MAXIMIZER

Maximizer CRM Live 2019 R5

Feature Review Guide

DATA SHEET

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If you are running Maximizer CRM Financial Advisor edition, some of the labels in your application are not the same as the labels displayed in this document. Use the chart below to match the labels in this document with the labels in Financial Advisor edition.

Labels in Financial Advisor Edition	Labels in this document
Contact List	Address Book
Households	Individuals
Accounts	Opportunities
Client Service	Customer Service

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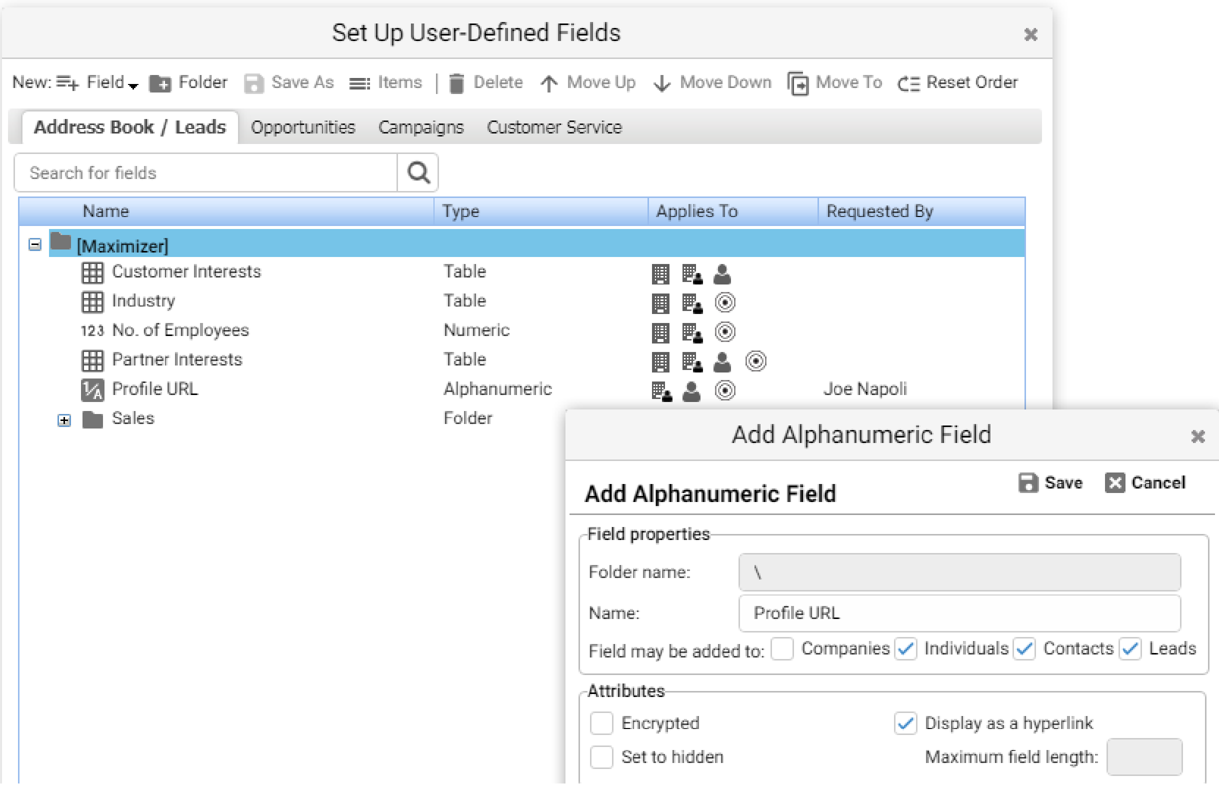
Enhancements to the Leads module

Maximizer CRM 2019 R5 release delivers more enhancements to the Leads module, allowing you to collect data of the prospects and automatically transfer data to Address Book entries during lead conversion. You are able to create different processes to work with various types of leads and customize the Industry and Source fields to meet your business needs.

User-defined fields for leads

You can now set up user-defined fields for leads.

- Create and manage fields for leads in Administration > Set Up User-Defined Fields dialog. You can create new fields for leads or make the existing Address Book entry fields available to leads.
- To transfer data from leads to Address Book entries, set the fields to be available to both leads and Address Book entries. These fields are mapped automatically. During lead conversion, data will be copied from leads to Address Book entries.
- The supported field types for leads include alphanumeric, numeric, date and table. Duration, formula and yes/no types are not supported in this release.
- Mandatory fields are supported, but conditional mandatory rules are not allowed for lead fields.
- The user-defined fields for leads can be displayed in column view. They can be edited through Global Edit and can be imported.



You can edit user-defined fields in Add / Edit Lead dialog. Key Fields are not available in this release. All the user-defined fields are displayed in alphabetical order. In Lead Details screen, you can view and edit user-defined fields in the new Lead Details widget.

Note

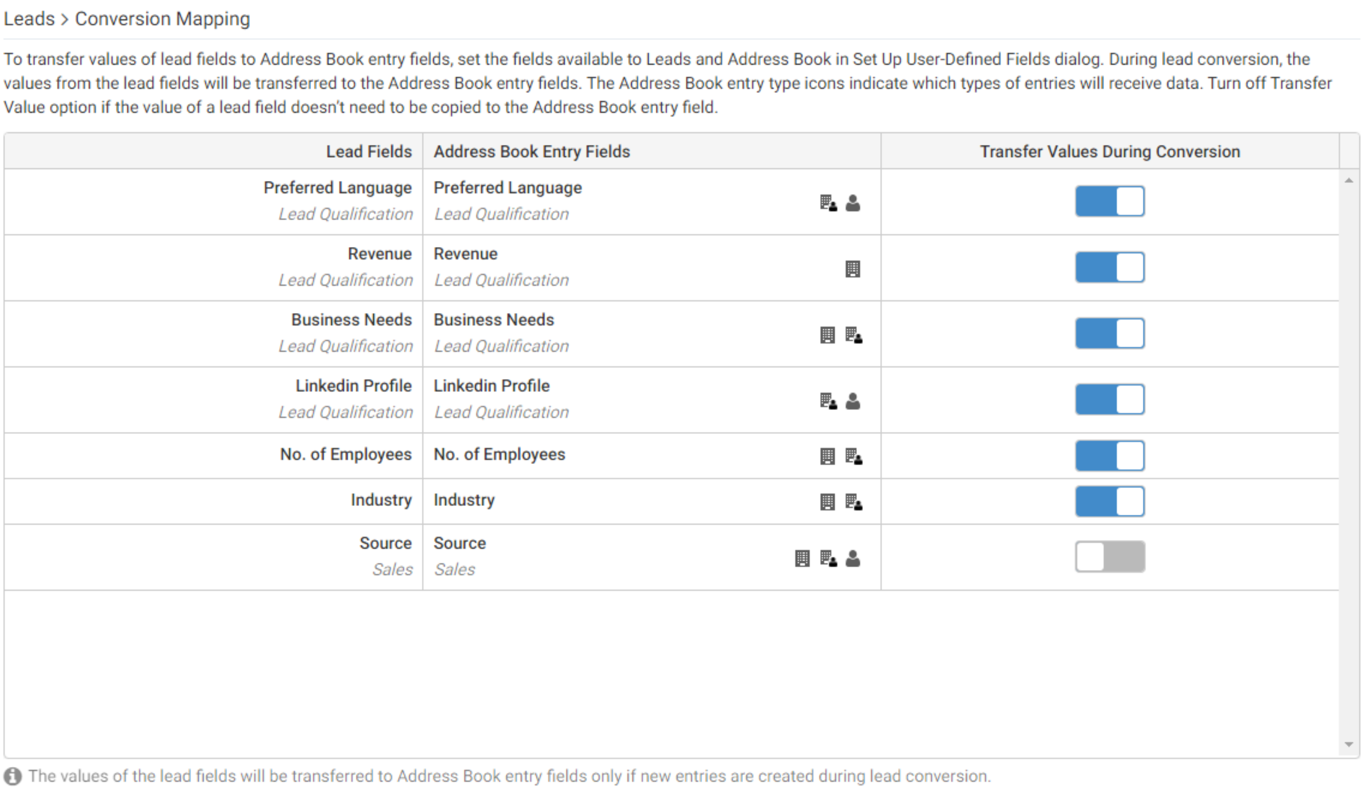
When a field is set to be available to both Address Book entries and leads, the value in the lead will be copied to the in Address Book entry during lead conversion.

User-Defined Fields section in Administrator module has been removed.

Field mapping and data transfer

To transfer data from leads to Address Book entries, you need to make the fields available to both leads and Address Book entries.

- Set the fields to be available to both leads and Address Book entries in Set Up User-Defined Fields dialog. The fields are mapped automatically. You can view how the data will flow from leads to Address Book entries in Administration > Settings > Leads > Conversion Mapping screen.
- During lead conversion, the data in the lead fields will be copied to Address Book entry fields. You can turn off transfer value option for certain fields if you do not want to copy data in those fields.
- If a field is available to leads and multiple Address Book entry types, the data will be copied to all the Address Book entries during conversion. For example, the LinkedIn Profile field is available to leads, Individuals and contacts. During lead conversion, the value from the lead field will be copied to the new individual and the new contact.


Leads > Conversion Mapping

To transfer values of lead fields to Address Book entry fields, set the fields available to Leads and Address Book in Set Up User-Defined Fields dialog. During lead conversion, the values from the lead fields will be transferred to the Address Book entry fields. The Address Book entry type icons indicate which types of entries will receive data. Turn off Transfer Value option if the value of a lead field doesn't need to be copied to the Address Book entry field.

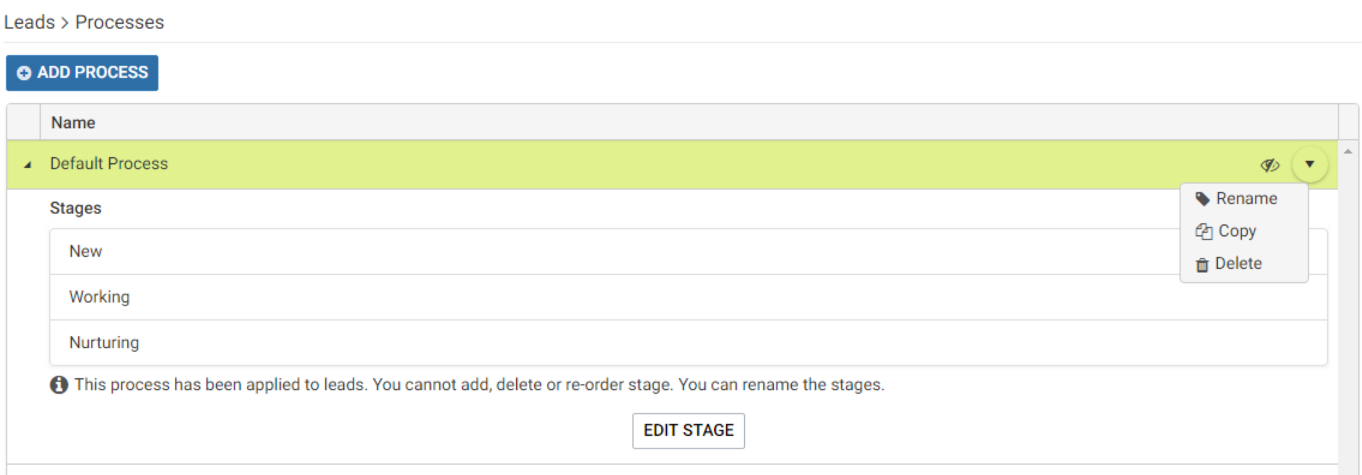
Lead Fields	Address Book Entry Fields	Transfer Values During Conversion
Preferred Language *Lead Qualification*	Preferred Language *Lead Qualification*	
Revenue *Lead Qualification*	Revenue *Lead Qualification*	
Business Needs *Lead Qualification*	Business Needs *Lead Qualification*	
Linkedin Profile *Lead Qualification*	Linkedin Profile *Lead Qualification*	
No. of Employees	No. of Employees	
Industry	Industry	
Source *Sales*	Source *Sales*	

The values of the lead fields will be transferred to Address Book entry fields only if new entries are created during lead conversion.

Process and stage for working with leads

In this release, you can create different processes to work with various types of leads. You can also test different processes and measure which one generates better result. Each process contains a set of stages.

- You can manage your processes and stages in Administration > Settings > Leads > Processes and Stages screen. Each of the process contains a set of stages. You can customize the stages in each process.
- When you create a new lead, the lead is set to Unqualified by default. You can pick a process and select a stage. You work through the process and change stages as you progress. At the end, the lead will either be converted or archived.
- If a process has been applied to leads, you cannot add stages into the process, remove stages from the process or change the order of the stages. You cannot delete the process either. This behavior is to preserve the historical data for reporting.
- If a process is no longer needed, you can hide it. The hidden process will not be visible to users. You can also do A/B test for the processes. For example, you apply process 1 for a period of time, then hide it and start to use process 2. You can compare which process generates better result.
- You can create a new process from scratch. Or create a process by duplicating an existing one. All the stages in the existing process will be copied to the new one.



Structure of the process and stage

<table>
<tr><td colspan="2">Unqualified</td><td>• System built-in stage (Not customizable)
• This stage indicates that leads come in but haven't been touched by anyone.</td></tr>
<tr><td>Default process and stages
• New
• Working
• Nurturing</td><td>Custom process and stages
• Stage 1
• Stage 2
• Stage 3
• Stage 4</td><td>• Default process is a built-in process. It contains new, working and nurturing stages.
• You can create custom processes and add stages in each process.
• You select a process and work through the stages in the process. Once you finish the process, the leads should be either converted or achieved.</td></tr>
<tr><td colspan="2">Converted</td><td>• System built-in stage (Not customizable)
• Leads are qualified and converted to customers.</td></tr>
<tr><td colspan="2">Archived</td><td>• System built-in stage (Not customizable)
• Leads are discarded because they cannot be converted.</td></tr>
</table>

Note

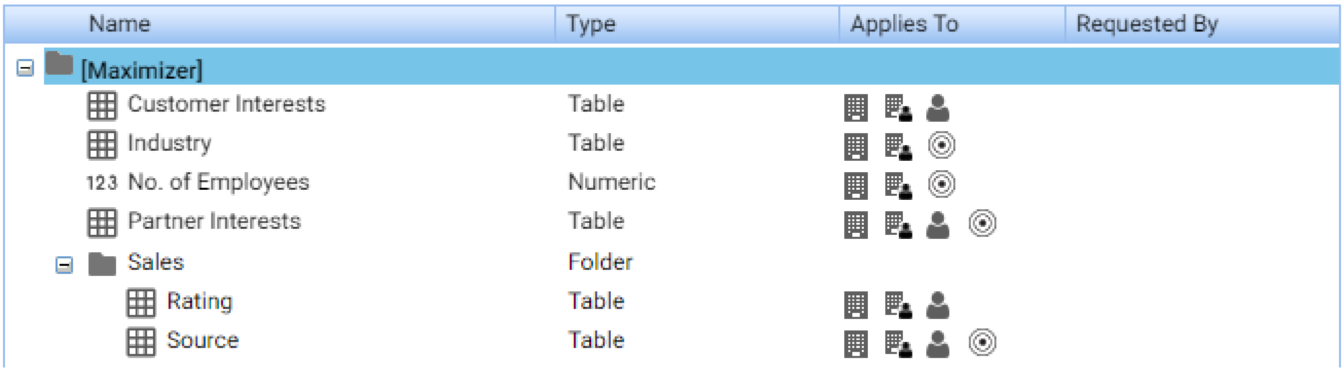
Because of introducing the process and stage for leads, the Status field in previous release has been changed to Stage. You will see Process and Stage fields in the dialogs and column setup view.

You can change the process and stage for leads using Global Edit. Import Manager will import leads in Unqualified stage.

Industry, Source and No. of Employees fields

In previous release, these fields were system fields for leads. The items in Industry and Source field were not customizable. In this release, these field have been changed to system generated user-defined fields, also known as pre-defined fields. You can edit the properties of these fields the same way as any other user-defined fields in Setup User-Defined Fields dialog. The items in Industry and Source fields can be edited the same way as any other table fields.

These fields are available to both leads and Address Book entries to ensure data being transferred from leads to Address Book entries during lead conversion.



Field name and folder	Applies To
\Sales\Source	Companies, Individuals, Contacts and Leads
\Industry	Companies, Individuals, and Leads
\No. of Employees	Companies, Individuals, and Leads

Note

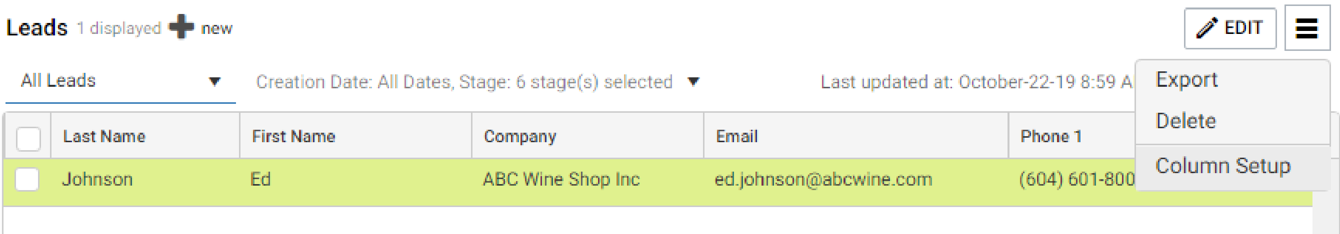
Because these fields are user-defined fields now, they are displayed in User-Defined Fields section instead of the Details section in Add/Edit Lead dialog.

The Source field for leads has been merged with the Source field in the Sales folder and is available to leads and Address Book entries. During lead conversion, the value will be copied from leads to Address Book entries.

Column setup in Leads module

You can now select basic fields and user-defined fields to display in the lead column view.

- In this release, you can only have one column view. Your column view cannot be shared with other users.
- By default, Creation Date column is sorted, from latest to earliest. If you remove the Creation Date column, the first column will be the default sorted column. Within a session, you can sort other columns. But after you log out and log in again, the default sort column will be applied.



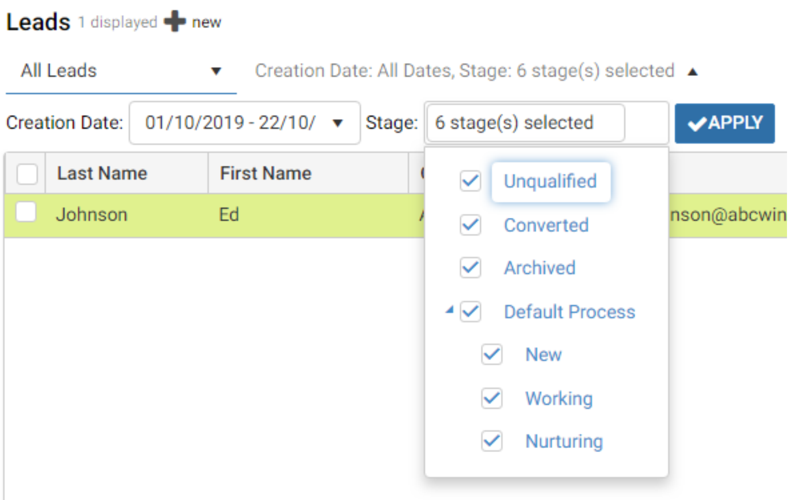
Note

You can add the Age field in the column view to see the elapse time from lead creation date/time to lead close date/time or lead creation date/time to current date/time if the leads haven't been closed.

More options in filters

If your marketing team launched a campaign in a specific date range, you may want to check the leads coming in during that period. You can now filter leads created within a specific date range by selecting Custom Date from the drop-down for Creation Date. You can also filter leads created in current quarter.

You can filter leads by stages. You can select the built-in stages (Unqualified, Converted, and Archived) and stages in the processes.



Other New Features

Task activity field supports more than 255 characters

Some users want to enter more text into the Activity field in a task. For example, a task is rescheduled and the user wants to enter a note about the reason. Now the Activity field supports 9126 characters. This is supported in the task dialog in Maximizer Web Access, Mobile Access, Mobile App and Outlook add-in.

Note

If a task that has more than 255 characters in the Activity field is synced to Outlook, do not modify the Subject field in Outlook task. It will result in text being truncated after the task is synced back to Maximizer from Outlook.

Custom password complexity rules

In this release, the password complexity rule is customizable and is more flexible compared to the rule in previous version. There are four types of characters that can be used in passwords, including upper case letters, lower case letters, numbers and symbols. The administrator can specify how many character types need to be used in a password. For example, the administrator specifies that a password needs three character types. User 1 can create a password using upper case letter, lower case letters and numbers. User 2 can create a password using lower case letters, numbers and symbols. If a user only uses two types, a message will be displayed to inform the user that the password doesn't match the password complexity rule.

- The symbols are not limited to #, _ and $. The user can include any symbols.
- A password doesn't need to start with a letter.
- The administrator can specify the minimum length of the passwords. Default is 6 characters.
- Some of the words should not be used in a password such as "password" or "control". If a password includes one of those words, it will be denied.
- If the administrator changes the complexity rule causing the existing passwords failed to match the rule, the users will be asked to change the password when they login.

You can set up password complexity rules in Administrator module > Preferences > Security screen.

A user's primary email address needs to be unique in one database

After upgraded to 2019 R5 release, each user's primary email address (email address 1) needs to be unique.

- There is no automatic process to look for the duplicate email addresses in a database. When the user saves changes in User Properties dialog (User Profile drop-down > User profile) or in Administrator > Modify User > General Information > General tab, checking will be performed to ensure that the primary email address is unique.
- The primary email address cannot be blank.
- The email addresses for service users won't be checked.

Disable settings of system generated user-defined fields

Maximizer ships some system generated user-defined fields, as known as pre-defined user-defined fields. These fields are created in every new database. The fields include:

Field name and folder	Applies to
\Sales\Source	Companies, Individuals, Contacts and Leads
\Sales\Rating	Companies, Individuals, and Contacts
\Industry	Companies, Individuals, and Leads
\No. of Employees	Companies, Individuals, and Leads
\Customer Interests	Companies, Individuals, and Contacts
\Partner Interests	Companies, Individuals, and Contacts

Since these are the system generated fields, some of the settings that will affect the whole system are disabled. This is to prevent the users making changes that will affect the built-in functions.

- The entry types specified by the system are checked and disabled. For example, in the Industry field, checkboxes for Companies, Individuals and Leads are checked and disabled. The entry types displayed in the table above are checked and disabled in the fields.
- Besides "Set to hidden" option, all other attributes are disabled.
- All fields in Access Rights and Creation Details sections are disabled.

Email URLs of the native mobile app

You can now email the URLs for installing the native mobile apps to your device. The URLs will direct you to the Google Play or Apple Store to download the respective apps. You can send the URLs to your device from User Profile menu or Administration > Desktop and Mobile Setup screen.

New version of Outlook add-in

After upgrading to the new release, you need to install the latest version of the Outlook add-in. The new version allows you to specify a process and select a stage when creating a lead based on an email. It also handles more than 255 characters in task Activity field when syncing tasks.

More Details

To view the detail guide about the new features, download the Feature Demo Guide.

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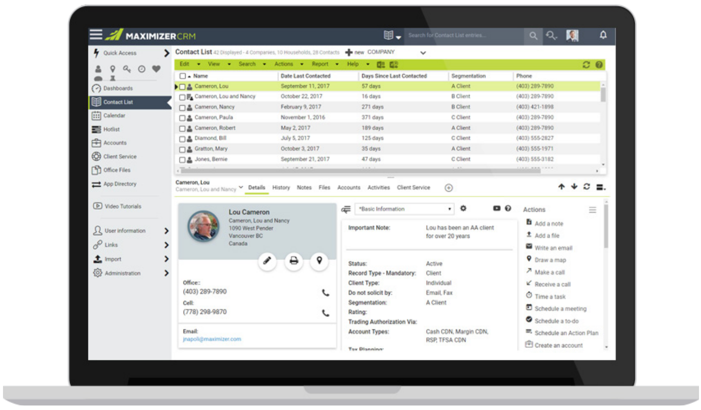
"Since 1987, more than **1 million users** and over **120,000 companies** have trusted us to help boost their bottom line."

We make enabling your success our top priority. That's why we're committed to helping each of our customers achieve outstanding results.



With top-rated tools for contact management, lead management and customer service, Maximizer CRM gives businesses everything they need to grow – all in one place.

Today, Maximizer is a global company with offices in five countries plus an international network of Certified Solution Providers. We constantly innovate to ensure our customers can become more successful.

Time and time again, they tell us that our exceptional service sets us apart as a market leader in CRM. And that feedback keeps us focused on making planning, selling and management ever easier – to help our customers get rapid results.

AMERICAS (HEAD OFFICE)

Maximizer Services Inc.
Sales +1 800 804 6299
Phone +1 604 601 8000
Email info@maximizer.com

EUROPE / MIDDLE EAST / AFRICA

Maximizer Software Ltd.
Phone +44 (0)1344 766 900
Email enquiries@maximizer.com

AUSTRALIA / NEW ZEALAND

Maximizer Software Solutions Pty.
Phone +61 (0)299 572 011
Email info.anz@maximizer.com

WWW.MAXIMIZER.COM