



2018 Financial Advisors Feature Review Guide

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 **MAXIMIZER**CRM
for Financial Advisors

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CONTENTS

ENHANCED IMPORT TOOL	4
Summary	4
Import Manager	4
Setting up an import - Step 1: Source	7
Setting up an import - Step 2: Rules	8
Setting up an import - Step 3: Mapping	9
Field mapping and duplicate checking	9
Field action and field format	11
Setting up an import - Step 4: Summary	13
Import process and import history	14
Import Template	16
Create a template	16
Apply a template	17
Edit a template	18
GLOBAL EDIT	19
Global Edit Dialog	20
Progress indicator	22
APP DIRECTORY	23
UI / UX ENHANCEMENT	24
Adding documents into Documents tab by drag and drop	24
Auto format phone numbers based on your location or country code	25
Notification enhancement	27
Show all option in Accounts following tab	28
Add new buttons available in the main modules	28
Mobile Access – Support grouping in Key Fields	29
SHOW ADDRESSES IN MAP	30

ENHANCED IMPORT TOOL

SUMMARY

Maximizer CRM 2018 features an enhanced import tool to move contact data stored in spreadsheets and other systems into Maximizer, creating a centralized view that customer-facing teams can use to deliver personalization across every customer interaction. Users can quickly and easily upload files, specify import rules, and map fields between spreadsheets and Maximizer. Other functions of the import tool include:

- An advanced duplicative feature check to ensure no duplicative entries are created during an import.
- An import history showing the status of each import, including error logs tracking each failed or skipped entry.
- Import templates storing import rules and field mapping, making it easy to repeat frequently performed imports.

The new import tool supports these entry types: company, household, contacts and account.

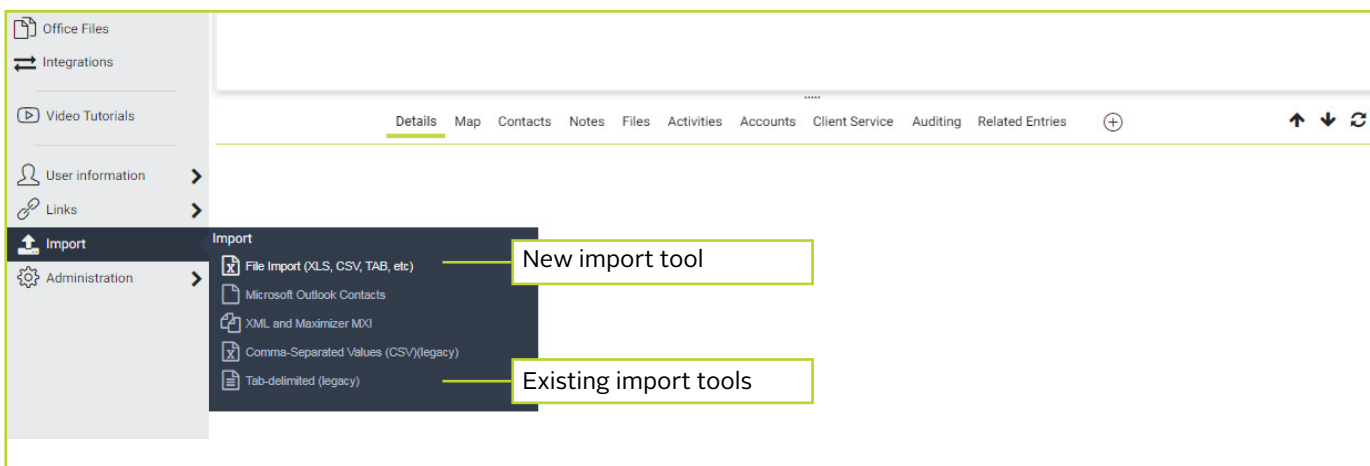
Now it is possible to import a file containing these different record types all in one go. Whereas in the previous version users had to perform a separate import for each type of record in a file – now they can import a file only once. Maximizer automatically sorts entries into their appropriate type.

In addition, the enhanced import tool can now create an account associated with a contact.

IMPORT MANAGER

Access the import tool through Icon Bar > Import > File Import (XLS, CSV, TAB, etc). Click on this menu item to open the Import Manager.

The existing import tools are still available. The following sections are available in the Import Manager screen:



The Import Manager screen allows you to start an import, access saved import templates and view import history.

Import Manager

You can import many types of records into Maximizer directly from a file

Select where your data is located now

Start a new import

Press this button to start a new import

Saved Import Templates

Use a previously saved import to update Maximizer from a regular source

Most recent import templates created

UPDATE CON
TACT INFORM
ATION
Click to load

ADD NEW AC
COUNTS AND
UPDATE EXIS
TING
Click to load

ADD NEW CO
MPANIES/CO
NTACTS AND
UPDATE EXIS
Click to load

MANAGE IMPORT TEMPLATES

Import History Last 14 days

Date ↓	Import Type	Status	# of records	# Success	# Failed	# Skipped
August 23, 2017 11:42 AM	Company and Contact (Weekly Contact Info Update.xlsx)	Done	50	✓ 50	0	0
August 16, 2017 10:11 AM	Account, Household, Contact (Accounts.CSV)	Done	80	✓ 75	⚠ 2	⚠ 3

The following sections are available in the Import Manager screen:

Start a new import

You can start a new import by pressing the **Start a new import button**. The steps for setting up a new import include:

Source > Rules > Mapping > Summary.

Saved import templates

The templates allow you to perform commonly used imports quickly. If you use a template to perform an import, all you need to do is to upload a new file.

Up to 5 of the most recently created templates will be displayed in Saved Import Templates section. You can manage your templates by pressing the Manage Import Templates button. Your templates are not shared with other users in your company. For more details about how to manage and apply your template, see [Import Template](#) section.

Import history

This section displays the imports that have been performed. For each import, the following data is recorded:

- Date and time of the import
- Import record types and the name of the import file
- Import status
- Number of rows in the import file
- Number of rows that have been processed successfully
- Number of rows that are failed to be imported
- Number of rows that are skipped during the import

Import History Last 14 days						
Date ↓	Import Type	Status	# of records	# Success	# Failed	# Skipped
August 23, 2017 11:42 AM	Company and Contact (Weekly Contact Info Update.xlsx)	Done	50	✓ 50	0	0
August 16, 2017 10:11 AM	Account, Household, Contact (Accounts.CSV)	Done	80	✓ 75	📄 2	📄 3

Press the icon or the number to download the log file.

If there are rows failed or skipped during the import process, a log file will be generated. You can download the CSV log file which contains the records that are failed or skipped. You will be able to review the reasons why records failed or skipped, fix any issues and upload the file again to import those records.

You can create a Favorite List for tracking successfully imported records. Pressing the number in the “# Success” column will retrieve the records from the Favorite List.

See more details in section [Import process and import history](#).

SETTING UP AN IMPORT - STEP 1: SOURCE

Import Manager > **Source** > Rules > Mapping > Summary

The first step in setting up an import is to upload a file. You also need to select the record types and specify import options.

Import Manager > Source

File Import

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

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

Select a file... Done

Contact Info.xlsx
11.03 KB

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

Contains Company information and the Contacts that belong to them

Global import setting options

The first row is a header
☒ Yes ☐ No

Encode
UTF 8

CSV field delimiter
Comma separator

BACK NEXT

Upload an import file

You can upload an import file by drag and drop or by pressing the “Select a file” button. Both CSV and Excel file formats are accepted.

Specify what record types that the file contains

You need to select the record type(s) that the import file contains. The selection will determine what record types will be imported and will affect field mapping -- which you will perform in a later step. The types in the drop-down include:

- Contains Company information only
- Contains Household information only
- Contains Company information and the Contact that belong to them
- Contains Household information and the Contact that belong to them
- Contains Account for Company (additional Contact information might be present)
- Contains Account for Household (additional Contact information might be present)

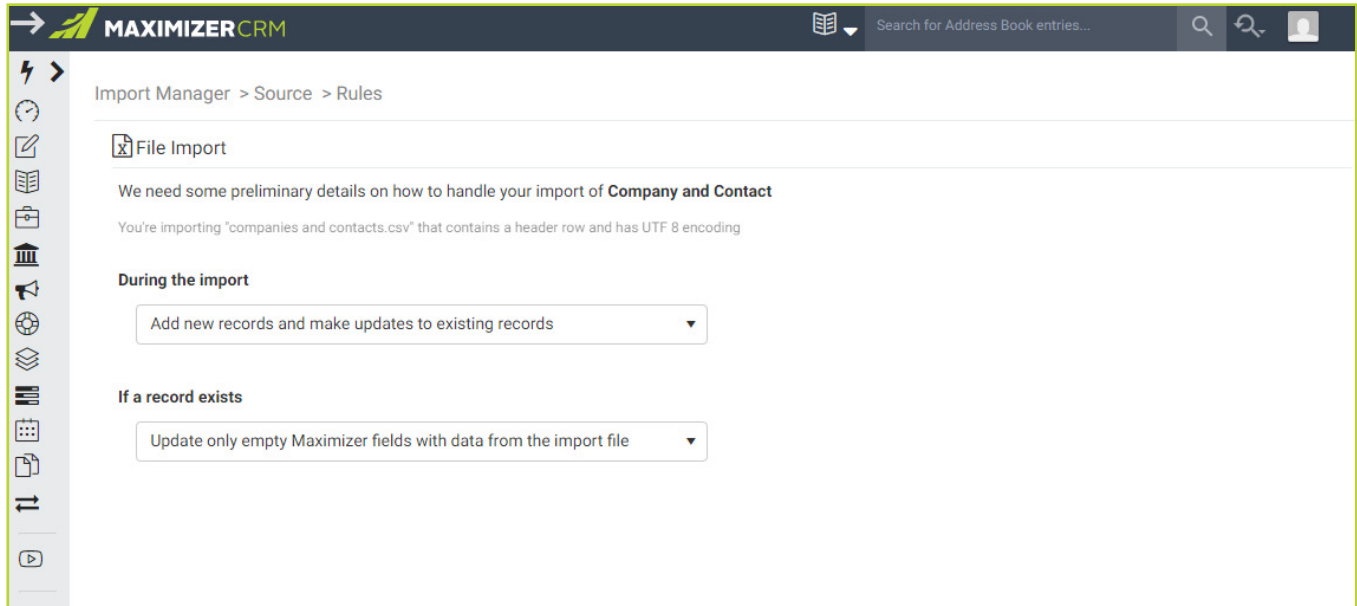
Set global import settings

By default, this section is closed. You need to expand the section and specify the settings for the import.

SETTING UP AN IMPORT - STEP 2: RULES

Import Manager > Source > **Rules** > Mapping > Summary

In this screen, specify what action will be performed during the import.



The screenshot shows the 'Rules' configuration screen in the Maximizer CRM. The breadcrumb trail at the top reads 'Import Manager > Source > Rules'. The main heading is 'File Import'. Below this, a message states: 'We need some preliminary details on how to handle your import of **Company and Contact**'. A note specifies: 'You're importing "companies and contacts.csv" that contains a header row and has UTF 8 encoding'. There are two sections with drop-down menus: 'During the import' with the selected option 'Add new records and make updates to existing records', and 'If a record exists' with the selected option 'Update only empty Maximizer fields with data from the import file'. A left-hand sidebar contains various icons for navigation, and a top-right header includes a search bar and user profile icon.

The first drop-down allows you to select an action for the import. The following actions are available:

- Add new records and make updates to existing records
- Add only new records currently not in Maximizer
- Only update existing Maximizer records with new data from the import file

The second drop-down specifies what action will be performed if an existing record is found in Maximizer

- Update only empty Maximizer fields with data from the import file
- Replace all Maximizer fields with data from the import file

SETTING UP AN IMPORT - STEP 3: MAPPING

Import Manager > Source > Rules > Mapping > Summary

In this screen, you will match the columns in your spreadsheet to Maximizer fields. You also need to specify the fields that will be used to find the duplicate records in Maximizer.

FIELD MAPPING AND DUPLICATE CHECKING

To map a column in the spreadsheet with a field in Maximizer, click any place in a row. The Field Picker will slide out for you to select a Maximizer field. If the column header and the name of a Maximizer field are exactly the same, they will be mapped automatically.

The new import tool also supports creating notes. Simply map a blank column in your spreadsheet to 'note'. When you import the file, Maximizer will create a matching note for each cell you fill in and attach it to the appropriate record inside Maximizer. You can even map multiple new columns (e.g., 'Note', 'Note2' and 'Note3'). Through this method you can create as many new unique notes as you need and automate the process of attaching them.

The import record types selected in Source screen affect field mapping and duplicate checking.

Import Contact List entries

If you select Company in the Source screen, you will only see company fields in the Field Picker and will only need to use company fields for duplicate checking. If you select Company and Contact in the Source screen, both company and contact fields are available in the Field Picker. You need to specify at least one company field and one contact field for duplicate checking.

MAXIMIZER CRM

Import Manager > Source > Rules > Mapping

File Import

Match your CSV columns to any Maximizer field to complete your import. The import you selected records Maximizer record type

Company Contact **Selected record types**

Fields to be imported <small>Preview of data</small>	Destination Maximizer Fields <small>Location of the field within Maximizer</small>	Use as duplicate check <small>Record exists when all are true</small>
Insurance Policy # <small>12345, 18975, 12249</small>	Don't Import	<input type="checkbox"/> NO
Company Name <small>ABC Wine Shop, Carlyle Wines & ...</small>	Company <small>Company/Basic Fields</small>	<input checked="" type="checkbox"/> YES
Contact Last Name <small>Johnson, James, Torres</small>	Last name <small>Contact/Basic Fields</small>	<input checked="" type="checkbox"/> YES
Contact First Name <small>Ed, Dolton, Martha</small>	First name <small>Contact/Basic Fields</small>	<input checked="" type="checkbox"/> YES
Contact EMAIL ADDRESS <small>EMAIL1@MAXIMIZER.COM, cont...</small>	Email Address <small>Contact/Basic Fields/Email Address</small>	<input type="checkbox"/> NO
Contact Phone Home <small>(604) 601...</small>	Phone 1 <small>Phone 1</small>	<input type="checkbox"/> NO
Contact Address Line 2 <small>SUITE 3 & 4, ...</small>	Don't Import	<input type="checkbox"/> NO
Contact City <small>heresville port moody port moody</small>	Don't Import	<input type="checkbox"/> NO

Available fields:

Search for fields

- Contact List
 - Company
 - Basic Fields
 - User-Defined Fields
 - Note
 - Contact
 - Basic Fields
 - User-Defined Fields
 - Note

At least one field for company and one for contact are needed for duplicate checking.

Map a column in the import file with "Note" to create notes in Maximizer.

Fields for company and contact are available for mapping.

The spreadsheet column header is displayed on top of the Field Picker.

The fields for company and contact are identified by the icons.

BACK NEXT

Import Accounts

If you select Account and Company in Source screen, the fields for account, company, and contact are available in the Field Picker. You need to map fields for company and account, and specify at least one company field and one account field for duplicate checking.

Contact fields are optional when you are importing accounts. If no contact fields are mapped, an account will be created for a company and not associated with a contact. If you map contact fields, the imported account will be created for a company and associated with a contact.

MAXIMIZER CRM

Import Manager > Source > Rules > Mapping

File Import

Match your CSV columns to any Maximizer field to complete your import. The import you selected requires the following Maximizer record type

Account Household Contact

Fields to be imported <small>Preview of data</small>	Destination Maximizer Fields <small>Location of the field within Maximizer</small>	Use as duplicate check <small>Record exists when all are true</small>
Account ID 3356a, 3357a, 3358a	Identification <small>Basic Fields</small>	<input type="checkbox"/>
Client ID 2256c, 2256c, 2256c	Don't Import	<input type="checkbox"/>
Contact Number 1, 2, 3	Don't Import	<input type="checkbox"/>
Insurance Policy # 1000-0, 1000-1, 1000-2	Policy # <small>User-Defined Fields</small>	<input checked="" type="checkbox"/>
Household Taylor Household, Taylor Hous...	Last name <small>Household/Basic Fields</small>	<input checked="" type="checkbox"/>
First Name David, Amy, Tom	First name <small>Contact/Basic Fields</small>	<input checked="" type="checkbox"/>
Last Name Taylor, Taylor, Taylor	Last name <small>Contact/Basic Fields</small>	<input checked="" type="checkbox"/>
Address 1 260 - 60 Smithe Street, 260 - 60 S...	Address <small>Contact/Basic Fields</small>	<input type="checkbox"/>

Click the icon to remove the field mapping

The fields for company and contact are identified by the icons.

Insurance Policy #

Available fields:

Search for fields

- Accounts
 - Basic Fields
 - User-Defined Fields
 - Note
- Household
 - Basic Fields
 - User-Defined Fields
 - Note
- Contact
 - Basic Fields
 - User-Defined Fields
 - Note

Fields for Account, company and contact are available for mapping.

Map a column in the import file with "Note" to create notes in Maximizer

At least one company field and one Account field need to be mapped and used for duplicate checking. Contact fields are optional.

BACK NEXT

Working with Field Picker










Click any place in a row to open the Field Picker. Select a Maximizer field in the Field Picker and it will link the field with the selected column in the spreadsheet. When you select a field in Field Picker, the highlight in the grid will automatically be moved to next row. You can continue selecting a Maximizer field in the Field Picker without clicking the rows. Note that you don't need to close the Field Picker when you are clicking the rows. The Field Picker will remain open when you are selecting a different row.

To select which fields you want to check for duplicates, turn on the switch in the "Use as duplicate check" column. Only mapped fields can be searched for duplicates.

FIELD ACTION AND FIELD FORMAT

You can specify a field-level action for each field. The default action is determined based on the selection in the Rules screen. You can change the default action using the drop-down menu in the Field Action column. Note that the field action drop-down won't be enabled until the field has been mapped. Also, field action is not allowed for fields used in duplicate checking.

- When "Add only new records currently not in Maximizer" is selected on the Rules screen, only "Add" is available for field action.
- When "Replace ALL Maximizer fields with data from the import file" is selected on the Rules screen, "Replace" is the default field action. You can select another action from the drop-down.
- When "Update only empty Maximizer fields with data from the import file" is selected on the Rules screen, "Add when empty" is the default field action. You can select another action from the drop-down.

Fields to be imported <small>Preview of data</small>	Destination Maximizer Fields <small>Location of the field within Maximizer</small>	Use as duplicate check <small>Record exists when all are true</small>	Field Action	Field Format
Account ID <small>3356o, 3357o, 3358o</small>	Identification  <small>Basic Fields</small>	<input type="checkbox"/> NO	Add when empty ▼	As imported ▼
Client ID <small>2256c, 2256e, 2256c</small>	Don't Import 	<input type="checkbox"/> NO	Add when empty ▼	As imported ▼
Contact Number <small>1, 2, 3</small>	Don't Import 	<input type="checkbox"/> NO	Add when empty ▼	As imported ▼
Insurance Policy # <small>1000-0, 1000-1, 1000-2</small>	Policy #  <small>User-Defined Fields</small>	<input checked="" type="checkbox"/> YES		
Household <small>Taylor Household, Taylor Hous...</small>	Last name  <small>Household/Basic Fields</small>	<input checked="" type="checkbox"/> YES		As imported ▼
First Name <small>David, Amy, Tom</small>	First name  <small>Contact/Basic Fields</small>	<input checked="" type="checkbox"/> YES		As imported ▼
Last Name <small>Taylor, Taylor, Taylor</small>	Last name  <small>Contact/Basic Fields</small>	<input checked="" type="checkbox"/> YES		As imported ▼
Address 1 <small>260 - 60 Smith Street, 260 - 60 S...</small>	Address 1  <small>Contact/Basic Fields/Address</small>	<input type="checkbox"/> NO	Add when empty ▼ Add when empty Replace	As imported ▼
	Address 2 			

Fields that are used for duplicate checking don't allow field action.

Use the drop-down to change field level action.

← BACK

Note that if the mapped field is a multi-value table field, Append will be available in the drop-down. Selecting "Append" will add the table item into the field.

If a mapped field is an alphanumeric field, you can specify the text format for the field. For example, you can set all letters to uppercase for the last name field.

Fields to be imported <small>Preview of data</small>	Destination Maximizer Fields <small>Location of the field within Maximizer</small>	Use as duplicate check? <small>Record exists when all are true</small>	Field Action	Field Format
Insurance Policy # 12345, 18975, 12249	Identification <small>Basic Fields</small>	YES <input checked="" type="checkbox"/>		As imported ▼
Company Name ABC Wine Shop, Carlyle Wines & ...	Company <small>Company/Basic Fields</small>	YES <input checked="" type="checkbox"/>		As imported ▼
Contact Last Name Johnson, James, Torres	Last name <small>Contact/Basic Fields</small>	YES <input checked="" type="checkbox"/>		As imported ▼
Contact First Name Ed, Dolton, Martha	First name <small>Contact/Basic Fields</small>	NO <input type="checkbox"/>	Replace ▼	As imported ▼ As imported Convert To Title Case Convert to sentence case COVERT TO UPPERCASE convert to lowercase
Contact EMAIL ADDRESS EMAIL1@MAXIMIZER.COM, cont...	Email Address <small>Contact/Basic Fields/Email Address</small>	NO <input type="checkbox"/>	Replace ▼	
Contact Phone Home (604) 6018000, (604) 6018001, (...)	Phone 1 <small>Contact/Basic Fields/Phone 1</small>	NO <input type="checkbox"/>	Replace ▼	
Contact Address Line 1 329 E MAIN STREET, 111 Johns, 123...	Don't Import	NO <input type="checkbox"/>	Replace ▼	As imported ▼
Contact Address Line 2 SUITE 3 & 4,	Don't Import	NO <input type="checkbox"/>	Replace ▼	
Contact City	Don't Import	NO <input type="checkbox"/>	Replace ▼	As imported ▼

Specify text format for an alphanumeric field.

SETTING UP AN IMPORT - STEP 4: SUMMARY

Import Manager > Source > Rules > Mapping > **Summary**

This screen provides a summary view before you start importing records. If there are multiple record types in the import file, a separate section will be created for each record type. Only fields that have been mapped will be displayed in this screen.

You can create a Favorite List for quickly retrieving imported records. In the Favorite List section, select New to create a new Favorite List. You need to specify a name for the list. You can also add the records to an existing Favorite List by selecting the Append option and selecting an existing Favorite List.

Import Manager > Source > Rules > Mapping > Summary

★ Pick a favorite list

☒ Create a new list ☐ Add to an existing list ☐ Replace an existing list ☐ None

New Import (13/10/2017 13:14)

Summary

Import Type: Company and Contact

During the import: Add new records and make updates to existing records

If a record exists: Replace ALL Maximizer fields with data from the import file

Company

Column Header	Destination Maximizer Fields	Import Value	Use as duplicate check	Field Action	Field Format
Company Name	Company	ABC Wine Shop, Carlyle Wines & Spirits, Edgar Bros.	✓		As imported

Contact

Column Header	Destination Maximizer Fields	Import Value	Use as duplicate check	Field Action	Field Format
Contact Last Name	Last name	Johnson, James, Torres	✓		As imported
Contact First Name	First name	Ed, Dolton, Martha		Replace	COVERT TO UPPERCASE
Contact EMAIL ADDRESS	Email Address	EMAIL1@MAXIMIZER.COM, contact2@maximizer.com, contact3@maximizer.com		Replace	As imported

← BACK SAVE TEMPLATE FINISH

You can create a Favorite List for retrieving the imported records.

Mapped company fields and contact fields are displayed in two sections.

Data from the import file is displayed so you can check if the field is mapped correctly.

After you review the information in the summary page and satisfy all the settings, press the Finish button to start the import process.

If you will do the same import again in the future, you can save all the import settings as a template. For more information about how to manage and apply a template, see [Import Template](#) section for details.

IMPORT PROCESS AND IMPORT HISTORY

After you press the Finish button in the Summary screen, the import process will start. You will be directed to the Import Manager screen where you can see import status.

Import Manager

You can import many types of records into Maximizer directly from a file

Select where your data is located now

[Start a new import](#)

Saved Import Templates

Use a previously saved import to update Maximizer from a regular source

Most recent import templates created

[UPDATE CONTACT INFORMATION](#)
Click to load

[ADD NEW OPPORTUNITIES AND UPDATE EXISTING RECORDS](#)
Click to load

[ADD NEW COMPANIES/CONTACTS AND UPDATE EXISTING RECORDS](#)
Click to load

[MANAGE IMPORT TEMPLATES](#)

Import History Last 14 days

Date	Import Type	Status	# of records	# Success	# Failed	# Skipped
August 23, 2017 11:42 AM	Company and Contact (Weekly Contact Info Update.xlsx)	In progress	50	0	0	0
August 16, 2017 10:11 AM	Opportunity and Company (Opportunity Update.xlsx)	Done	80	75	2	3

The new import will be displayed in the Import History section, with a progress indicator.

After the import is completed, import statistics will be displayed in Import History. The statistics include:

- # of records – Total number of rows in the import file.
- # of success – Number of rows in the import file that have been imported successfully. Clicking the number will retrieve the Favorite List and show the records. Note that if your import creates accounts, companies and contacts, the Favorite List will retrieve accounts only.
- # of failed – Number of rows in the import file failed to be imported. Clicking the number will download the CSV log file.
- # of skipped – Number of rows in the import file skipped during the import. Clicking the number will download the CSV log file.
-

Import History Last 14 days						
Date ↓	Import Type	Status	# of records	# Success	# Failed	# Skipped
August 23, 2017 11:42 AM	Company and Contact (Weekly Contact Info Update.xlsx)	Done	50	✓ 50	0	0
August 16, 2017 10:11 AM	Opportunity and Company (Opportunity Update.xlsx)	Done	80	✓ 75	👤 2	☁ 3

Multiple phases in the import process

The import tool performs an import in multiple phases, depending on the record types in the import file. For example, if the import file contains opportunities and companies, you will need to map the fields for company, contact and opportunity. The import process then proceeds through the following multi-phase process for each row:

- **Phase 1** – Checks existing companies. If an existing company is found, it updates the record. Otherwise, it creates a new company.
- **Phase 2** – Checks existing contacts. If an existing contact is found, it updates the record. Otherwise, it creates a new contact.
- **Phase 3** – Checks existing accounts. If an existing account is found, it updates the record. Otherwise, it creates a new account.
-

If the import tool fails in any phase when processing a row, that row will be marked as failed. Using the example above, if the import tool processes one row, creates a company and a contact successfully but fails to create the account, that row will be marked as failed.

IMPORT TEMPLATE

You may need to perform the same import regularly. For example, you export a list of accounts to a CSV or an Excel file and send it to a business partner. You will regularly get updates from the partner and will need to import the accounts back into Maximizer. To make it easy to repeat an import, you can save your import settings, including the import rules and field mapping, into a template. When you perform that import again, all you need to do is to upload a new file.

Create a template

To create a template, you need to go through all the steps to set up the import, including specifying import rules and field mapping. In the Summary screen, press the Save Template button. An Import Template dialog will open where you can enter a name for the template.

The screenshot shows the Maximizer CRM interface. The top navigation bar includes the Maximizer CRM logo, a search bar, and user profile icons. The left sidebar contains various icons for navigation. The main content area is titled 'Import Manager > Source > Rules > Mapping > Summary'. It features a 'Pick a favorite list' section with radio buttons for 'Create a new list' (selected), 'Add to an existing list', and 'None'. Below this is a text box containing 'New Import (9/25/2017 10:52 AM)'. The 'Summary' section displays import settings: 'Import Type: Company and Contact', 'During the import: Add new records and make updates to existing records', and 'If a record exists: Replace ALL Maximizer fields with data from the import file'. A table for 'Company' mapping is partially visible. An 'Import template' dialog box is open in the center, with a text input field containing 'Update Contact Information' and 'SAVE' and 'CANCEL' buttons. Below the dialog, a 'Contact' mapping table is visible. At the bottom, there are 'BACK', 'SAVE TEMPLATE', and 'FINISH' buttons.

Import Manager > Source > Rules > Mapping > Summary

☆ Pick a favorite list

☒ Create a new list ☐ Add to an existing list ☐ None

New Import (9/25/2017 10:52 AM)

Summary

Import Type: Company and Contact

During the import: Add new records and make updates to existing records

If a record exists: Replace ALL Maximizer fields with data from the import file

Company

Column Header	Destination Maximizer Fields	Import Value	Use as duplicate check	Field Action	Field Format
Company Name	Company				As imported

Import template

Name: Update Contact Information

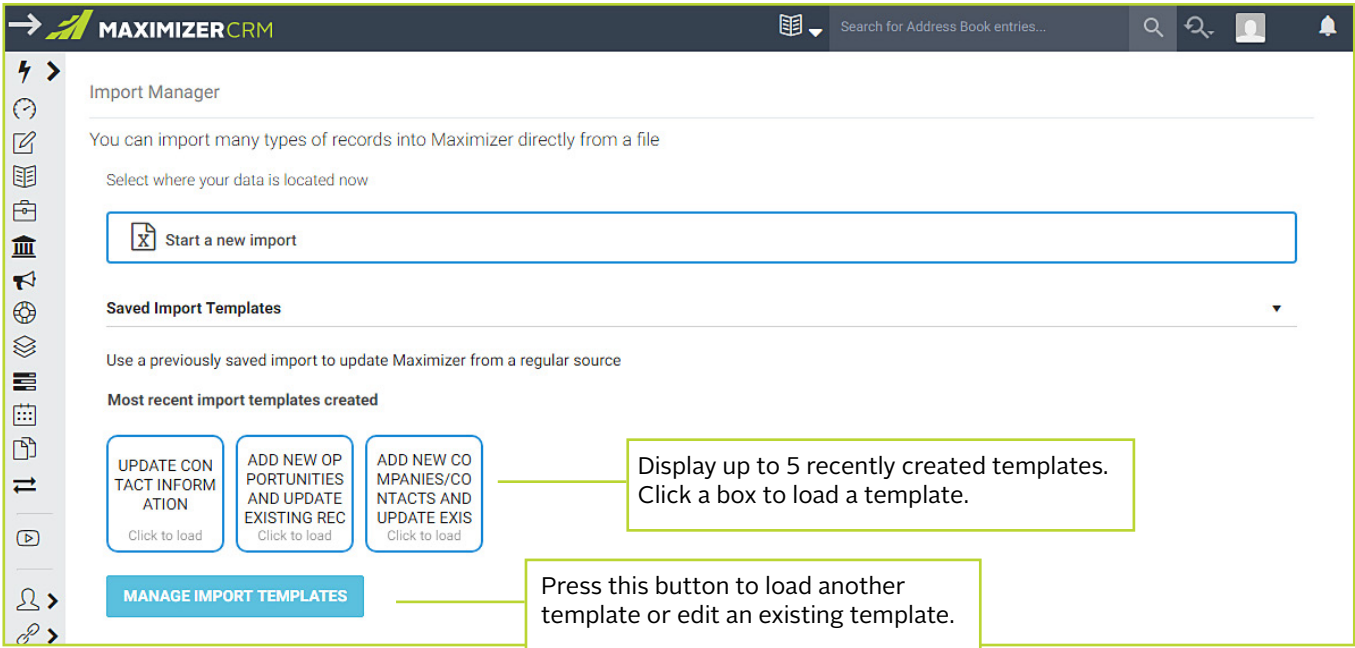
SAVE CANCEL

Contact

Column Header	Destination Maximizer Fields	Import Value	Use as duplicate check	Field Action	Field Format
Contact Last Name	Last name	Johnson, James, Torres	✓		As imported
Contact First Name	First name	Ed, Dolton, Martha		Replace	COVERT TO UPPERCASE
Contact EMAIL ADDRESS	Email Address	EMAIL1@MAXIMIZER.COM, contact2@maximizer.com, contact3@maximizer.com		Replace	As imported

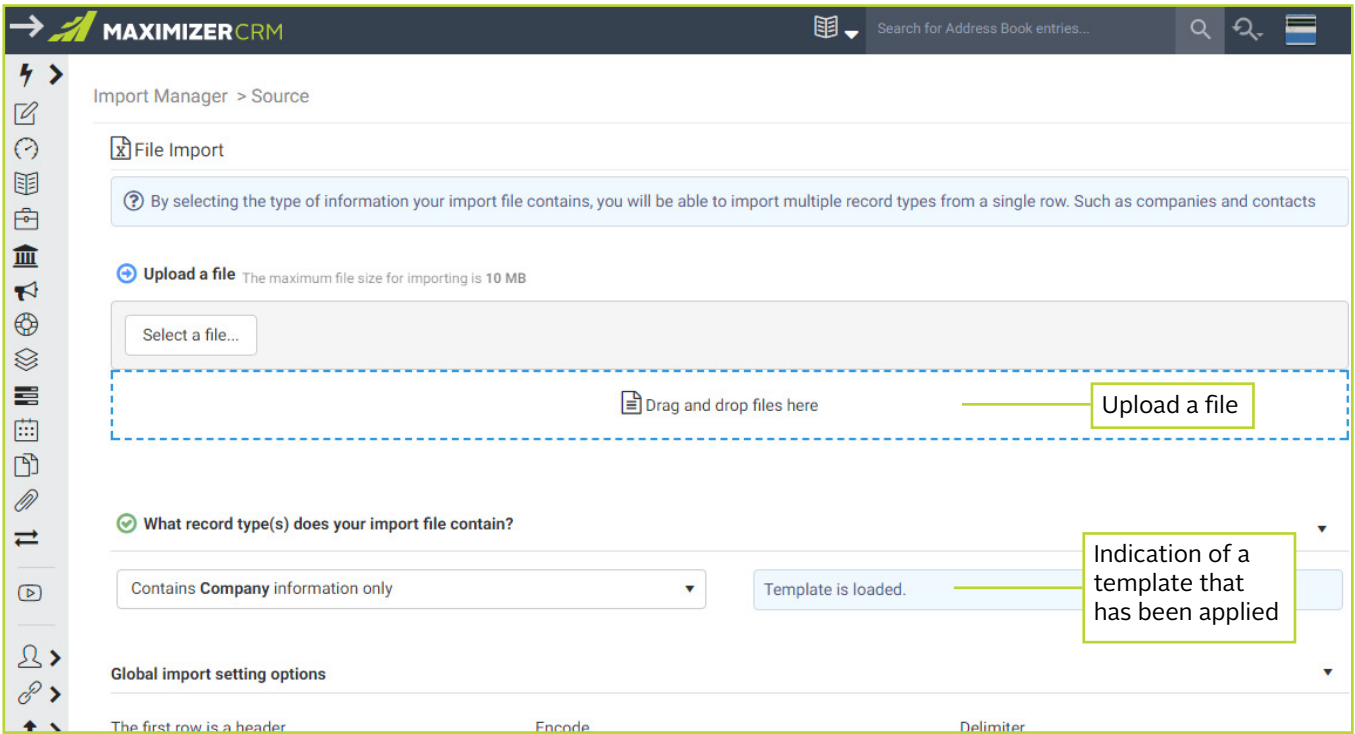
BACK SAVE TEMPLATE FINISH

Saved templates can be accessed from the Import Manager screen. The recently created templates are displayed in the Saved Import Templates section. Press the Manage Import Templates button if you want to edit an existing template or use another template.



Apply a template

To apply a template, select a template in Import Manager. When the template is loaded, all you need to do is to upload a new file.



Click the Next button to go through each step and press the Finish button in the Summary page to start the import

If you change the record type in the Source screen, your template will be changed and you will be prompted with a message. For example, in your template the record types are Company and Contact. If you load the template and change the record types to Household and Contact, you will see the message below.

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

Contains **Household** information only

Your template is mapped to a different selection and will not work as saved.

You can save the changes in the selected template or create a new template.

Edit a template

To change an existing import template, you need to load the template, and go through each step to make changes. In the Summary screen, press the Save Template button. In the Import Template dialog, press Save to update the selected template. Or, enter a new name and press Save As to create a new template.

MAXIMIZERCRM

Search for Address Book entries...

Import Manager > Source > Rules > Mapping > Summary

Pick a favorite list

☒ Create a new list ☐ Add to an existing list ☐ None

New Import (9/25/2017 10:52 AM)

Summary

Import Type:

Company and Contact

During the import:

Add new records and make updates to existing records

If a record exists:

Replace ALL Maximizer fields with data from the import file

Company

Column Header	Destination Maximizer Field	Field Action	Field Format
Company Name	Company		As imported

Contact

Column Header	Destination	Field Action	Field Format
Contact Last Name	Last name		As imported
Contact First Name	First name	Replace	COVERT TO UPPERCASE
Contact EMAIL ADDRESS	Email Address	Replace	As imported

Import template

Name

Update Contact Information

SAVE AS

SAVE

CANCEL

Change the name and press Save As to create a new template.

Press Save to update the existing template.

GLOBAL EDIT

Global Edit allows you to batch edit a large number of records. The editing process can take a long time, depending on how many records you are editing. Previously, when Global Edit was in process, you could not work in another area of the product. You needed to wait for editing to finish before you could continue working in Maximizer. Now you are able to continue working while global editing is in progress.

The new Global Edit function is only available in the Contact List module.

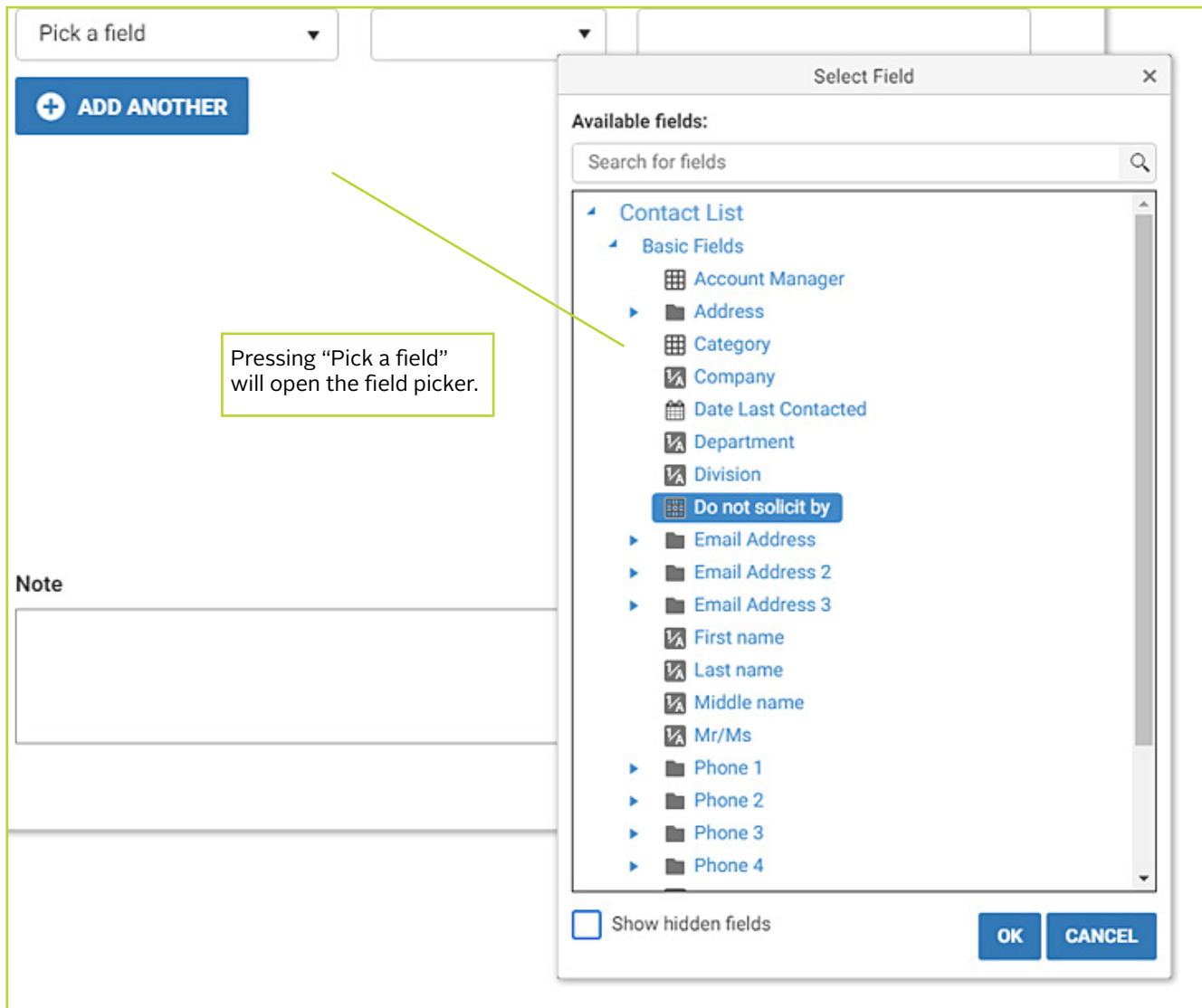
The screenshot displays the Maximizer CRM interface. On the left is a sidebar with navigation options: Quick Access, Dashboards, Contact List (selected), Calendar, Hotlist, Accounts, Client Service, Office Files, Integrations, Video Tutorials, User Information, Links, Import, and Administration. The main window shows the 'Contact List' module with a header bar indicating '4 Displayed - 4 Contacts - (4 selected)'. Below the header is a table with columns: Birthdate, Segmentation, Phone, Email, Address, City, and Province. The table contains four rows of contact data. A context menu is open over the table, listing various actions. The 'Global Edit...' option is highlighted in blue. A yellow callout box with a green border points to this option, containing the text: 'Click this menu item to access the new Global Edit dialog.' Below the table, there are tabs for 'Basic Information', 'Notes', 'Files', 'Activities', 'Accounts', 'Client Service', 'Auditing', and 'Related Entries'. The 'Basic Information' tab is active, showing fields for 'Important Note', 'Date Last Contacted', 'Days Since Last Contacted', and 'Status'.

Birthdate	Segmentation	Phone	Email	Address	City	Province
May 12, 1953	A Client	403-289-7890	jnapoli@maximizer.com	1323 1st Ave.	Calgary	AB
October 8, 1963	B Client	403-421-1898	nancy.cameron@maximiz	1323 1st Ave.	Calgary	AB
February 28, 2006	C Client			1323 1st Ave.	Calgary	AB
September 9, 2007	A Client			1323 1st Ave.	Calgary	AB

Click this menu item to access the new Global Edit dialog.

GLOBAL EDIT DIALOG

In the Global Edit dialog, you need to select fields for editing. Pressing “Pick a field” will open the Field Picker.



Note that Full Access, Read Access and Territory fields are not supported in this release.

Once you select a field, you can edit the rule and values to change the field value.

The available actions for the rule depend on the selected field type. For example, for a date or an alphanumeric field, the following actions are available: Add when empty, Replace, Clear.

If the field is a multi-value table field, there are extra actions, including Append and Remove.

You can add more fields by pressing “Add another.”

The screenshot displays a user interface for configuring a rule. At the top, there is a dropdown menu labeled "Do not solicit by" with a downward arrow. To its right is another dropdown menu labeled "Append" with a downward arrow, which is currently open, showing a list of actions: "Add when empty", "Append" (highlighted in blue), "Replace", "Remove", and "Clear". To the right of the "Append" dropdown is a text input field containing "Email" and a blue button with a white "X" icon. Below the "Do not solicit by" dropdown is a blue button with a white plus icon and the text "ADD ANOTHER". At the bottom left, there is a section labeled "Note" followed by a large, empty text area. At the bottom right, there are two blue buttons labeled "OK" and "CANCEL".

PROGRESS INDICATOR

In past versions, while you are performing a global edit, you cannot work in another area of the product until the editing process is complete. In the 2018 release, you can continue working during a global edit.

When global editing is in progress, a progress indicator is displayed in the header. You can switch to another module and continue working. You can even log out of Maximizer and the editing process will continue.

Global Edit progress: 27%

MAXIMIZER CRM

Quick Access: Contact List (4 Displayed - 4 Contacts - (4 selected))

Name	Birthdate	Segmentation	Phone	Email	Address	City	Province	Country
Cameron, Lou	May 12, 1953	A Client	403-289-7890	jnapoli@maximizer.com	1323 1st Ave.	Calgary	AB	Canada
Cameron, Nancy	October 8, 1963	B Client	403-421-1898	nancy.cameron@maximiz	1323 1st Ave.	Calgary	AB	Canada
Cameron, Paula	February 28, 2006	C Client			1323 1st Ave.	Calgary	AB	Canada
Cameron, Robert	September 9, 2007	A Client			1323 1st Ave.	Calgary	AB	Canada

Cameron, Lou
Cameron, Lou and Nancy

When the editing process is completed, you can view the results by clicking View Global Edit Results in the header. If you are still in the Contact List screen, the list will be refreshed and show the updated data if the fields changed are in the column view. If you are not in the Contact List screen, you will be switched to the Contact List.

MAXIMIZER CRM

VIEW GLOBAL EDIT RESULTS

Calendar

TODAY: 2017-09-24 - 2017-09-30 (WEEK 39)

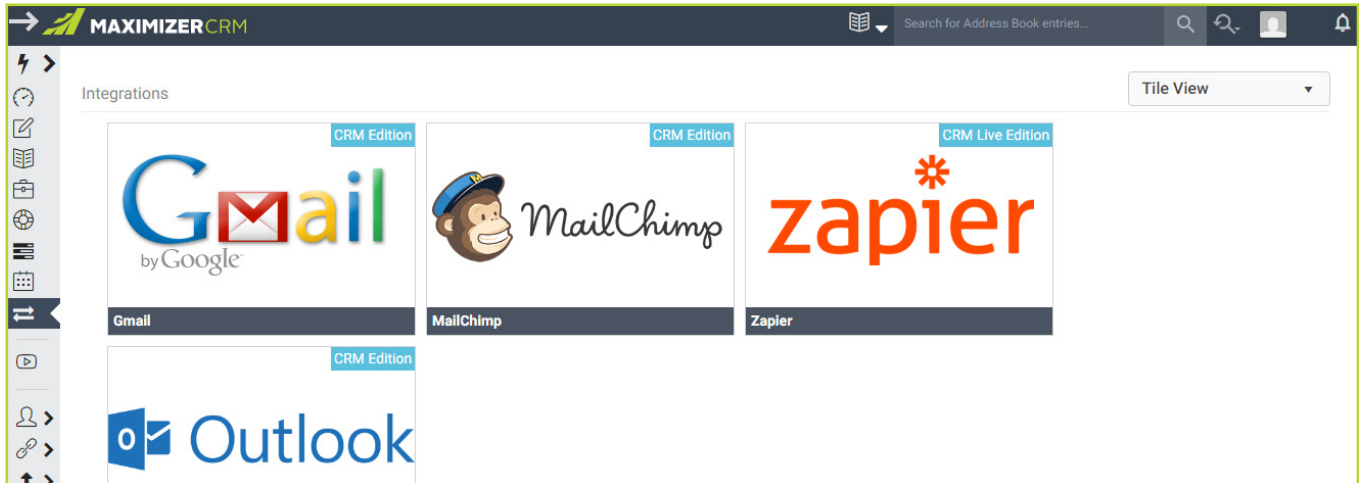
	SUN -09-24	MON -09-25	TUE -09-26	WED -09-27	THU -09-28	FRI -09-29	SAT -09-30
All day							
8:00 AM							
9:00 AM							
10:00 AM							

Calendar: SEPTEMBER 2017

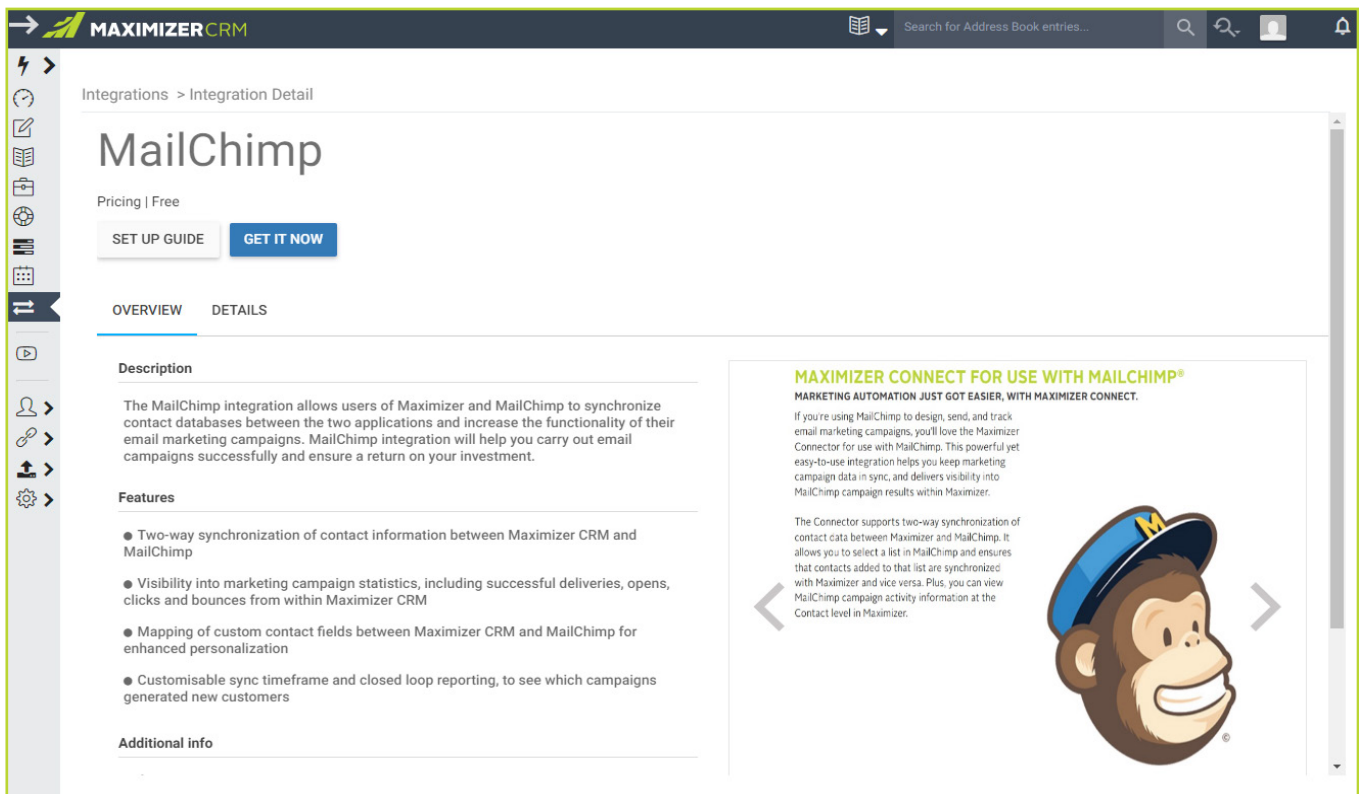
Note that while a Global Edit is in progress, you cannot perform another one. The Global Edit menu item will be disabled until the current editing process is completed.

APP DIRECTORY

You can now access and enable other business applications, quickly and easily, straight from within Maximizer. Click the Integration button in the Icon Bar to open the App Directory where you can find every app integrated with Maximizer. We are actively working on building more integrations. Each one will be made available in the App Directory as they are released.



Clicking on the App icon will show more details related to the App. You can access the Setup Guide, check the features available and activate or download the integration by clicking the 'Get It Now' button. On-Premise users need to have an active internet connection to access the App Directory.



UI / UX ENHANCEMENT

ADDING FILES INTO THE FILES TAB BY DRAG AND DROP

You can now directly drag and drop files from your computer to the File tab. This allows you to quickly upload files into Maximizer.

The screenshot displays the Maximizer CRM interface. The top navigation bar includes the Maximizer CRM logo, a search bar, and user profile information. The left sidebar contains a 'Quick Access' section and a list of modules: Dashboards, Contact List (selected), Calendar, Hotlist, Accounts, Client Service, Office Files, Integrations, Video Tutorials, User information, Links, Import, and Administration. The main content area shows the 'Contact List' for 'Cameron, Lou' with 4 displayed contacts. Below this, the 'Files' tab is active, showing a list of files with columns for Date, Time, Category, Type, Name, Creator, Full Access, and Read Acc. A green arrow points to the 'Drag and drop files here' area, and a text box explains the functionality.

Name	Birthdate	Segmentation	Phone	Email	Address	City	Province	Country
Cameron, Lou	May 12, 1953	A Client	403-289-7890	jnapoli@maximizer.com	1323 1st Ave.	Calgary	AB	Canada
Cameron, Nancy	October 8, 1963	B Client	403-421-1898	nancy.cameron@maximiz	1323 1st Ave.	Calgary	AB	Canada
Cameron, Paula	February 28, 2006	C Client			1323 1st Ave.	Calgary	AB	Canada
Cameron, Robert	September 9, 2007	A Client			1323 1st Ave.	Calgary	AB	Canada

Date	Time	Category	Type	Name	Creator	Full Access	Read Acc
April 10, 2015	3:16 PM	Reviews	JPG	Franchise Opportunity ? New Breakfast Ideas	Administrator	Public	Public
April 10, 2015	3:15 PM	Investment	JPG	Future Commuter Car	Administrator	Public	Public
April 10, 2015	3:15 PM	New Business	JPG	Dentist In Training	Administrator	Public	Public
April 10, 2015	3:06 PM	General	Hyperlink	Company Website	Administrator	Public	Public
April 10, 2015	3:01 PM	New Business	BMP	New Listing Agency Offering	Administrator	Public	Public
April 10, 2015	2:59 PM	Investment	JPG	Future Healthcare of Elderly	Administrator	Public	Public
April 10, 2015	2:54 PM	Investment	MOV	Future Healthcare, Invest Now	Administrator	Public	Public
April 10, 2015	2:12 PM	General	Email		Administrator	Public	Public
April 8, 2015	8:34 AM	New Business	JPG		Administrator	Public	Public

Drag and drop files here

You can drag and drop files directly into the Documents tab.

AUTO FORMAT PHONE NUMBERS BASED ON YOUR LOCATION OR COUNTRY CODE

When you edit your contacts' phone numbers, these will automatically be formatted for your country (set in your preferences) or according to the country code of the phone number.

Your phone number locale can be set in the preferences dialog.

The image shows a 'Preferences' dialog box with a close button (X) in the top right corner. The dialog is divided into several sections:

- Preferences**
 - Maximum number of entries returned: 10000 ▼
 - Display blank UDFs: ☒ Yes ☐ No
 - Allow multi-selection in Advanced Search (may require the website to be in the Trusted Sites zone): ☒ Yes ☐ No
 - ☐ Automatically assign campaign when creating a new opportunity
 - Limit the search to campaigns created: This Quarter ▼
 - ☒ Display users by groups:
 - ☒ All users ☐ Disabled users ☒ Departments
 - ☐ Divisions ☐ Security groups ☐ Teams
- Support Center**
 - Choose between local or hosted online help content: Maximizer Hosted help content ▼
- Regional Settings** (highlighted with a yellow box)
 - Locale: English (Canada) [en-CA] ▼
 - Time zone: (UTC-08:00) Pacific Time (US & Canada) ▼
 - ☒ Automatically adjust for Daylight Saving

At the bottom of the dialog are five buttons: 'User Properties...', 'Other Preferences...', 'Password...', 'Save' (highlighted with a blue border), and 'Cancel'.

When you edit a contact list entry phone number without a country code, the phone number will be automatically formatted to comply with the formatting of your locale.

For example, you've set your locale to the United States and enter a phone number. When you click out of the field, the phone number will be automatically formatted as follows:

Phone numbers

Main

▼

(604) 601-8000

▼

If you are entering a number with a country code, type “+” directly before the country code to ensure it is formatted correctly. This works with international numbers too.

EXAMPLES

US/Canada

Phone numbers

Main

▼

+1 604 601 8000

▼

United Kingdom

Phone numbers

Main

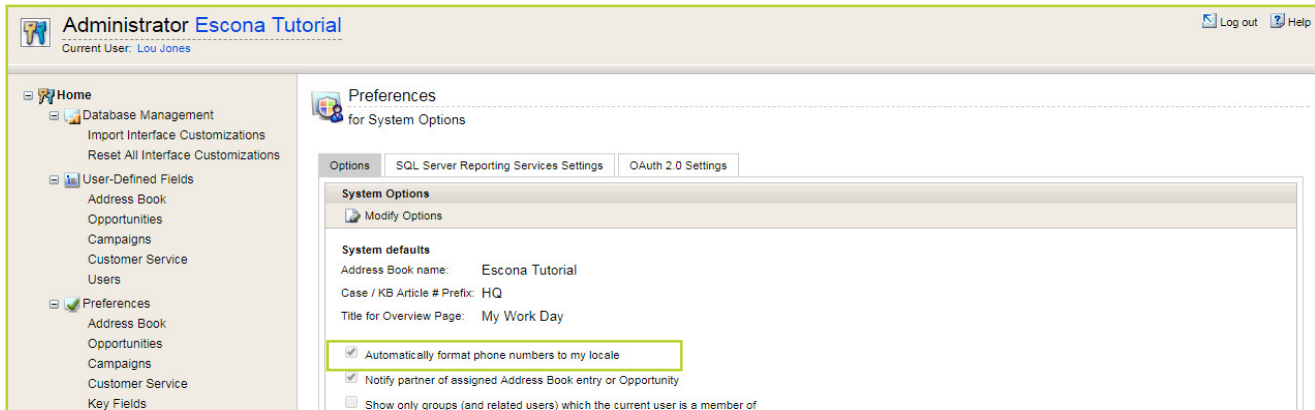
▼

+44 1344 766900

▼

TURN OFF AUTOMATIC PHONE FORMAT

If you don't want to apply the automatic phone format, you can turn it off. Go to Administrator module > Preferences > System Options and uncheck "Automatically format phone numbers to my locale".

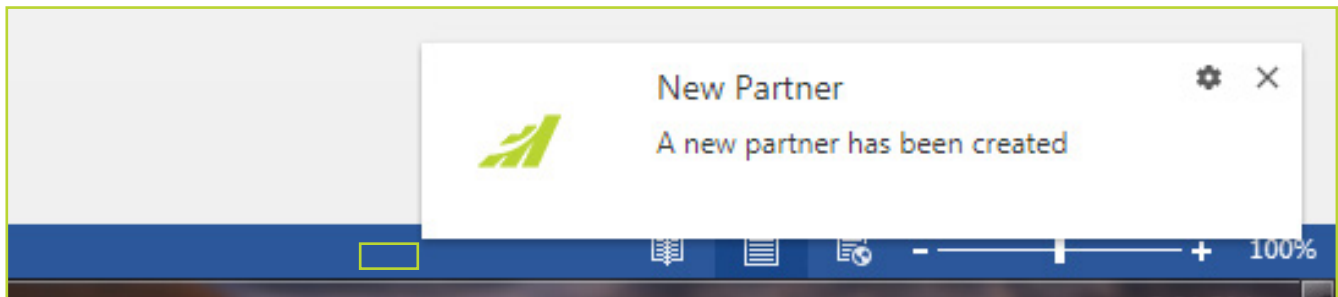


NOTIFICATION ENHANCEMENT

Desktop notification shows notification for Contact List entries, accounts and cases

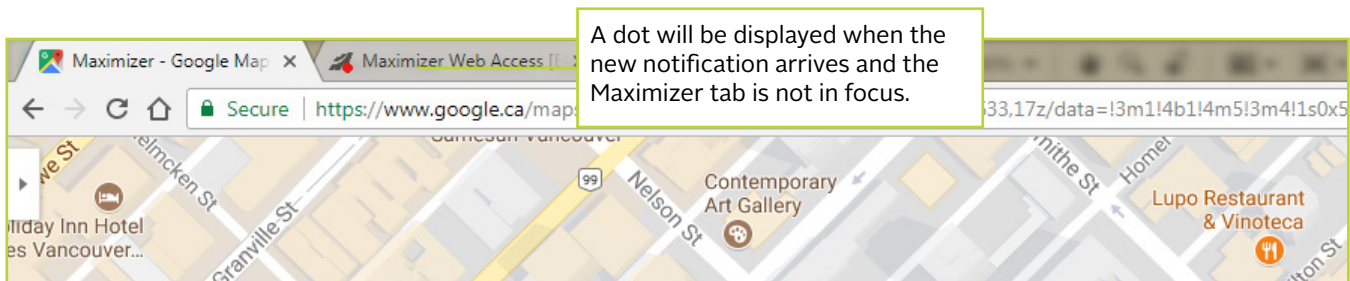
In past releases, only the notification for appointments and tasks could be displayed as a desktop notification. Now you can see Contact List entries, accounts, and client service cases displayed as desktop notifications. Clicking the notification will open Maximizer and highlight the entry.

Note that the desktop notification only works with Chrome and Firefox.



Favicon in browser tab indicates new notifications have arrived

When the notifications arrive and the Maximizer tab is not in focus, a dot will be displayed in the favicon in the tab to indicate that new notification has arrived.



SHOW ALL OPTION IN ACCOUNTS TAB

A Show All checkbox has been added to the Accounts tab. If a contact is selected and Show All is checked, all the accounts created for that contact's parent company or household will also be displayed.

Cameron, Lou
Cameron, Lou and Nancy ▾ Details Contacts Notes Files Activities **Accounts** Client Service Auditing Related Entries (+) ↑ ↓ ↺ ≡

Columns: Public Opportunities View | ☒ Show All View: All Accounts ▾ ?

<input type="checkbox"/> Status	Company/Individual	Objective	Stage	Revenue	Close Date
<input checked="" type="checkbox"/> Managed Account	Cameron, Lou and Nancy	Add New Policy	4. Managed Account	\$12,000.00	September 1, 2017
<input type="checkbox"/> Abandoned	Cameron, Lou and Nancy	Manage Account	0. Not started	\$25,000.00	April 28, 2015
<input checked="" type="checkbox"/> Managed Account	Cameron, Lou and Nancy	Manage Account	4. Managed Account	\$10,000.00	April 7, 2015
<input checked="" type="checkbox"/> Managed Account	Cameron, Lou and Nancy	Manage Account	4. Managed Account	\$35,000.00	April 2, 2015
<input type="checkbox"/> Lost	Cameron, Lou and Nancy	Manage Account	Internal Account Review	\$8,000.00	July 31, 2017
<input checked="" type="checkbox"/> Managed Account	Cameron, Lou and Nancy	New Insurance Policy	4. Managed Account	\$50,000.00	July 31, 2017

In contrast, if a contact is selected and Show All is un-checked, only accounts assigned to the selected contact will show up.

Cameron, Lou
Cameron, Lou and Nancy ▾ Details Contacts Notes Files Activities **Accounts** Client Service Auditing Related Entries (+) ↑ ↓ ↺ ≡

Columns: Public Opportunities View | ☐ Show All View: All Accounts ▾ ?

<input type="checkbox"/> Status	Company/Individual	Objective	Stage	Revenue	Close Date
<input checked="" type="checkbox"/> Managed Account	Cameron, Lou and Nancy	Manage Account	4. Managed Account	\$10,000.00	April 7, 2015
<input type="checkbox"/> In Progress	Cameron, Lou and Nancy	Purchase New Policy	2. Needs Assessment	\$125,000.00	
<input checked="" type="checkbox"/> Managed Account	Cameron, Lou and Nancy	Purchase New Policy	4. Account	\$50,000.00	August 1, 2017

ADD NEW BUTTONS AVAILABLE IN THE MAIN MODULES

The button for adding a new entry has been added into the Contact List, Accounts, Client Service and Hotlist screens. It allows you to quickly create a new entry.

MAXIMIZER CRM Search for Contacts...

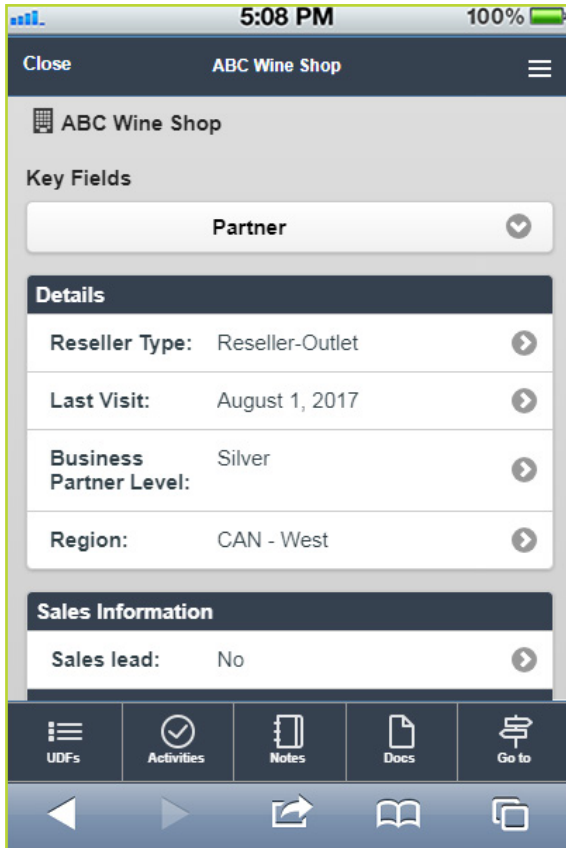
Quick Access > **Contact List** 4 Displayed - 4 Contacts COMPANY

Edit View Search Action

<input type="checkbox"/> Name	Birthdate	Phone	Email	Address	City	Province	Country
<input checked="" type="checkbox"/> Cameron, Lou	May 12, 1953	403-289-7890	jnapoli@maximizer.com	1323 1st Ave.	Calgary	AB	Canada
<input type="checkbox"/> Cameron, Nancy	October 8, 1963	403-421-1898	nancy.cameron@maximiz	1323 1st Ave.	Calgary	AB	Canada
<input type="checkbox"/> Cameron, Paula	February 28, 2006			1323 1st Ave.	Calgary	AB	Canada
<input type="checkbox"/> Cameron, Robert	September 9, 2007			1323 1st Ave.	Calgary	AB	Canada

COMPANY
COMPANY LEAD
HOUSEHOLD
INDIVIDUAL LEAD
CONTACT
CONTACT LEAD

MOBILE ACCESS – SUPPORT GROUPING IN KEY FIELDS



If you have created groups for Key Fields on the web version and give each group a title, the groups and titles are now displayed in Mobile Access.

SHOW ADDRESSES IN MAP

A new Map tab is still under development. You can preview this feature in the beta release build. The Map tab uses an open source data and Geocoding service provider called Open Street Map (OSM) to show a map view of selected address entries. The accuracy of the data is dependent on the info provided by the OSM community and thus might not always be accurate.

The Map tab is available in Contact List module and it is hidden by default. To turn on the tab, go to “Customize your tab” dialog and check the Map tab.

Select multiple Contact List entries in the main grid, and the locations of the entries will be displayed in the Map Tab. Clicking the pin will change the current entry in the main grid.

The screenshot displays the MAXIMIZERCRM interface. At the top, the 'Contact List' module is active, showing 4 displayed entries with 3 selected. The table below lists the entries:

Type	Company	First Name	Last Name	Phone Number	Phone 1 Ext	Email Address	City
Company	ABC Wine Shop						Vancouver
Company	Amelia Liquors South			6046018000	Phone 1 Ext	hamid@maximizer.com	Vancouver
Company	Atlas Food Inc			(604) 601-8000		escona@maximizer.com	Vancouver
Company	Beringer Vineyards					@maximizer.com	Saint Helena

Below the table, the 'Map' tab is selected, showing a map of Vancouver. A callout box points to the 'Customize your tab' dialog, stating: 'Click here to open the “Customize your tab” dialog and turn on the Map tab.' Another callout box points to a pin on the map, stating: 'Address of another selected entry. Clicking the pin will highlight the entry in the main grid.' A third callout box points to a red pin on the map, stating: 'Location of the current selected Address Book entry.' The map shows the location of ABC Wine Shop at 60 Smithe Street, Room 260, Vancouver, BC, Canada.