MAXIMIZER CRM
2019

Feature Review Guide
For Financial Advisor

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Contents

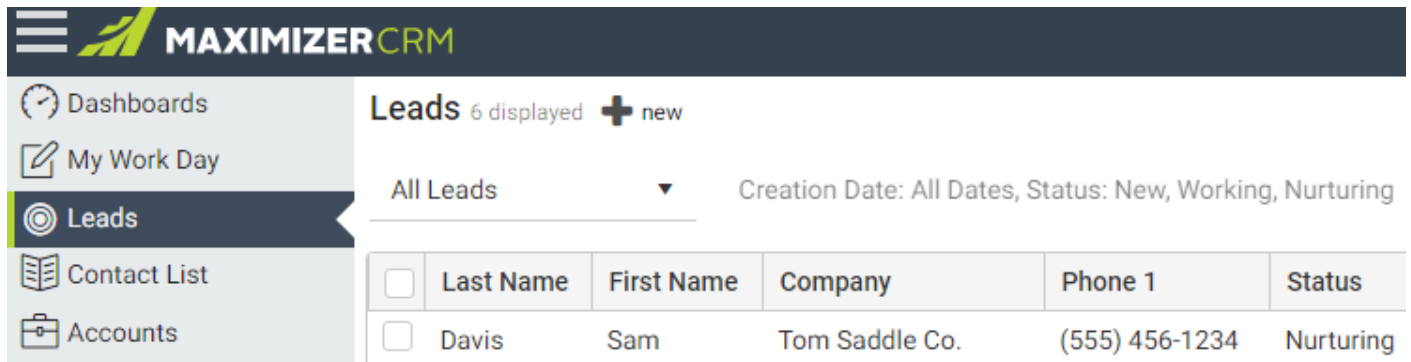# Lead Management

Summary

With Maximizer CRM 2019, you will have a new leads module that allows you to manage your prospects, qualify leads and convert leads to accounts.
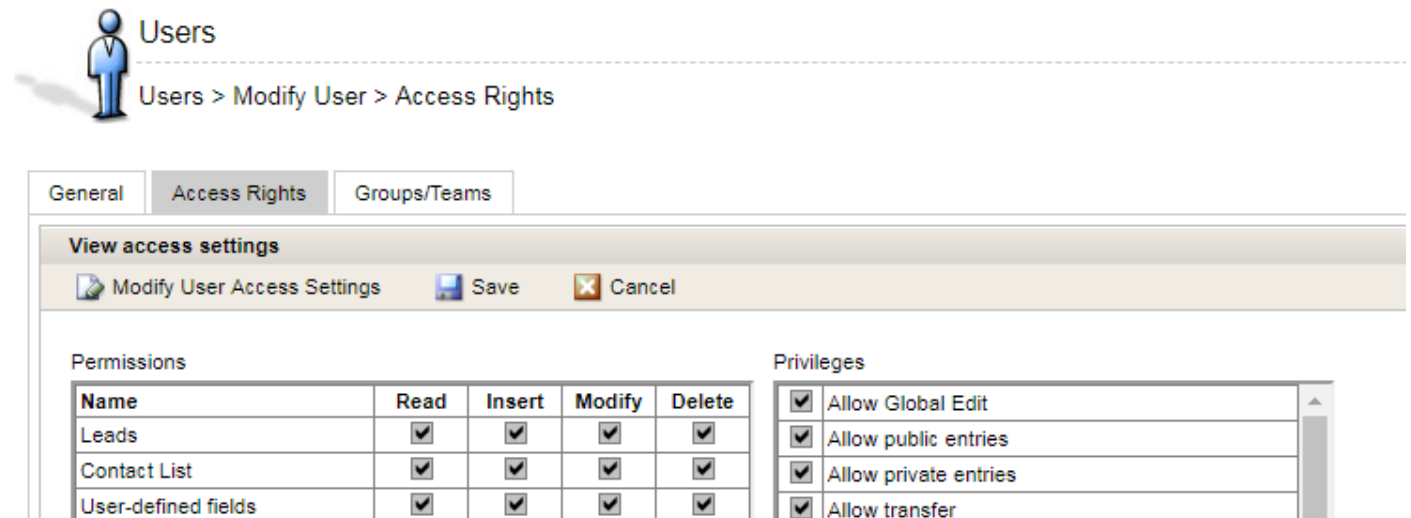
Leads Module

To access the Leads module, click the icon in the Icon Bar.

Access rights

The administrator can specify which users have access to the Leads module, and their rights to add, modify and delete leads.

Contact List fields related to leads

The fields used to manage leads in Contact List have been renamed so they can be used for other purposes. For example, the Sales Lead field in Contact List used to indicate whether an entry is a lead or not. When this field sets to Yes, a star will be displayed in the entry type icon. This field has been renamed to Starred Entries. You can use this field to mark important entries or the primary contact in a household.

The label for the following fields has been changed:

Previous release	2019 release
Sales lead	Starred entries
Lead status	Rating
Lead source	Source

Get leads into Maximizer

There are two ways for you to bring leads into Maximizer. You can import leads using a spreadsheet or create leads manually.

Import leads

In Import Manager, record types now include leads. In Import Manager > Source screen, selecting "Contains Lead information only" option for importing leads.

In the Mapping screen, you need to map the fields in the spreadsheet with the lead fields and select at least one field for duplicate checking.

In this release, Favorite Lists are not supported for leads. You cannot create a Favorite List to retrieve the leads after they are imported.

Add leads manually

You can manually add leads into the Leads module by pressing the "new" button. When creating a new lead, last name is mandatory.

Owner field
The users who have the right to view the Leads module will be available in the drop-down list.

Status, Source, and Industry fields
The items in these fields cannot be modified in this release. They will be customizable in future release.

View and edit leads

View entries in Leads screen

The Leads module features a new interface design which doesn't have the following tabs. By default, the leads are sorted by creation date. You can change the sort order by clicking the header of a column. In this release, the column view cannot be changed.

Use the Owner drop-down to change the views. The following options are available:
- My leads - The leads that you have been assigned as the owner.
- All leads – All leads regardless of whether they have owner assigned or not. This allows the manager to monitor the leads that the whole team is working on.
- Unassigned leads - The leads that haven't been assigned to any user. This allows the manager to find out which leads need to be assigned to sales reps.
- You can also select a user and see the leads that have been assigned to that user.

Filtering leads

Besides the Owner field, you can also filter the leads by creation date and status. After you make the changes in the fields, press the APPLY button.

Refresh list and export leads

The list in Leads module does not refresh if you switch to another module and come back again. If you want to check the updated data (e.g. other user changes a lead that is displayed in your screen), press the REFRESH button.

EDIT   DELETE   MAPPING

Last updated at: October-09-18 12:31 PM   REFRESH   EXPORT

Note:
- If you edit a lead, the updated information will be displayed in the list right away. You don't need to refresh the list.
- If you change the filter and press the APPLY button, the list will be refreshed.

You can export the leads to an Excel file and create a report. Press EXPORT button to export the leads displayed in screen.

Search for leads

The Quick Search field supports searching for leads. Make sure you select Leads as the search type. Just like searching for Contact List entries, you will see suggestions while you are typing the search text. Selecting a suggestion or pressing the search button will perform a search for leads.

Select Leads from the drop-down

bill

SUGGESTIONS

anderson, **bill** - abc wine shop

DELETE   MAPPING

Last updated at: October-09-18 12:31 PM   REFRESH   EXPORT
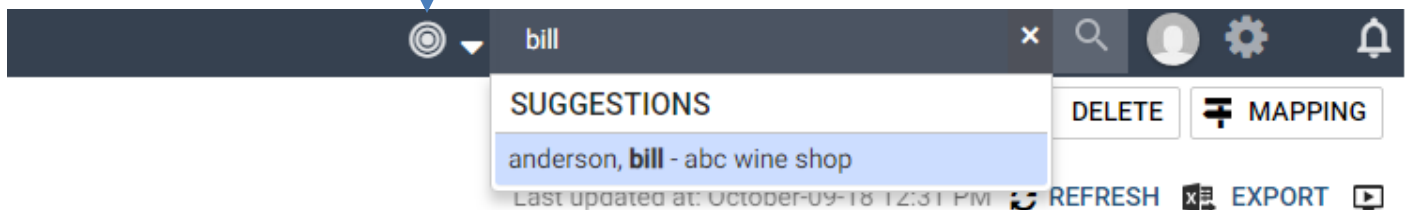
After a search has been performed, the filter will be disabled. Press CLEAR SEARCH button or select an item from the Owner drop-down to clear the search results.

Editing entries from Leads screen

To edit a lead in Leads screen, select an entry and press the EDIT button. If you want to change multiple leads at the same time, select the entries you would like to change and press the EDIT button. In this scenario, the Global Edit dialog will open. This allows you to update multiple entries quickly. For example, you can change the status of multiple leads from New to Working.

Use the EDIT button to modify leads. If one entry is selected, the Edit Lead screen will open. If multiple entries are selected, Global Edit dialog will open.

EDIT   DELETE   MAPPING

pdated at: October-09-18 12:31 PM   REFRESH   EXPORT

Owner of a lead

Everyone who has the right to edit leads can make changes in any lead. However, the Owner field is protected. Only the user who has been assigned as the owner of a lead or a sales manager can re-assign a lead to another user.

If a lead has no owner assigned, everyone can take it.

Work with leads

To work and qualify a lead, you need to open the lead details screen. In this screen, you will see all the information about the lead, link the lead with an existing Contact List entry, make a call or send an email, schedule activities and enter notes and documents into the lead.

The lead details screen include five main components:
- Lead details – Display the data about the lead
- Status bar – Allow you to change status while you are working through the process
- Notes widget – Show notes created for the lead
- Activities widget – Create appointments and tasks for the lead
- Documents widget – Insert documents into the lead.

> Press the arrow keys to go to previous or next entry in Leads screen.

Details about the lead

The detail information about the lead is displayed on top of the screen. Phone numbers and email addresses are always visible so you can quickly make a call or send an email. Press the More button to see all the fields.

You can go to previous or next entry in the list by pressing the up / down arrow.

Pressing a phone number will open the Make a Call dialog. You can create a follow-up task and log a phone note after you finish the call.

Pressing an email address will open the email compose dialog for you to send an email to the lead. In this release, merge fields and email templates are not supported. The email will be saved to Notes widget and Documents widget.

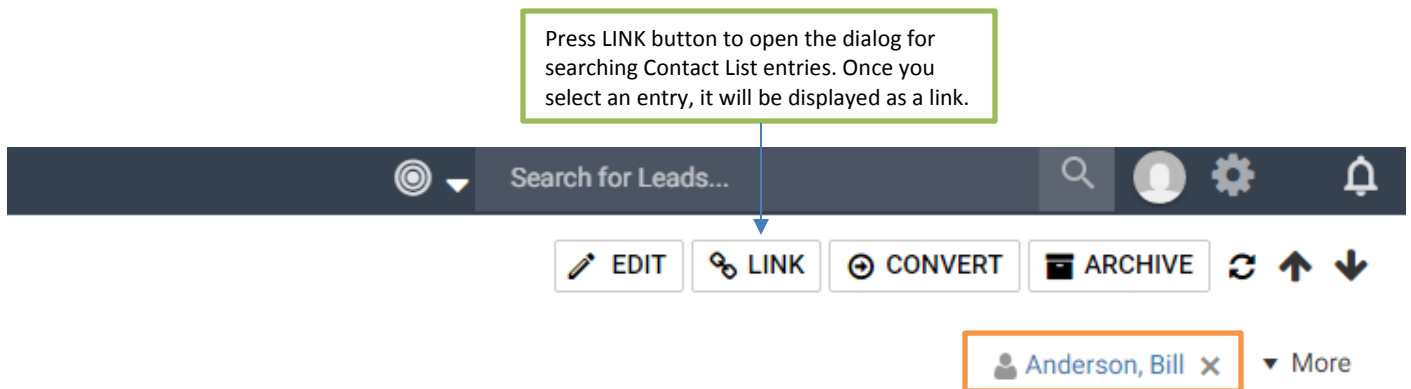## Link a lead with an existing Contact List entry

When you work with a lead, you would like to know if the lead is a returning customer or not. If the lead is a returning customer, you can link it with the Contact List entry. It has following benefits:

- The link to the Contact List entry is displayed in lead details screen. This allows you to view details about the entry.
- During lead conversion, no duplicate entry will be created.

You can link a lead with a contact or with a household. For example, the household is already a customer but the lead is a new person in the household. In this case you should link the lead with the household. During lead conversion, a new contact will be created for the household.

To find the existing Contact List entries, press LINK button to open the search dialog for Contact List entries. The dialog will automatically perform a Contact List entry search by matching email or company name or first name and last name. If there are Contact List entries found, they will be displayed when the search dialog opens. If you don't see any entry or the automatic search returns too many entries, you can manually perform a search.

Once you find the existing customer and link it with the lead, the name of the Contact List entry will be displayed in the details screen. Clicking the link will show the entry in Contact List module.

Press LINK button to open the dialog for searching Contact List entries. Once you select an entry, it will be displayed as a link.

Search for Leads...

EDIT   LINK   CONVERT   ARCHIVE

Anderson, Bill   More

Change status

The lead status are displayed in the status bar which allows you to change the status easily. Simply select a status and press SET STATUS button to apply the change. You can go forward or move backward. You can also change the status in Edit Lead screen.

Note that if you change the status from Unqualified to New, Working or Nurturing, you cannot set the status back to Unqualified again. You cannot set the status to Converted or Archived using the bar or in Edit Lead dialog. You need to click the CONVERT or ARCHIVE button to change to those status.

Anderson, Bill   Anderson, Bill   More

Phone:	Email and Website:	Owner:	Source:	No. of Employees:
(604) 601-8001	Bill.Anderson@abcwine.com	Lou Jones	Event/Trade Show	
(778) 999-8001	www.abcwine.com			

Unqualified	New	Working	Nurturing	SET STATUS

Select a status and press SET STATUS button to change the status.
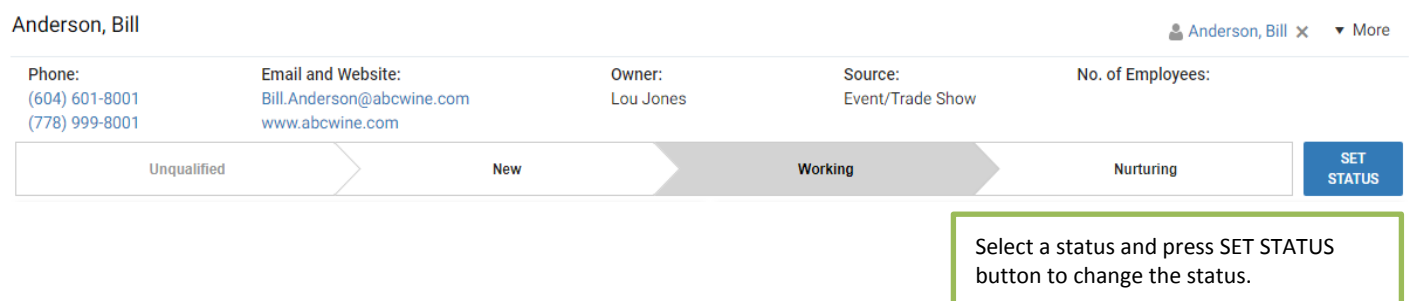
Notes Widget

All the communication and activities with the lead are displayed in Notes widget, including manual notes, emails, phone logs and history notes. The notes are displayed from latest one to earliest one.

Clicking a note will expand it and show all the contents of the note. Clicking the arrow button in each row to show the drop-down menu where you can edit or delete the note. Use the filter to narrow down the list.

Notes   + ADD | All Selected ▼ |

Manual   Lou Jones   ▼
                                            August-22-18 9:00 AM
                                                          ✏ Edit
Latest update: 🗑 Delete
  • Paul is very happy with the documents.
  • They would like to have a PS project to implement accounting integration.
  • They like the idea of moving to cloud

Task   Lou Jones   ▼
                                            August-22-18 8:57 AM

Hotlist Task Completed: Prepare documents for next meeting With: Ramirez, Pa...

Email   Lou Jones   ▼
                                            August-22-18 8:56 AM

Subject: Documents for next meeting Body: Hi Paul: Here are the documents for...

Outgoing calls   Lou Jones   ▼
                                            August-22-18 8:43 AM

Called Paul today. He is very interested in our product. We will have a follow-up ...

Manual   Lou Jones   ▼
                                            August-22-18 8:36 AM

Paul called today and asked to present the 2 year product roadmap in next meet

Activities Widget

The Activities widget shows the appointments and tasks created for the lead. Press ADD button to create a new appointment or a new task. Clicking an appointment or a task opens the respective dialog for you to view details or modify the activity.

Note that once an appointment is created for a lead, you cannot invite Contact List entries to the appointment. You can invite other leads or users.

Clicking the arrow button in a row will open the drop-down menu where you can complete or delete the activity.
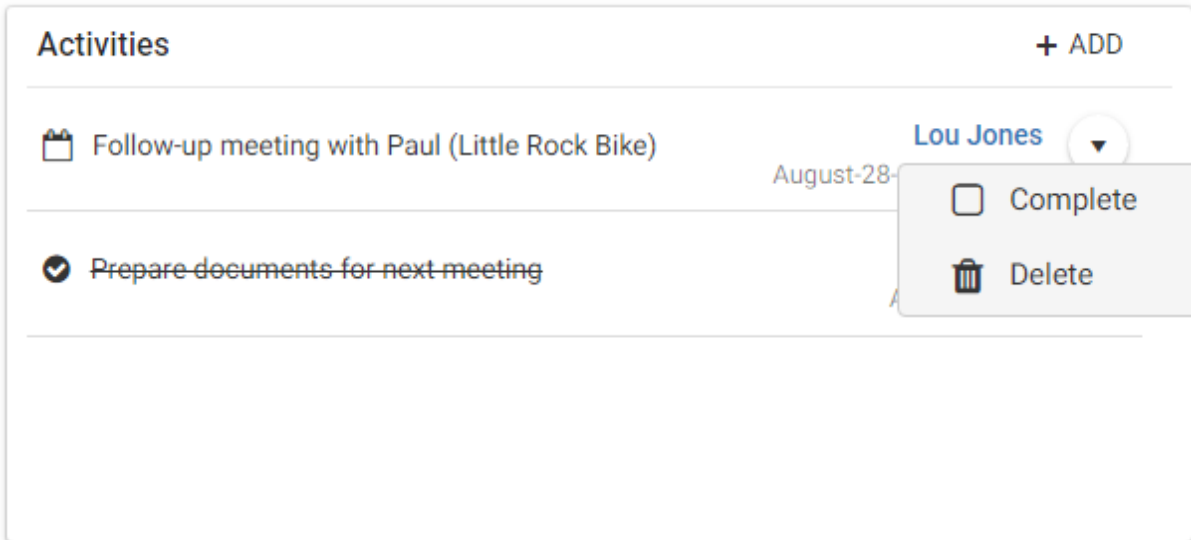
Files Widget

You can insert the documents related to the lead into the Files widget. The emails you sent to the lead will be saved to the Files widget if you choose "Save copy to entry's documents" in email compose dialog.

Clicking the arrow button in a row will open the drop-down menu where you can delete the document or edit the properties of the document such as name, description and access rights.
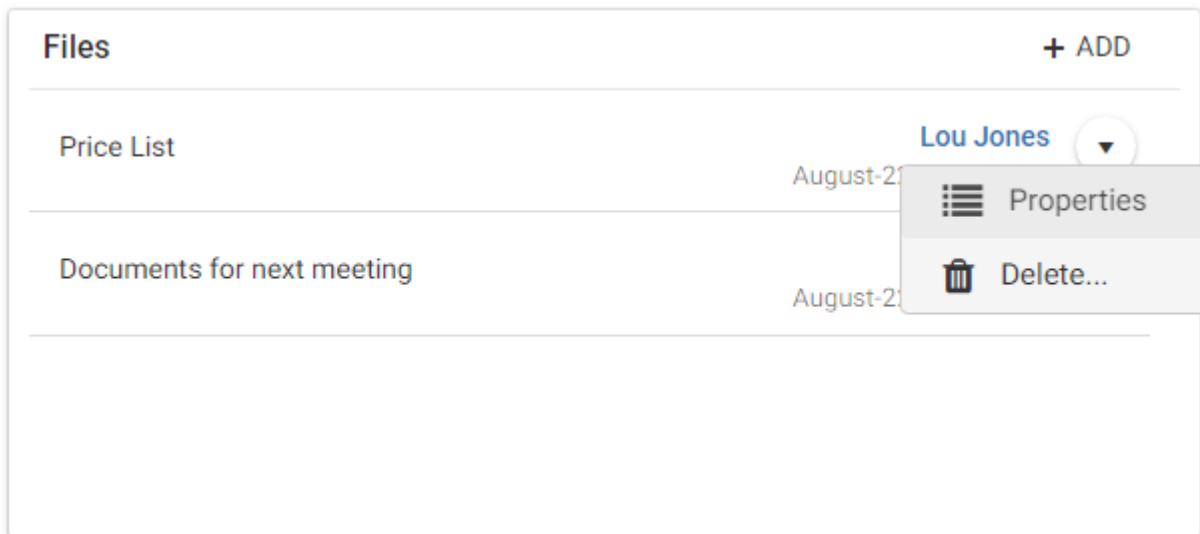
Convert Leads

When a lead is qualified, you should convert it to Contact List entries and optionally create an account. If the lead is net new, you can create new Contact List entries and an account. If the lead is a returning customer, you should link the lead with the existing Contact List entry, and only create an account. The conversion process will copy all the notes and documents from the lead to the Contact List entry.

Field mapping

The lead fields should be mapped with Contact List entry fields. When new Contact List entries are created during the conversion, the data from the lead will be transferred to the Contact List entry.
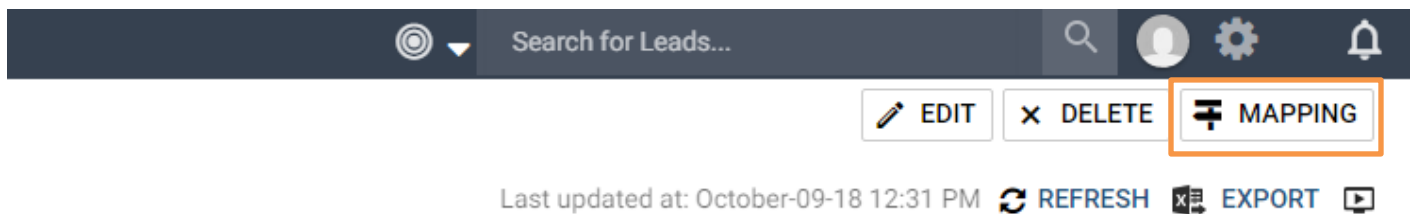
Field mapping for conversion can be set up by the administrator. When the administrator logs in, the MAPPING button will be available in Leads screen. Press the button to open the mapping screen.

In this release, most of the fields will be mapped automatically. For example, the Company field in a lead will be mapped to the Company Name field for a company or a household. The administrator only needs to map two fields: Industry and # of Employees.

Similar to field mapping in Import Manager, clicking the field will open the field picker for you to select a field for Contact List entry. Only the fields with matching type will be available in the field picker. When you map # of Employees, only the numeric fields will be available in the field picker. When you map Industry, only the single value table field will be available. The value in Industry and # of Employees fields will be transferred to company or household level. Make sure the selected fields are available to companies or households. Also, the field mapped with Industry should have the same items. This will ensure that the lead can be converted successfully.

Convert lead

To convert a lead, open the lead and click the CONVERT button. You can convert a lead regardless of which status the lead currently has.
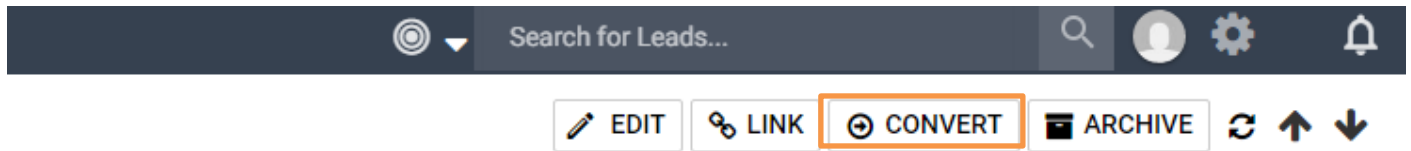
Create new entries

If the lead doesn't exist in Contact List, you can create new company / household and a new contact. The data entered in the lead will populate the fields automatically. The owner of the lead becomes the account manager of the company or household. If the owner of the lead is not a sales rep nor a sales manager, the Account Manager will be blank. You need to select another user.

You can create a new company and a new contact. If you choose to create a new household, you can decide whether a new contact will be created or not. If you don't want to create a contact, check "Do not create a contact" checkbox.

Creating an account is always optional during the conversion. If you don't want to create an account, check "Do not create an account" checkbox.

When the lead is converted, the data from the lead will be copied into the newly created Contact List entry. The notes and documents in the lead will be copied into the contact. If no contact is created during conversion, the notes and documents will be copied to the company or household. Tasks and appointments with the lead will still be associated with the lead.

Convert a lead that has been linked with an existing Contact List entry
If the lead has been linked with an existing Contact List entry, the conversion won't create new Contact List entries by default. When you open the conversion dialog, the linked entry will be displayed in the dialog as read-only.

If the lead is linked with a household, you can create a new contact for the existing household and a new account. If the lead is linked with an existing contact, you don't create any new Contact List entry. You just create a new account.

When a lead is linked with a Contact List entry, the existing data in Contact List entries won't be overwritten by the data in the lead.

Converted lead

After a lead is converted, it becomes read-only. The associated Contact List entries and account will be displayed as links. This allows you to access the account so you can work on managing the account.

Archive leads

If a lead cannot be converted, you can archive it so you don't need to work on it anymore. Pressing ARCHIVE button will open the dialog for archiving the lead. You will need to enter a reason why the lead cannot be converted. After the lead is archived, it becomes read only.

Handing Leads in Other Modules

Tasks and appointments displayed in Hotlist

The tasks and appointments created for leads are displayed in Hotlist screen. The name column now includes entry type icon to indicate whether the associated entry is a lead or a Contact List entry. Click the View in Leads button to retrieve the leads associated with the appointment or the task.

Appointments displayed in Calendar

In Calendar, the pop-up for an appointment with leads allows you to view those leads in Leads module.
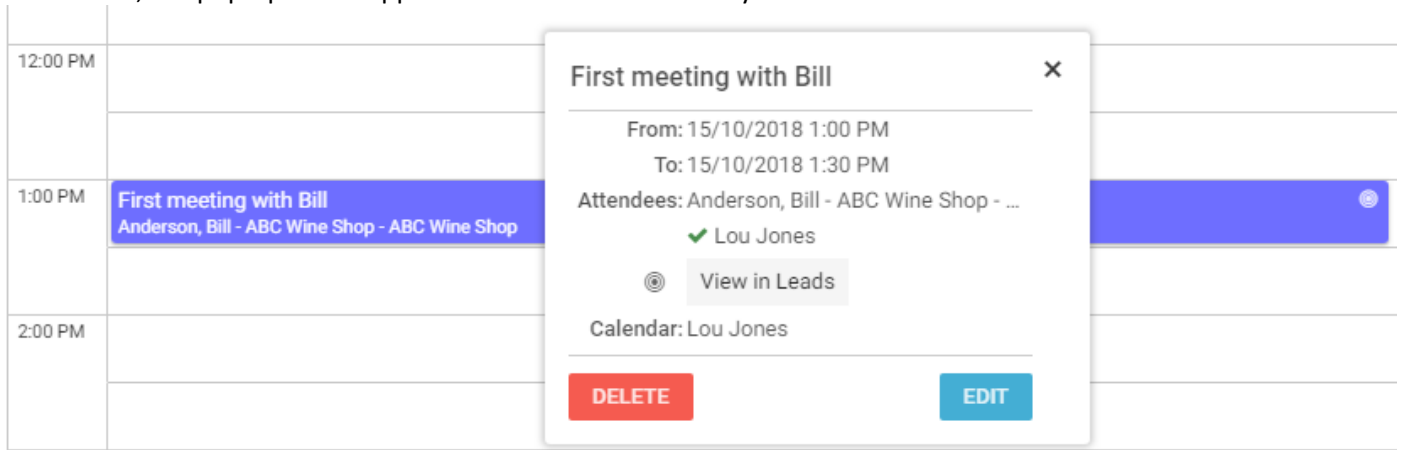
Web to Lead Form

Web to Lead Form has been renamed to Web Form. In this release, it continue working with Contact List entries.

Quick Search Enhancement

Changes in Searchable Fields

In the previous version, the searchable fields for Quick Search includes:
- Name fields: company name, first name, last name, and middle name
- Address fields: address line 1, address line 2, city, state/province, zip/postal code and country
- Phone numbers and email addresses

Quick Search will search across all those fields which can return some unexpected results. Most of the time, you want to search entries by name, either a contact's name or a company name. For example, you are looking for a contact named "Ed Johnson". You type in Ed Johnson in Quick Search field. The search results include a contact named "Joe Smith". The reason is that Joe Smith lives in "Johnson Street". This entry is not what you expect to see.

To make the search result closer to your expectation, changes have been made in Quick Search such that only the name fields will be searched. Address fields won't be searched by default. To search entries by address fields, you need to use search parameters. See more details about the parameters below.

Searching by phone number and email address are working the same way as before.

Search Entries by Parameters
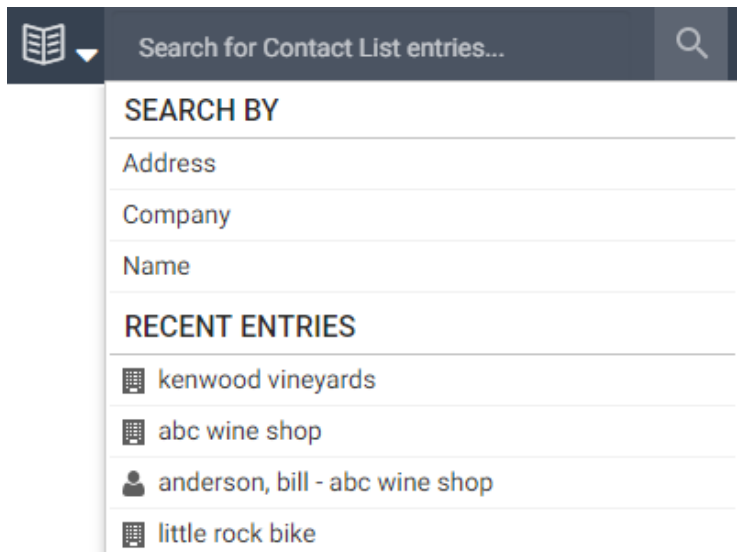
Search Contact List entries and leads

Quick Search Parameters have been introduced in 2019 release. Through use of parameters, you can tailor your Quick Search to search by specific fields. You can also combine as many parameters as you need to further narrow your search.

For example, "Address: California" and "Company: ABC Bike Shop" can be combined in a single search string to look for contacts in a company from a specific state.

When you click an empty Quick Search field, you'll be given the option to add the following parameters to your search.

Address
Use this parameter to search entries by address fields including address line 1, address line 2, city, state/province, zip/postal code and country.

Say for example, you want to recall all your customers in California. Click Address in your auto-suggestion list and enter California. The search text should then look like this: Address:California or Address: California

To search for customers in a more specific area, you can try searching by city, zip code or postal code. For example: Address:V3B 6T2

Company
Use this parameter to search entries by company name.

For example, want to retrieve all your contacts affiliated with ABC Bike Shop? Click Company and enter ABC Bike Shop. The search text should then look like this: Company:ABC Bike Shop

Note that your search will match each word in the search string but ignore the order in which the words appear. So, for example, if there is a company called Bike Shop ABC in your database, it will also be retrieved. To match a name exactly, just add quotation marks. For example: Company:"ABC Bike Shop"

Name
Use this parameter to search leads, contacts or households by first name, last name and middle name.

Remember: You can combine multiple parameters to target your search more precisely.

For example, if there are many contacts in your database named Ed Johnson, you can refine your search by "Company:" and or "Address:". Looking for the Ed Johnson who works for the ABC Bike Shop in the City of Vancouver? Just enter the following: Name:Ed Johnson Company:ABC Bike Shop Address:Vancouver

Search accounts

Quick Search retrieves accounts by searching objective and description.
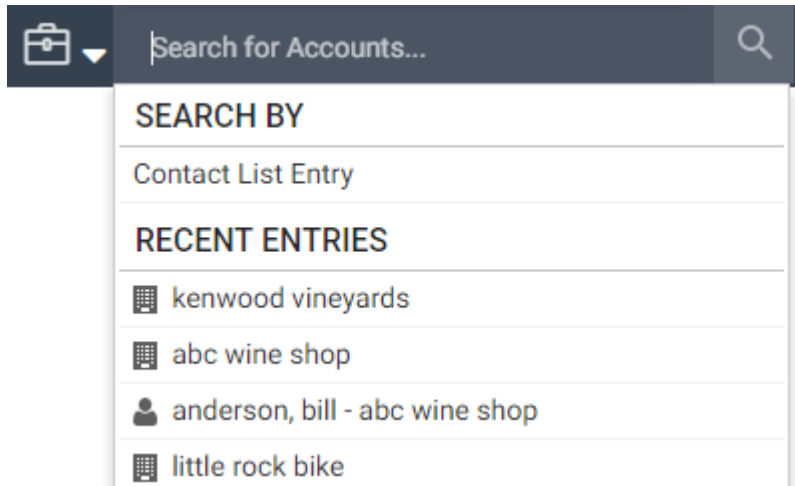
To retrieve accounts by Contact List entries, use the Quick Search Parameter. For example, if you want to retrieve all the accounts with ABC Bike Shop, click Contact List Entry and enter ABC Bike Shop. The search text should look like this: ab:ABC Bike Shop.

You can combine multiple search parameters to narrow your search. For example, you can search objective and related Contact List entry together. The se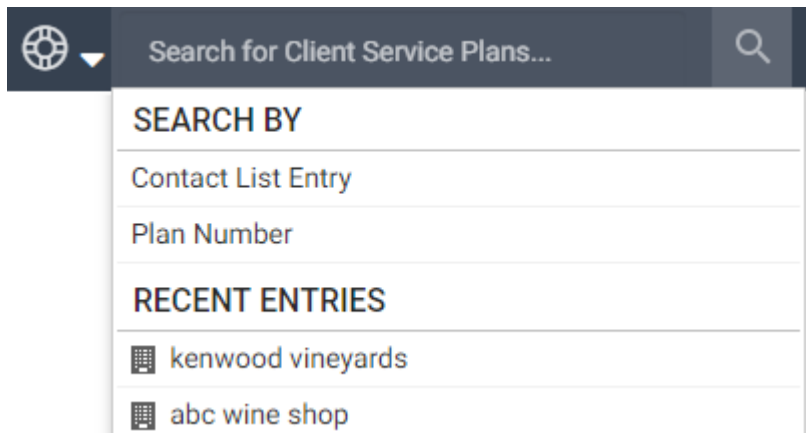arch text looks like this: bike to work week ab:beach cycle and sport. This will retrieve accounts related to "Bike to Work Week" with Beach Cycle and Sport.

Search plans

Quick Search retrieves plans by searching subject and description.

To retrieve plans by Contact List entries, use the Quick Search Parameter, Contact List Entry. You can also use the parameter to search a plan by plan number. For example, if you want to retrieve a plan with a specific plan number, select Plan Number. The search text should look like this: caseno:00099.

**Automatically change search types when switching modules**

When you switch module, the search type for Quick Search will be changed accordingly. For example, you switch from Contact List module to Leads module, the search type for Quick Search will be changed to Leads automatically. Then you switch to Accounts module, the search type will be changed to Accounts.

Search type will be changed when you switch module.
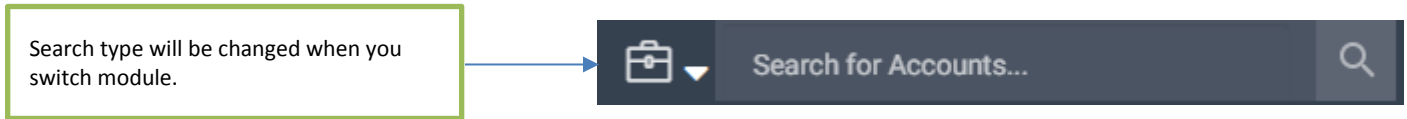
Other Features

Search Notes in Notes Following Tab

In the Notes following tab, you can now search for notes. Enter the text into the search field and press the Search button to search for notes in the selected entry.
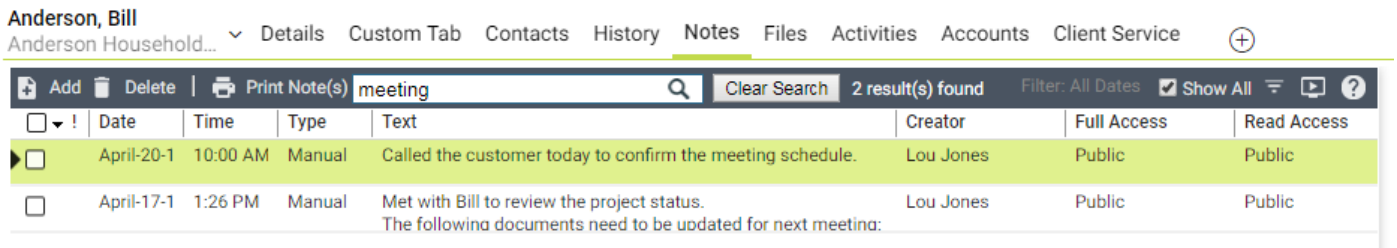
You can use the filter to specify other parameters such as date range and note types. When you open a note after a search, the text that matches your search string will be highlighted.

Global Edit

Support global editing Process and Stage for accounts

Global Edit in Accounts module now supports Process and Stage fields. These two fields need to be edited together. Selecting one field in the Field Picker will add both fields into the Global Edit dialog. You need to select a process and then select a stage.
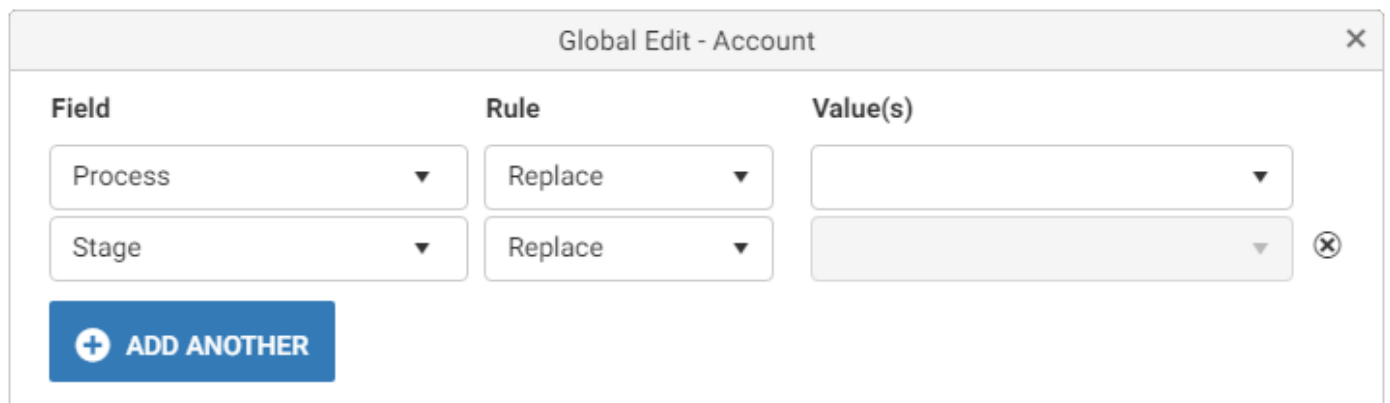
Support global editing Territory for Contact List entries

Global Edit in Contact List module now supports Territory field.

With these fields being supported, the legacy Global Edit dialog will be turned off permanently in 2019 release.

Custom Tab

The Note List widget that has been created in Leads module is now available in Custom Tab in Contact List module. You can view a list of notes, filter the notes and add / modify / delete notes. The previous Notes Widget has been renamed to Notes Timeline widget.

Contacts widget now allows to expand all or collapsed all.

Press the button to expand all contacts in the widget.

Note list widget is now available in Custom Tab in Contact List module.

Outlook Add-in – Indication for Emails That Have Been Saved to Maximizer

(New to on premise - This feature has been released to Maximizer CRM Live in April 2018)

In Outlook, now you can mark the emails that have been saved to Maximizer entries using an Outlook category. In the Preferences dialog for Maximizer Outlook add-in, a new option has been added which allows you categorize the saved email.
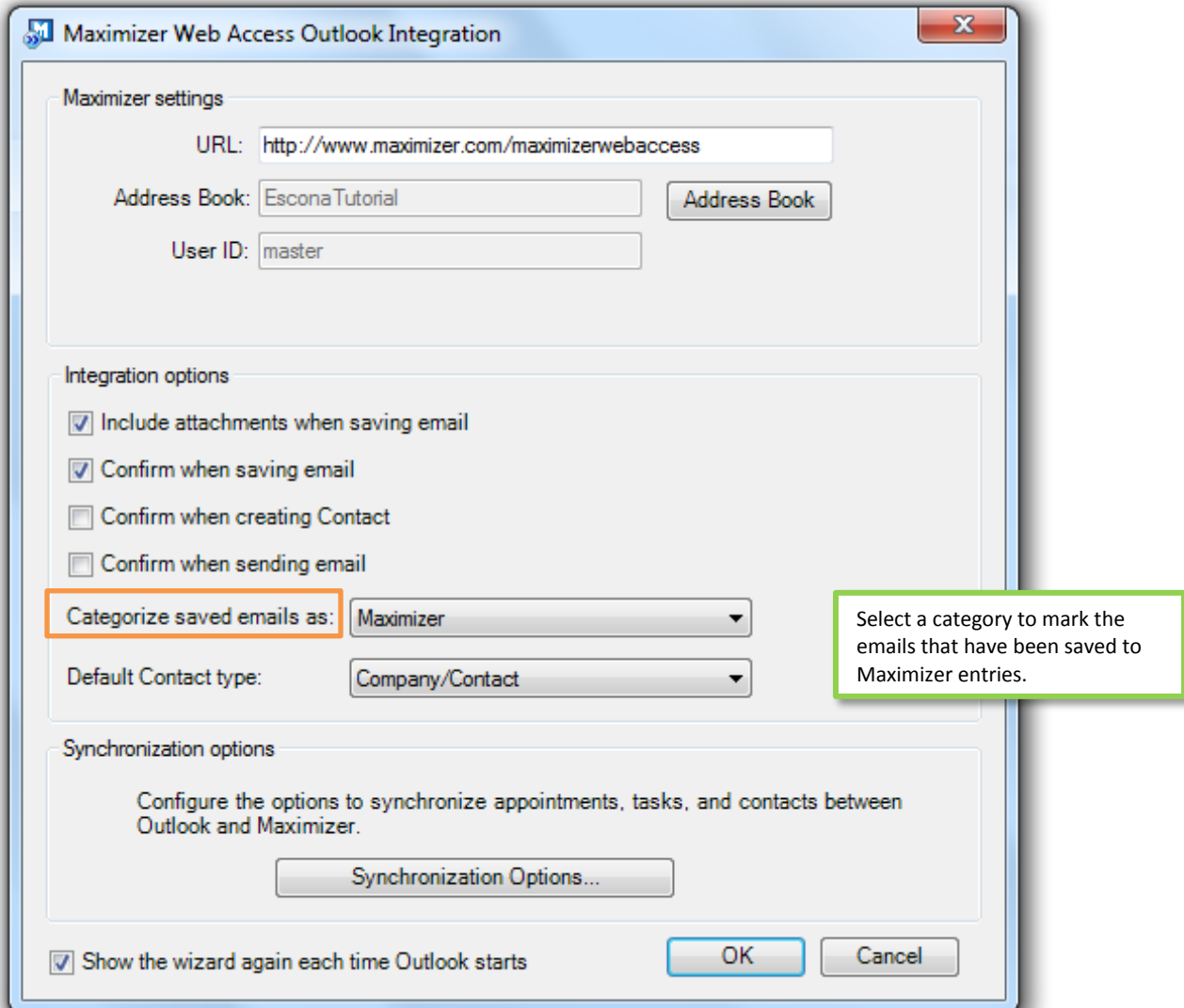
All emails saved to Maximizer, regardless of whether they are saved manually or saved by tracking, the category specified in the Preferences are displayed in the Outlook column view.

The category selected in the Preferences dialog are displayed in Outlook to indicate that the emails have been saved.

Go to App Directory to get the latest update of the Outlook add-in. Note that the latest version of Maximizer Outlook add-in doesn't work with Microsoft Outlook 2007.

Notification Manager – Allow Sending Notifications by Emails

(New to on premise – This feature has been released to Maximizer CRM Live in April 2018)

You can now receive notifications by emails. In Notification Manager, in the wizard page for setting up appearance of a notification, a new option "Send an email when this notification arrives" has been added. If you turn on this option, an email will be sent to you when the notification arrives.

In the email, you can click the link to open the entry in Maximizer.

Plan Notification Templates

Now you can create notification templates for plans. The templates can be created in Web Access > Administration > Template Library. You can insert merge fields for plans into the template. Plain text and HTML formats are supported for the templates.

Once the templates are created, they will be available in Administrator module > Customer Service > Notification tab. You can select templates for plan creation, assignment, escalation and resolving.

Press the button to select a template for the action.

Release Note

Outlook and Word Add-ins
A new version of Outlook and Word add-in is available in 2019 release. It is a minor upgrade. You can continue using your existing add-ins. If you would like to use the new features, go to App Directory and download the latest version.

Icon Bars
To clean up the interface, some of the buttons in the Icon Bar that are not commonly used have been removed, including Video Tutorials, User Information and links.

Resolved Cases

If there is a large amount of incoming emails in Outlook, some of them may not be saved by the Outlook add-in automatic tracking function
If you already have many emails in your inbox, automatic tracking may not save some of the emails to or from the email addresses that you are tracking.

Formula field based on account close date doesn't work
A formula field is based on the account close date. If the account close reason is suspended, the formula field doesn't work.

In Import Manager, downloading the failed entries doesn't work when using the basic authentication for Web Access
If you configure Web Access to use basic authentication, you cannot download the failed entries after you complete an import.

Dates are changed by daylight saving during import
If the import file contains dates inside and outside the Daylight Saving date range, the dates inside the range will be shifted one day earlier after import.

Make Selected List Current function includes entries that are selected in previous search
You select some entries in the screen. Then you perform a search and select some entries in the search result. If you make the selected list current and perform an action (e.g. Global Edit), the action will be applied to the entries that you selected prior to the search.

Campaign statistics are not updated in Maximizer CRM Live
After an email has been sent to a subscriber and the subscriber opens the email, campaign statistics are not updated.

Exception happens when opening a Hotlist task in Activities screen in Mobile Access
When you open a Hotlist task in Activities screen in Mobile Access, you will get an exception.

Mandatory setting for Article # and Solution Note fields are not enforced
If you have set Article # and Solution Note as the mandatory fields, they won't be enforced if you resolve a plan by using the right-click menu.

Email address field shouldn't allow empty space at the beginning
When editing an email address, empty space shouldn't be allowed at the beginning. If you enter any spaces, they should be removed.

Related Entry dialog blocks the dialog for adding new relationship type
In Related Entries following tab, you cannot edit the relation types in Related Entry Description dialog as the dialog for editing the types is hidden behind the Related Entry Description dialog.

When editing a company, the contact switcher is not disabled
When editing a company, the drop-down for selecting a contact is still available. It should be disabled.

The user who doesn't have Modify System Tables privilege may see blank subject field when editing an appointment
You don't have the privilege of modifying system table and you select the first item in the drop-down for the Subject field when creating an appointment. When you edit the appointment again, the Subject field is blank.

Adding hyperlink in email strips out letter "s" from the link text
You add a hyperlink in email compose dialog. If the text of the link contains letter "s", it will be removed. For example, you type in "Download Files", highlight the two words and click the Hyperlink button. After you convert the text to link, you will see "Download File".

The emails saved by Outlook add-in have read access set to the first user in alphabetical order
You don't have the right to create public entries. If you save an email from Outlook to Maximizer, the default for full access is you. But the read access is the first user in alphabetical order. The read access should be default to you as well.

Last Modified Date for a Client Service plan is not updated if a note or document is added
If you add a note or a document into a plan, the Last Modified Date is not updated.

Audit Log report in Web Administrator is very slow when a large amount of accounts have been changed
If a large amount of accounts have been changed, the Audit Log Report displayed in Web Administrator will become very slow.

This issue has been addressed by introducing paging into the report.

Audit Log Report cannot be loaded in 64-bit Maximizer Web Access
Audit log report cannot be loaded in 64-bit Maximizer Web Access.

Blank user-defined fields are not merged properly in plan notification emails
If the user-defined fields included in an email template for Client Service plan notification are blank, the name of the field will be displayed.

Now, the field will be blank.

Switching Key Field list in accounts changes the sales team leader
You already select a sales team and a team member who is not the default leader of the team. If you switch from a Key Field list that doesn't include Team and Leader fields to one that includes those two fields, the leader will be changed to the default leader.

Dashboard click-through should use a Search Catalog ID plus refinement criteria instead of passing a full search string
Create a saved search based on a table field with many items. If you use this saved search to create an indicator in a dashboard, you may see error when you try to click the indicator to retrieve entries.

Notes for a private entry are displayed in Activity Report
A public note is created for a private Contact List entry. It shouldn't be visible to other users. But in Activity Report, the note is visible to other users.

Latest version of Edge doesn't send email notification when assigning a new task to another user
In Edge browser, if you create a new task and assign it to another user, email notification won't be sent to that user.

Error message displayed when sending or saving an email in Outlook add-in with Outlook 2016 using a POP3 account
When sending or saving an email in Outlook add-in with Outlook 2016 using a POP3 account, an error will be displayed: "The operation cannot be performed because the message has been changed".

Letter s in a string will be removed if the string is converted to a hyperlink in email compose dialog
You add a string with letter s into email compose dialog. After you convert the string into hyperlink, letter s will be removed.