

Maximizer CRM Live 2019 R5 Release Notes



Outlook Add-in

After upgrading to 2019 R5 release, you will be prompted to upgrade your Outlook add-in. You can install the new version on top of the previous version directly. If you would like to uninstall the previous version first, you can download the new version at Administration > Desktop and Mobile Setup screen.

Changes in Leads module

Process and stage

In previous release, there was a Status field in Leads module. In 2019 R5 release, you can create different processes to work with various types of leads. Each process contains a set of stages. The Status field has been replaced by Stage field. After upgrading to the new release, you will see a built-in process, Default Process. It contains three stages, New, Working and Nurturing. You can create other custom processes and stages.

You will work with process and stage fields in Add/Edit Lead dialog, Lead Details screen, filter, column setup view and Global Edit dialog.

Import leads

In this release, all the imported leads will be set to unqualified stage.

Industry, Source and No. of Employee fields

In previous release, these fields were system fields for leads. The items in Industry and Source field were not customizable. In 2019 R5 release, these fields have been changed to system generated user-defined fields, also known as pre-defined fields. You will find these fields in user-defined fields section in Add/Edit lead dialog, Lead Details screen, and in field picker for leads.

The properties of these fields can be edited in Set Up User-Defined Fields dialog > Address Book / Leads tab. These fields are available to both leads and Address Book entries.

Default setting for creating user-defined fields

If you create a new field in Set Up User-Defined Fields dialog > Address Book / Leads tab, by default all the entry types, including Companies, Individuals, Contacts and Leads, will be selected. If a field should not be available to leads, uncheck the checkbox for Leads.

When creating a table field, "Single value only" option is checked by default.

Lead partner field is mapped to Address Book

The Partner field in leads was not mapped to the Partner field in Address Book entries in previous release. Now the field is mapped. During lead conversion, the partner assigned to a lead will be transferred to the Address Book entries.

Task Activity field

The task Activity field now allows 9126 characters. The Activity field is mapped with the Subject field in Outlook task, which does not allow more than 255 characters. 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.

Changes in API

For changes in API, [click here to view details](#).

Known issue

In Leads module, only the stages from the visible processes will be available in the Status filter. But if you select all the stages in the Stage filter, the leads that are using hidden processes will also be displayed.



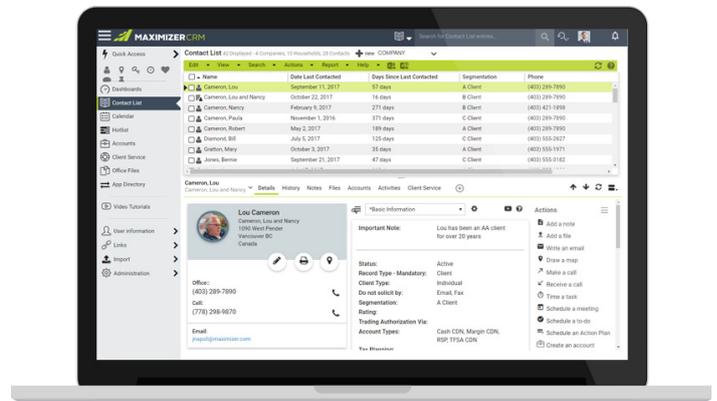
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