



Maximizer CRM 2017 R2

Feature Review Guide

For Financial Advisors

Published By |



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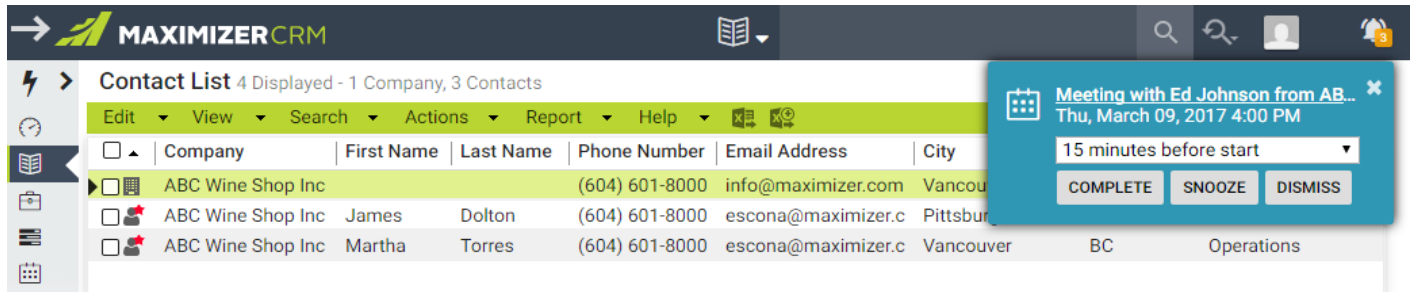
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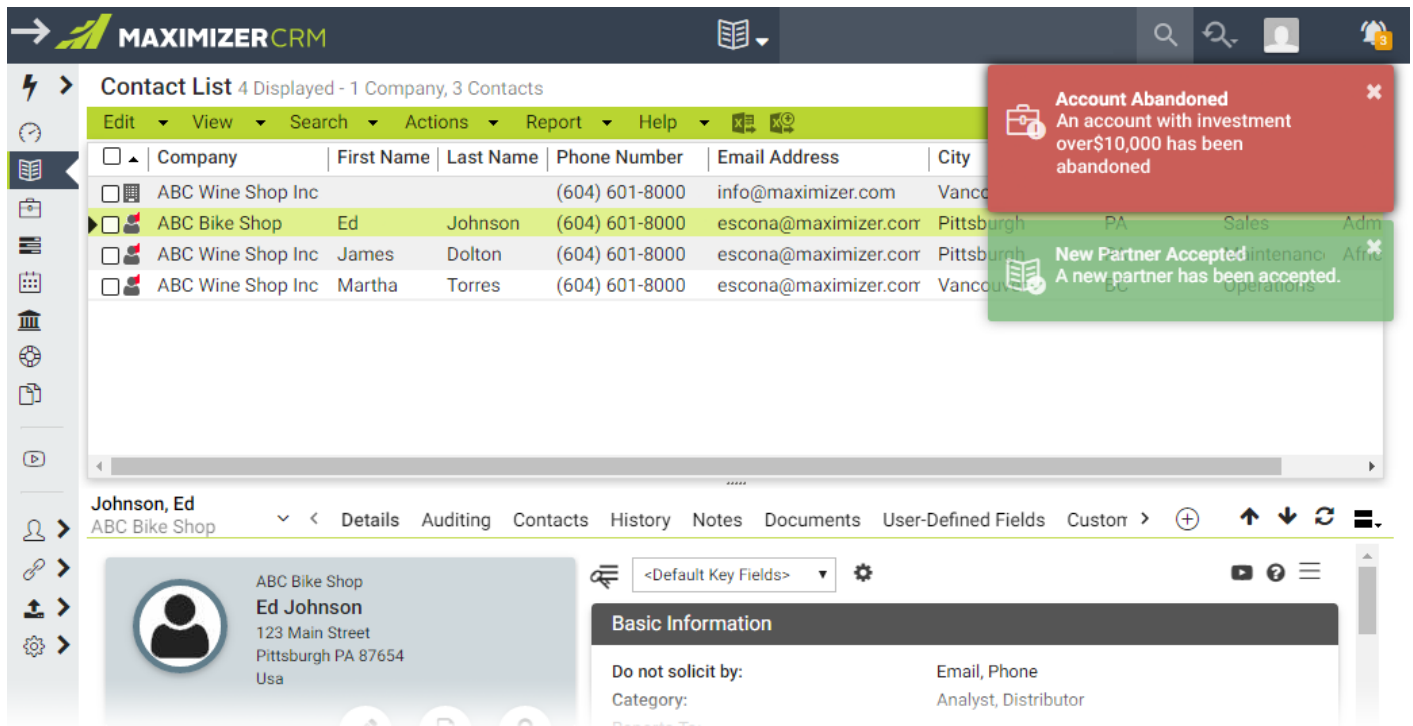
Condition-Based Notifications

Maximizer CRM 2017 R2 allows you to set up condition-based notifications for Contact List entries, accounts or Client Service plans. 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.



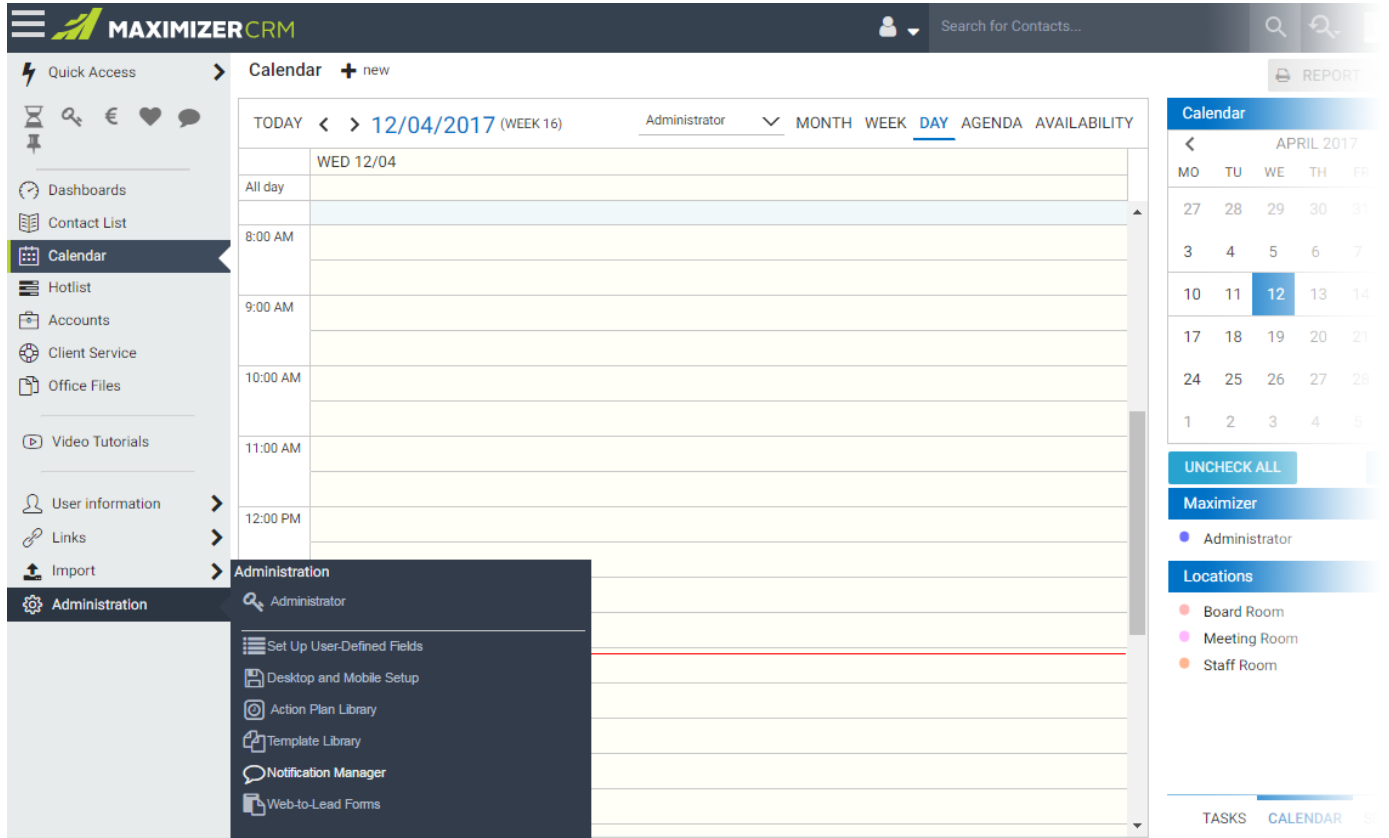
Example Toaster Notifications for an abandoned account and a new contact.



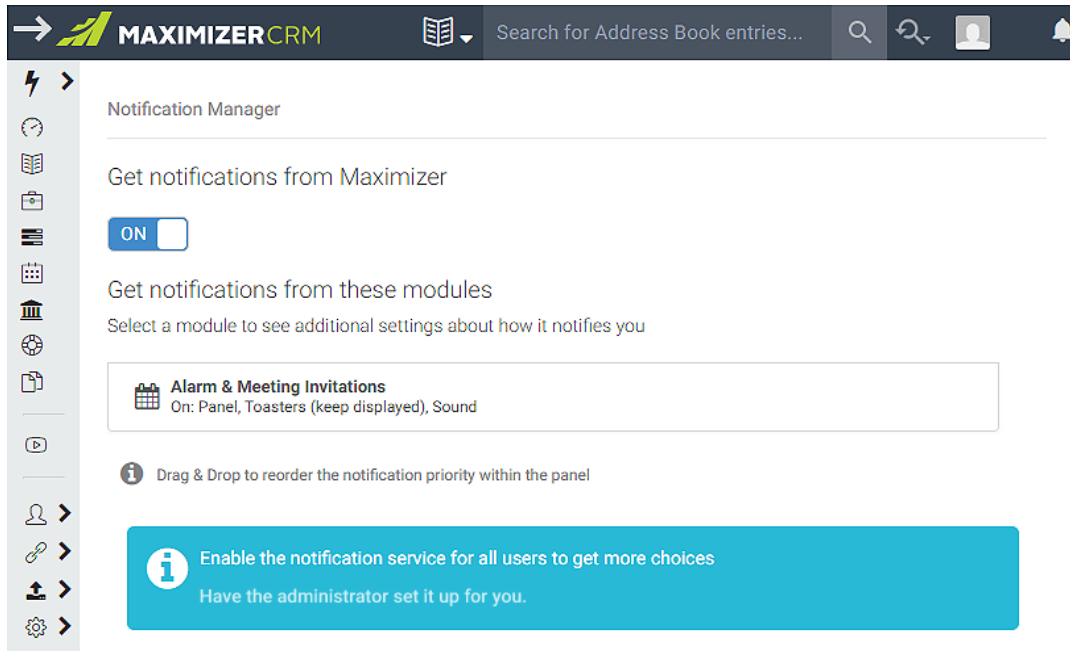
Setup Notifications

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.

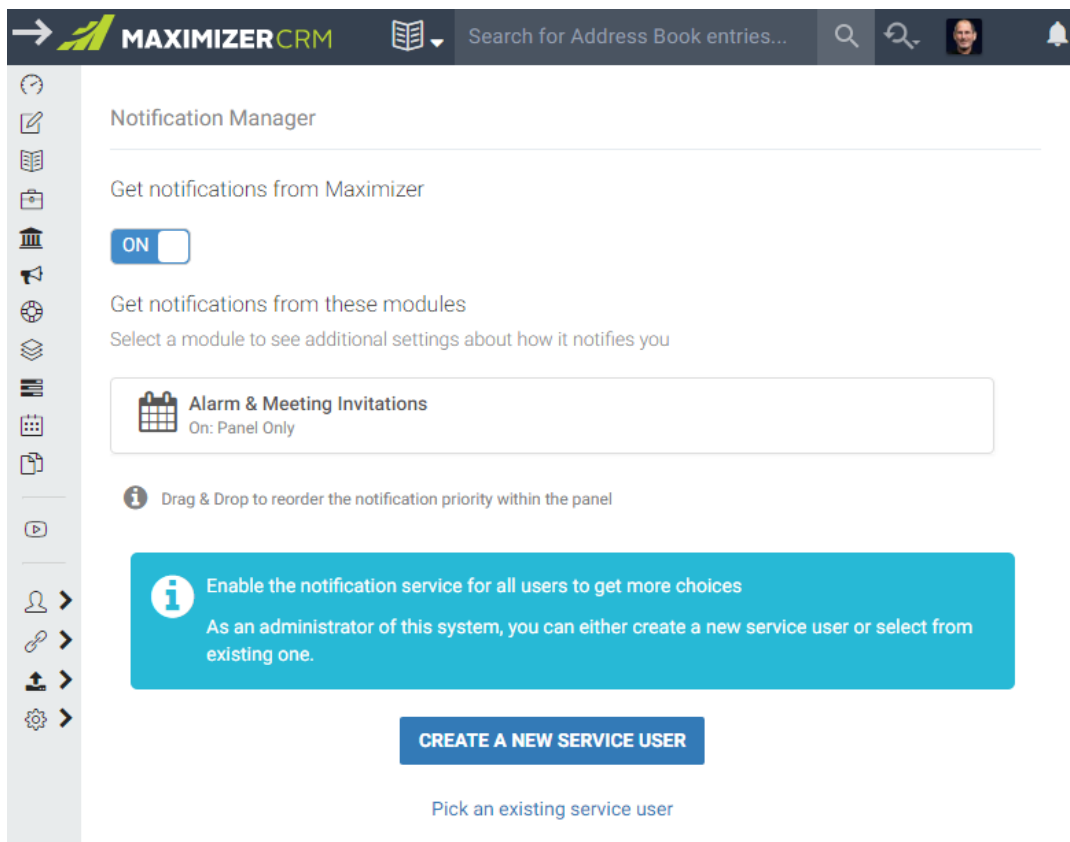


If you are not the Maximizer Administrator, you will see the screen below. You can enable notifications for alarms and meeting invitations, but you cannot create notifications for other modules until your Administrator enables this functionality.



Enable Notification Service

Before notifications for Contact List entries, Accounts or Plans 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

Enter the user ID of the service user

Password

Password Confirmation

SAVE **CANCEL**

Enable Audit Log

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

The screenshot shows the 'Notification Manager' interface in the Maximizer CRM. At the top, there is a dark header with the Maximizer CRM logo, a search icon, and a user profile icon. Below the header is a vertical sidebar with various icons representing different modules. The main content area is titled 'Notification Manager' and contains the following elements:

- A toggle switch labeled 'ON' for 'Get notifications from Maximizer'.
- A section titled 'Get notifications from these modules' with the instruction 'Select a module to see additional settings about how it notifies you'.
- A table listing modules and their notification settings:

Module	On	Off	Status
Contact List	2	6	ACTIVE
Accounts	3	2	ACTIVE
Client Service	4	0	ENABLE
Alarm & Meeting Invitations	Panel Only		

Below the table, there is an information icon and the text: 'Drag & Drop to reorder the notification priority within the panel'.

A blue callout box at the bottom contains the following text:

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.

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.

The image shows two screenshots from the Maximizer CRM interface. The left screenshot is the 'Notification Manager' web page. It features a main toggle switch for 'Get notifications from Maximizer' which is currently 'ON'. Below this, there is a section for 'Get notifications from these modules' with a list of modules: Accounts (On: 3, Off: 2), Contact List (On: 2, Off: 6), Client Service (On: 4, Off: 0), 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.' The right screenshot shows a mobile notification panel titled 'Notifications Thu, Mar 09, 2017'. It lists notifications for 'Account' (Account Abandoned at 2:06 PM) and 'Contact List' (New Partner Accepted at 3:16 PM), followed by 'Alarms' (Meeting with Ed Johnson f... at 24mir and Project Planning Meeting at Wed, March 08, 2017 9:00 AM). A text box on the right explains: 'You can re-order the modules by drag & drop. In Notification Panel, the modules will be displayed in the same order.' An orange arrow points from the 'Contact List' module in the web interface to the 'Contact List' notification in the mobile panel.

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 Contact List entries, accounts or plans

You can create notifications for Contact List entries, accounts or plans. Go through the wizard to define the trigger, conditions and appearance for each notification.

General settings

Notification Manager > Account Module

Accounts

General settings for Account 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

New Account 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 > Account Module > Create

Account 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 Account gets created
This trigger fires whenever an account gets created
- Notify even if I made the change

BACK

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 > Account Module > Create

 Account 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 Amount Greater than 10,000.00

+ ADD ANOTHER CONDITION

PREVIOUS: TRIGGER SELECTION

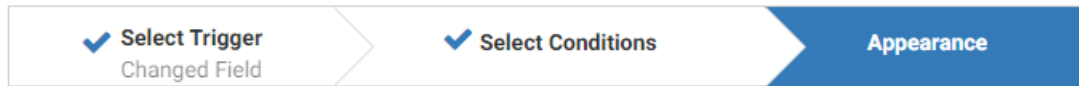
NEXT: NOTIFICATION APPEARANCE

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.

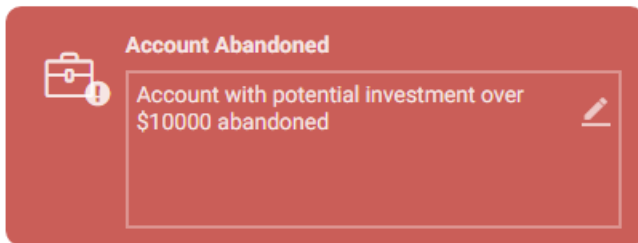
Notification Manager > Account Module > Create

 Account Abandoned



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

Keep the Toaster displayed until I close it

Play a sound when this notification arrives NO

Your notification is ON

PREVIOUS: CONDITIONS

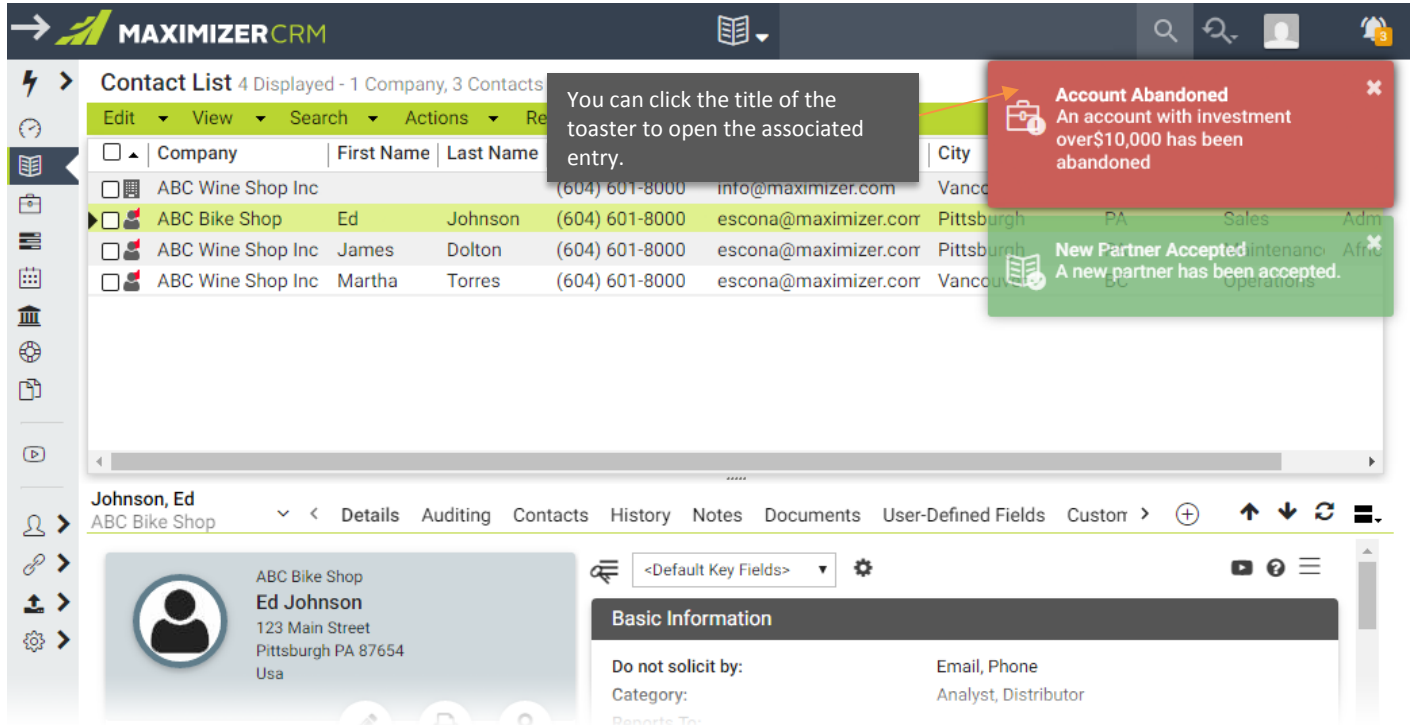
+ ADD ANOTHER

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.



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.

The screenshot displays the Maximizer CRM interface. At the top, the header shows 'abc wine shop inc' and a 'Notifications' panel for 'Fri, Mar 10, 2017'. The contact list below has columns for First Name, Last Name, Phone Number, and Email Address. A callout box with an orange arrow points to a notification titled 'High Priority Case Assigne...' in the notification panel. Below the contact list, there are tabs for 'contacts', 'History', 'Notes', 'Documents', 'User-Defined Fields', and 'Custom'. A 'Basic Information' section is visible, showing fields like 'Do not solicit by: Phone', 'Category: Key Account', and 'Reports To:'.

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

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

Notifications
Fri, Mar 10, 2017

Account

- Account Abandoned** | Thu
An account with potential...

Contact List

- New Partner Accepted** | Thu
A new partner has been acce...

Client Service

- High Priority Case Assigne...** | X
There is a case assigned to m...

Alarms

- The follow-up deadline is a...** | 11:00 AM
Thu, March 09, 2017 5:11 PM
- Meeting with Ed Johnson f...** | Thu
Thu, March 09, 2017 4:00 PM
- Project Planning Meeting** | Thu
Wed, March 08, 2017 9:00 AM

Basic Information

Do not solicit by: Phone
Category: Key Account
Reports To:

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.

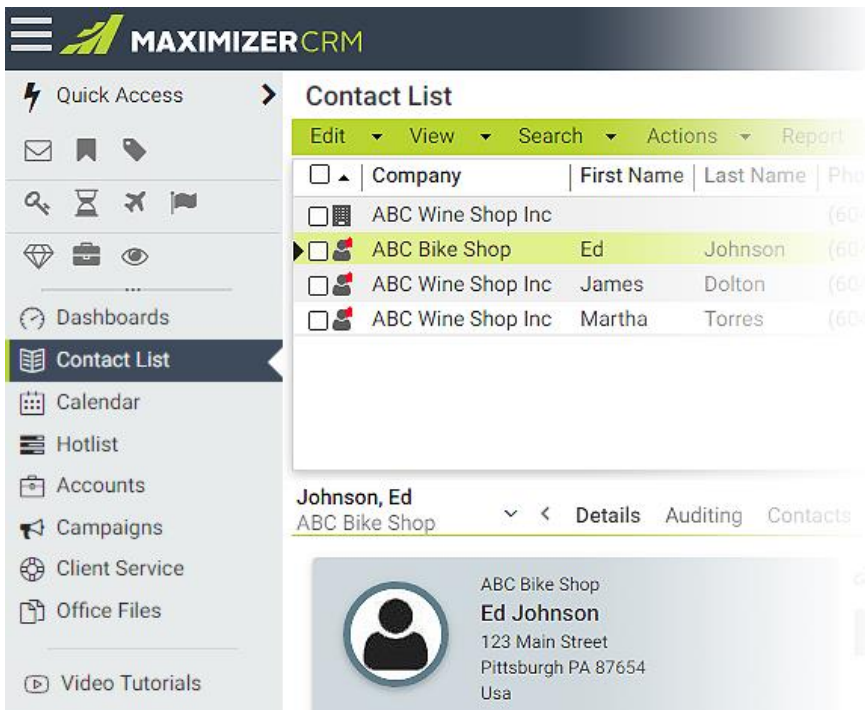
To facilitate the ability to have unlimited shortcuts, Maximizer CRM 2017 R2 includes an increased number of easy to recognize Icons that can be used to help you better organize their shortcuts into groups.

Select a group to add the shortcut.

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

Name:

Icon:




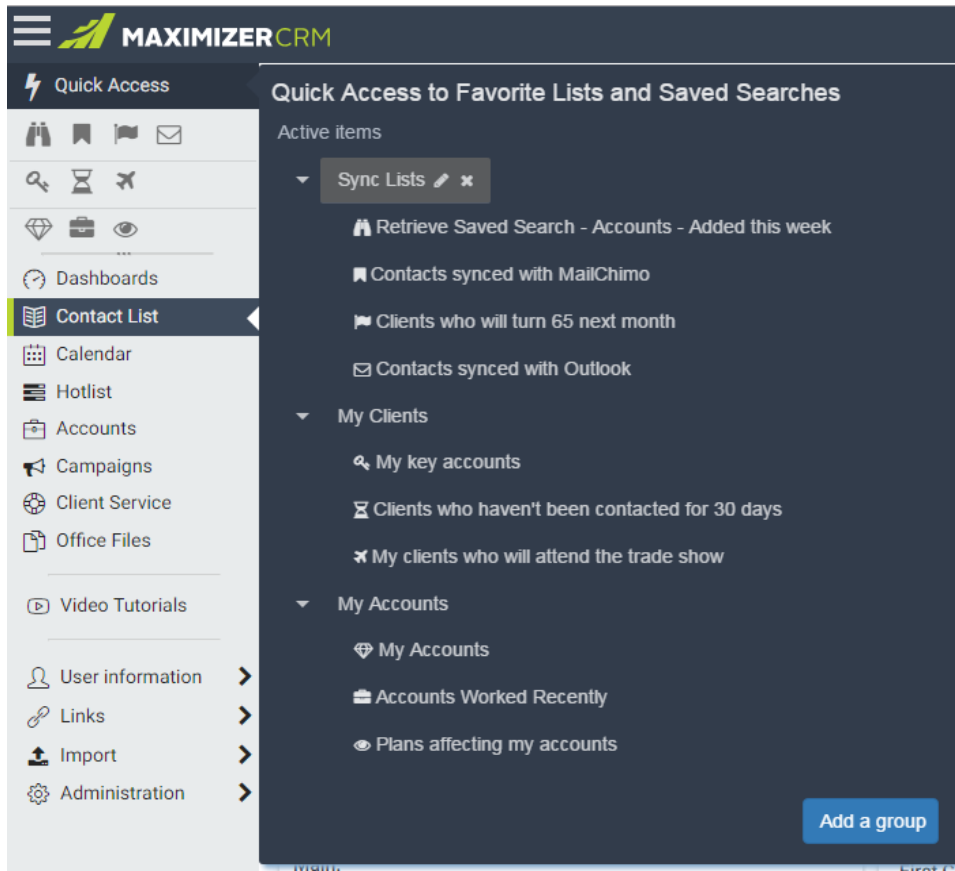
Quick Access icons in Icon Bar

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.

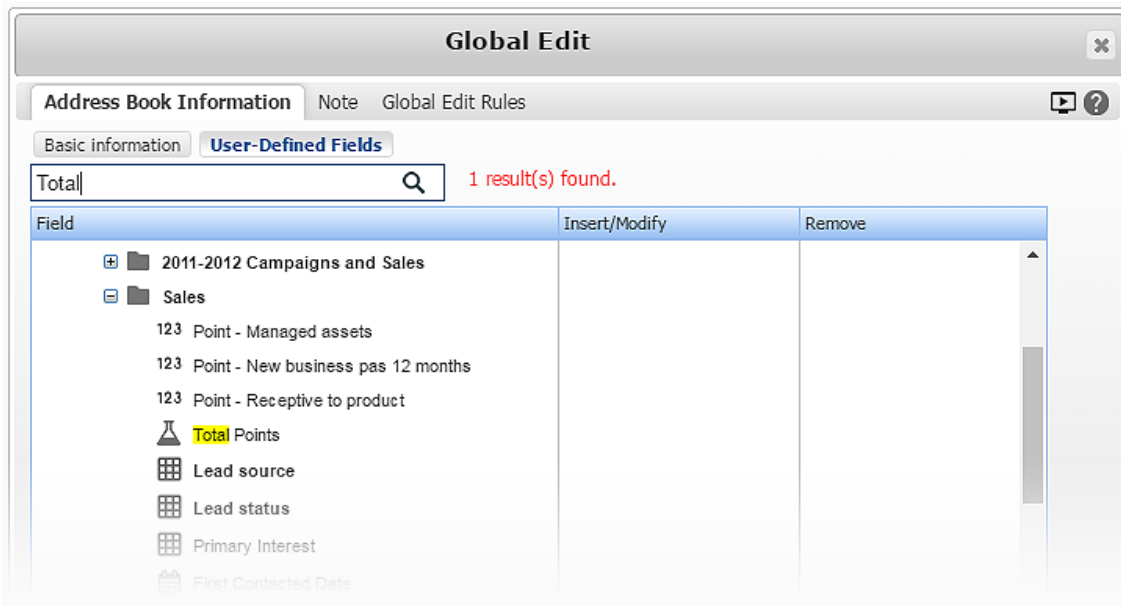
You can delete a group or a shortcut from the panel. If you delete a group, all the shortcuts inside that group will be moved to the Trash group at the bottom of the panel. Deleting the shortcuts from the Trash group will permanently delete them.



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

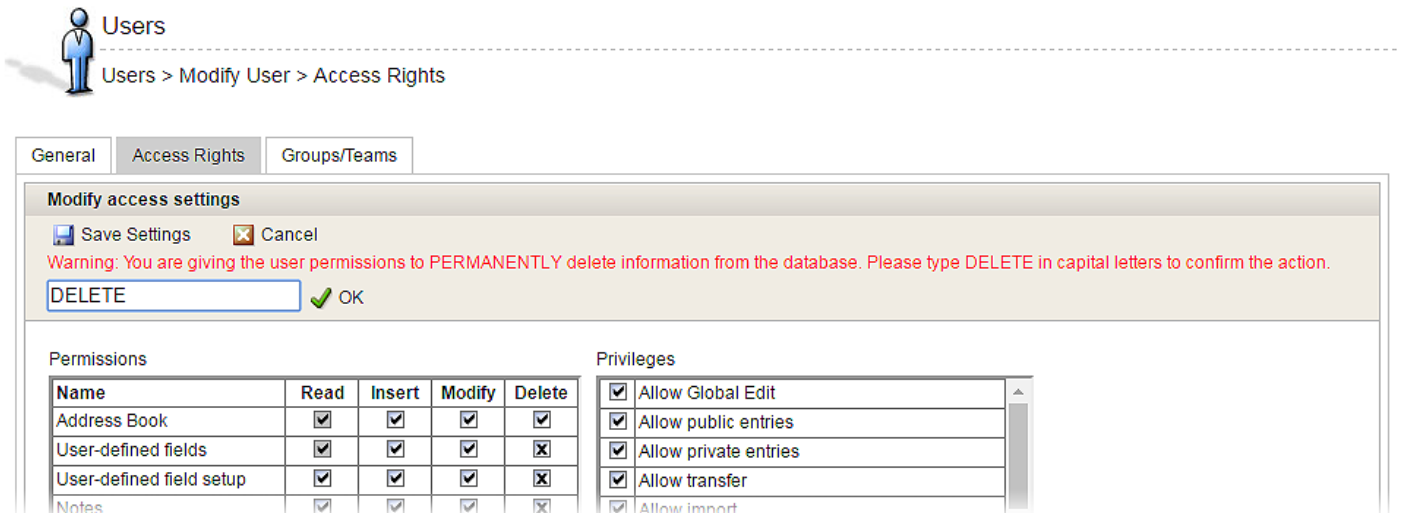
Searching for User-Defined Fields in Global Edit Dialog

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? ✕

WARNING! 1 Contact List entry is selected for deletion

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

Type **"DELETE"** to confirm

i 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 Client Service or Accounts Following Tabs and you want to learn more about a particular Client Service plan or account, clicking on the relevant plan or account will automatically open that item within its associated module.

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

Contact List 31 Displayed - 1 Company, 9 Households, 21 Contacts

Name	Birthdate	Segmentation	Phone	Email
<input type="checkbox"/> Cameron, Lou	May-12-53	A Client	403-289-7890	jnapoli@maximizer.cor
<input type="checkbox"/> Cameron, Lou and Nancy		B Client		
<input type="checkbox"/> Cameron, Nancy	October-08-63	B Client	403-421-1898	nancy.cameron@maxir

Cameron, Lou
Cameron, Lou and Nancy < ontacts Notes Files Activities Accounts **Client Service** Auditing Rela > (+) ↑ ↓ ↻

Columns: 1) Default Service Plan View | Filter: All

Plan Number	Company / Household	Contact	Category	Segmentation	Subject
✓ HQ-00028	Cameron, Lou and Nancy	Cameron, Lou	Client	B Client	cs
✓ HQ-00015	Cameron, Lou and Nancy	Cameron, Lou	Client	B Client	What is the home mort
✓ HQ-00019	Cameron, Lou and Nancy	Cameron, Nancy	Client	B Client	Questions regarding th

Selecting multiple plans and pressing the button will bring all the plans to the Client Service module.

Actions Panel in Following Tabs

The Actions Panel allows the user to initiate certain actions from within a record contained in the Contact List, Client Service and Accounts 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.

Cameron, Nancy
Cameron, Lou and Nancy < Details Investment Insurance Contacts Notes Files **Activities** Accounts Cli > (+) ↑ ↓ ↻ ☰

Add: Appointment Task Schedule Action Plan Delete View: All dates Actions

Tasks and Appointments	Date/Time
<input type="checkbox"/> Anniversary Date	November-24-19
<input type="checkbox"/> Anniversary Date	November-24-18
<input type="checkbox"/> Anniversary Date	
<input type="checkbox"/> The follow-up deadline is approaching.	
<input type="checkbox"/> Anniversary Date	November-24-16
<input type="checkbox"/> Anniversary Date	November-24-15
<input type="checkbox"/> Send info regarding allocations.	September-30-14 11:00 AM

You can write a note or send an email from the Activities tab.

- Add a note
- Add a file
- Write an email
- Draw a map
- Make a call
- Receive a call
- Time a task
- Schedule a meeting

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

Cameron, Lou
Cameron, Lou and Nancy < Details Contacts Notes Files Activities Accounts Client Service Au > (+) ↑ ↓ ↻ ☰

Lou Cameron
astry
Cameron, Lou and Nancy
1323 1st Ave.
Calgary AB V4E-9R9
Canada

Office::
403-289-7890

Cell:
778-298-9870

Email:

*Basic Information

Important Note: Lou has been an AA client for over 20 years

Status: Active

Record Type - Mandatory: Client

Client Type: Individual

Do not solicit by: Fax

Segmentation: A Client

Rating:

Trading Authorization Via:

Account Types: Cash CDN, Margin CDN, RSP, TFSA CDN

- +
- ↑
- ✉
- 📍
- ↗
- ✓
- 🕒
- 📅
- 👍
- ☰
- ☰

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.

The screenshot shows a CRM interface. At the top, there is a green navigation bar with options: Edit, View, Search, Actions, Report, Help. Below this is a table titled "Contact List" with 31 displayed contacts. The table has columns for Name, Birthdate, Segmentation, Phone, and Email. The first row is highlighted in green and shows "Cameron, Lou" with birthdate "May-12-53" and phone "403-289-7890".

Below the table, there is a detailed view for "Cameron, Lou". It includes a profile picture, name "Lou Cameron", and address: "aastry, Cameron, Lou and Nancy, 1323 1st Ave., Calgary AB V4E-9R9, Canada". There is also a section for "Important Note" which says "Lou has been an AA client for over 20 years".

A tooltip box is overlaid on the right side of the interface, pointing to a button in the top right corner of the contact details view. The tooltip contains the following text:

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.

The button being pointed to is a small icon with three horizontal bars, representing a maximize/minimize function for the following tab.

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.

The screenshot displays the CRM Calendar interface. The main calendar view shows a grid for Wednesday, 3/8/2017, with time slots from 6:00 AM to 5:00 PM. A meeting titled "Project Planning Meeting" is scheduled for 9:00 AM, with a description: "This meeting is to discuss the scope of next project and the start date." The right-hand side panel contains various settings. The "Settings" tab is selected, and the "Timeslot height (weekly & daily views)" field is highlighted with an orange box, showing a value of 4. Other settings include work hours (8:00 AM to 5:00 PM), working week (Monday-Friday), and default view (Weekly).

Time Slot	Appointment
6:00 AM	
7:00 AM	
8:00 AM	
9:00 AM	Project Planning Meeting This meeting is to discuss the scope of next project and the start date.
10:00 AM	
11:00 AM	
12:00 PM	
1:00 PM	
2:00 PM	
3:00 PM	
4:00 PM	
5:00 PM	

Calendar Settings Panel:

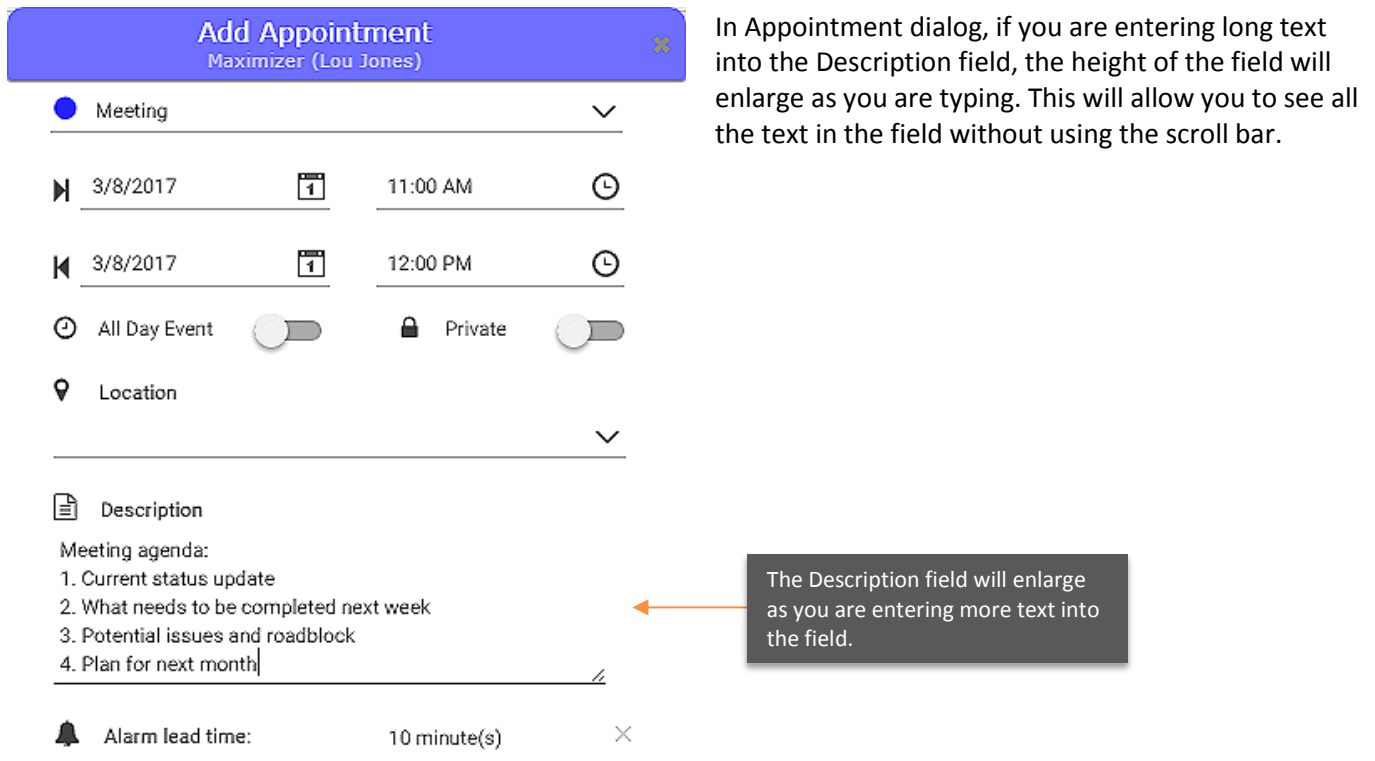
- Calendar: [Dropdown]
- Notification Options: [Dropdown]
- Display Options: [Dropdown]
- Work hours: Start Time 8:00 AM, End Time 5:00 PM
- Working week: Sunday [], Monday [x], Tuesday [x], Wednesday [x], Thursday [x], Friday [x], Saturday []
- Default icon for Address Book contact: [User Icon]
- First day of week: Sunday [Dropdown]
- Default view on startup: Weekly [Dropdown]
- Default interval (minutes): 60 [Dropdown]
- Timeslot height (weekly & daily views): 4 [Dropdown]**
- Show non-work days in weekly view: [Checked]

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.

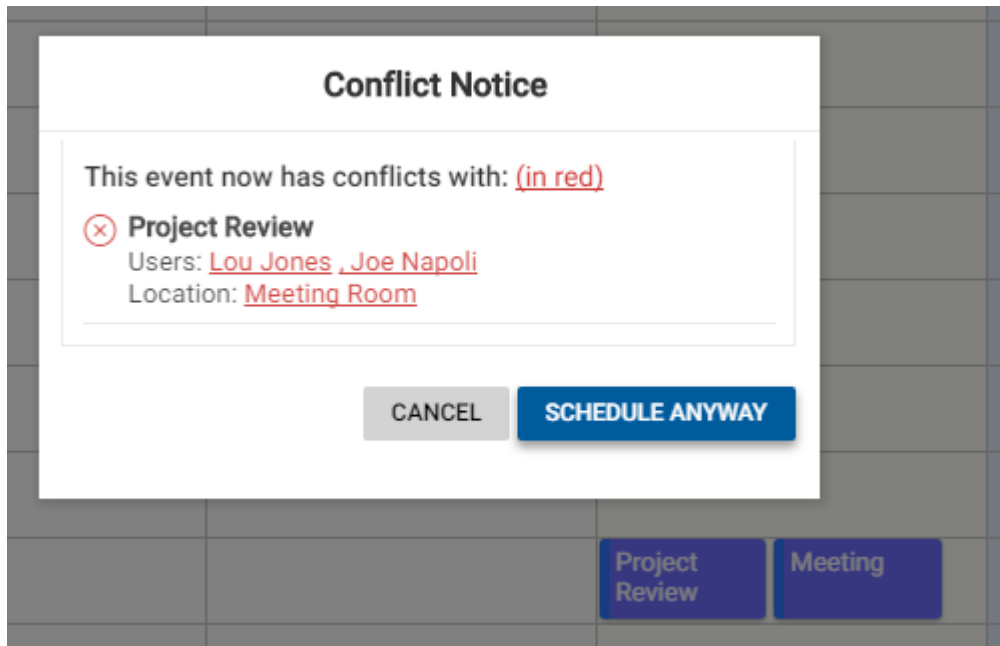


Automatically Expand the Height of the Description Field



Conflict Checking when Rescheduling an Appointment by Drag and Drop

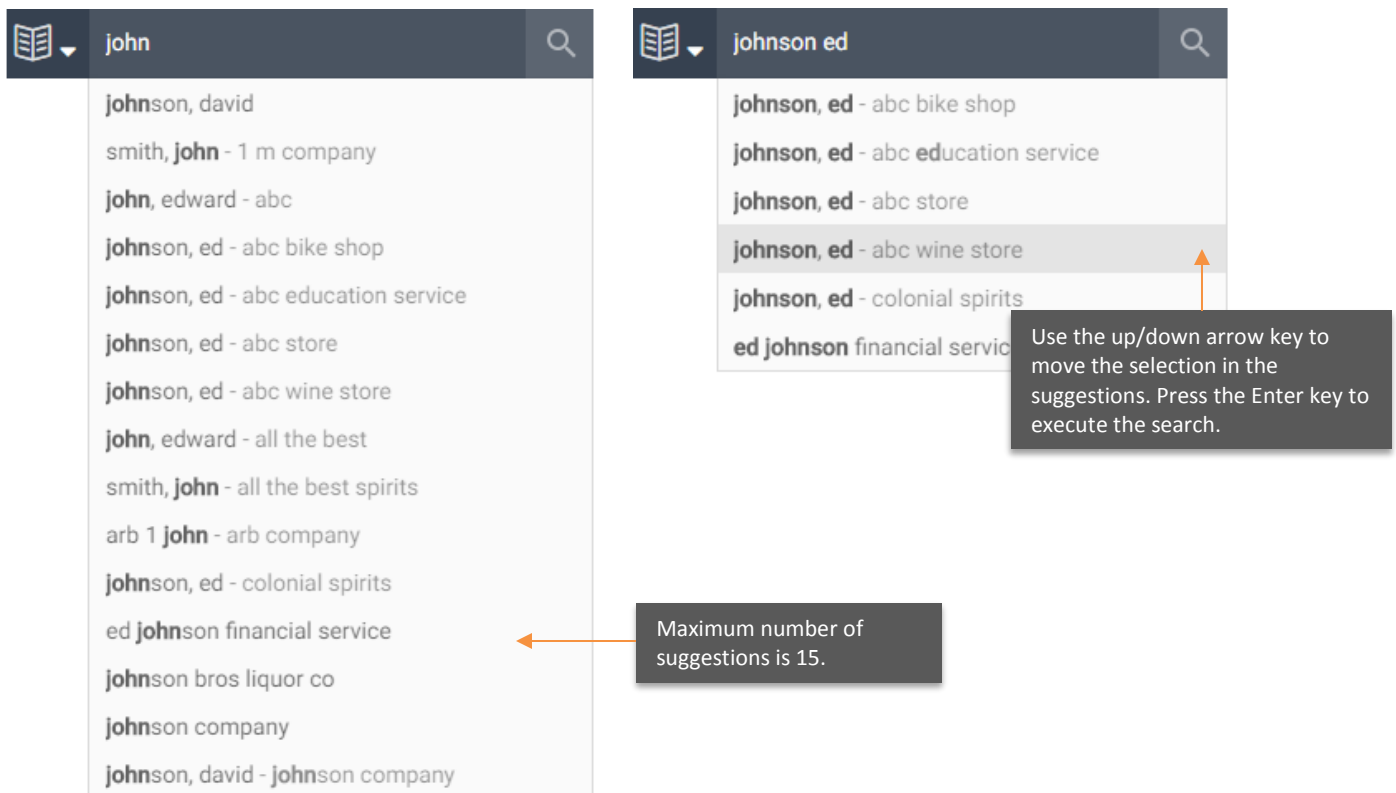
When you re-schedule an appointment by drag and drop, conflict checking will be performed. Press the Cancel button will cancel the action and move the appointment back to the original time slot. Press Schedule Anyway button will move the appointment into the new location.



Quick Search Enhancement

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

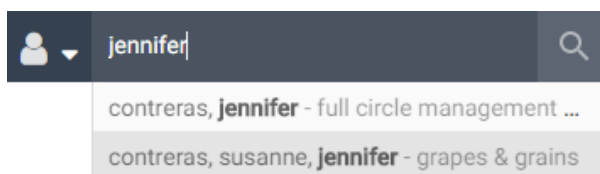
When you begin typing in the Quick Search field, suggestions will be displayed after three letters have been entered. As you continue typing in the field, the suggestions will be refined to match the search string. You can use the up/down arrow key to select the correct entry in the suggestions. Highlight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

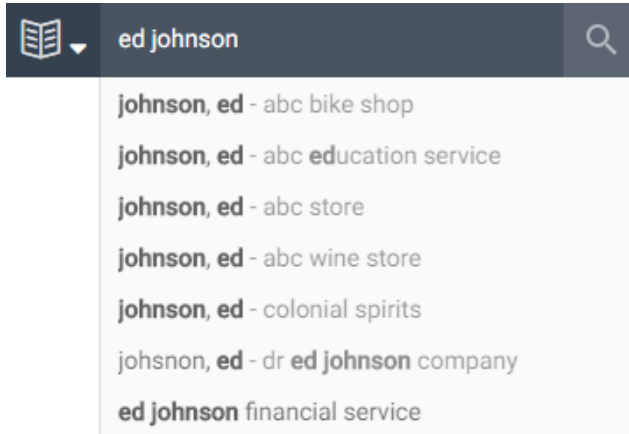
- You are searching for a contact. You know the contact's first name and the company name, but you don't remember how to spell the last name.
- You are looking for a contact, but there are many other contacts with the same name from different companies in your database.

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 Contact List entries for Companies, Individuals, and Contacts, and are based on searching for First Name, Last Name and Company Name.
- When searching for Contact List 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 accounts and plans.



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

When you are searching for Contact List entries, all the matching companies, individual and contacts are 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 database, only one suggestion will be provided for these entries. The search will retrieve all the duplicated entries.

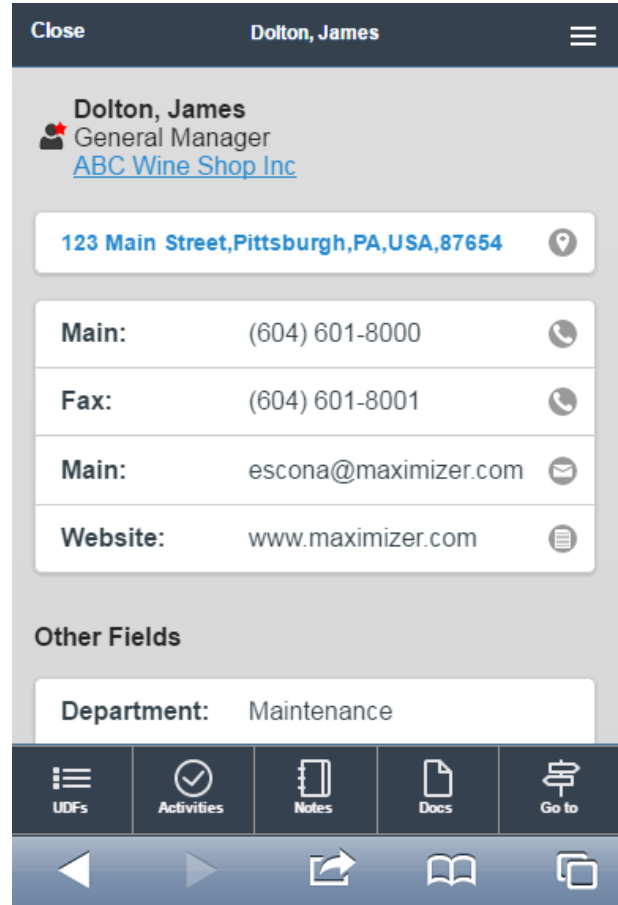
The function of remembering the search history is no longer available.

If you are not looking for a particular Contact List 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

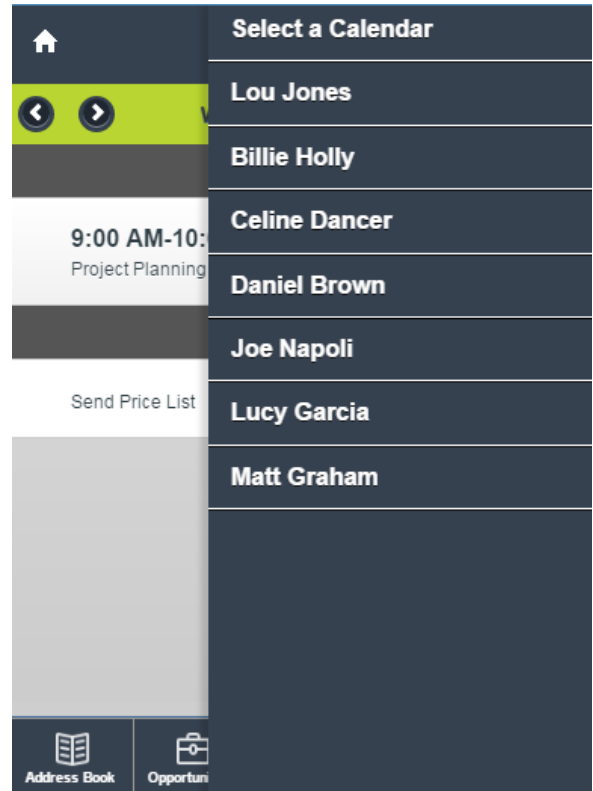
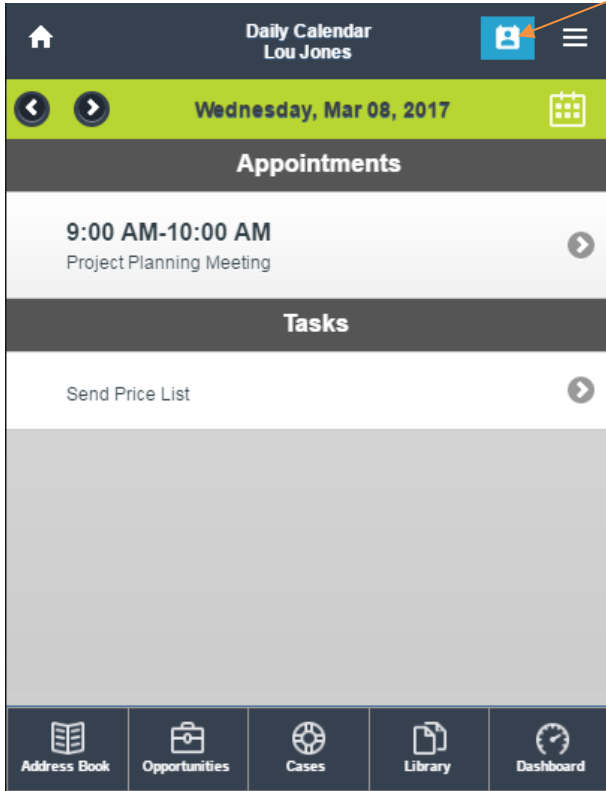
The look and feel of Mobile Access has been updated to be consistent with the style of the Web Access.



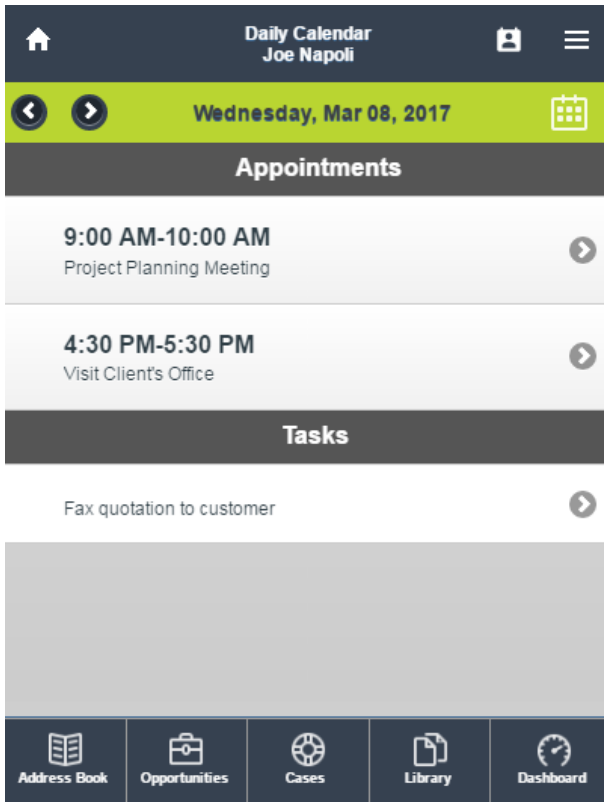
View Other Users Calendar

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.

Press the button to select another user



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.

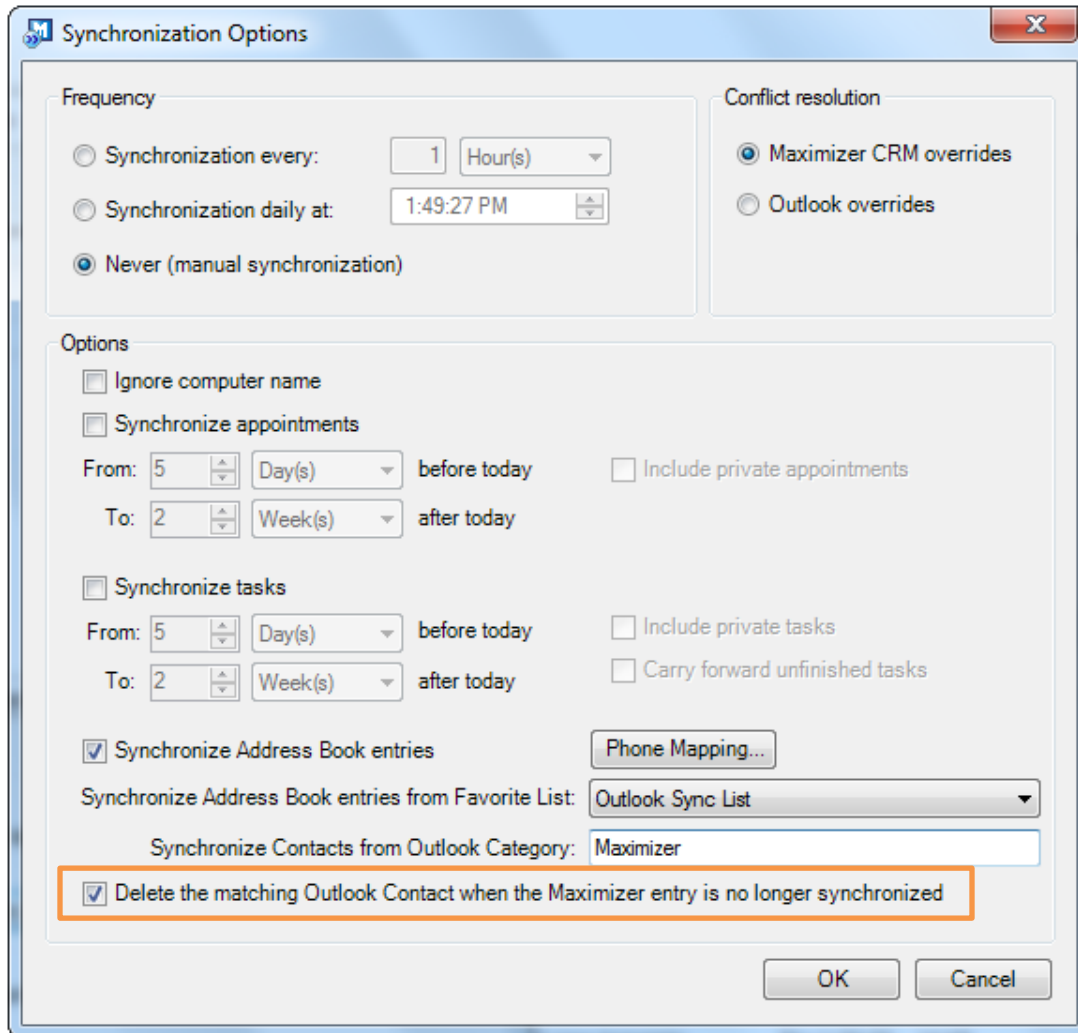
Press an appointment or a task in the screen will open the View Appointment or View Task screen.

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.

Move Selected Contact

Source entry: Johnson, ED - ABC Education Service

Target entry: ABC Wine Store

Options

- Use the main address of the source entry to create a mailing address for the target entry
- Prefix contact's notes with move text:
Contact moved from 'ABC Education Service' to 'ABC Wine Store':
- Maintain contact's association with Opportunities and Customer Service Cases
- Update Related Entries to maintain relationships
- Update Favorite Lists to reflect contact move
- Update Campaigns to reflect contact move
- Delete source entry after move

OK Cancel

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 a Contact List 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 Contact List 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 account or a plan doesn't show all the Key Fields if there are many of them

Category: Client Service, Accounts, Reports

In the Details tab for an account or a plan, 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: Accounts, User Defined Fields

If you have set a mandatory account user-defined field based on the Probability of Close field, and you set a Process Stage in an account 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 plan is not updated if user-defined fields in Key Fields have been updated

Category: Client Service

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

Merging Contact List entries causes plans and accounts to resend the initial alert emails

Category: Contact List, Client Service, Accounts

If you are merging two Contact List entries together and the source entry has any Client Service plans or accounts assigned to it, the initial alert emails will be sent again as if the plans or accounts 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 account doesn't allow clearing Close Date on new one.

Category: Account

You duplicate an account that is already closed. When you open the new account 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 Contact List 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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