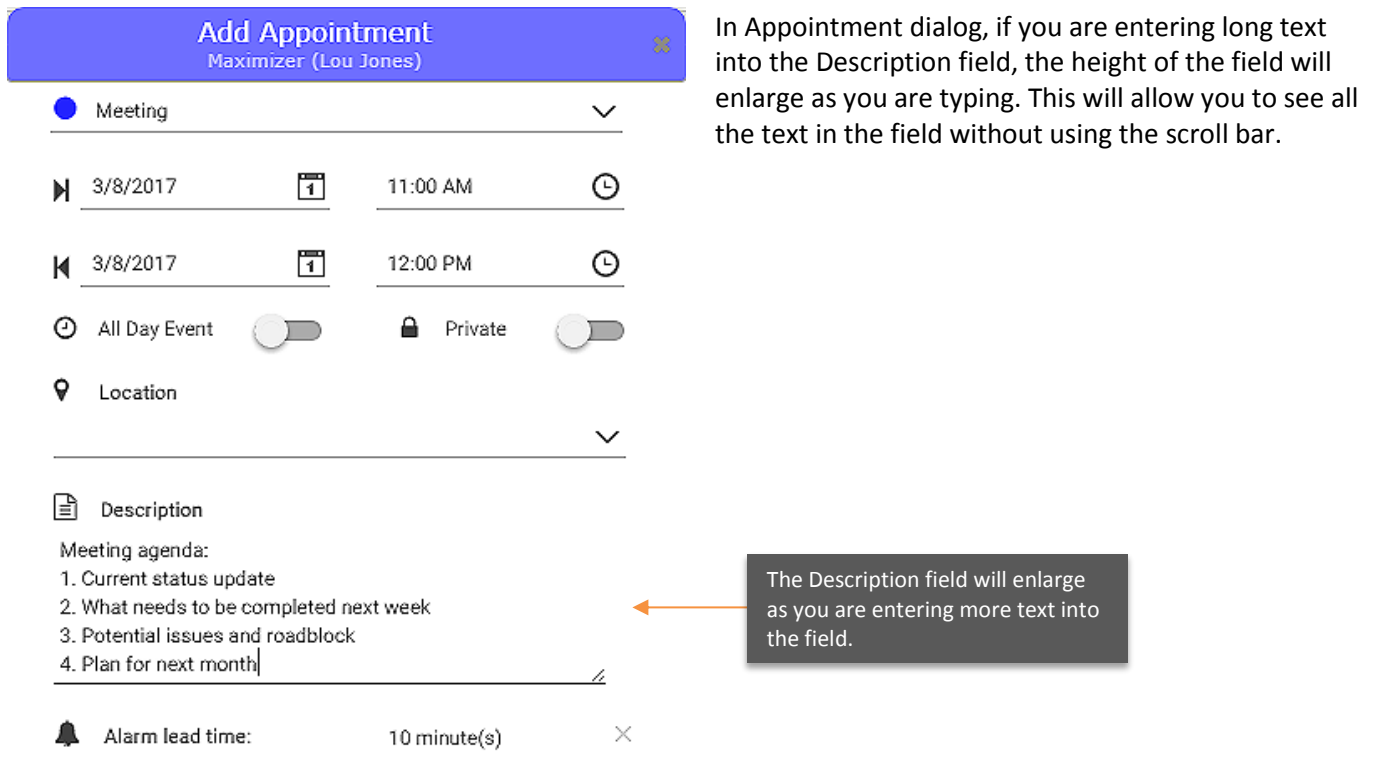
TASKS CALENDAR SETTINGS

Select Pre-defined Appointment Subjects

This function was in the older version of Maximizer but was missed in 2017 release. You can now select a pre-defined appointment subject in Appointment dialog.

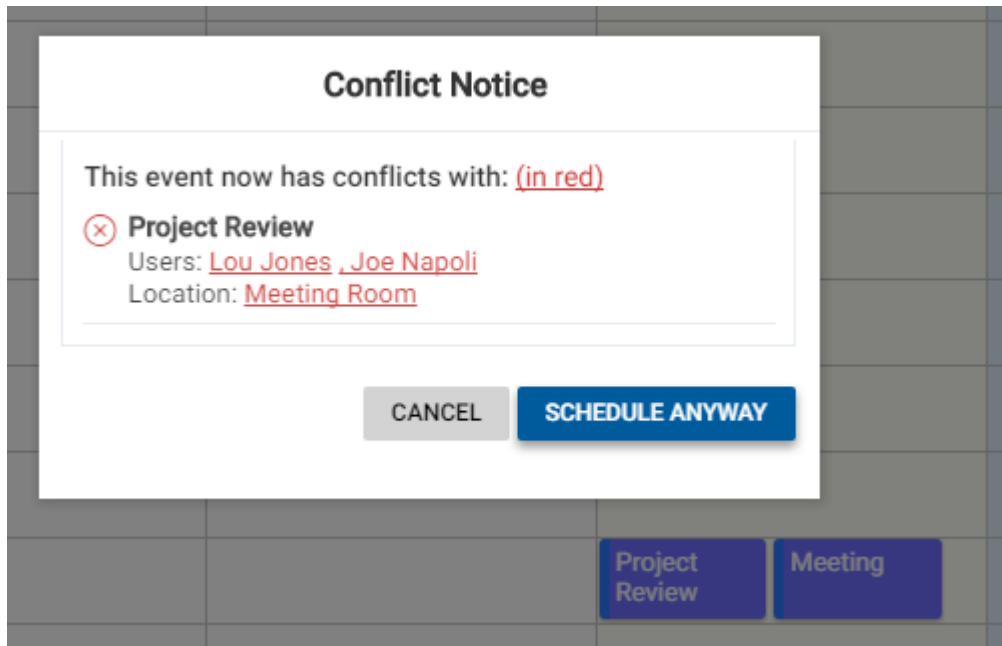


Automatically Expand the Height of the Description Field



Conflict Checking when Rescheduling an Appointment by Drag and Drop

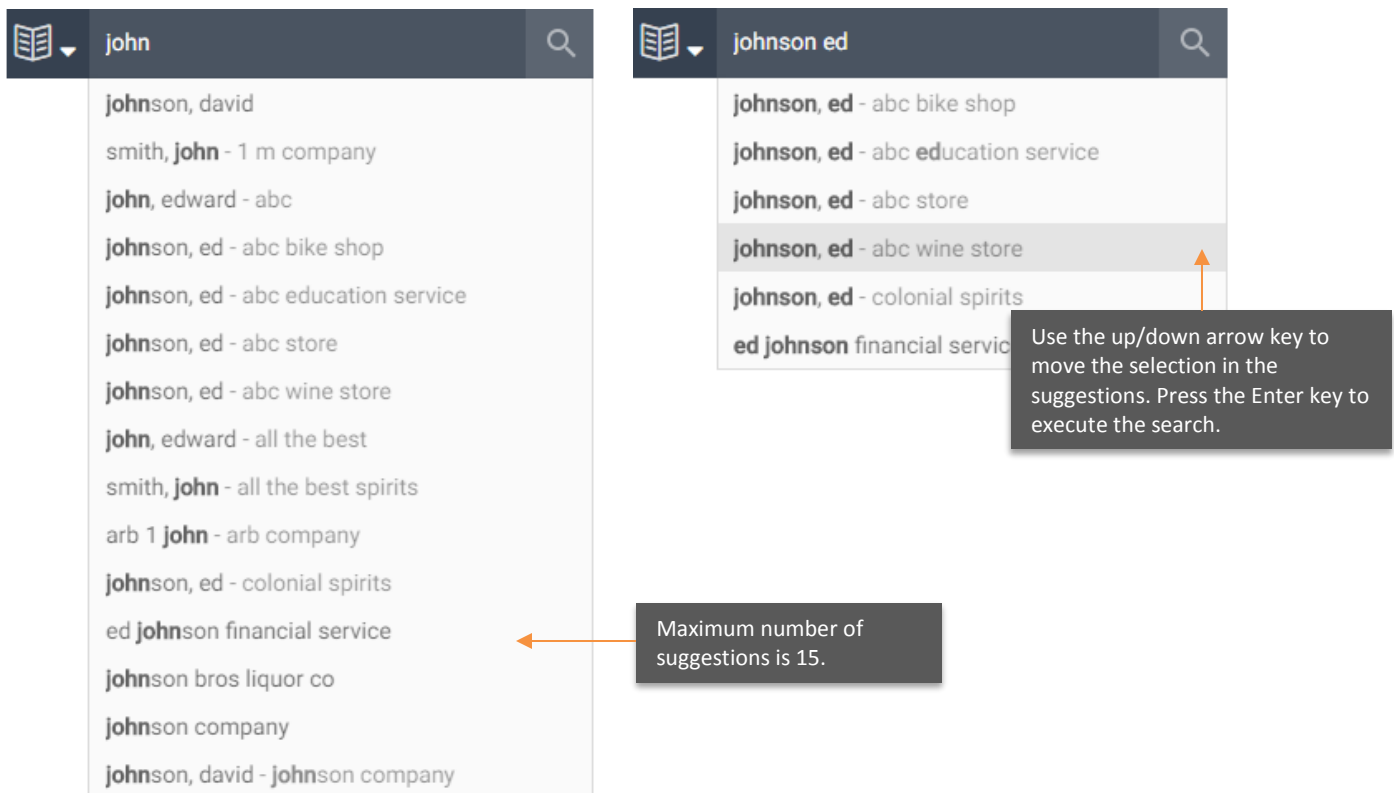
When you re-schedule an appointment by drag and drop, conflict checking will be performed. Press the Cancel button will cancel the action and move the appointment back to the original time slot. Press Schedule Anyway button will move the appointment into the new location.



Quick Search Enhancement

The Quick Search enhancement allows you to quickly find the entry that you are looking for by automatically providing suggestions.

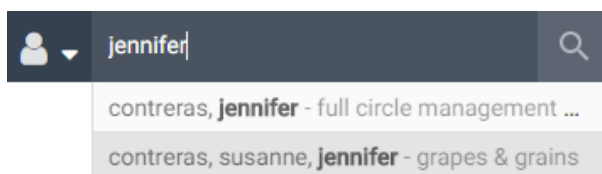
When you begin typing in the Quick Search field, suggestions will be displayed after three letters have been entered. As you continue typing in the field, the suggestions will be refined to match the search string. You can use the up/down arrow key to select the correct entry in the suggestions. Highlight the entry and press the Enter key or click on the entry to execute the search.



The enhancement is also beneficial in following use cases:

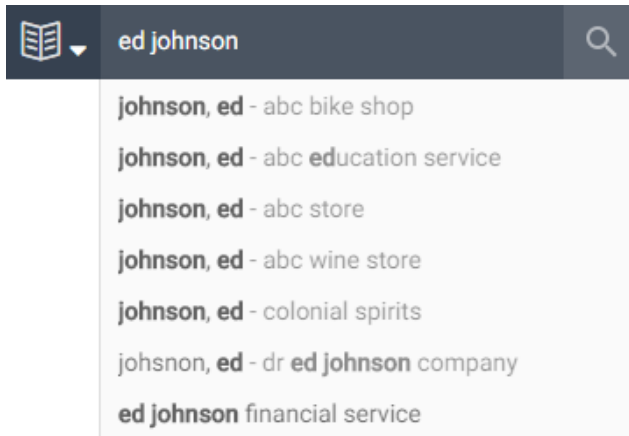
- You are searching for a contact. You know the contact's first name and the company name, but you don't remember how to spell the last name.
- You are looking for a contact, but there are many other contacts with the same name from different companies in your Address Book.

The suggestions will help you to find the contact if you don't remember the contact's last name. If there are many contacts with the same name, you can identify which one you are looking for by the company name displayed in the suggestions.



Other notes about the suggestions in Quick Search

- The Quick Search suggestions are available for searching against Address Book entries for Companies, Individuals, and Contacts, and are based on searching for First Name, Last Name and Company Name.
- When searching for Address Book entries, the suggestions will include matching Companies, Individuals or Contacts.
- When searching for companies, individuals or contacts, only the matching type will be displayed in the suggestion. For example, if you are searching for companies and type in “Johnson”, company names containing “Johnson” will be displayed in the suggestions list whereas contacts containing “Johnson” won’t be displayed.
- Suggestions are not available for searching opportunities and cases.



When you are searching for Address Book entries, all the matching companies, individual and contacts are displayed in the suggestions.



When you are searching for companies, only the matching companies will be displayed in the suggestions.

The suggestions won’t be displayed if you combine First Name or Last Name with Company Name in your search string.

If there are duplicate entries in the Address Book, only one suggestion will be provided for these entries. The search will retrieve all the duplicated entries.

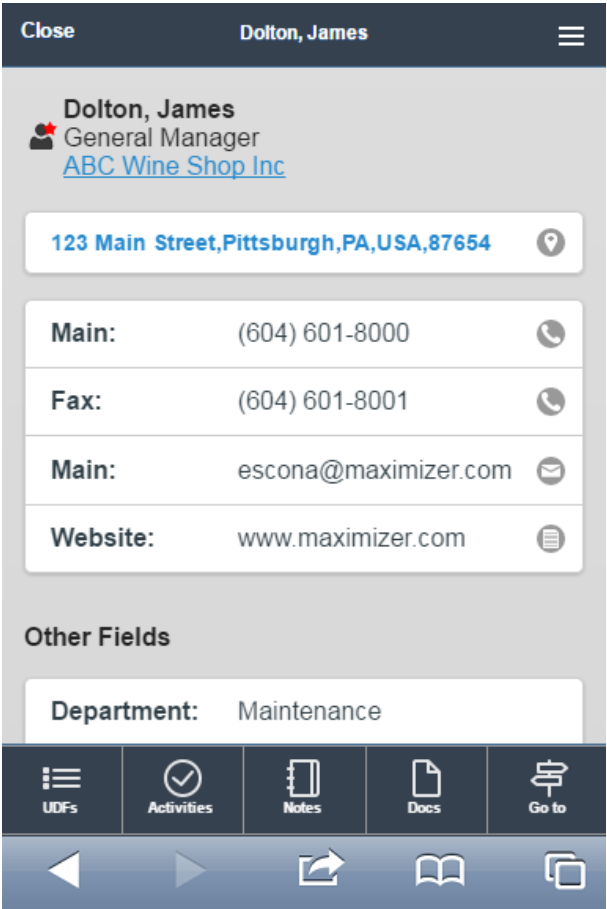
The function of remembering the search history is no longer available.

If you are not looking for a particular Address Book entry and wish to retrieve all the relevant entries, you can type in the search string in Quick Search and press the Search button to perform the search. Wildcard search is still supported by entering the asterisk symbol at the end of the search string.

Mobile Access

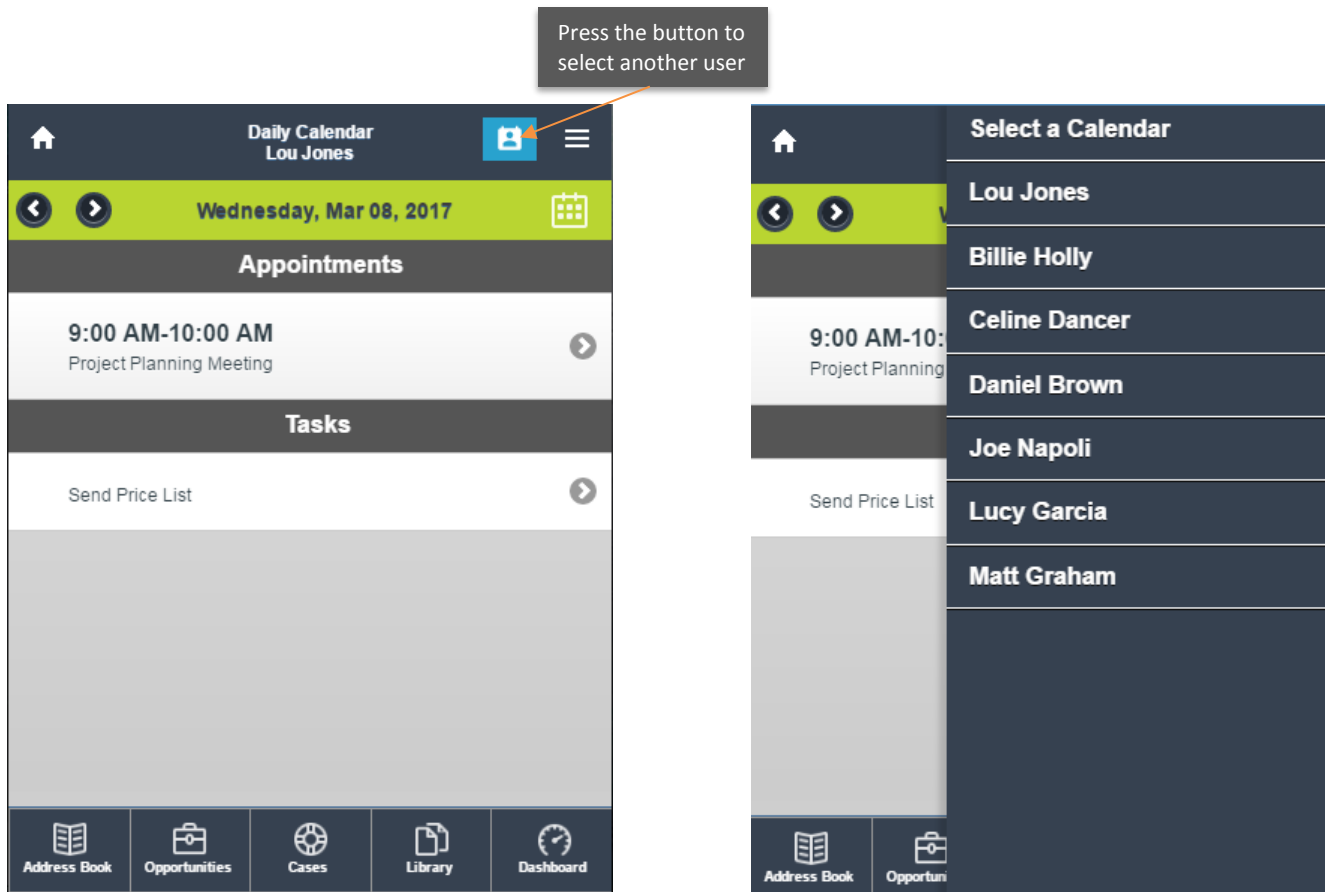
User Interface Refresh

The look and feel of Mobile Access has been updated to be consistent with the style of the Web Access.

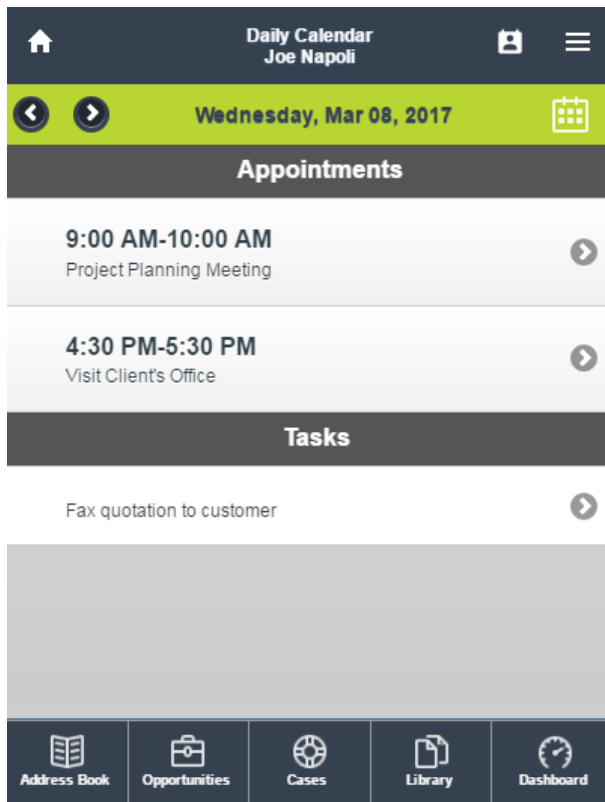


View Other Users Calendar

You can now access another user's Calendar in Mobile Access and see the details of their appointments. If you have the Modify right, you can also create or modify the appointments on that user's behalf.



The users who have granted the login user full access or read access right to Calendar or Hotlist will be displayed in the panel. Select a user will show that user's appointment and tasks.



The selected user's Calendar is displayed.

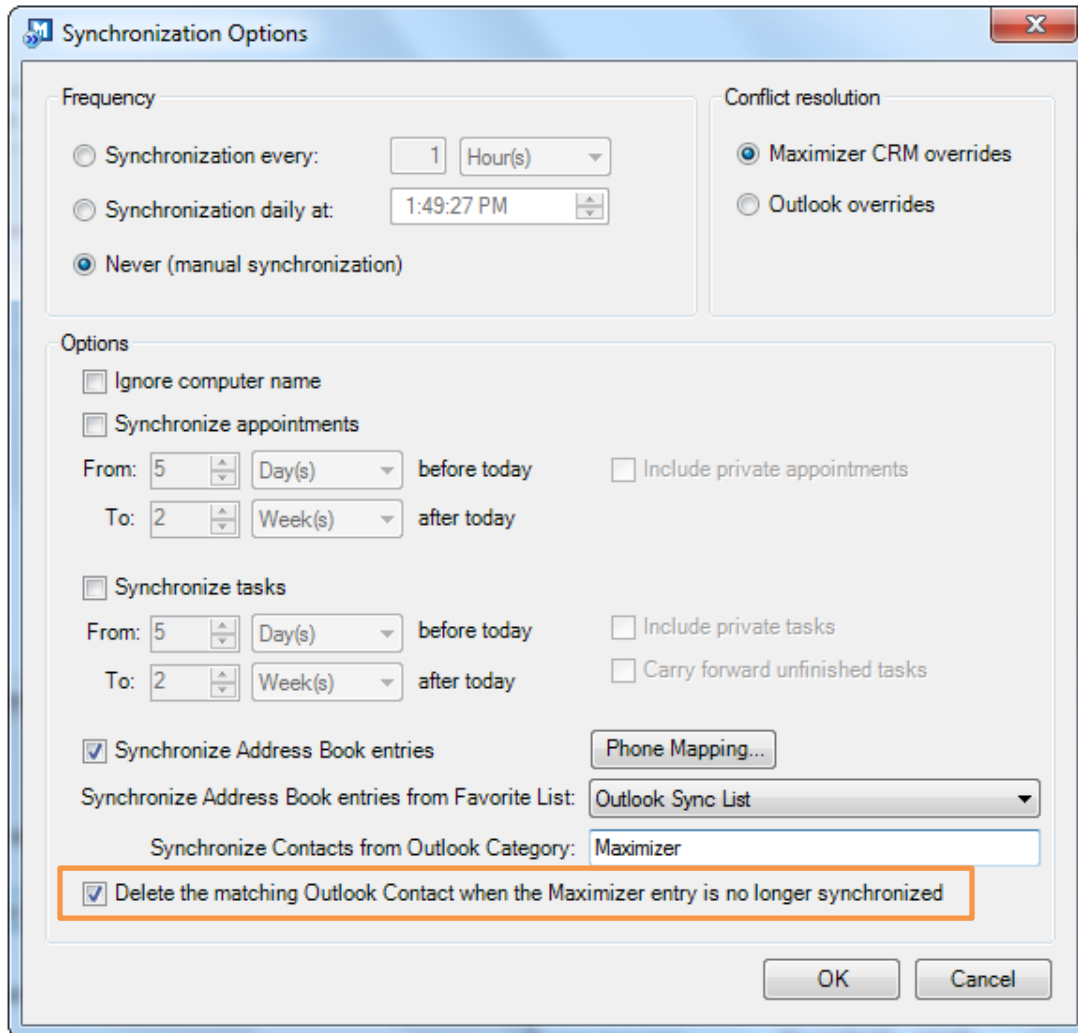
Press an appointment or a task in the screen will open the View Appointment or View Task screen.

The login user can create, modify or delete the selected user's appointments or tasks if full access right has been granted.

Outlook Add-in Synchronizing Contacts

Currently, if you delete a Maximizer contact that is synced to Outlook through the Maximizer Outlook add-in, the contact in Outlook won't be deleted. The Outlook category specified for synchronization will be removed. The Outlook contact won't be synced back to Maximizer again. An option has been added into the Outlook add-in which can automatically delete the contact in Outlook if the synced entry in Maximizer is deleted or removed from the Favorite List for Outlook sync.

In Maximizer Outlook add-in > Preferences > Synchronization Options dialog, a new checkbox Delete the matching Outlook Contact when the Maximizer entry is no longer synchronized has been added.

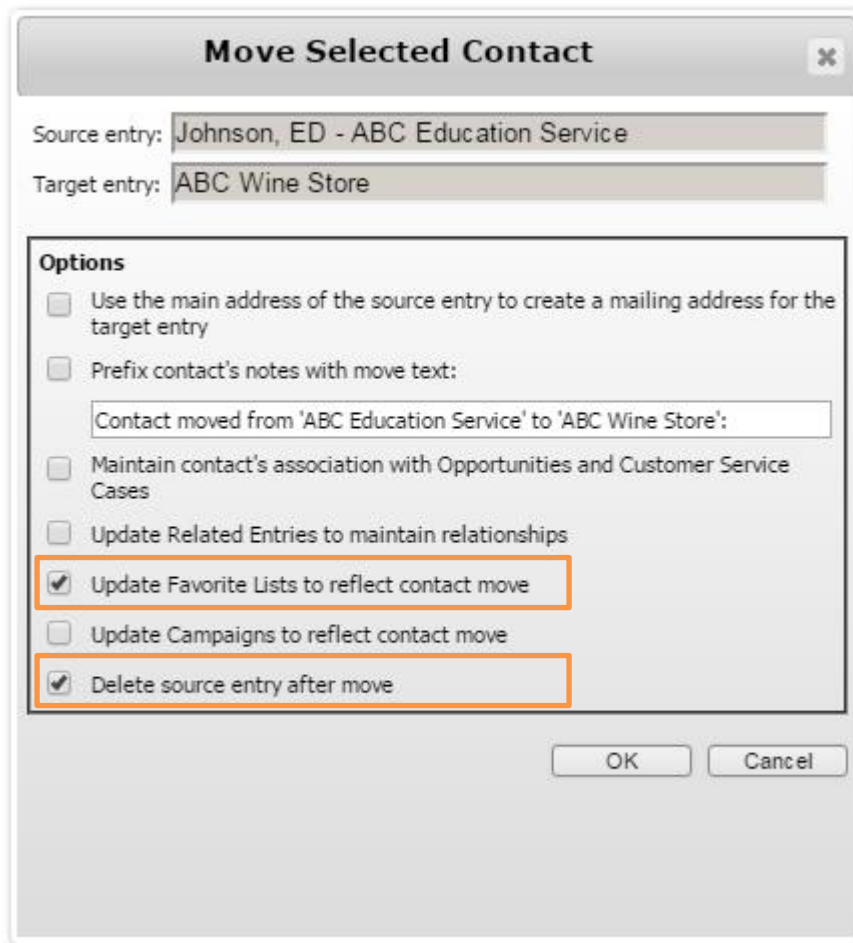


This checkbox is un-checked by default. Once it is checked, the matching contact in Outlook will be deleted if the Maximizer entry is deleted or removed from the sync Favorite List. Note that if a synced contact in Outlook is deleted, the matching entry in Maximizer won't be deleted.

Note that if the new function is not necessary for you, you don't need to install the new version of the Outlook add-in. Your current version of the Outlook add-in will continue working.

Other notes about the enhanced Outlook Add-in synchronizing contacts

When a synced contact in Maximizer has been moved from one company to another one, the new company name should be displayed in the Outlook contact. There shouldn't be a duplicated contact with the previous company name in Outlook.



There are functions in the product to handle these use-cases already. In the **Move Selected Contact** dialog in Maximizer, you need to check **Update Favorite Lists to reflect contact move**. This option will add the contact with the new company to the sync Favorite List and sync it to Outlook. You also need to check **Delete source entry after move**. This option will delete the contact with the previous company in Outlook.

In this release, the options in the Move Selected Contact dialog have been changed to become sticky across the sessions. You don't need to remember to select these two checkboxes every time you move a contact to a new company.

Note that if you convert an individual to a contact or convert a contact to an individual, there is not option for you to update the Favorite List. If you want the new entry to be synced to Outlook, you need to manually add the entry to the sync Favorite List.

Technical Feature

Support 64-bit in On Premise Environment

Maximizer CRM Web Access (On Premise) now supports 64-bits. Note that the deployment of 64-bit Web Access needs to be implemented by Maximizer Professional Service team.

Resolved Issues in Maximizer CRM 2017 R2

Follow-up task marked as personal and completed in the same step if the Activities tab is blank

Category: Activities

There is an Address Book entry that has no activity in the Activities Tab. While you are adding a new task in the tab, if you also complete it at the same time, the Follow-Up Activity dialog will come up. You will notice that the radio button isn't selected and if you choose to create a task, it will become Personal instead of with the Address Book entry.

Appointment inserted with DMID = 0 and SN = 0 If database DMID > 2,147,483,648

Category: Calendar, Appointment

If your Maximizer database has a Data_Machine_Id that is greater than 2,147,483,648, when you create a new appointment in Calendar, it will be inserted with a Data_Machine_Id of 0 and a Sequence_Number of 0. This will prevent future appointments from being inserted.

Problem of uploading a document to Template Library

Category: Template Library

You have a file that is over 4K but less than 15MB. When you try to add it into the Document Template library, you will be prompted that it is bigger than 15 MB and cannot be uploaded.

Report in Details tab for an opportunity or a case doesn't show all the Key Fields if there are many of them

Category: Customer Service, Opportunity, Reports

In the Details tab for an Opportunity or a Cases, you can click the print button to generate a report. If your current Key Fields list is large, the fields won't be shown in the report.

Completing an appointment via editing it doesn't generate completion note

Category: Appointment

If you open an appointment and complete it, you just get an Appointment Modified note. The Completion note is not generated.

Adding entries to a campaign via Saved Search doesn't honor "Find Matching"

Category: Campaign Manager

When creating a Campaign, if you choose to add subscribers from a Saved Search, and the "Find Matching" option isn't set to include Companies, Individuals and Contacts but a subset of those, the selected option will be ignored and all the record types will be added.

Quick Search stop word handling not case insensitive

Category: Searching

When using the Quick Search, there are codes to remove SQL Stop words to allow the Full Text Search to be executed successful. But the codes are not case insensitive so if a word like "the" is capitalized to "The" it isn't caught and still passed causing no results to be retrieved.

Mandatory user-defined fields based on Probability of Close not triggered when threshold stage is set

Category: Opportunity, User Defined Fields

If you have set a mandatory opportunity user-defined field based on the Probability of Close field, and you set a Process Stage in an opportunity that should trigger the mandatory field and save, it will not be triggered.

"Unable to set the value of a data field..." message when changing task priority to "!!"

Category: Hotlist

You have set up a list of priorities for Hotlist tasks and appointments along with the normal "HI", "MID", and "LOW". One of your custom priority is "!!". If you update a task from one priority to "!!", you will get an error message: "Unable to set the value of a data field. The string supplied must be in the allowable length range" when you try to save the task. The change won't be saved.

Holidays shown one day back in the Calendar in Maximizer CRM Live

Category: Calendar

In the Calendar in Maximizer CRM Live, the holidays are shown one day back from where they should be.

Clicking Reset Password link in email brings you to the login screen of Maximizer CRM Live

Category: Web Access

In Maximizer CRM Live, you use the Forgot Password link to generate an email to reset your password. When you receive that email, you click on the link to go to the page to set password. After that, if you click the same link in the email, you end up on the Login page with the password filled in.

Mobile Access record return limit does not appear in Web Administrator without "Allow Manage Currency"

Category: Web Administrator

In Web Access Administrator there is a section at the bottom of the System Options screen where you can set in a drop down what the maximum amount of entries you want to return in Maximizer Mobile Access. If you are logged into Maximizer Web Administrator as a User that does not have the "Allow Manage Currency" privilege, this drop-down does not appear.

New Duration user-defined field type won't save related Date field if DBID is really big

Category: User Defined Fields

When you create a Duration field, you need to pick an existing Date field. If the Data_Machine_Id in the AMGR_User_Field_Defs_Tbl for the existing Date field is equal to or bigger than 2147483647, you won't be able to save the reference Date field with the Duration field.

Calendar shows white text on white background in some situations

Category: Calendar

If your Calendar Legend doesn't contain the legend for you but contain the legends for another users, when you look at your appointments in Daily, Weekly or Monthly views, they will appear as "blanks", because the text is set to white and so is the background.

CalendarDataProvider.aspx?command=calendarConfig wrong calendar if language different

Category: Calendar

You have configured your server with another Language like French. In Calendar it falls back to UTC time zone, the display giving the Customer confusing results.

Updating blank Description fails if there is already Note record in database with NULL in TextCol

Category: Calendar

You have an existing appointment. You open it and add text into the Description field. If there is already a Note record in the database for the Description but the TextCol is set to NULL, the update will fail as it tries to insert a new record rather than update the existing one.

Quick Search not working properly when searching for names that contain the single quote character

Category: Searching

When you are using the new Quick Search with the suggestions and what you are looking for contains a single quote, the wrong results are returned.

Selecting multiple emails to save to Maximizer at the same time not following setting for attachment

Category: Outlook Add-In

If you have your Outlook Add-In set to save attachments and you select multiple emails to save at the same time, when the dialog comes up to show the entries that are to be saved to, the checkbox is not checked and the attachments are not saved.

Last Modified Date for a case is not updated if user-defined fields in Key Fields have been updated

Category: Customer Service

You open an existing Customer Service case and edit the user-defined fields in the Key Fields section. The Last Modified Date is not updated after you save the changes.

Merging Address Book entries causes Cases and opportunities to resend the initial alert emails

Category: Address Book, Customer Service, Opportunity

If you are merging two Address Book entries together and the source entry has any Customer Service cases or opportunities assigned to it, the initial alert emails will be sent again as if the cases or opportunities had been created from scratch.

Coming back to test SMTP settings in Web Admin in CRM Live fails unless typing password again

Category: Email, Web Administrator

You have been set up a SMTP server for CRM Live. Something goes wrong and you want to test it again. You go to the Web Administrator, open the Email Server Settings and modify them. When you press the Test button, it won't pass the current password and thus it will fail.

Unable to modify user access settings for users with underscore in user ID

Category: Users Dialog

If a User ID contains an underscore, changes in user settings will not be saved.

Grouping by Account Manager not representing contacts properly in Dashboard

Category: Dashboard

In Dashboard, if you create an indicator to return contacts and group the results by Account Managers, all the matching contacts will be grouped as Public for the Account Manager instead of the Parent Company/Individual's Account Manager.

"Error processing the audit log for this record" error when audit log times out

Category: Administrator

In the Administrator module if you run the audit log for a date range that causes the report to time out, you get an error message "Error processing the audit log for this record" and no records are returned.

Duplicating a closed opportunity doesn't allow clearing Close Date on new one.

Category: Opportunity

You duplicate an opportunity that is already closed. When you open the new opportunity and try to clear the Close Date and save it, the Close Date stays.

Word Add-In does not following sort order when printing via "Send to Printer"

Category: Word Macro

When you use the Word Add-In to merge a document to printer for multiple selected entries with the Send to Printer > Selected entries feature, it does not follow the sort order currently set in the Address Book window.

About Maximizer

Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.



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