



# 2018 Feature Review Guide

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# 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.

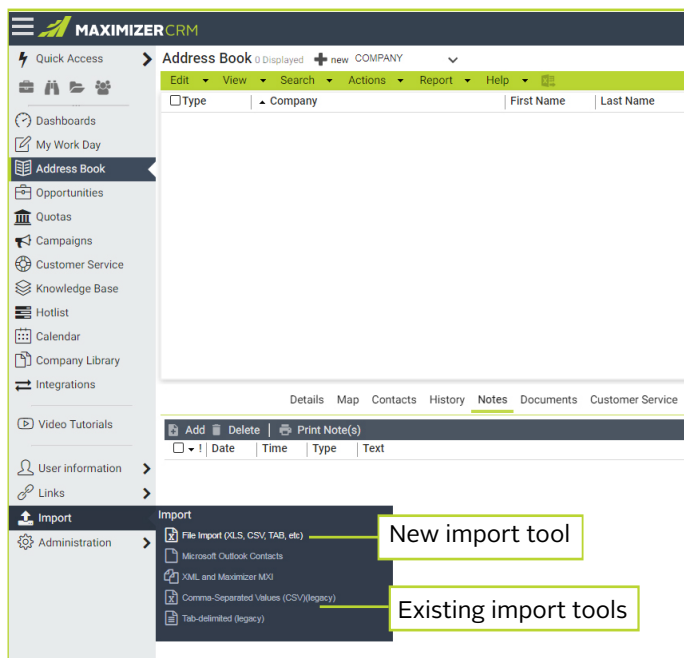
The new import tool supports these entry types: Company, Individual, Contacts and Opportunity.

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 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 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)	Done	50	50	0	0
August 16, 2017 10:11 AM	Opportunity and Company (Opportunity Update.xlsx)	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 <span>Last 14 days</span>						
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

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

Upload a file

Contact Info.xlsx  
11.03 KB

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

Select record types

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

Specify import options

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

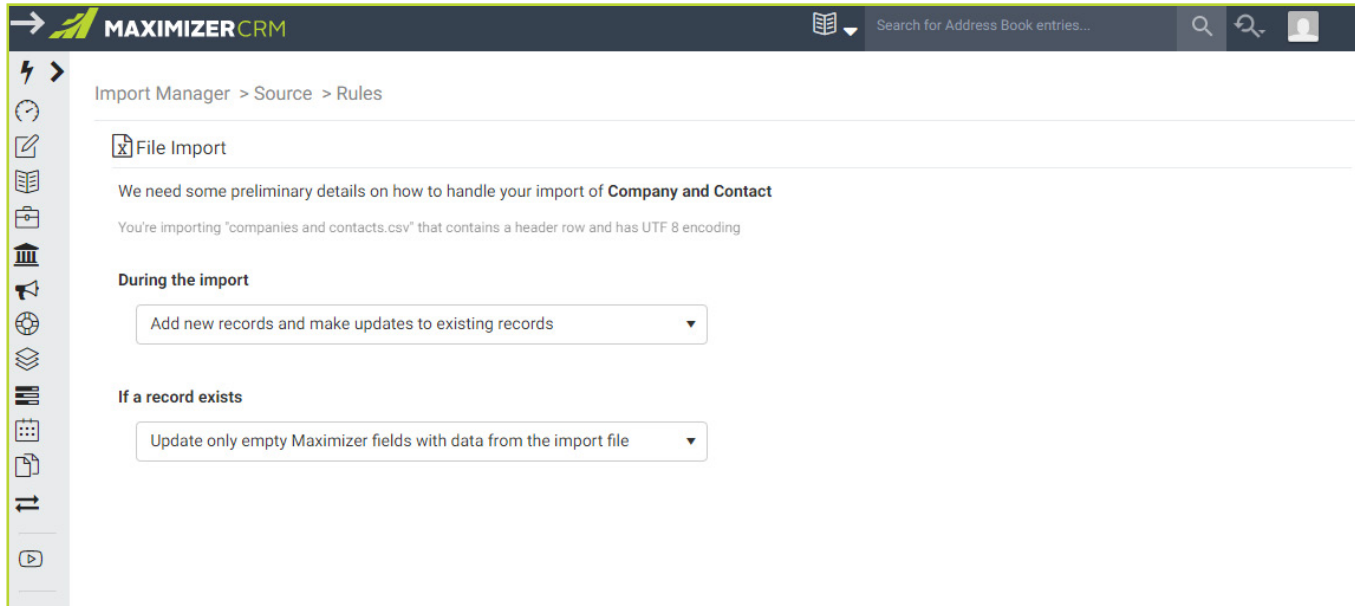
### Set global import settings

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. The first section, 'During the import', has a drop-down menu currently set to 'Add new records and make updates to existing records'. The second section, 'If a record exists', has a drop-down menu currently set to 'Update only empty Maximizer fields with data from the import file'. A left-hand sidebar contains various icons for navigation, and a top-right search bar is visible.

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 Address Book 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.

MAXIMIZERCRM

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

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 # 12345, 18975, 12249	Don't Import	<input type="checkbox"/> NO
Company Name ABC Wine Shop, Carlyle Wines & ...	Company <small>Company/Basic Fields</small>	<input checked="" type="checkbox"/> YES
Contact Last Name Johnson, James, Torres	Last name <small>Contact/Basic Fields</small>	<input checked="" type="checkbox"/> YES
Contact First Name Ed, Dolton, Martha	First name <small>Contact/Basic Fields</small>	<input checked="" type="checkbox"/> YES
Contact EMAIL ADDRESS EMAIL1@MAXIMIZER.COM, cont...	Email Address <small>Contact/Basic Fields/Email Address</small>	<input type="checkbox"/> NO
Contact Phone Home (604) 60180...	Phone 1 <small>Contact/Basic Fields/Phone 1</small>	<input type="checkbox"/> NO
Contact Address Line 1 329 E MAIN ST	Address Line 1 <small>Contact/Basic Fields/Address Line 1</small>	<input type="checkbox"/> NO
Contact Address Line 2 SUITE 3 & 4,	Don't Import	<input type="checkbox"/> NO
Contact City hereville, port moody, port moody	Don't Import	<input type="checkbox"/> NO

Available fields:

Search for fields

- Address Book
  - 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 opportunities

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

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

MAXIMIZERCRM

Search for Address Book entries...

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

Opportunities Company

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 # 12345, 18975, 12249	Identification <small>Basic Fields</small>	YES <input type="checkbox"/>
Company Name ABC Wine Shop, Carlyle Wines & ...	Company <small>Company/Basic Fields</small>	YES <input type="checkbox"/>
Contact Last Name Johnson, James, Torres	Last name <small>Contact/Basic Fields</small>	
Contact First Name Ed, Dolton, Martha	First name <small>Contact/Basic Fields</small>	
Contact EMAIL ADDRESS EMAIL1@MAXIMIZER.COM, cont...	Email Address <small>Contact/Basic Fields/Email Address</small>	
Contact Phone Home (604) 6018000, (604) 6018001, (...)	Phone 1 <small>Contact/Basic Fields/Phone 1</small>	NO <input type="checkbox"/>
Contact Address Line 329 E MAIN STREET, 111 Johns, 75		NO <input type="checkbox"/>
Contact Address Line SUITE 3 & 4, ...	Don't import <input type="checkbox"/>	NO <input type="checkbox"/>
Contact City	Don't import <input type="checkbox"/>	NO <input type="checkbox"/>

Insurance Policy #

Available fields:

Search for fields

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

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

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

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

The fields for each record type are identified by the icons.

Click the icon to remove the field mapping.

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
<b>Insurance Policy #</b> <small>12345, 18975, 12249</small>	Identification <small>Basic Fields</small>	<input checked="" type="checkbox"/> YES		As imported
<b>Company Name</b> <small>ABC Wine Shop, Carlyle Wines &amp; ...</small>	Company <small>Company/Basic Fields</small>	<input checked="" type="checkbox"/> YES		
<b>Contact Last Name</b> <small>Johnson, James, Torres</small>	Last name <small>Contact/Basic Fields</small>	<input checked="" type="checkbox"/> YES		As imported
<b>Contact First Name</b> <small>Ed, Dolton, Martha</small>	First name <small>Contact/Basic Fields</small>	<input type="checkbox"/> NO	Replace Add when empty Replace	As imported
<b>Contact EMAIL ADDRESS</b> <small>EMAIL1@MAXIMIZER.COM, cont...</small>	Email Address <small>Contact/Basic Fields/Email Address</small>	<input type="checkbox"/> NO		As imported
<b>Contact Phone Home</b> <small>(604) 6018000, (604) 6018001, (...)</small>	Phone 1 <small>Contact/Basic Fields/Phone 1</small>	<input type="checkbox"/> NO	Replace	
<b>Contact Address Line 1</b> <small>329 E MAIN STREET, 111 Johns, 123...</small>	Don't Import	<input type="checkbox"/> NO	Replace	As imported
<b>Contact Address Line 2</b> <small>SUITE 3 &amp; 4, ...</small>	Don't Import	<input type="checkbox"/> NO	Replace	As imported

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.

MAXIMIZER CRM

Search for Address Book entries...

Import Manager > Source > Rules > Mapping

File Import

Match your CSV columns to any Maximizer field to complete your import. The import you selected requires that you match at least 1 CSV column to a corresponding Maximizer record type

Opportunities Company 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>	Field Action	Field Format
Insurance Policy # <small>12345, 18975, 12249</small>	Identification <small>Basic Fields</small>	YES		As imported
Company Name <small>ABC Wine Shop, Carlyle Wines &amp; ...</small>	Company <small>Company/Basic Fields</small>	YES		As imported
Contact Last Name <small>Johnson, James, Torres</small>	Last name <small>Contact/Basic Fields</small>	YES		As imported
Contact First Name <small>Ed, Dolton, Martha</small>	First name <small>Contact/Basic Fields</small>	NO	Replace	As imported
Contact EMAIL ADDRESS <small>EMAIL1@MAXIMIZER.COM, cont...</small>	Email Address <small>Contact/Basic Fields/Email Address</small>	NO	Replace	As imported Convert To Title Case Convert to sentence case COVERT TO UPPERCASE convert to lowercase
Contact Phone Home <small>(604) 6018000, (604) 6018001, (...)</small>	Phone 1 <small>Contact/Basic Fields/Phone 1</small>	NO	Replace	As imported
Contact Address Line 1 <small>329 E MAIN STREET, 111 Johns, 123...</small>	Don't Import	NO	Replace	As imported
Contact Address Line 2 <small>SUITE 3 &amp; 4, ,</small>	Don't Import	NO	Replace	As imported
Contact City	Don't Import	NO	Replace	As imported

Specify text format for an alphanumeric field.

BACK NEXT

## 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.

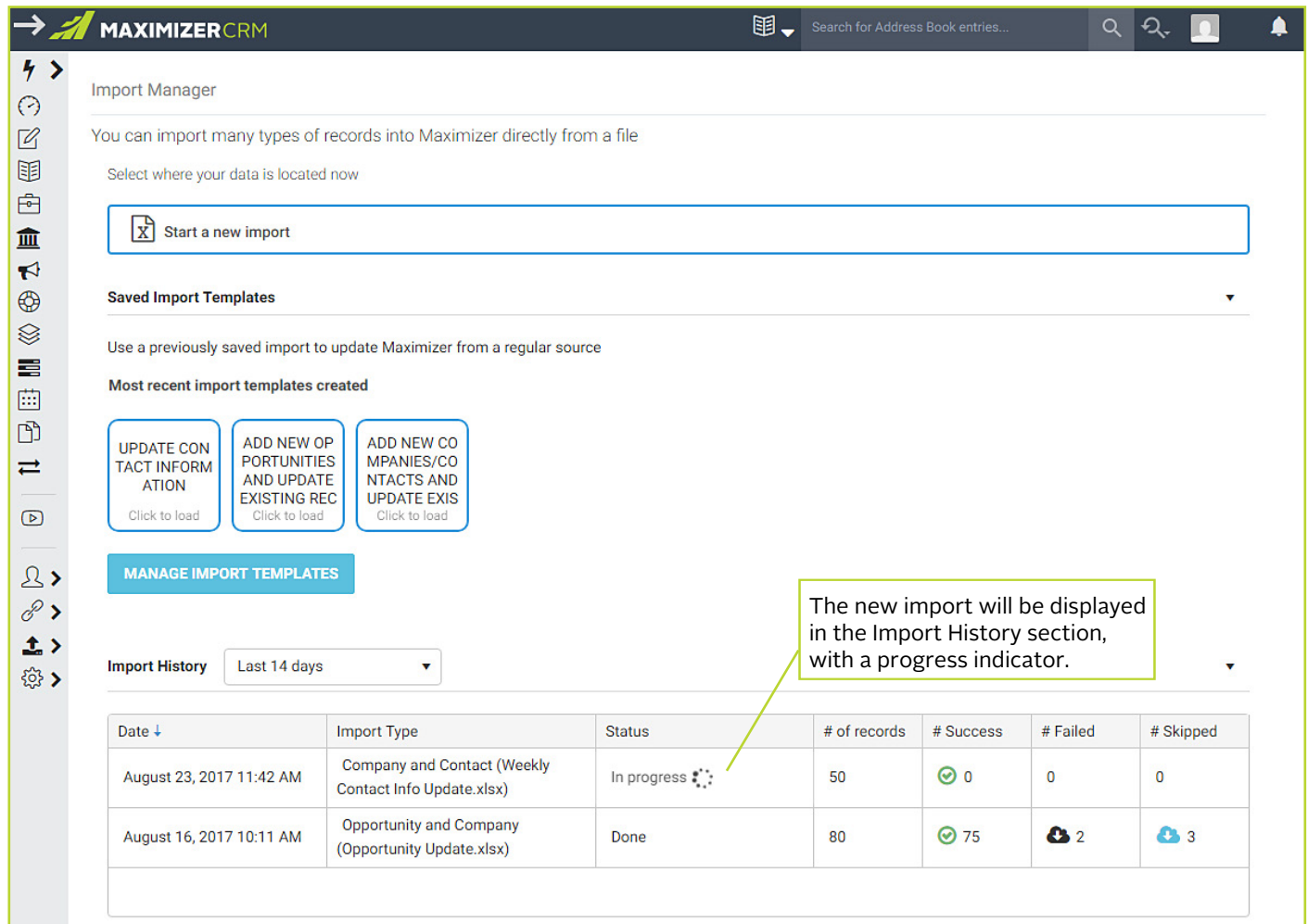
After you review the information in the summary page and satisfy all the settings, press the Finish button to start the import process.

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 REC](#)  
Click to load

[ADD NEW COMPANIES/CONTACTS 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)	In progress 	50	 0	0	0
August 16, 2017 10:11 AM	Opportunity and Company (Opportunity Update.xlsx)	Done	80	 75	 2	 3

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 opportunities, companies and contacts, the Favorite List will retrieve opportunities 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 <span>Last 14 days</span>						
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 opportunities. If an existing opportunity is found, it updates the record. Otherwise, it creates a new opportunity.

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 opportunity, 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 opportunities 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 opportunities 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 main content area is titled 'Import Manager > Source > Rules > Mapping > Summary'. It features a sidebar with various icons and a main panel with the following sections:

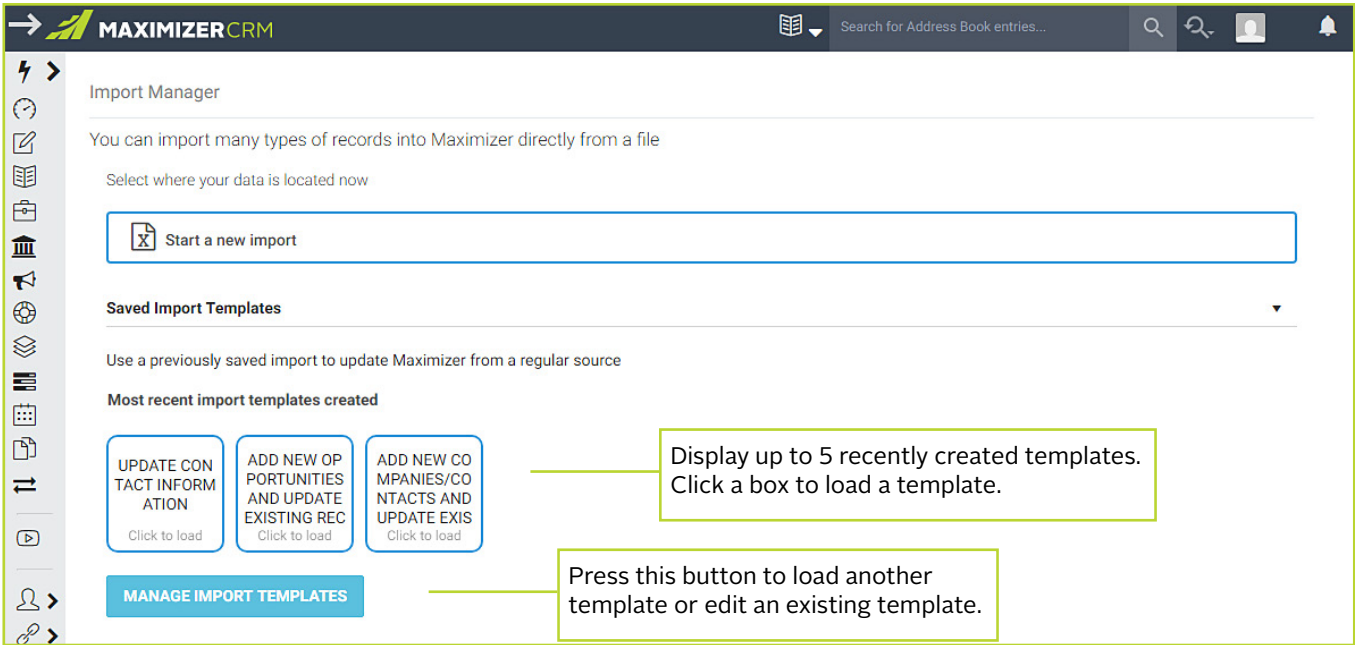
- Pick a favorite list:** A star icon and a text input field.
- Create a new list:** Three radio buttons: 'Create a new list' (selected), 'Add to an existing list', and 'None'.
- New Import (9/25/2017 10:52 AM):** A text input field.
- Summary:** A section with the following details:
  - Import Type:** 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:** A table with columns: Column Header, Destination Maximizer Fields, Field Action, and Field Format.

Column Header	Destination Maximizer Fields	Field Action	Field Format
Company Name	Company		As imported
- Contact:** A table with columns: Column Header, Destination Maximizer Fields, Import Value, Use as duplicate check, Field Action, and Field Format.

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

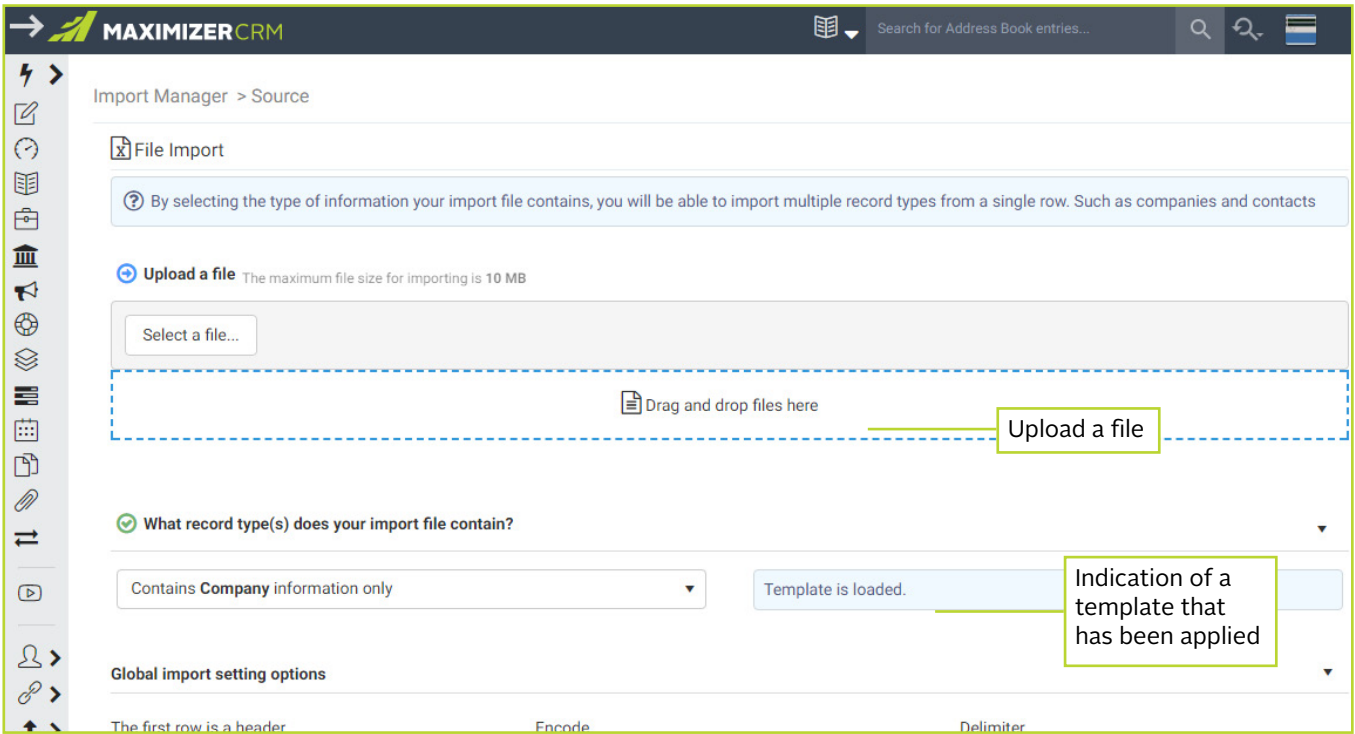
At the bottom of the main panel are buttons for 'BACK', 'SAVE TEMPLATE', and 'FINISH'. An 'Import template' dialog box is open in the center, with a text input field containing 'Update Contact Information' and 'SAVE' and 'CANCEL' buttons.

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 Individual and Contact, you will see the message below.

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

Contains **Individual** 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.

MAXIMIZER CRM

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	Ed, Dolton, Martha	COVERT TO UPPERCASE
Contact EMAIL ADDRESS	Email Address	EMAIL1@MAXIMIZER.COM, contact2@maximizer.com, contact3@maximizer.com	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 Address Book module.

The screenshot shows the MaximizerCRM Address Book interface. The top navigation bar includes 'Edit', 'View', 'Search', 'Actions', 'Report', and 'Help'. The 'Edit' dropdown menu is open, showing various options. The 'Global Edit...' option is highlighted with a yellow box, and a text box points to it with the message: 'Click this menu item to access the new Global Edit dialog.'

First Name	Last Name	Phone Number	Phone 1 Ext	Email Address	City	State	Department
		+1 604 601 802		escona@gmail.com	Vancouver	BC	Sales
David	Taylor	+1 604 601 802			Vancouver	BC	Sales
Ed	Johnson	(604) 601-8000		escona@maximizer.com	Vancouver	BC	Sales
James	Dolton	(604) 601-8000		escona@maximizer.com	Pittsburgh	PA	Sales
Martha	Torres	(604) 601-8000		escona@maximizer.com	Vancouver	BC	Sales

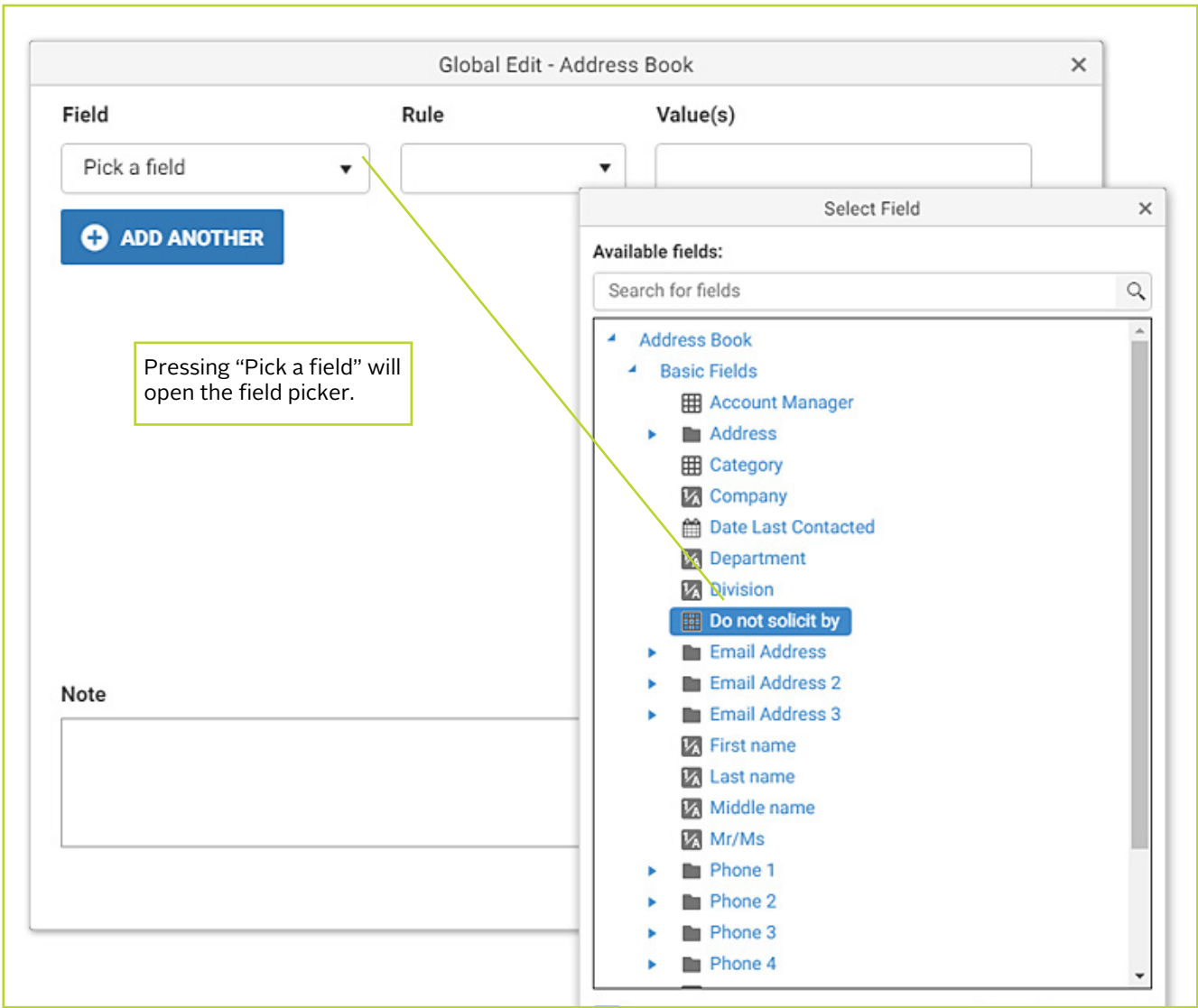
The interface also shows a 'Details' panel on the right with the following information:

- Reseller Type: Reseller-Bar/Pub
- Last Visit: July 29, 2011
- Business Partner Level: Silver
- Partner Sales (YTD): 157000.00
- Volume:
- Region: CAN - West
- First Contacted Date: February 1, 2009



# 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.”

**Global Edit - Address Book**

Field	Rule	Value(s)
Do not solicit by ▼ <b>+ ADD ANOTHER</b>	Append ▼ Add when empty <b>Append</b> Replace Remove Clear	Email X

**Note**

OK 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%

Type	Company	First Name	Last Name	Phone Number	Phone 1 Ext	Email Address	City	State	Department	Division	Do not Solicit by	Category
✓ Company	ABC Wine Shop Inc.	David	Taylor	+1 604 601 802		escona@gmail.com	Vancouver	BC	Sales	Canadian Ot	Email	Partner
✓ Contact	ABC Wine Shop Inc.	Ed	Johnson	(604) 601-8000		escona@maximizer.com	Vancouver	BC	Sales	Administrati	Email	Partner
✓ Contact	ABC Wine Shop Inc.	James	Dolton	(604) 601-8000		escona@maximizer.com	Pittsburgh	PA	Sales		Email	Partner
✓ Contact	ABC Wine Shop Inc.	Martha	Torres	(604) 601-8000		escona@maximizer.com	Vancouver	BC	Sales		Email	

ABC Wine Shop Inc. Details Map Contacts History Notes Documents Customer Service Opportunities Activities User-Defined Fields

ABC Wine Shop Inc. 1006 West 10th Vancouver BC V6R 3Y5 Canada

Details Reseller Type: Reseller-Bar/Pub Category: Partner

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 Address Book 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 Address Book screen, you will be switched to the Address Book.

VIEW GLOBAL EDIT RESULTS

Calendar + new

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

Lou Jones MONTH WEEK DAY AGENDA AVAILABILITY

	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							
11:00 AM							
12:00 PM							
1:00 PM							
2:00 PM							

Calendar SEPTEMBER 2017

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

UNCHECK ALL EDIT LIST

Maximizer

- Lou Jones
- Celine Dancer
- Daniel Brown
- Joe Napoli

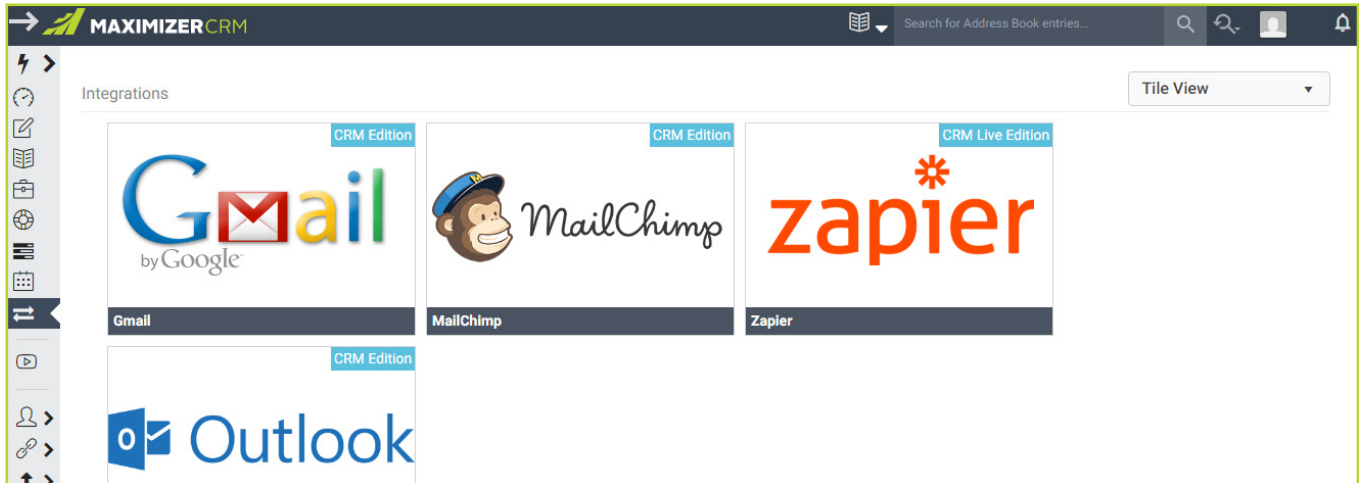
Locations

- Board Room

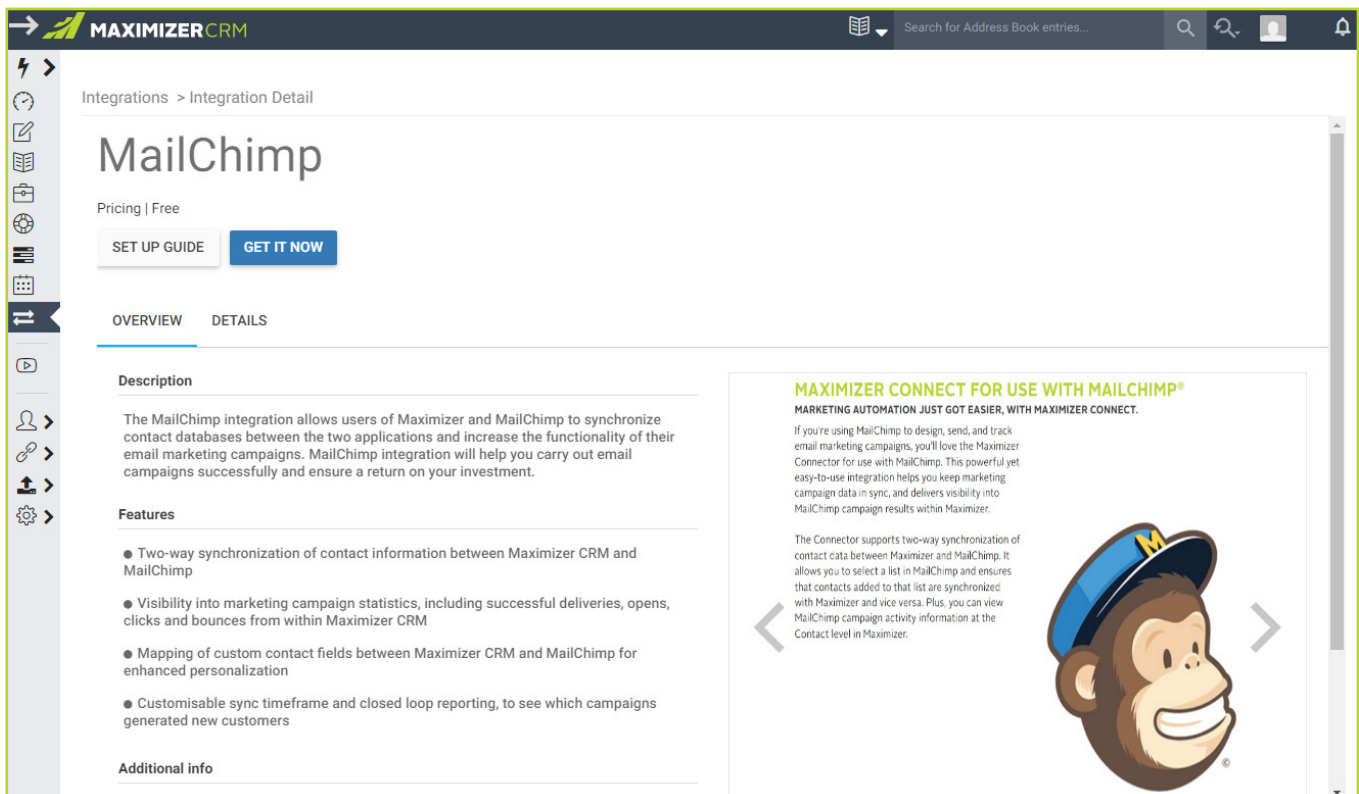
Note that while a Global Edit is in progress, you cannot perform another one. The Global Edit menu item will be disabled until the current editing process is completed.

# 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.



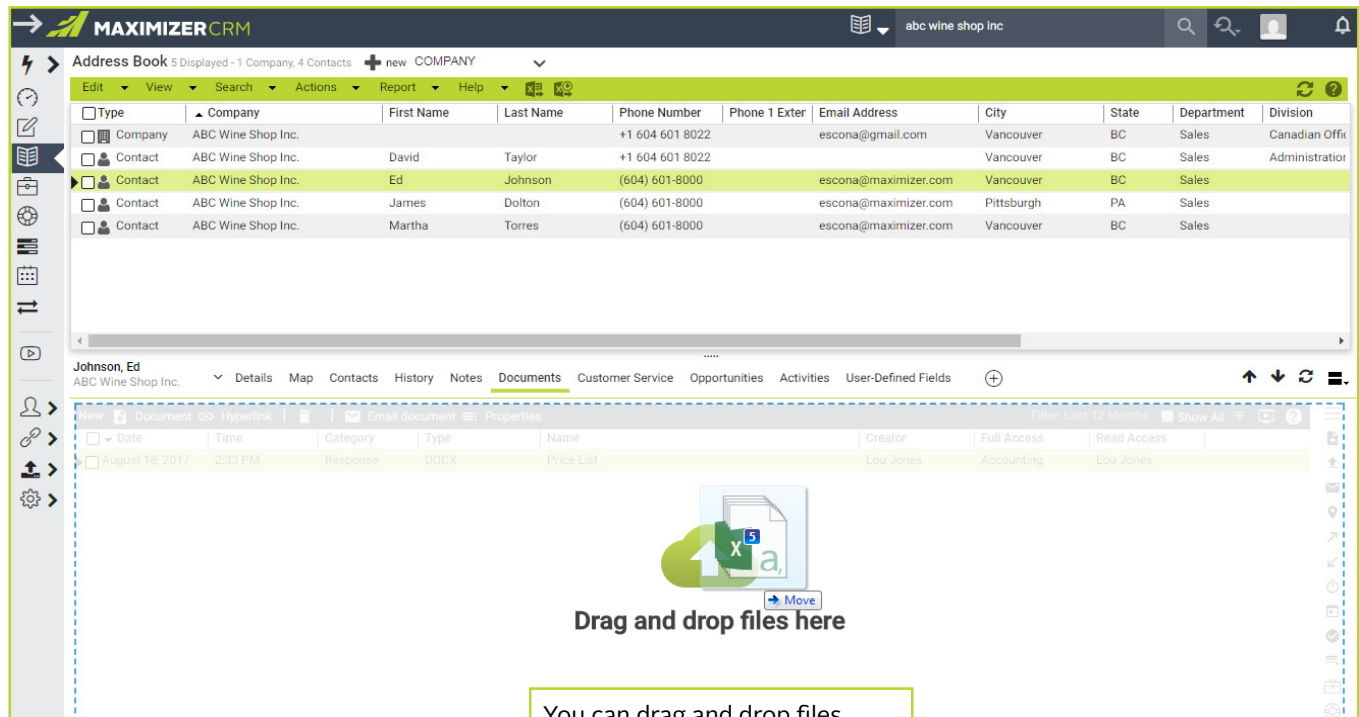
Clicking on the App icon will show more details related to the App. You can access the Setup Guide, check the features available and activate or download the integration by clicking the 'Get It Now' button. On-Premise users need to have an active internet connection to access the App Directory.



# UI / UX ENHANCEMENT

## ADDING DOCUMENTS INTO DOCUMENTS TAB BY DRAG AND DROP

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



The screenshot displays the MAXIMIZER CRM interface. The top navigation bar shows the company name 'abc wine shop inc'. The main area is divided into two sections. The upper section, titled 'Address Book', displays a table of contacts for 'ABC Wine Shop Inc.'. The lower section, titled 'Johnson, Ed', shows the 'Documents' tab. A dashed blue box highlights the 'Documents' tab area, which contains a message: 'Drag and drop files here' with a file icon and a 'Move' button. A callout box points to this area with the text: 'You can drag and drop files directly into the Documents tab.'

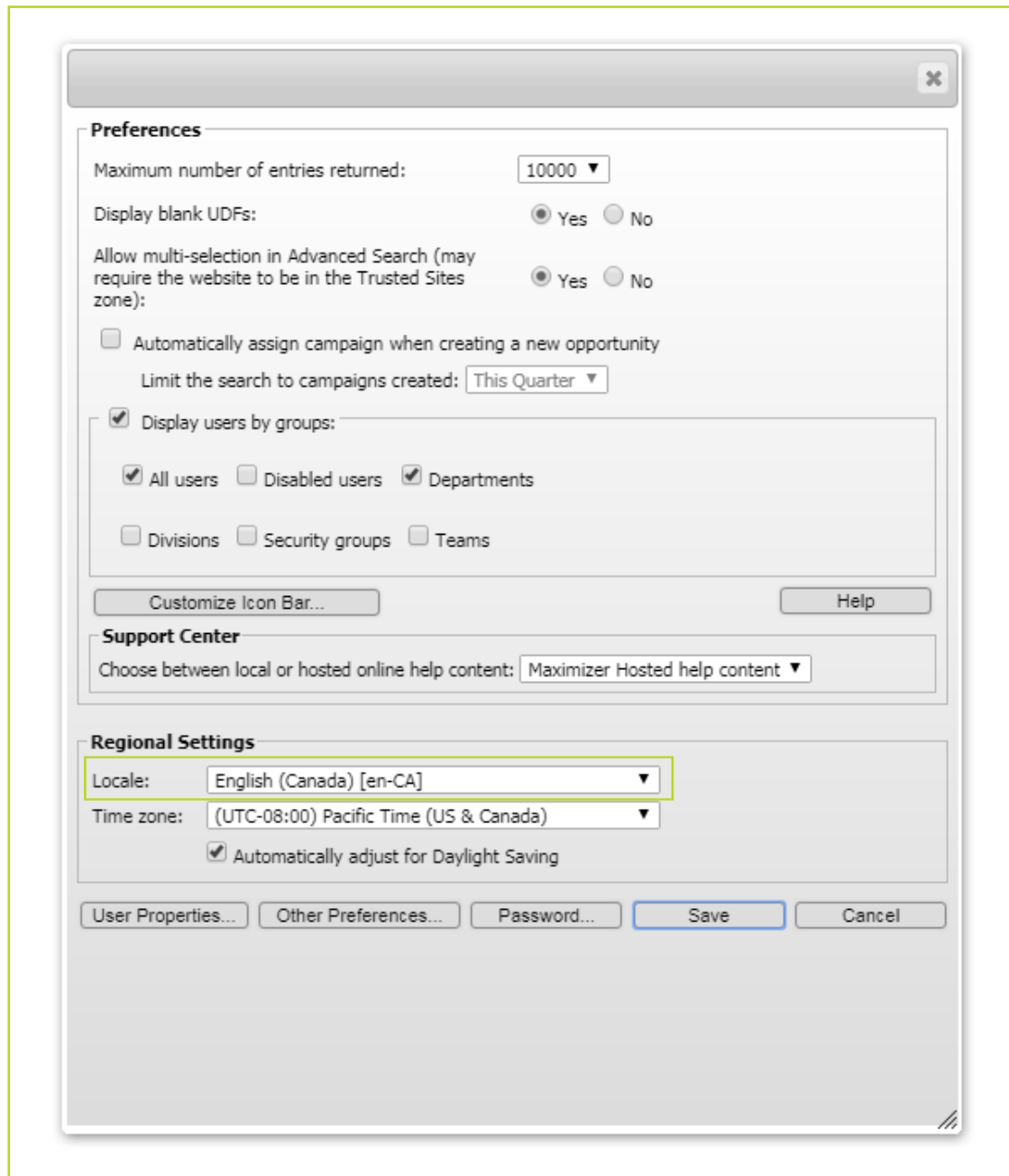
Type	Company	First Name	Last Name	Phone Number	Phone 1 Ext	Email Address	City	State	Department	Division
<input type="checkbox"/>	Company	ABC Wine Shop Inc.		+1 604 601 8022		escona@gmail.com	Vancouver	BC	Sales	Canadian Offic
<input type="checkbox"/>	Contact	ABC Wine Shop Inc.	David	Taylor	+1 604 601 8022		Vancouver	BC	Sales	Administrator
<input checked="" type="checkbox"/>	Contact	ABC Wine Shop Inc.	Ed	Johnson	(604) 601-8000	escona@maximizer.com	Vancouver	BC	Sales	
<input type="checkbox"/>	Contact	ABC Wine Shop Inc.	James	Dolton	(604) 601-8000	escona@maximizer.com	Pittsburgh	PA	Sales	
<input type="checkbox"/>	Contact	ABC Wine Shop Inc.	Martha	Torres	(604) 601-8000	escona@maximizer.com	Vancouver	BC	Sales	

Date	Time	Category	Type	Name	Creator	Full Access	Read Access
August 18, 2017	2:33 PM	Response	DOCX	Price List	Lou Jones	Accounting	Lou Jones

## 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.





When you edit an address book 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	
	▼		
	▼		
Direct	▼		

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	
	▼		
	▼		
Direct	▼		

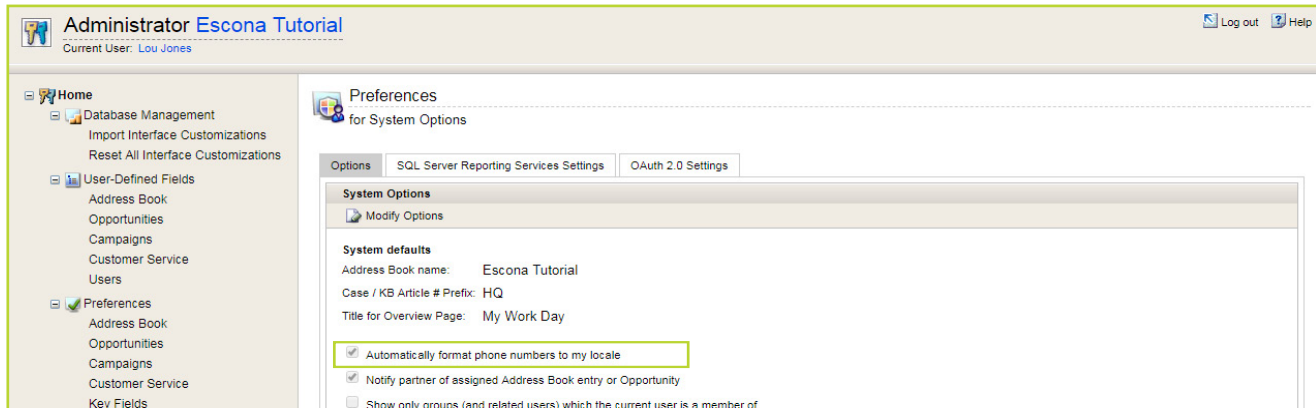
United Kingdom

Phone numbers

Main	▼	+44 1344 766900	
	▼		
	▼		
Direct	▼		

## 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".

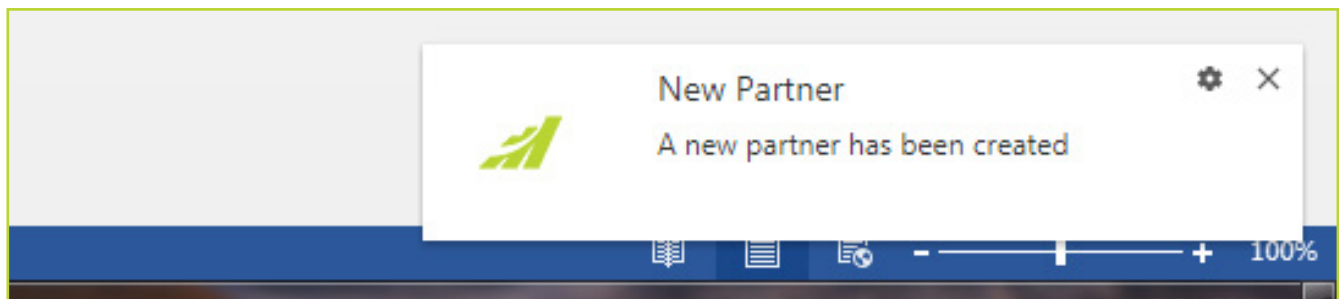


## NOTIFICATION ENHANCEMENT

### Desktop notification shows notification for Address Book entries, opportunities and cases

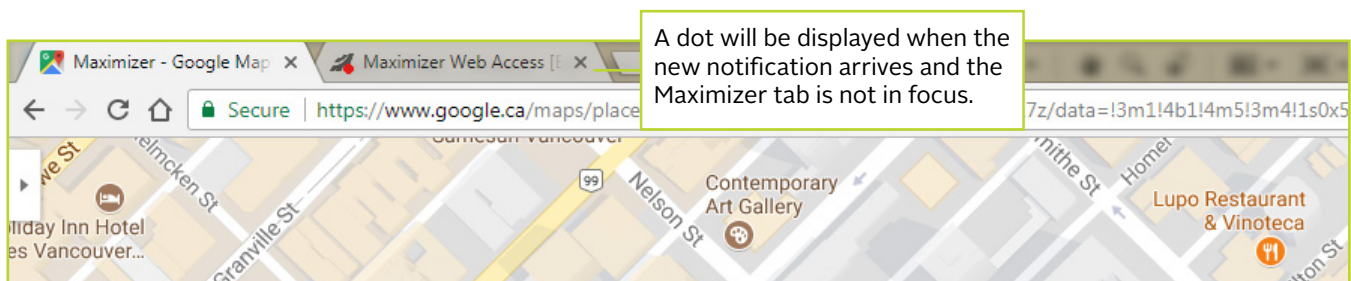
In past releases, only the notification for appointments and tasks could be displayed as a desktop notification. Now you can see Address Book entries, opportunities, and customer service cases displayed as desktop notifications. Clicking the notification will open Maximizer and highlight the entry.

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 OPPORTUNITIES TAB

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

Johnson, Ed  
ABC Wine Shop Inc.

Details Map Contacts History Notes Documents Customer Service **Opportunities** Activities User-Defined Fields

Columns: Public Opportunities View ☒ Show All View: All Opportunities

Status	Company/Individual	Objective	Stage	Revenue	Close Date	Contact Name
<input checked="" type="checkbox"/> Abandoned	ABC Wine Shop Inc.	Sell Escona Wine	Not Started	\$100,000.00	August 18, 2017	
<input type="checkbox"/> In Progress	ABC Wine Shop Inc.	Get Escona on Wine List	Not Started	\$50,000.00	September 29, 2017	Dolton, James
<input type="checkbox"/> In Progress	ABC Wine Shop Inc.	Sell Escona Wine	Not Started	\$80,000.00	October 30, 2017	Johnson, Ed

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

Johnson, Ed  
ABC Wine Shop Inc.

Details Map Contacts History Notes Documents Customer Service **Opportunities** Activities User-Defined Fields

Columns: Public Opportunities View ☐ Show All View: All Opportunities

Status	Company/Individual	Objective	Stage	Revenue	Close Date	Contact Name
<input checked="" type="checkbox"/> In Progress	ABC Wine Shop Inc.	Sell Escona Wine	Not Started	\$80,000.00	October 30, 2017	Johnson, Ed

## ADD NEW BUTTONS AVAILABLE IN THE MAIN MODULES

The button for adding a new entry has been added into the Address Book, Opportunities, Customer Service and Hotlist screens. It allows you to quickly create a new entry.

MAXIMIZER CRM

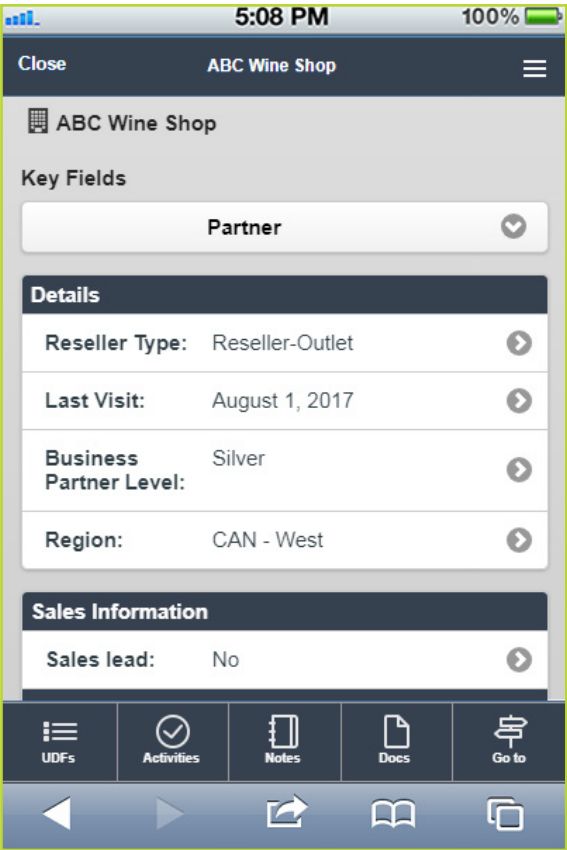
abc wine shop inc

Address Book 5 Displayed - 1 Company, 4 Contacts ☒ new

COMPANY  
COMPANY LEAD  
INDIVIDUAL  
INDIVIDUAL LEAD  
CONTACT  
CONTACT LEAD

Type	Company	First Name	Phone Number	Phone 1 Ext	Email Address	City	State	Department	Division
<input type="checkbox"/> Contact	ABC Wine Shop Inc.	James	(416) 601-8000		escona@maximizer.com	Pittsburgh	PA	Sales	
<input type="checkbox"/> Contact	ABC Wine Shop Inc.	Ed	(416) 601-8000		escona@maximizer.com	Vancouver	BC	Sales	
<input type="checkbox"/> Contact	ABC Wine Shop Inc.	Martha	(604) 601-8000		escona@maximizer.com	Vancouver	BC	Sales	
<input type="checkbox"/> Contact	ABC Wine Shop Inc.	David	+1 604 601 8022			Vancouver	BC	Sales	Administration
<input checked="" type="checkbox"/> Company	ABC Wine Shop Inc.		+1 604 601 8022		escona@gmail.com	Vancouver	BC	Sales	Canadian Office

# 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 Address Book 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 Address Book 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 MAXIMIZER CRM interface. At the top, the 'Contact List' tab is active, showing a table with 4 displayed entries (3 selected). The table columns are: Type, Company, First Name, Last Name, Phone Number, Phone 1 Ext, Email Address, and City. The selected entries are:

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

A callout box points to the 'Customize your tab' dialog button, stating: "Click here to open the 'Customize your tab' dialog and turn on the Map tab."

The 'Map' tab is selected, showing a map of Vancouver. A 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."

Another callout box points to a pin on the map, stating: "Location of the current selected Address Book entry."

The map shows the location of the current selected entry, ABC Wine Shop, at 60 Smithe Street, Room 260, Vancouver, BC, Canada. The map also shows the location of another selected entry, Amelia Liquors South, at 6046018000.

## 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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