Maximizer CRM 2017 R2

Feature Review Guide

For Financial Advisors

Published By | MAXIMIZER CRM

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

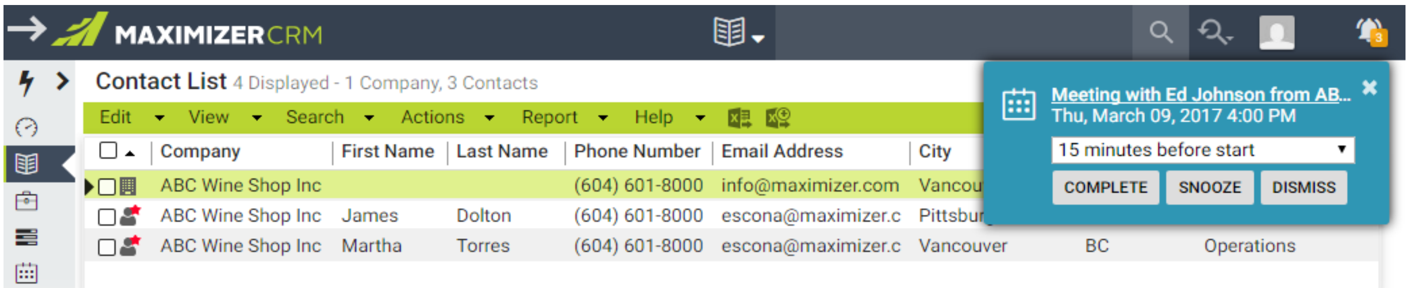
Support 64-bit in On Premise Environment 31

RESOLVED ISSUES IN MAXIMIZER CRM 2017 R2 32

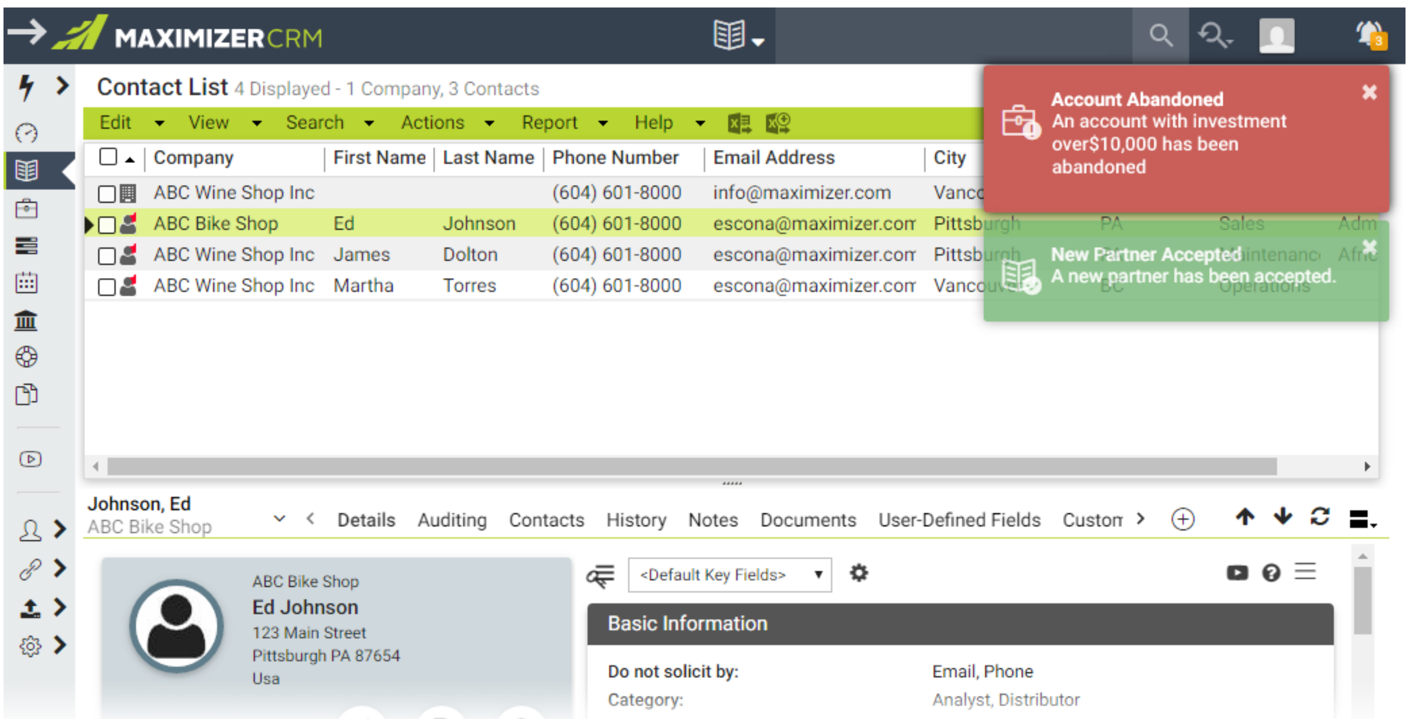
Condition-Based Notifications

Maximizer CRM 2017 R2 allows you to set up condition-based notifications for 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.



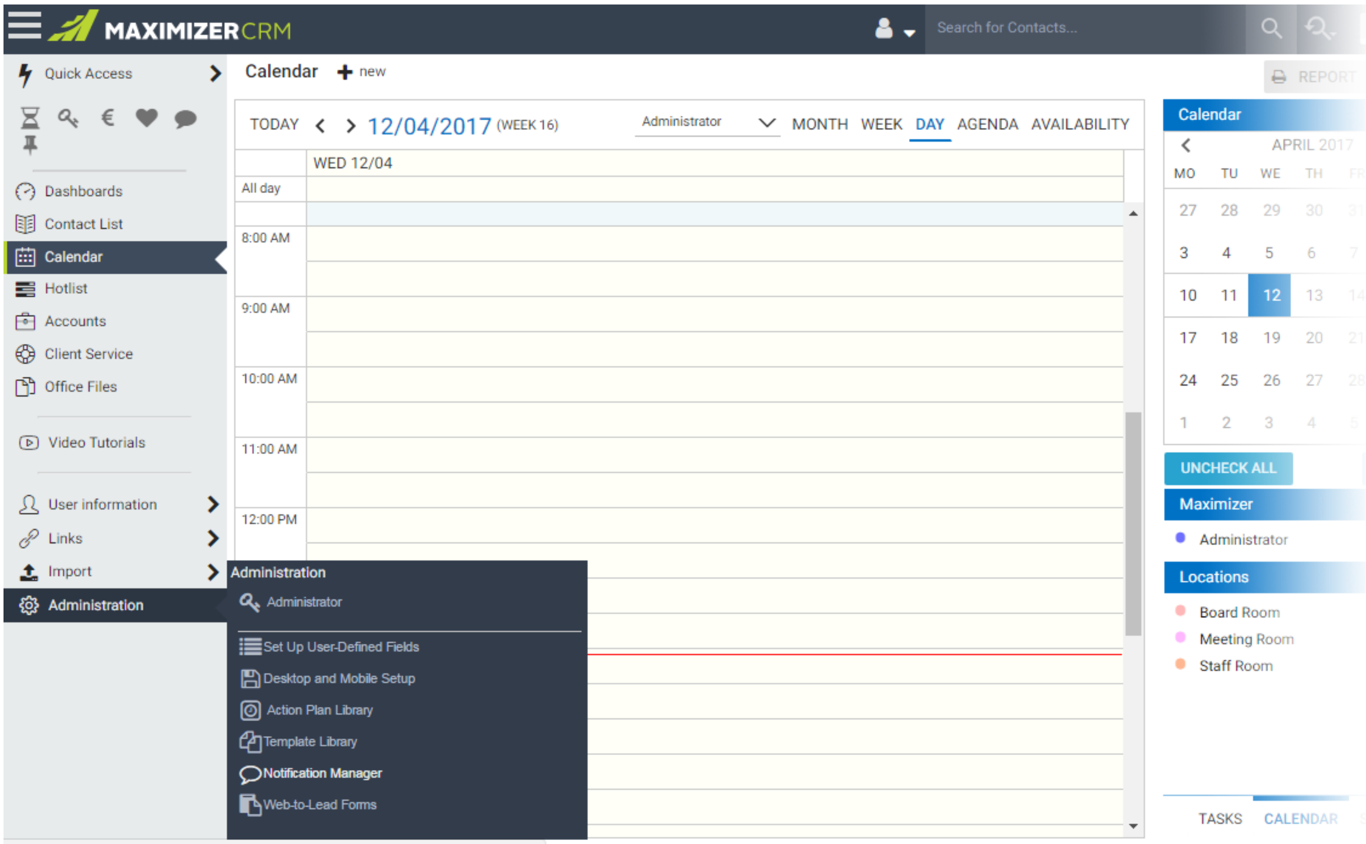
Example Toaster Notifications for an abandoned account and a new contact.



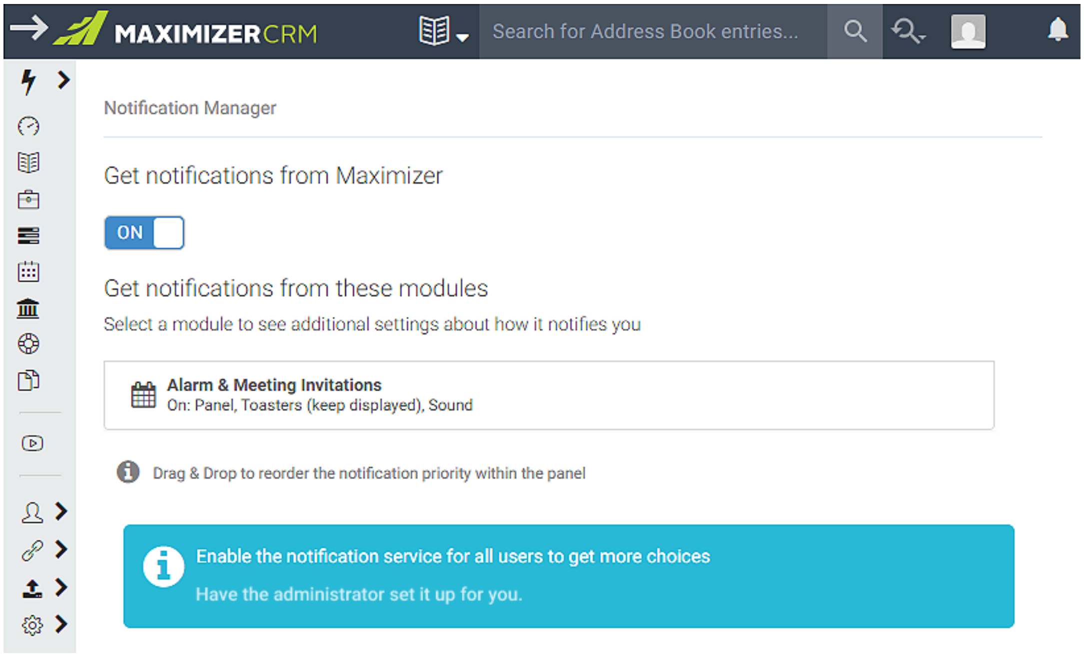
Setup Notifications

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.

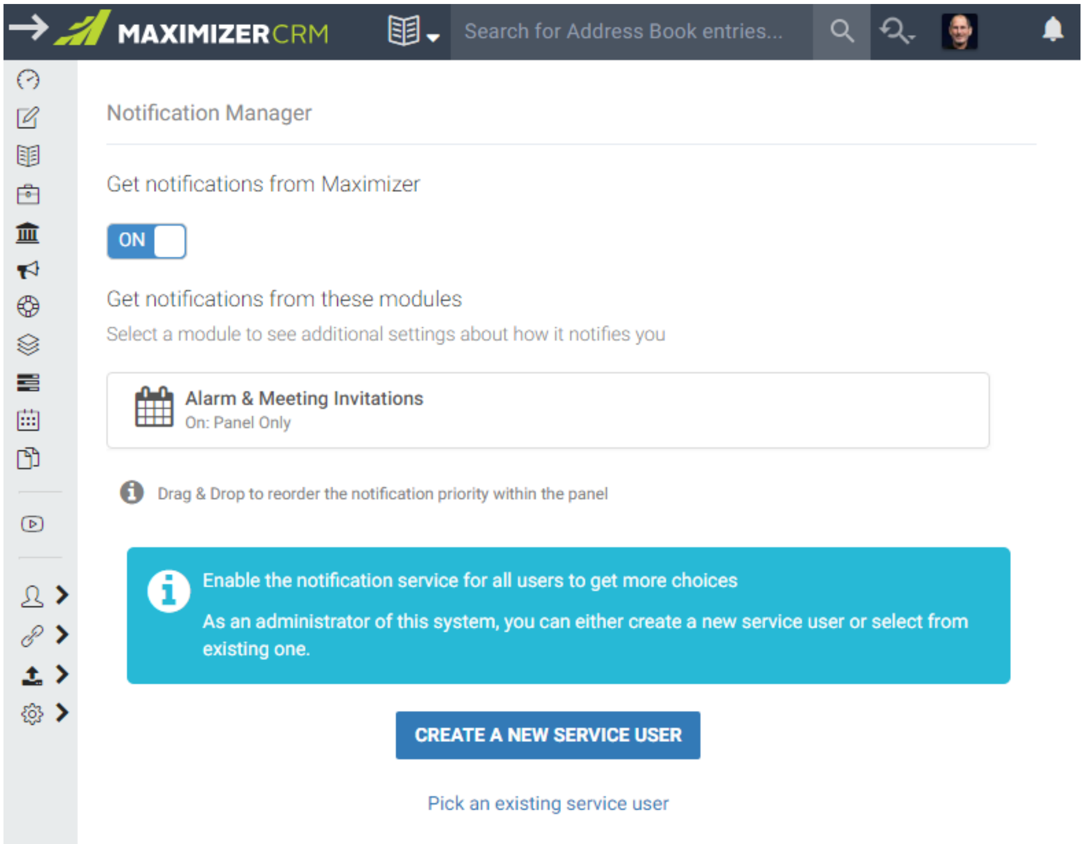


If you are not the Maximizer Administrator, you will see the screen below. You can enable notifications for alarms and meeting invitations, but you cannot create notifications for other modules until your Administrator enables this functionality.

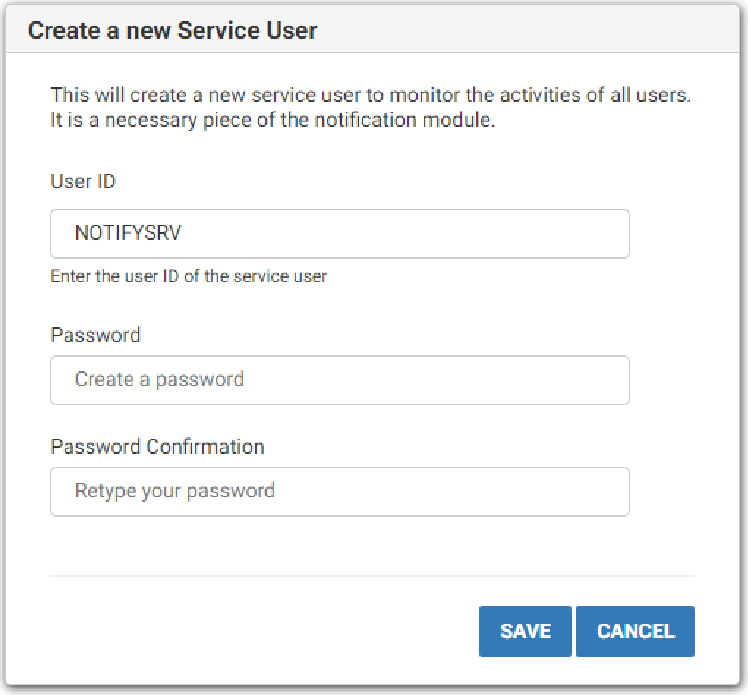


Enable Notification Service

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.

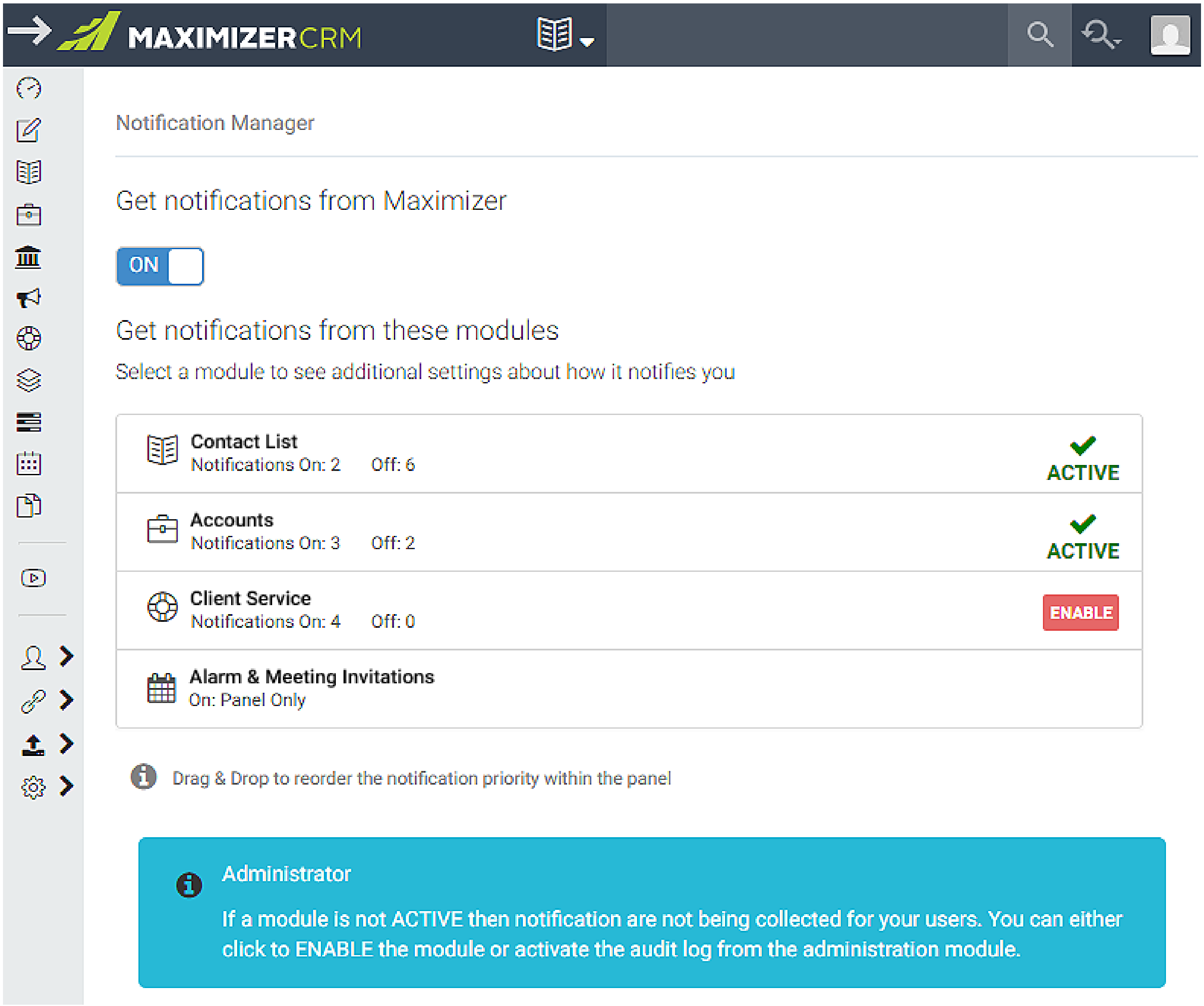


Clicking on Create a new Service User will present the Administrator with this dialog. The User ID will default to the above illustrated name. Create and confirm a Password for the Service User and save.



Enable Audit Log

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



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

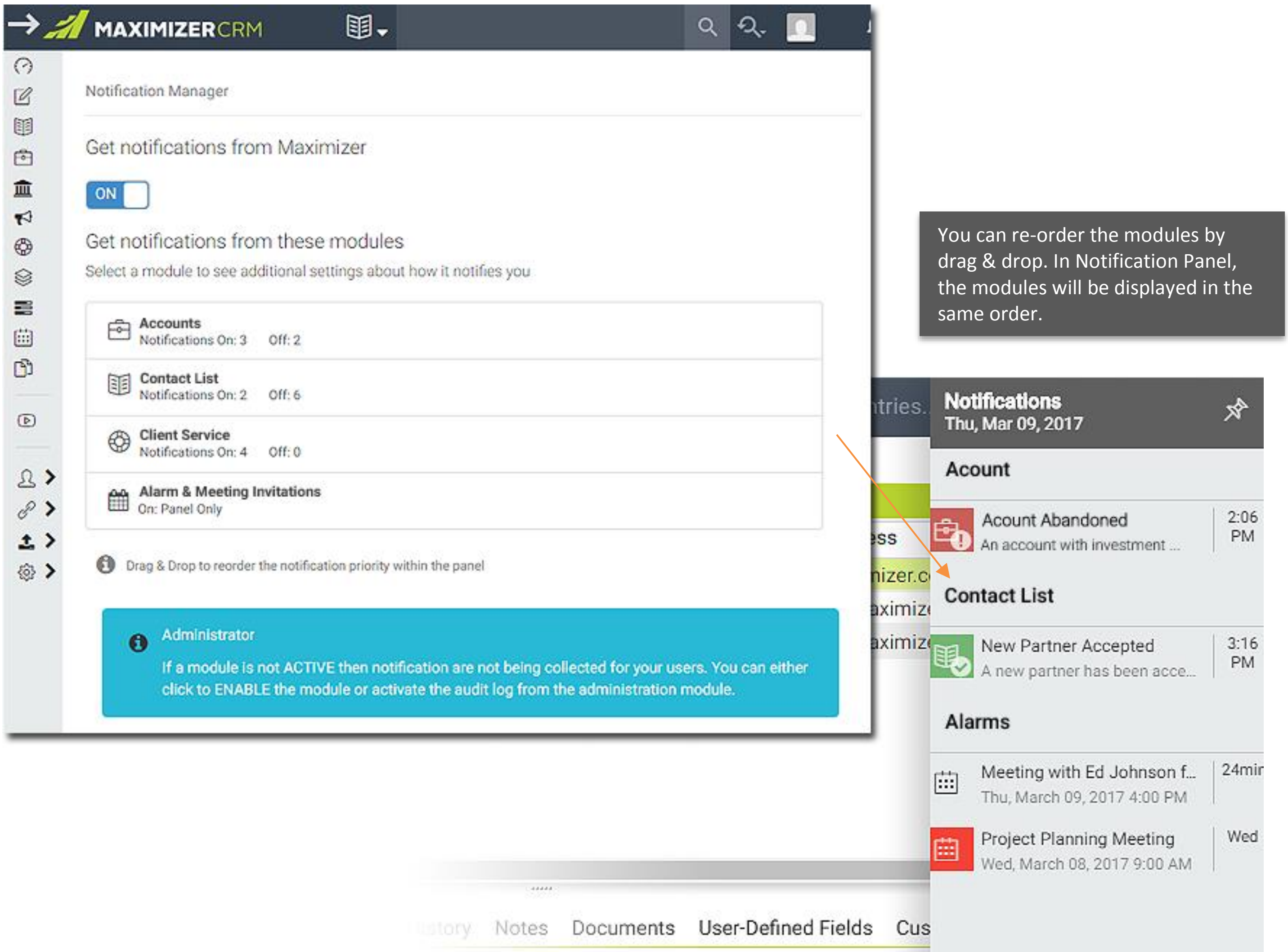
Only the Maximizer Administrator can view the status of the audit log. If the audit log is enabled for the desired module, a checkmark will be displayed. If the audit log for the module is not enabled, you will see the Enable button. Press the button to enable the audit log. Enabling the Audit Log is 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.

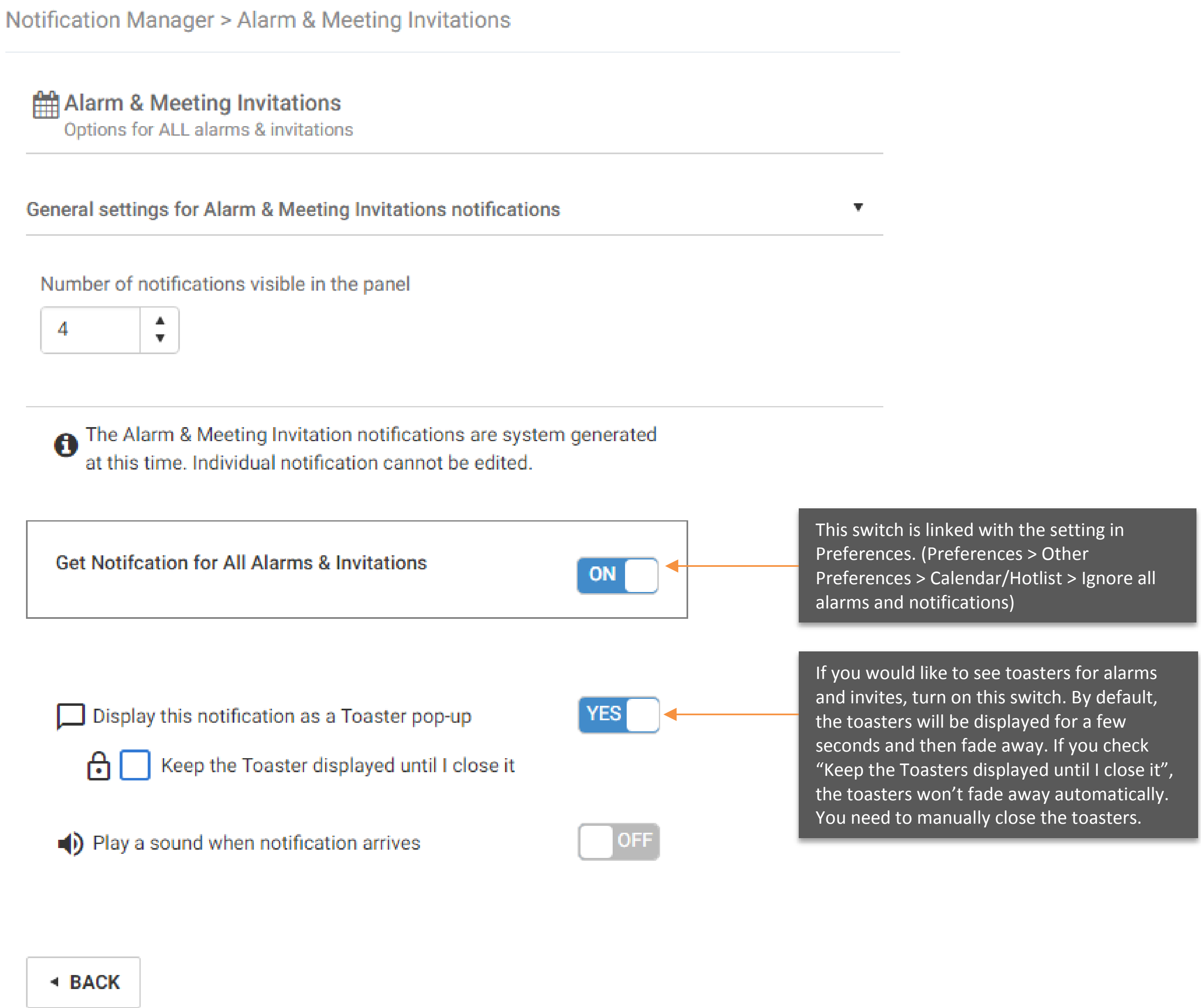
The main switch on top of the screen controls whether you will see notifications or not. If it is off, the Notification Panel will be hidden. You won't see any notifications.

Click on each module to create notifications for that module.



Setup notifications for alarm and meeting invitations

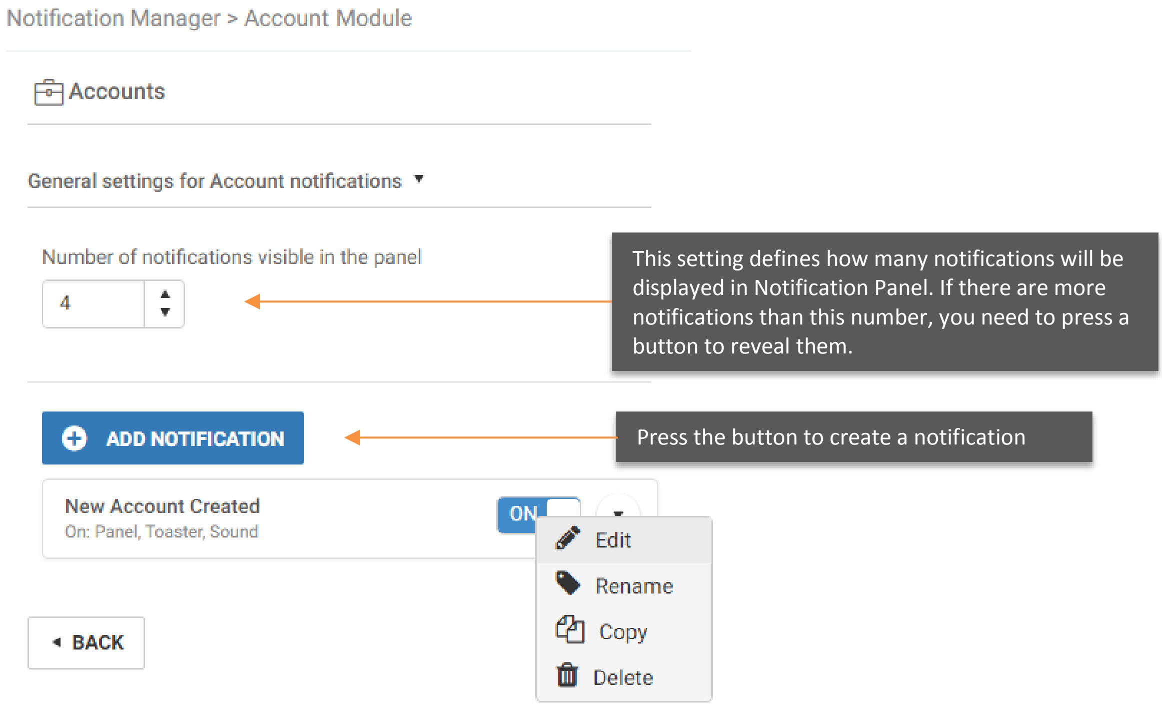
The setup of notifications for alarms and meeting invitations in Maximizer CRM 2017 R2 is consistent with earlier builds. The R2 release offers the option to display the alarms and invitations in Toasters.



Setup notification for Contact List entries, accounts or plans

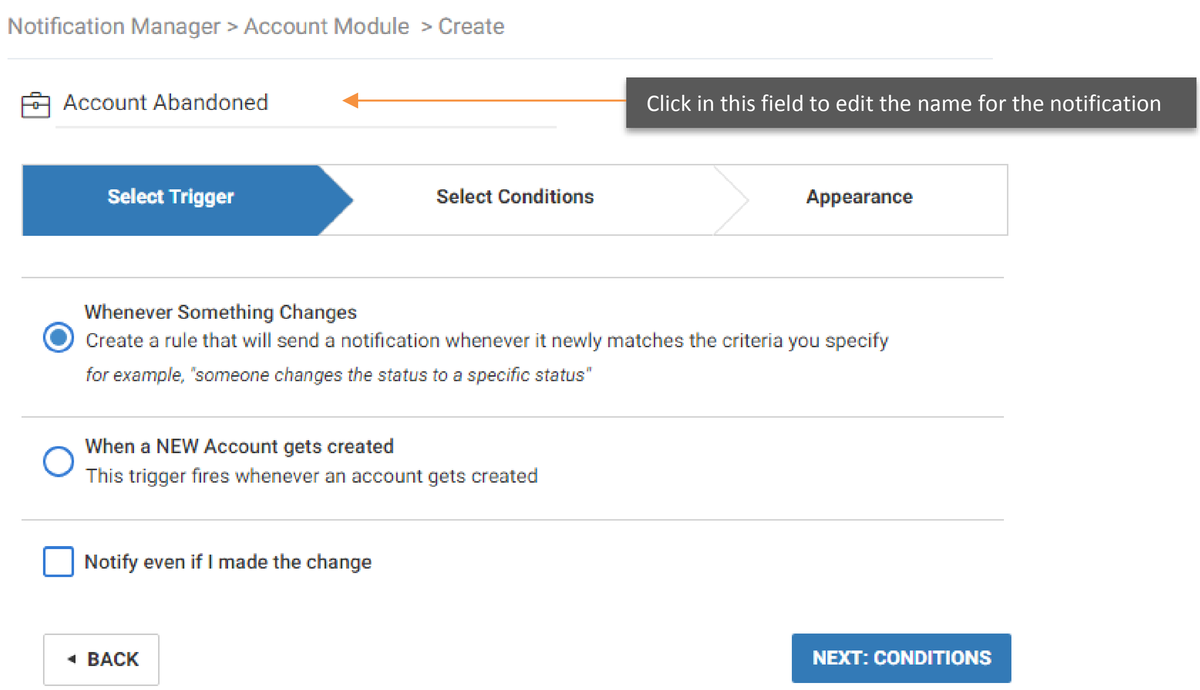
You can create notifications for Contact List entries, accounts or plans. Go through the wizard to define the trigger, conditions and appearance for each notification.

General settings



Create a notification – Step 1: Select trigger

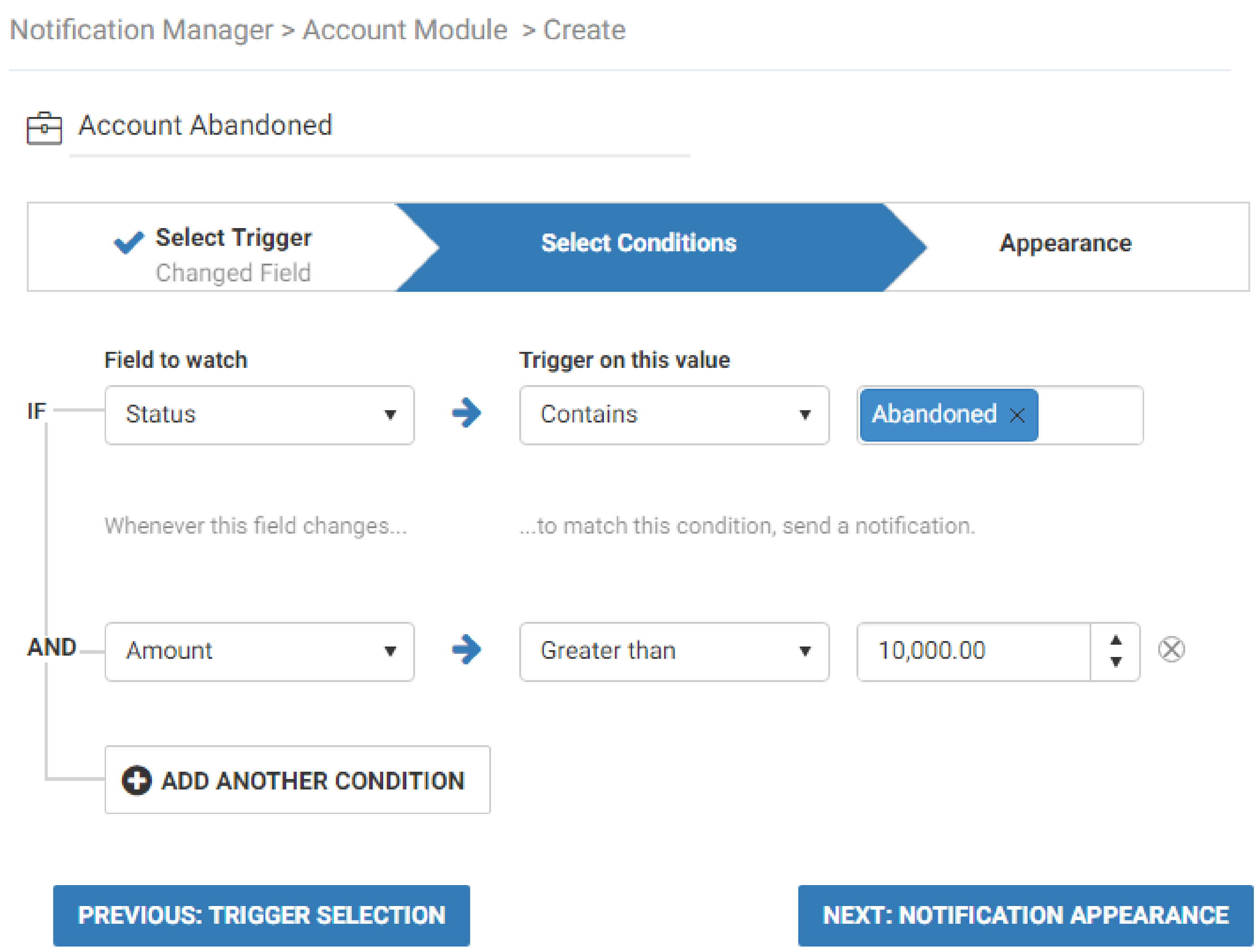
In the first step, you need to determine what will trigger a notification, whether a new entry is created or a field has been changed to the value that you specify.



Create a notification – Step 2: Select conditions

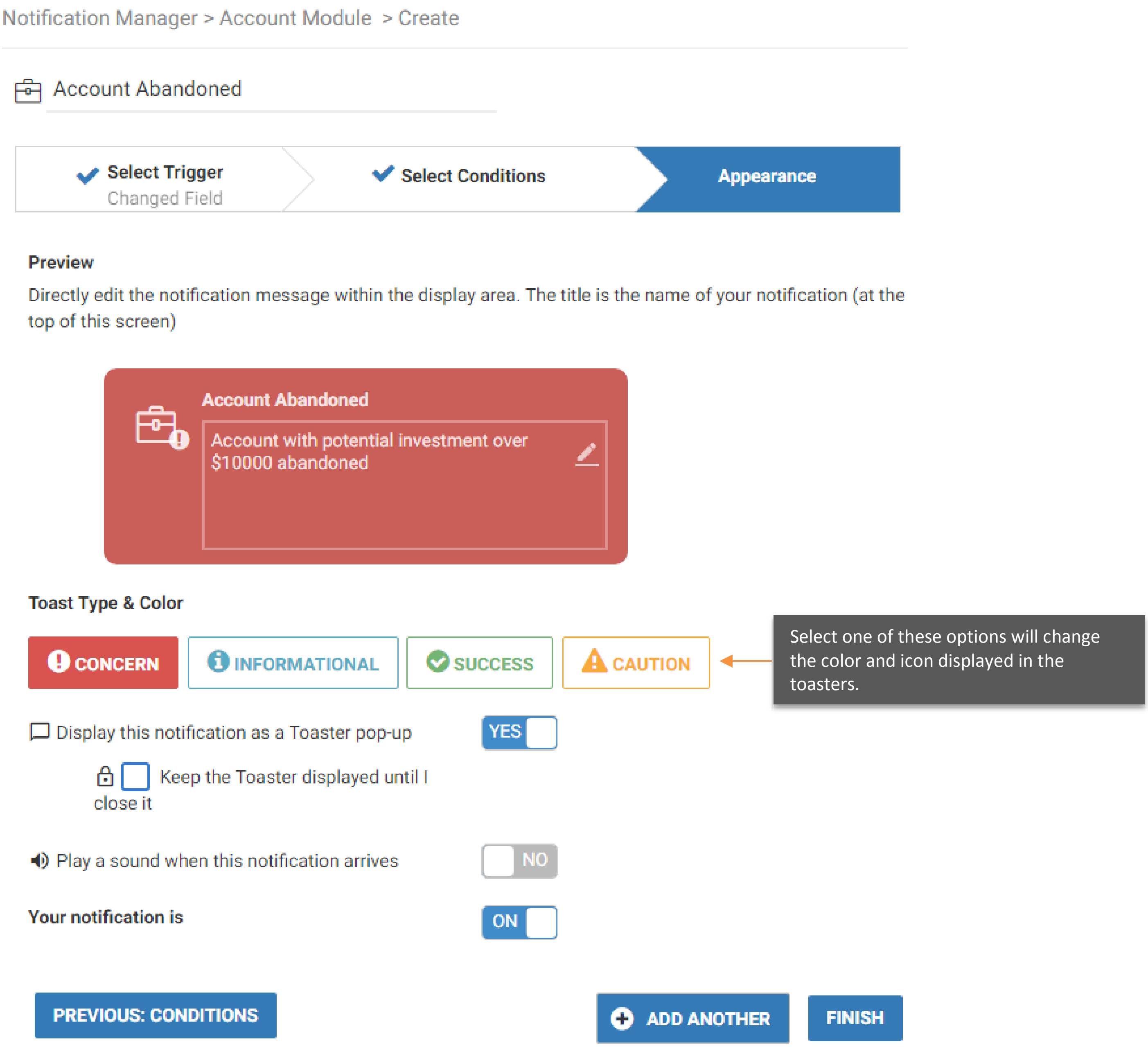
In this step, you specify the conditions for the notification. You will select a field and define condition. You can add multiple conditions.

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



Create a notification – Step 3: Set appearance

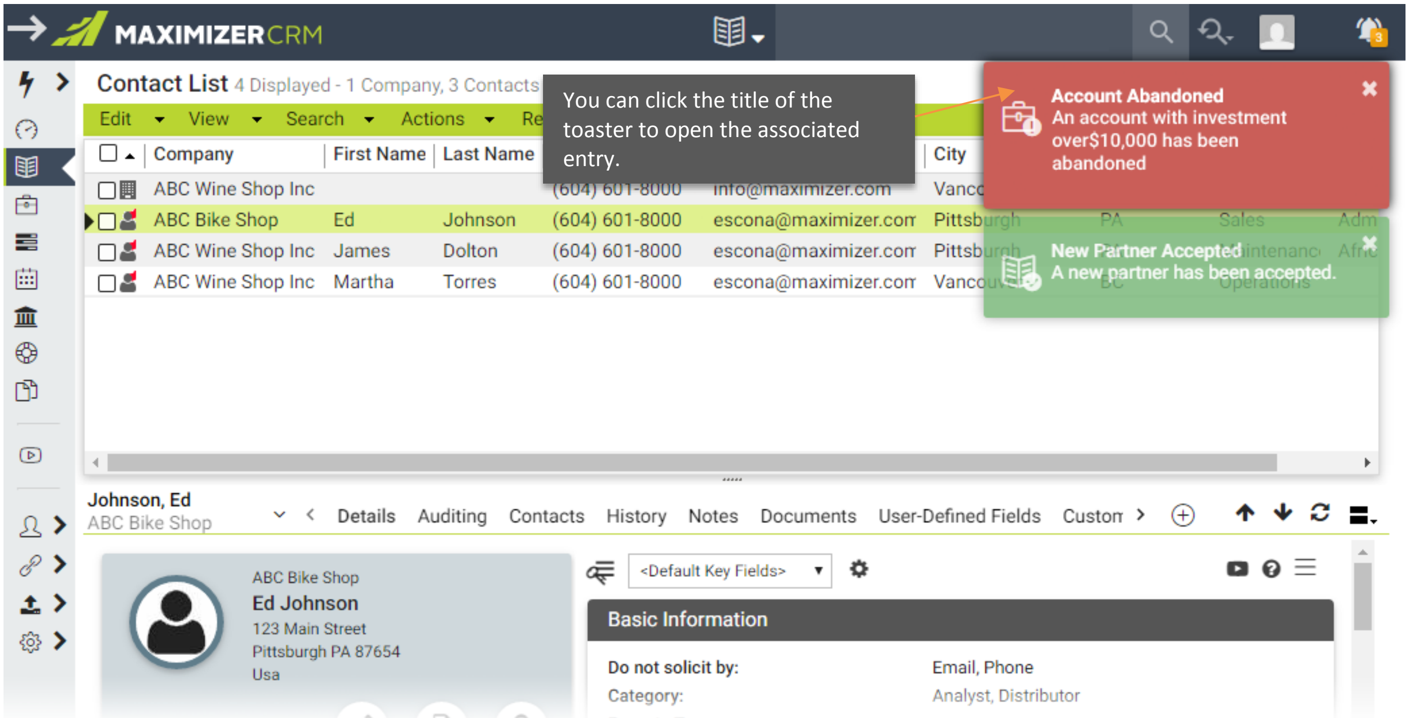
In this step, you will decide the look and feel of the notification. You can enter description, select a color and decide whether you want to see the toaster or not. You can also play a sound when the notification arrives.



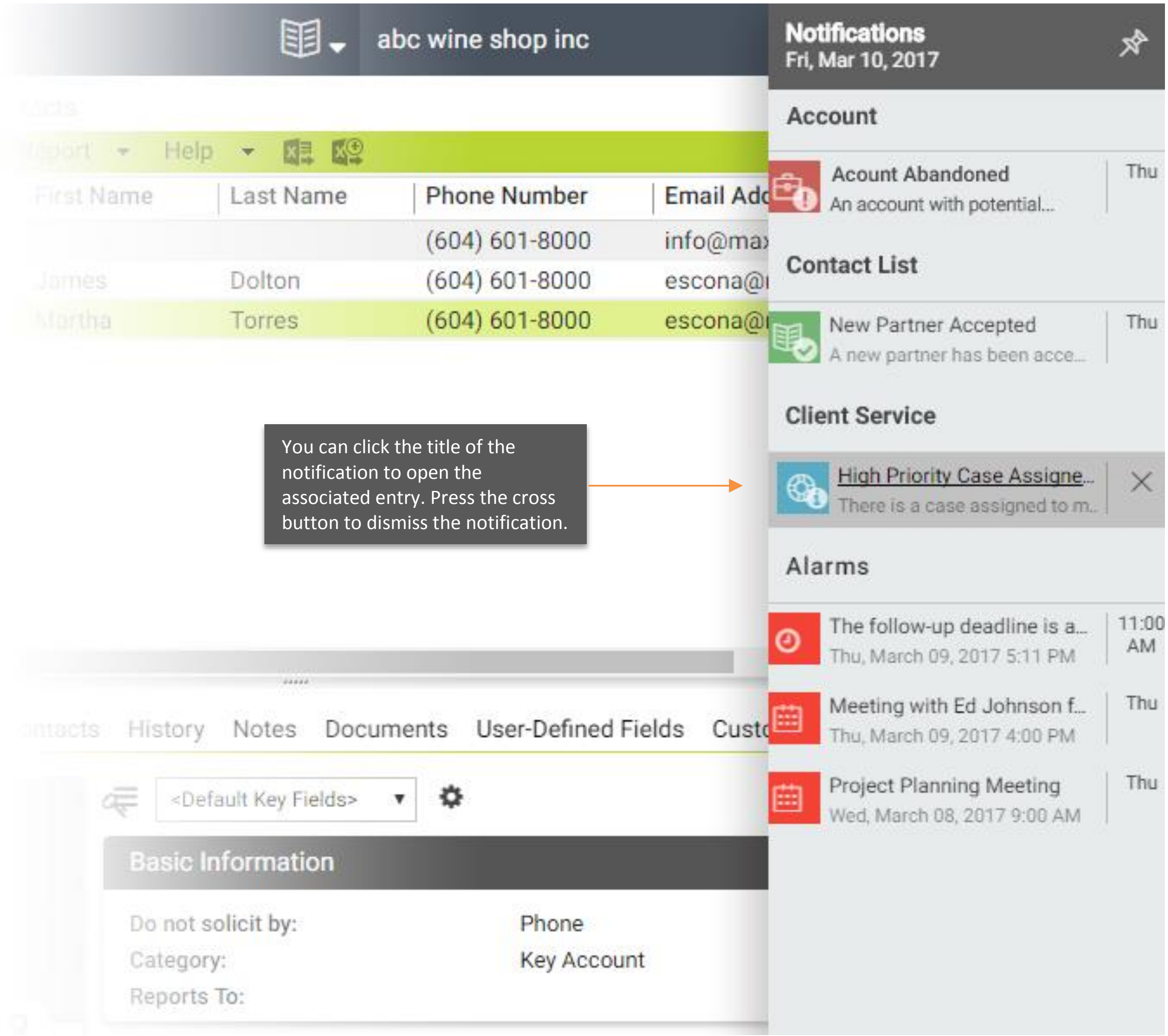
Display Notifications

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.



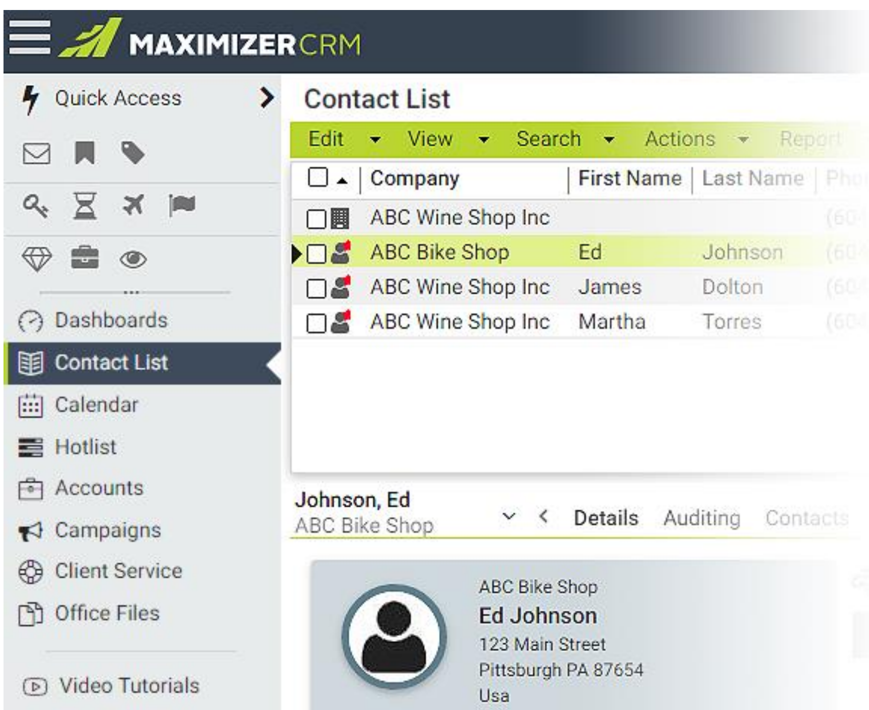
User Experience Improvements

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.

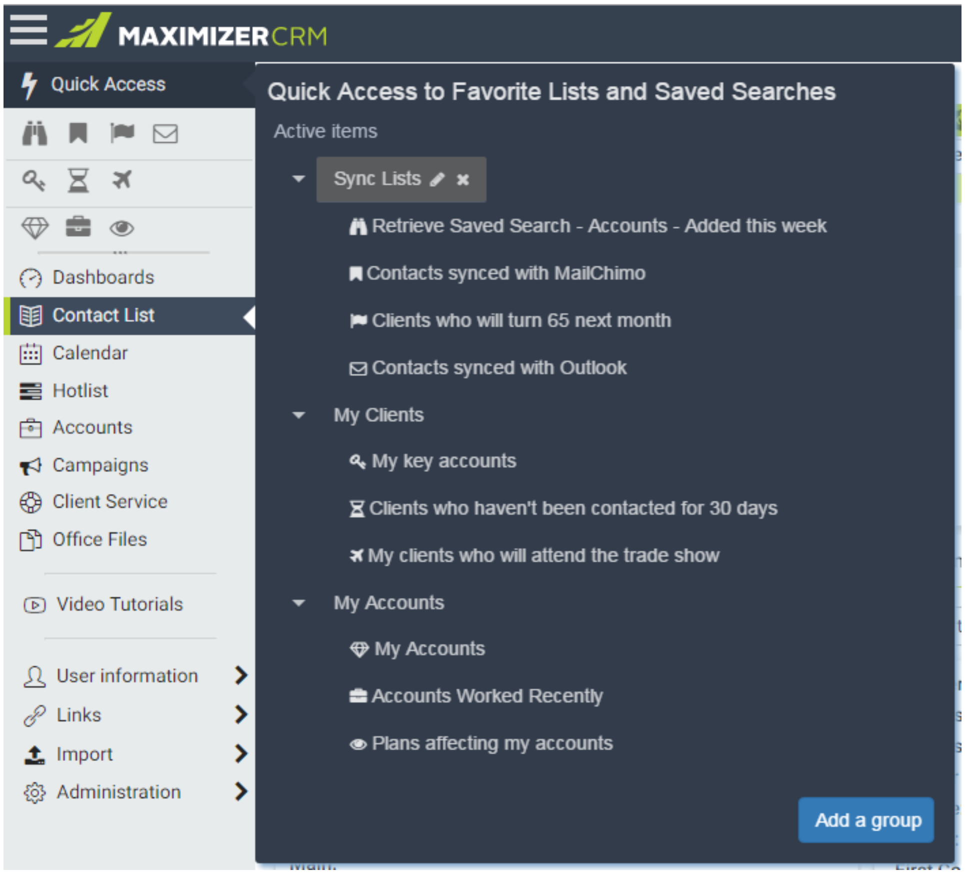


Quick Access icons in Icon Bar
You can re-organize the icons by drag and drop.

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.

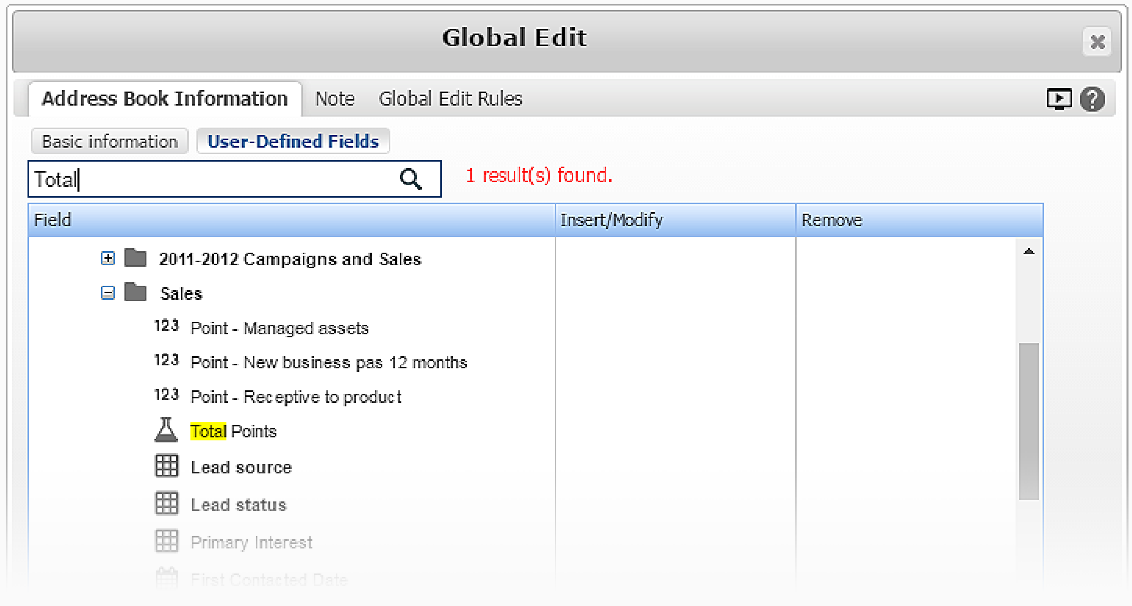
You can delete a group or a shortcut from the panel. If you delete a group, all the shortcuts inside that group will be moved to the Trash group at the bottom of the panel. Deleting the shortcuts from the Trash group will permanently delete them.



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

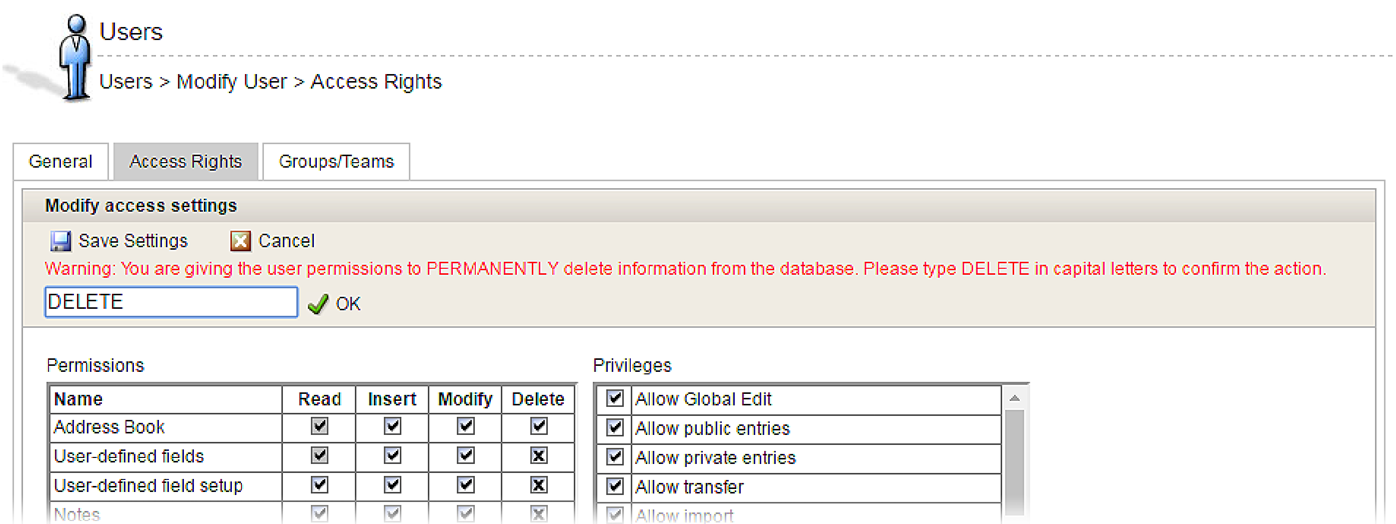
Searching for User-Defined Fields in Global Edit Dialog

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.

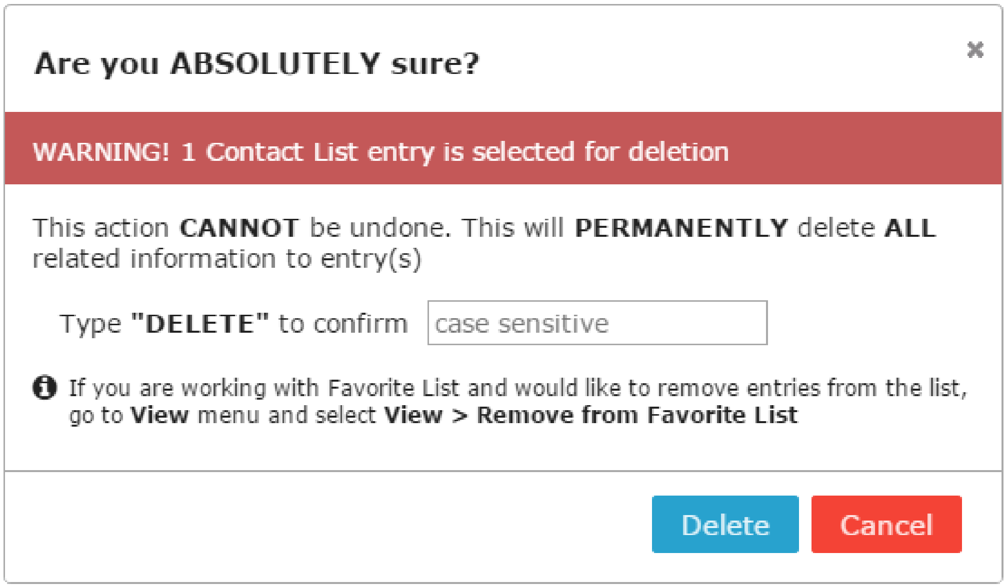


Deletion Protection

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 world DELETE in capital letters to confirm the action.



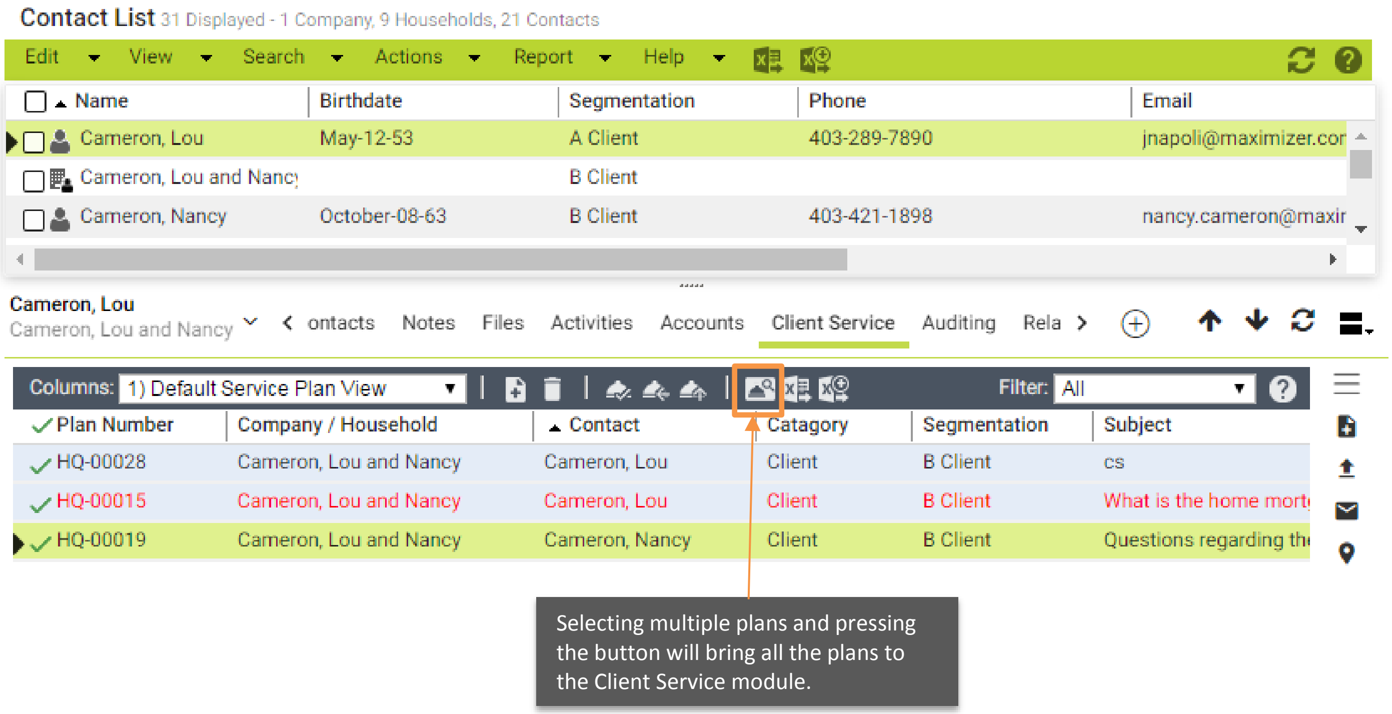
To prevent accidental deletion of items by users who have been given delete-rights, Maximizer will prompt the user to confirm the deletion by requiring them to type DELETE in capital letters.



Moving Multiple Entries from Following Tabs to the Main Grid

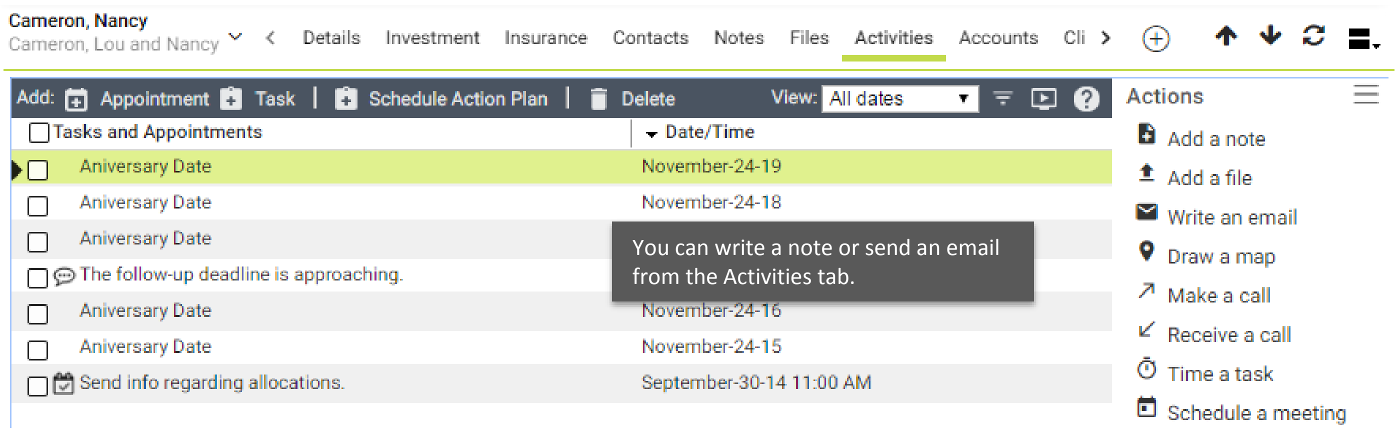
When you are working within either the Client Service or Accounts Following Tabs and you want to learn more about a particular Client Service plan or account, clicking on the relevant plan or account will automatically open that item within its associated module.

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.

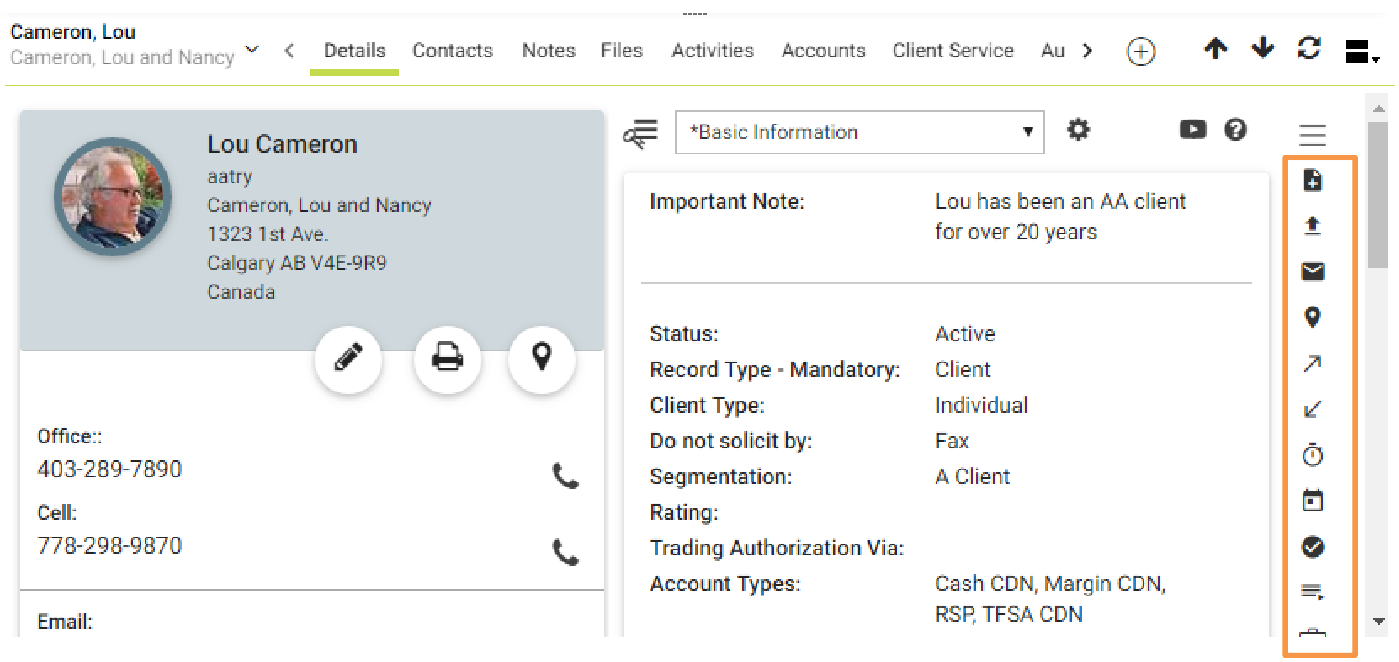


Actions Panel in Following Tabs

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.

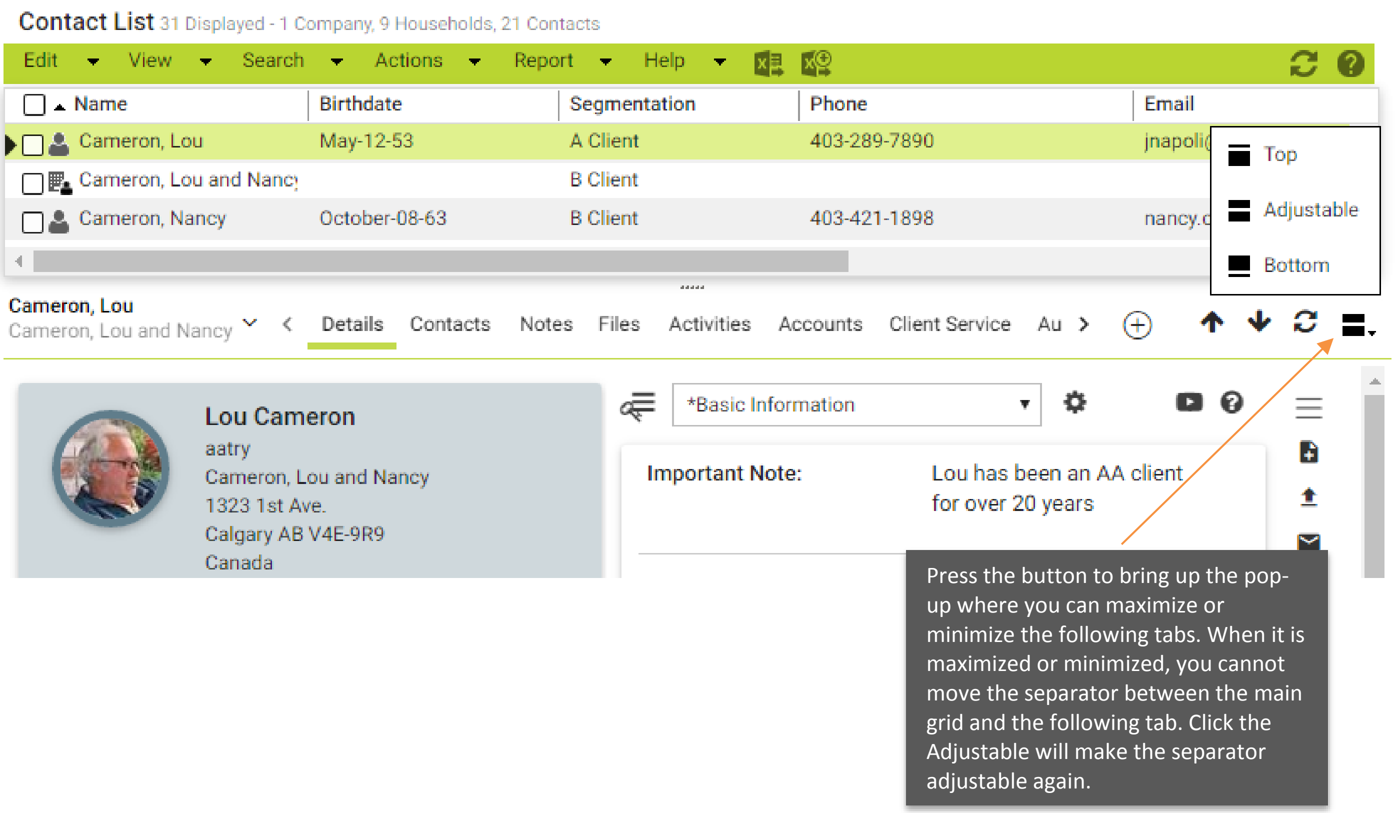


Users may optionally collapse the Actions Panel to display only the associated Icons for each action, to increase workspace on the screen.



Maximize Following Tabs

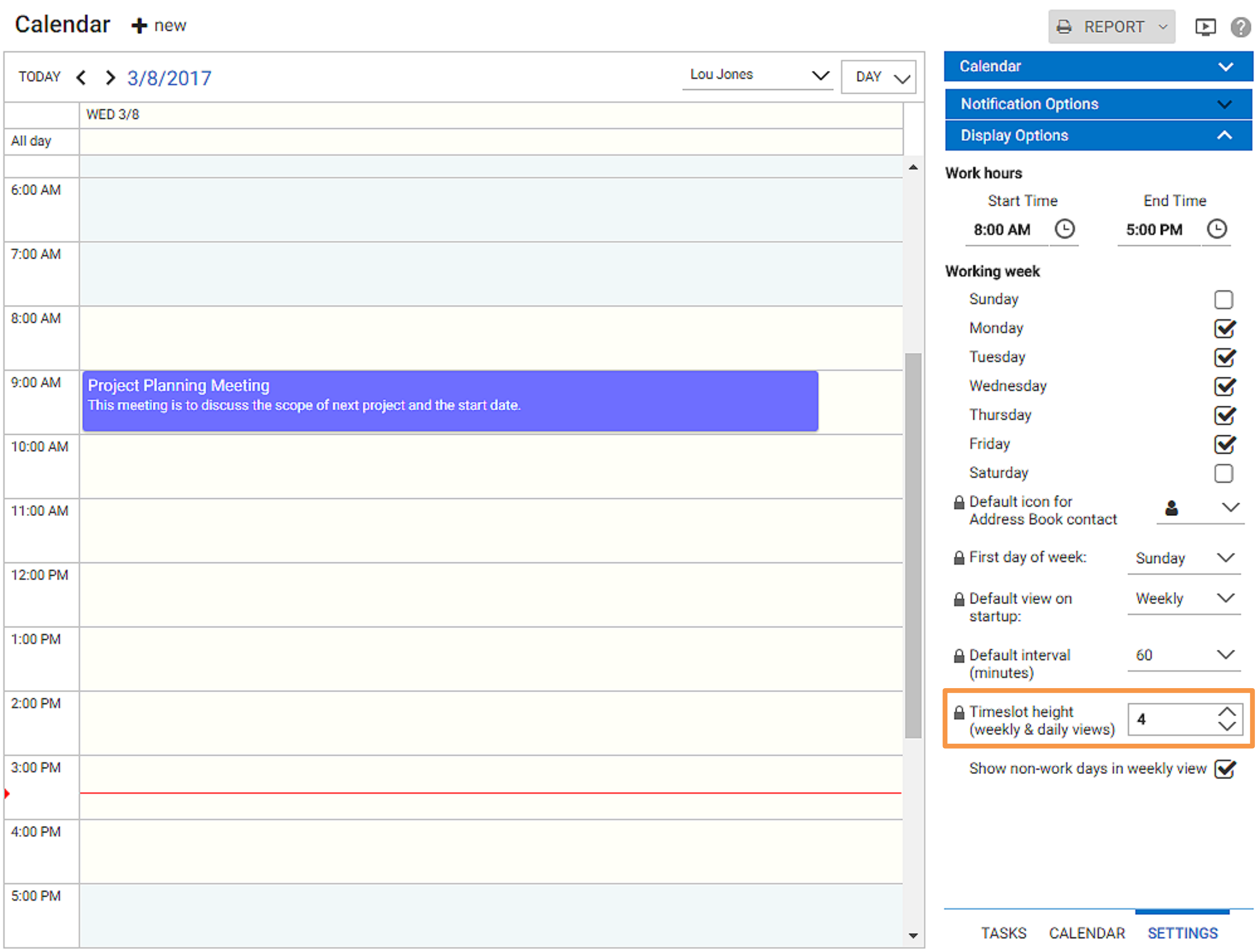
If you have many fields inside a Key Field list, you may want to enlarge the height of the following tab to view them easily. Now, there is a button for you to easily maximize the height of the following tab.



Enhancements for Calendar and Appointment Dialogs

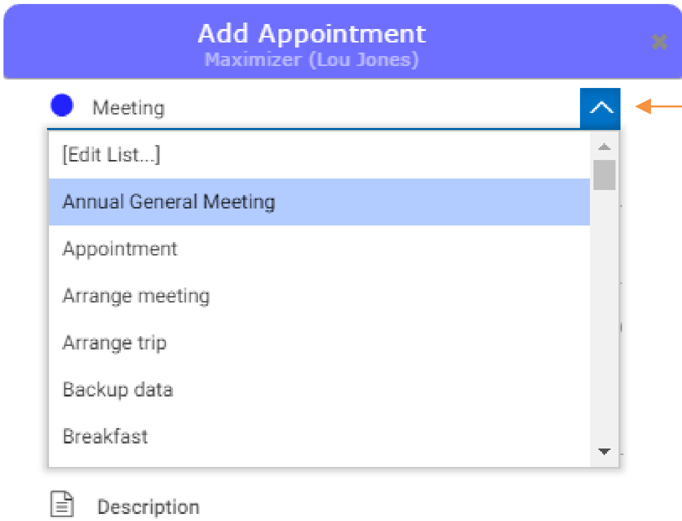
Expand Timeslot Height to Show More Information of an Appointment

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.



Select Pre-defined Appointment Subjects

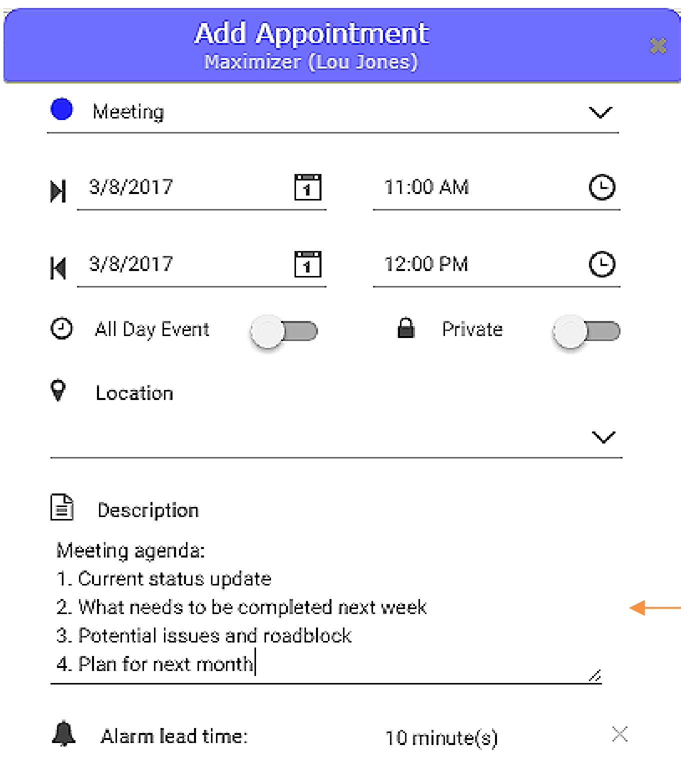
This function was in the older version of Maximizer but was missed in 2017 release. You can now select a pre-defined appointment subject in Appointment dialog.



Press the arrow to select a pre-defined appointment subject from the drop-down list.

Automatically Expand the Height of the Description Field

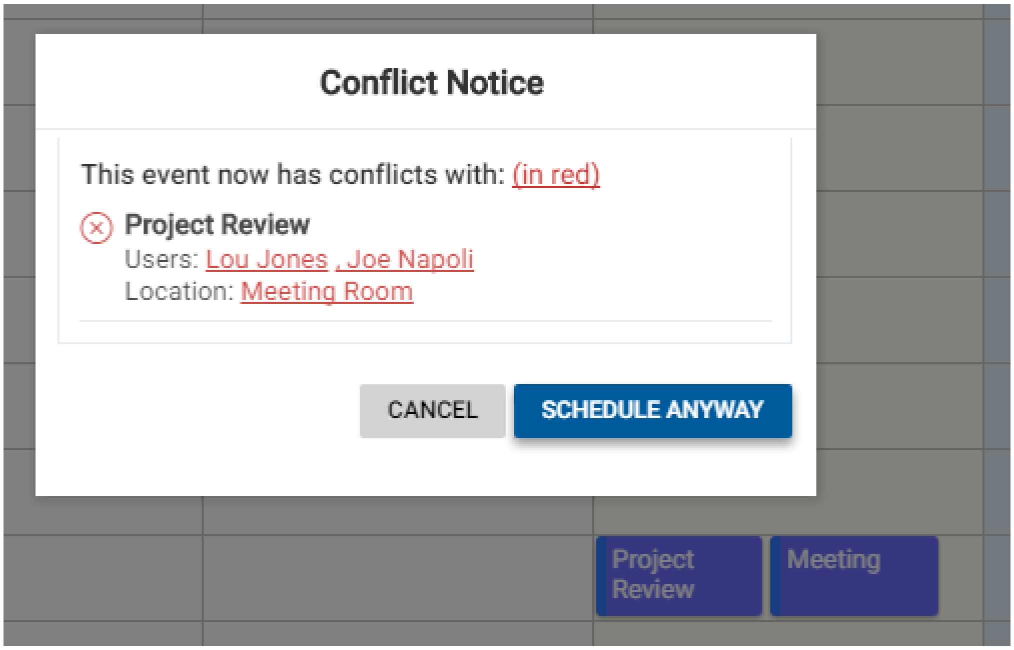
In Appointment dialog, if you are entering long text into the Description field, the height of the field will enlarge as you are typing. This will allow you to see all the text in the field without using the scroll bar.



The Description field will enlarge as you are entering more text into the field.

Conflict Checking when Rescheduling an Appointment by Drag and Drop

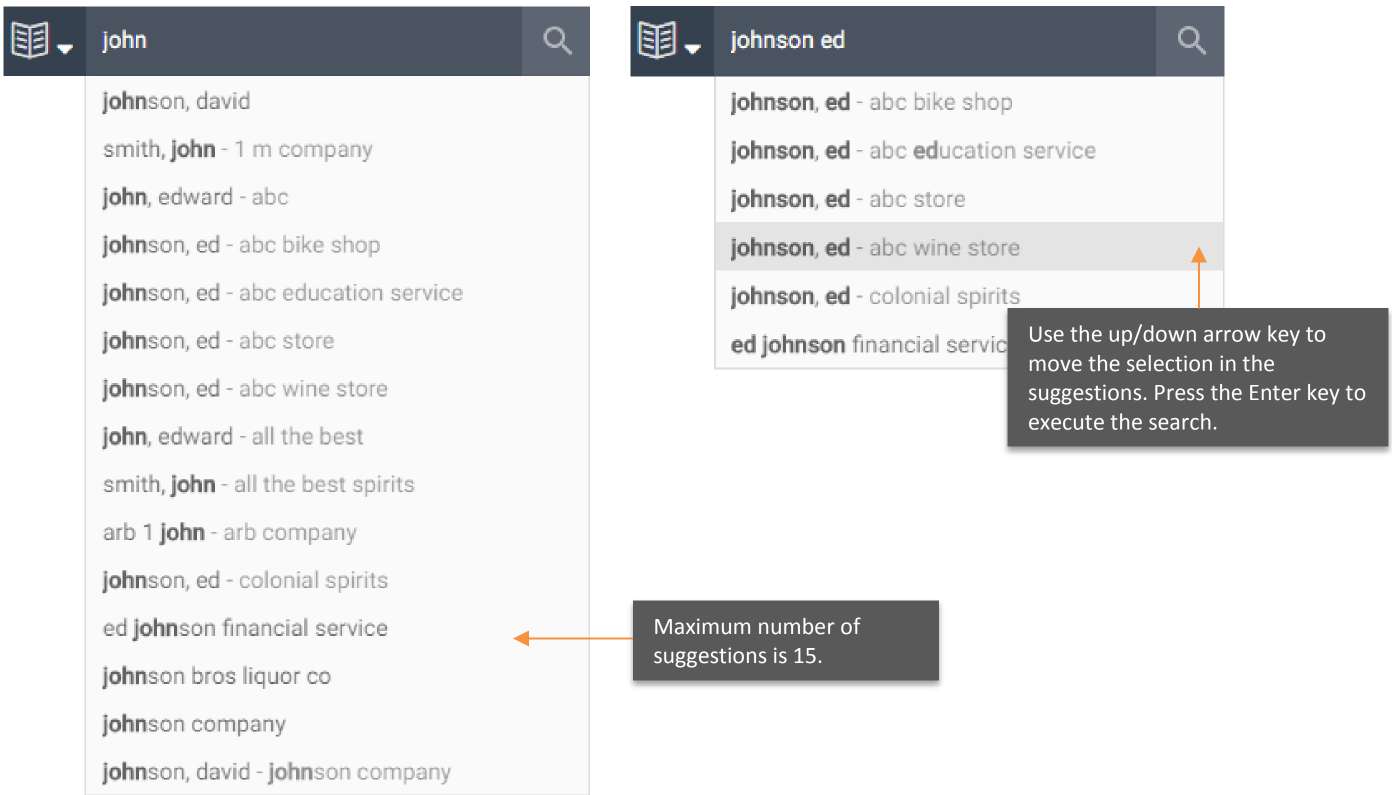
When you re-schedule an appointment by drag and drop, conflict checking will be performed. Press the Cancel button will cancel the action and move the appointment back to the original time slot. Press Schedule Anyway button will move the appointment into the new location.



Quick Search Enhancement

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

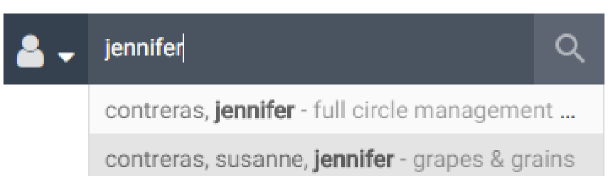
When you begin typing in the Quick Search field, suggestions will be displayed after three letters have been entered. As you continue typing in the field, the suggestions will be refined to match the search string. You can use the up/down arrow key to select the correct entry in the suggestions. Highlight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

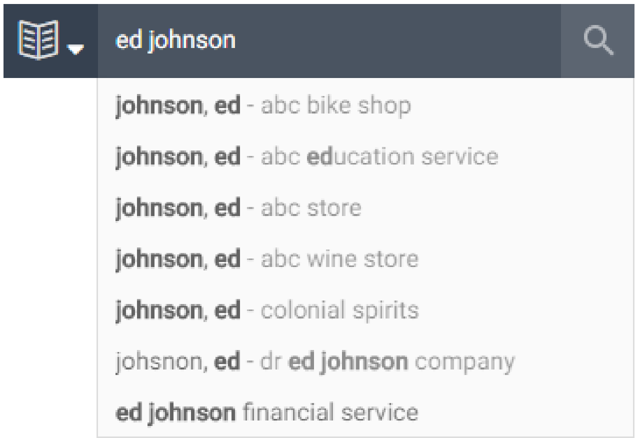
- You are searching for a contact. You know the contact's first name and the company name, but you don't remember how to spell the last name.
- You are looking for a contact, but there are many other contacts with the same name from different companies in your database.

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.

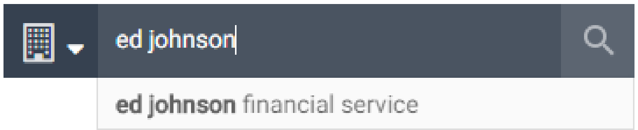


Other notes about the suggestions in Quick Search

- 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 Contact List 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 database, only one suggestion will be provided for these entries. The search will retrieve all the duplicated entries.

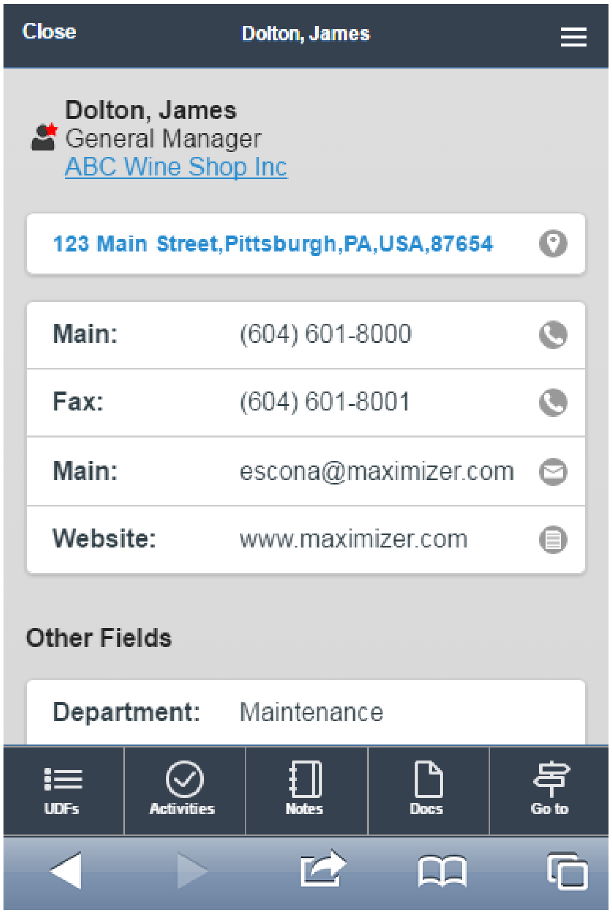
The function of remembering the search history is no longer available.

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

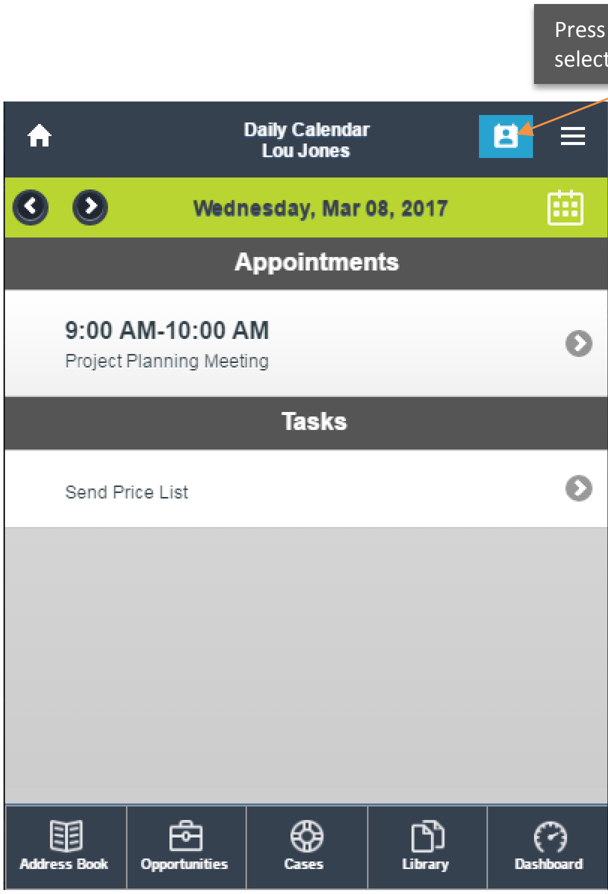
User Interface Refresh

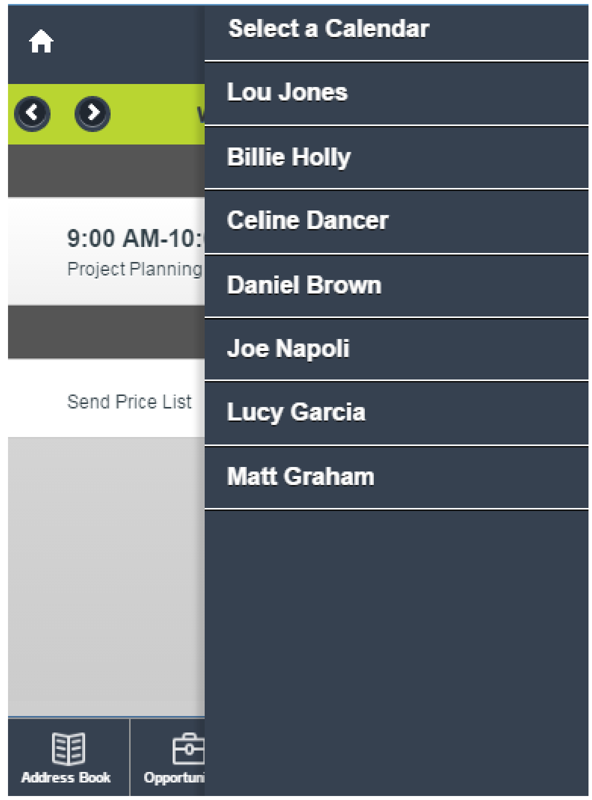
The look and feel of Mobile Access has been updated to be consistent with the style of the Web Access.



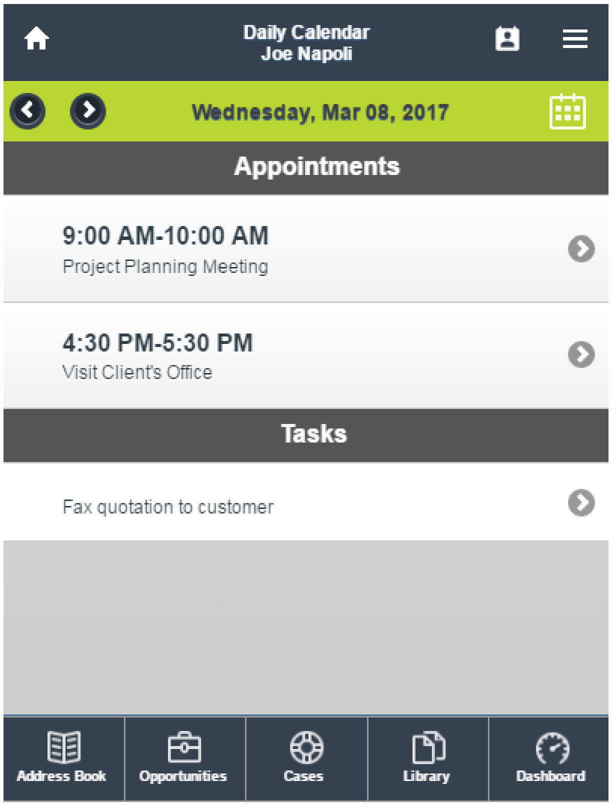
View Other Users Calendar

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.





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.

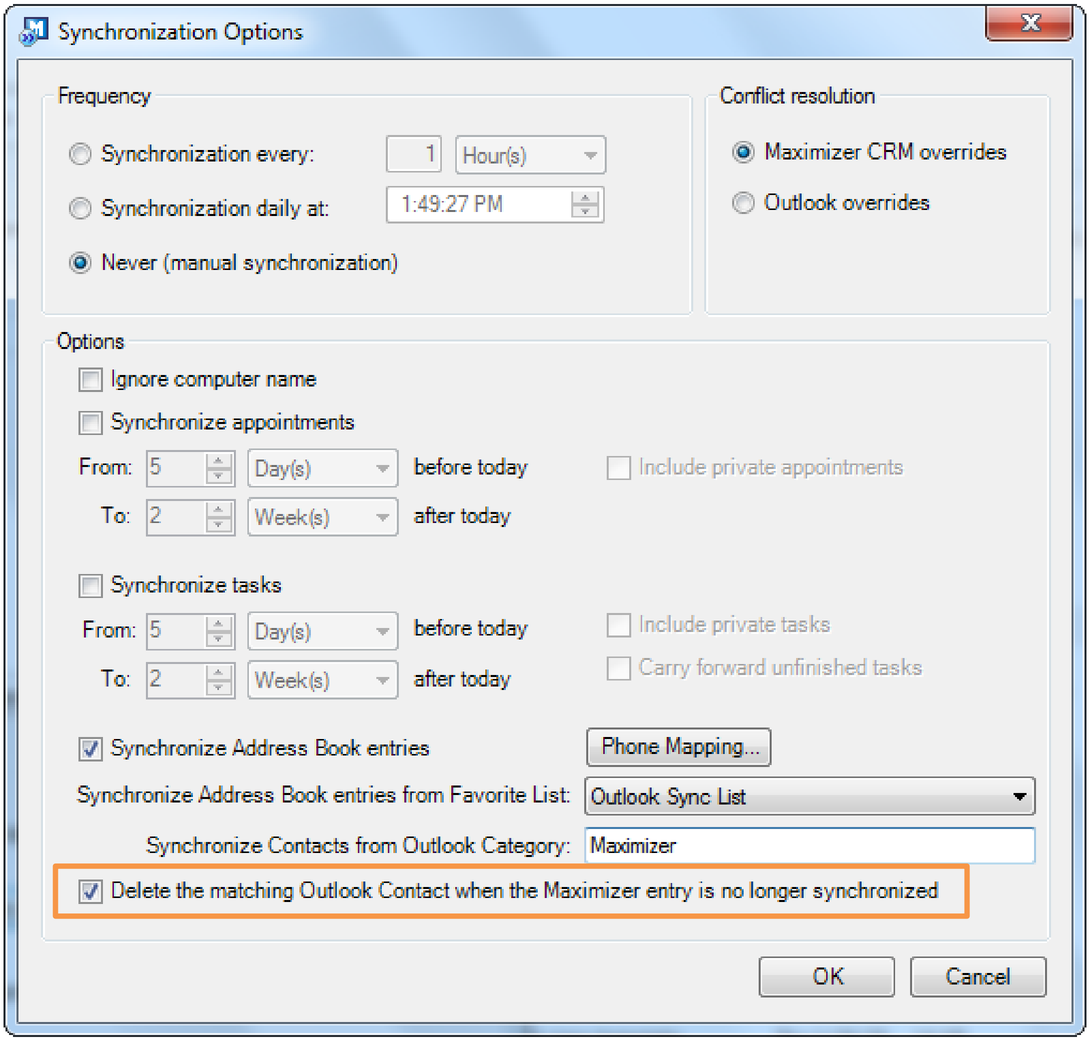
Press an appointment or a task in the screen will open the View Appointment or View Task screen.

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.

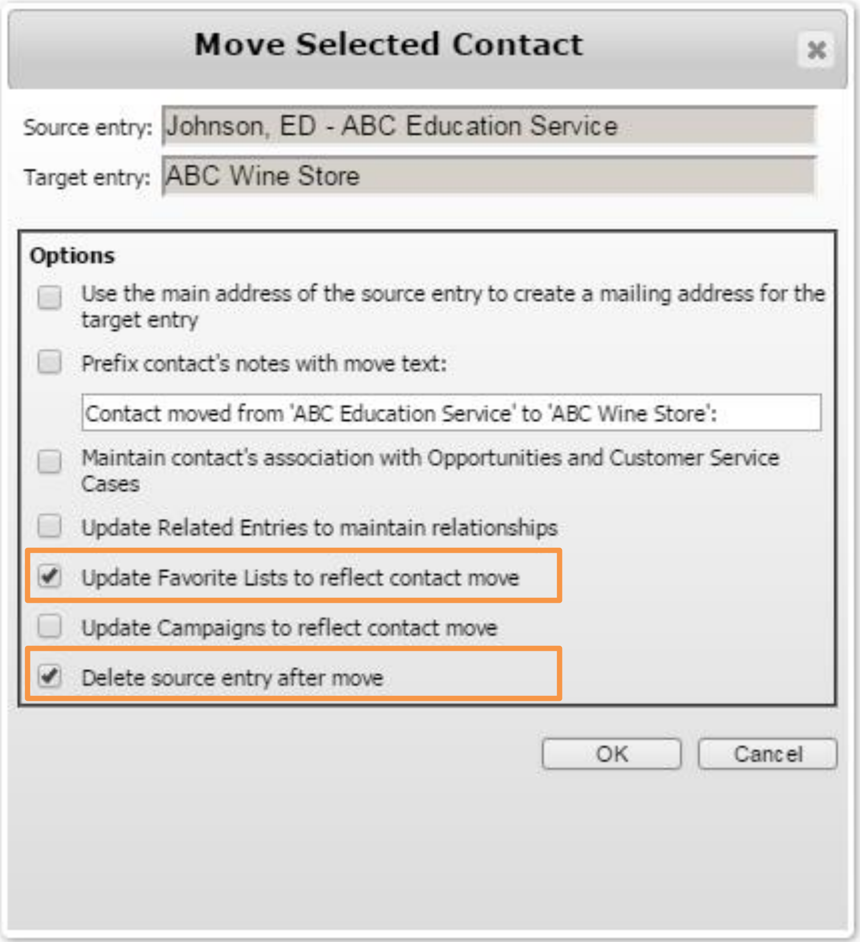


This checkbox is un-checked by default. Once it is checked, the matching contact in Outlook will be deleted if the Maximizer entry is deleted or removed from the sync Favorite List. Note that if a synced contact in Outlook is deleted, the matching entry in Maximizer won't be deleted.

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 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.

MAXIMIZER CRM

AMERICAS (HEAD OFFICE)

Maximizer Services Inc.
Suite 260, 60 Smithe Street
Vancouver, BC
V6B 0P5, Canada
Sales +1 800 804 6299
Phone +1 604 601 8000
Email info@maximizer.com
Website www.maximizer.com

EUROPE / MIDDLE EAST / AFRICA

Maximizer Software Ltd.
1 The Courtyard
Eastern Road,
Bracknell, Berkshire,
RG12 2XB, United Kingdom
Phone +44 (0) 1344 766 900
Email enquiries@maximizer.com
Website www.maximizer.com/uk

AUSTRALIA / NEW ZEALAND

Maximizer Software Solutions Pty. Ltd.
Level 1, Suite 14, 32 Delhi Road
North Ryde, New South Wales,
2113 Australia
Phone +61 (0) 2 9957 2011
Email info.anz@maximizer.com
Website www.maximizer.com/au

WWW.MAXIMIZER.COM