

# Feature Review Guide

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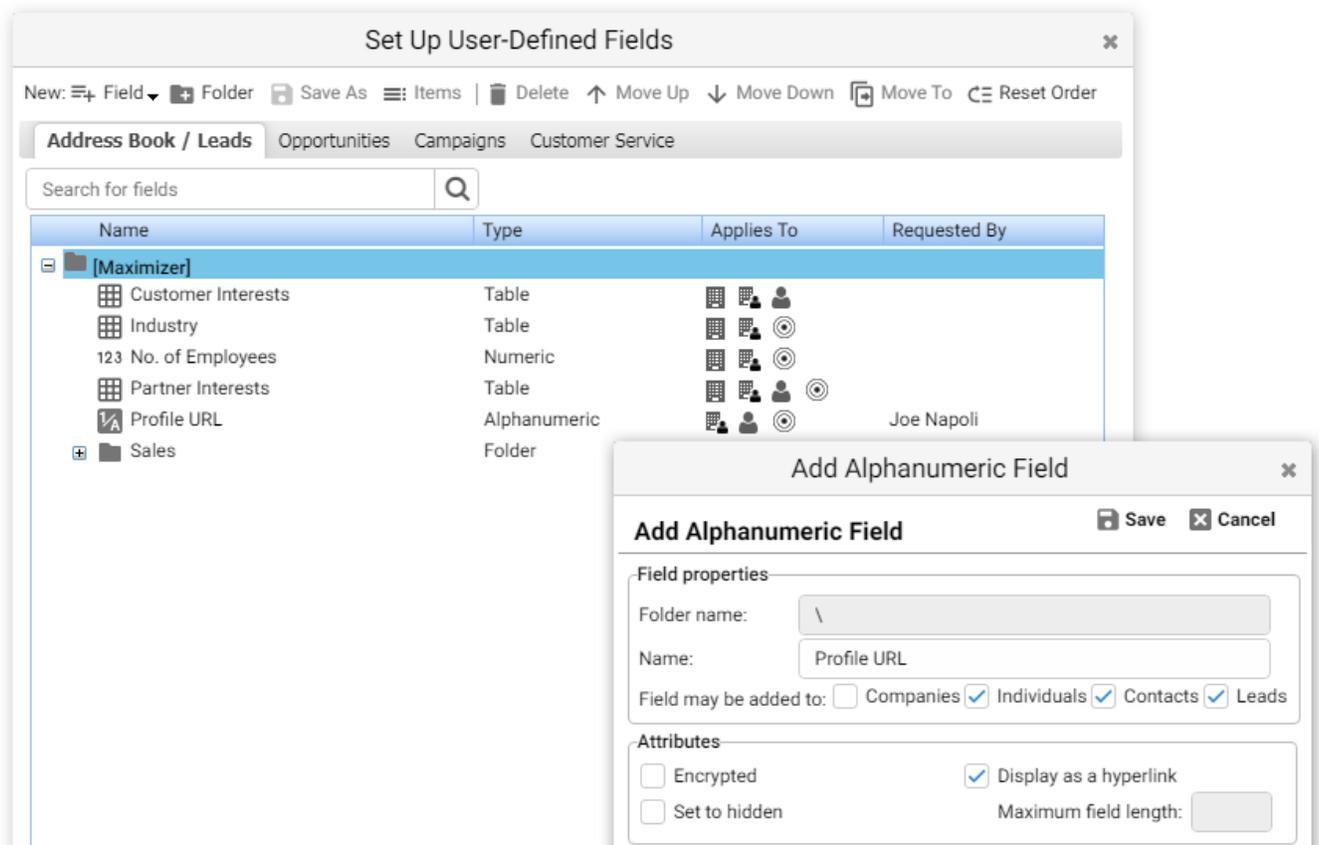
## Enhancements to the Leads module

Maximizer CRM 2020 R1 release delivers more enhancements in 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, customize the Industry and Source fields and create user-defined 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 leads will be copied to the Address Book entries during lead conversion.

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

**Field mapping and data transfer during lead conversion**

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
<b>Preferred Language</b> <i>Lead Qualification</i>	<b>Preferred Language</b> <i>Lead Qualification</i>		<input checked="" type="checkbox"/>
<b>Revenue</b> <i>Lead Qualification</i>	<b>Revenue</b> <i>Lead Qualification</i>		<input checked="" type="checkbox"/>
<b>Business Needs</b> <i>Lead Qualification</i>	<b>Business Needs</b> <i>Lead Qualification</i>		<input checked="" type="checkbox"/>
<b>LinkedIn Profile</b> <i>Lead Qualification</i>	<b>LinkedIn Profile</b> <i>Lead Qualification</i>		<input checked="" type="checkbox"/>
<b>No. of Employees</b>	<b>No. of Employees</b>		<input checked="" type="checkbox"/>
<b>Industry</b>	<b>Industry</b>		<input checked="" type="checkbox"/>
<b>Source</b> <i>Sales</i>	<b>Source</b> <i>Sales</i>		<input type="checkbox"/>

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

## Status, Process and stage for working with leads

### Introducing lead status and process

To better manage the lead qualification process, lead status and custom process have been introduced in this release. There are four status for leads, including Unqualified, Active, Converted and Archived.

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.

The status will be set automatically based on your actions. If a lead has not been worked on and no process has been applied to the lead, the status will be set to Unqualified. Once a process has been applied to a lead, its status will be automatically changed to Active. After you complete the process, you will either convert or archive the lead. The status will be set to Converted or Archived.

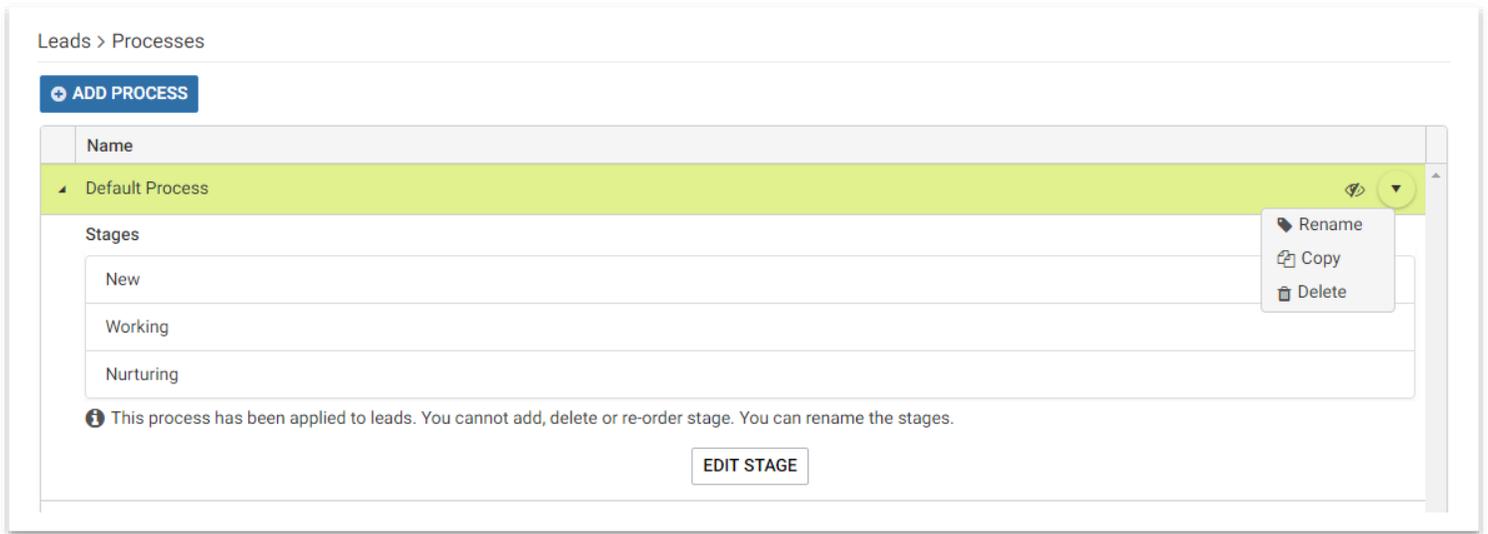
Status	Process	Stage
Unqualified <i>A lead hasn't been touched.</i>	No process has been applied.	
Active <i>A lead is being worked on.</i>	A process has been applied to the lead.	
	Default Process	New
		Working
		Nurturing
	Custom Process	Stage 1
		Stage 2
Stage 3		
Converted <i>A lead has been closed.</i>	Lead qualification process has been completed. A lead has been converted to an opportunity.	
Archived <i>A lead has been closed.</i>	Lead qualification process has been completed. A lead has been abandoned.	

### Note

If you upgrade from Maximizer CRM 2019, you will see some changes in lead status. Unqualified, Converted and Archived are still in the Status field. New, Working and Nurturing are now stages in the Default Process and will be displayed in the Stage field.

### Managing process

- 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 without applying a process, the lead is set to Unqualified by default. You can pick a process and select a stage. The lead status will be changed to Active automatically. 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.



**Note**

You can change the process and stage for leads using Global Edit.

**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

Name	Type	Applies To	Requested By
[Maximizer]			
Customer Interests	Table		
Industry	Table		
123 No. of Employees	Numeric		
Partner Interests	Table		
Sales	Folder		
Rating	Table		
Source	Table		

**Note**

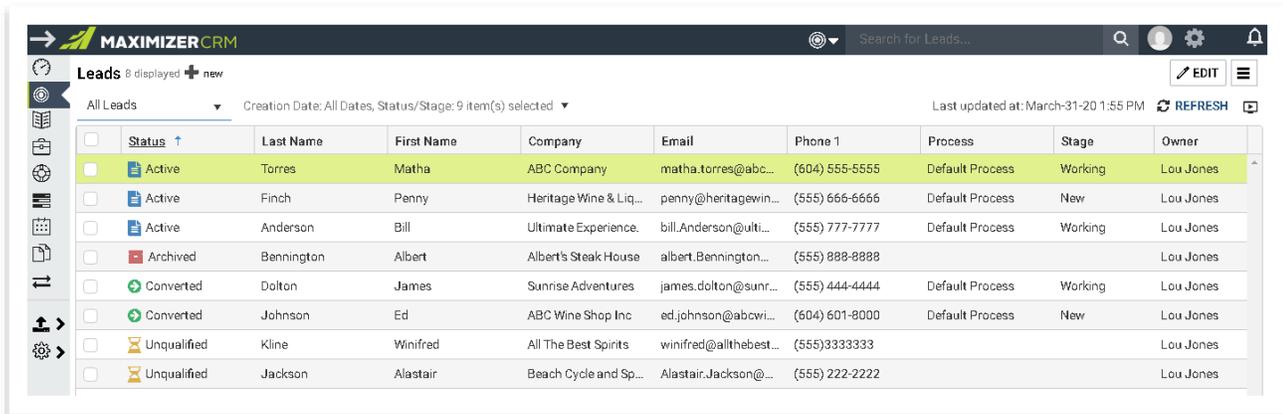
Because these fields are user-defined fields now, they are displayed in User-Defined Fields section instead of the Details section in Add/Edit Lead dialog.

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.



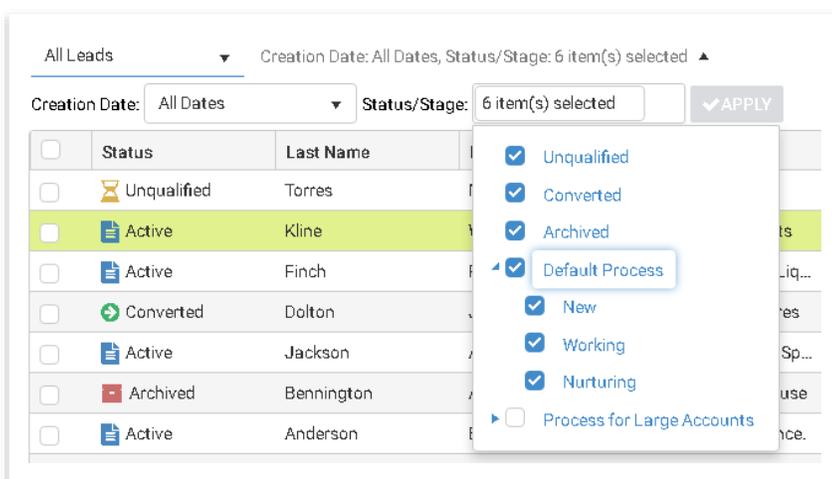
	Status	Last Name	First Name	Company	Email	Phone 1	Process	Stage	Owner
<input type="checkbox"/>	Active	Torres	Matha	ABC Company	matha.torres@abc...	(604) 555-5555	Default Process	Working	Lou Jones
<input type="checkbox"/>	Active	Finch	Penny	Heritage Wine & Liq...	penny@heritagewin...	(555) 666-6666	Default Process	New	Lou Jones
<input type="checkbox"/>	Active	Anderson	Bill	Ultimate Experience.	bill.Anderson@ulti...	(555) 777-7777	Default Process	Working	Lou Jones
<input type="checkbox"/>	Archived	Bennington	Albert	Albert's Steak House	albert.Bennington...	(555) 888-8888			Lou Jones
<input type="checkbox"/>	Converted	Dolton	James	Sunrise Adventures	james.dolton@sunr...	(555) 444-4444	Default Process	Working	Lou Jones
<input type="checkbox"/>	Converted	Johnson	Ed	ABC Wine Shop Inc	ed.johnson@abcwi...	(604) 601-8000	Default Process	New	Lou Jones
<input type="checkbox"/>	Unqualified	Kline	Winifred	All The Best Spirits	winifred@allthebest...	(555)3333333			Lou Jones
<input type="checkbox"/>	Unqualified	Jackson	Alastair	Beach Cycle and Sp...	Alastair.Jackson@...	(555) 222-2222			Lou Jones

### 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 filter

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 by status and stages.



Creation Date: All Dates    Status/Stage: 6 item(s) selected    APPLY

Status	Last Name
Unqualified	Torres
Active	Kline
Active	Finch
Converted	Dolton
Active	Jackson
Archived	Bennington
Active	Anderson

- Unqualified
- Converted
- Archived
- Default Process
- New
- Working
- Nurturing
- Process for Large Accounts

## Enhancements to Hotlist module

In previous release, the lead information is not available in Hotlist module. If you have a task or an appointment with a lead, you need to switch to the Leads module in order to view the details about a lead and work on the lead. Now you can view the lead information and perform actions against a lead without leaving the Hotlist.

The lead information displayed is displayed in Details, History, Notes, Documents and Activities tabs in Hotlist. The Details tab contains widgets for lead details, notes, documents and activities. You can edit the fields, add notes or documents, or schedule tasks or meetings. You can also perform actions against a leads, such as make a call, send an email, schedule a meeting or upload a document.

You can change stages, convert a lead if it is qualified, or archive a lead if it should be abandoned.

The screenshot displays the Maximizer CRM interface. At the top, there's a navigation bar with the Maximizer CRM logo and a search bar for leads. Below this is a 'Hotlist' section showing a table of leads. The table has columns for Date, Time, Pr., Activity/Subject, Name, Company, Phone 1, Assigned to, and Con. One lead is highlighted in green: 'To-do - Prepare documents for the meeting with Bill' assigned to Lou Jones on April 13, 2020.

Below the table, there are tabs for 'Details', 'Contacts', 'Customer Service', 'Opportunities', 'History', 'Notes', 'User-Defined Fields', 'Documents', 'Related Entries', and 'Activities'. The 'Details' tab is active, showing information for 'Anderson, Bill Manager at Ultimate Experience'. This includes contact details (phone, email, website), address, creation and modification dates, and a default process flow from 'New' to 'Working' to 'Nurturing'.

The 'Details' tab is divided into several sections: 'Lead Details' (Owner: Lou Jones, Partner: Lou Jones), 'Business Needs' (Service: Entertainment, Industry: Entertainment), 'Notes' (Hotlist Task Created: To-do With: Anderson, Bill, Scheduled by: Lou Jones, Assigned to: Lou Jones, March 30, 2020), 'Activities' (First meeting with Bill from Ultimate Experi..., To-do - Prepare documents for the meeting...), and 'Documents' (Basic Information).

## Enhancements in Import Manager

### Create new items in table fields during import

If you map a column in an import file to a table field in Maximizer, the items in the import file must match the items in the Maximizer field. Import will fail if the items don't match. In this release, Import Manager will be able to detect if there are items missing in Maximizer fields and allow you to create new items on the fly.

In the Mapping screen in Import Manager, you will be prompted if the import file contains items that don't exist in the mapped Maximizer field. You have options to create new items in the Maximizer field. The import process will create the new items first before importing the entries.

The screenshot shows a dialog box titled "New Items Found" with a close button (X) in the top right corner. Below the title bar, there is a paragraph of text: "The import fields listed below contain items that do not match the items in the mapped Maximizer fields. Check the checkbox in each row to add new item into the Maximizer fields. If similar items already exist in Maximizer field and you do not want to create new one, modify the import file to make sure that the items in the import fields match the items in Maximizer fields." Below this text is a table with two main columns: "Fields to be imported" and "Mapped Maximizer fields". The table is organized into sections with expandable headers. The first section is "Industry", which is expanded to show "Food & Beverage" and "Retail". The second section is "Customer Interest", expanded to show "Help", "Press Release", and "Product Info". The third section is "Business Needs", expanded to show "Partner Management". Each row in the table has a checkbox on the right side, with the text "Add a new item in Maximizer field" next to it. At the bottom right of the dialog, there is a blue button labeled "CONTINUE".

### Support users' display name in import files

In previous release, you need to use the User IDs for importing users. For example, to import a user as an Account Managers, you need to use User ID such as "JNAPOLI". In this release, you can use both User ID and users' Display Name in the import file. For example, you can use "JNAPOLI" or "Joe Napoli" in the import file.

### Display better messages

When an import fails, you can check the problems in the log file. In previous release, the name of the user-defined field is not displayed in the log file. For example, a message looks like this:

*In column SIN mapped to Udf/\$TYPEID(1182): The cell value '740 598 545' is not a number (in the culture that is selected in Preferences)*

In this release, the field name is displayed. You can easily identify which field has caused the problem. The message looks like: *In column SIN mapped to Udf/SIN: The cell value '740 598 545' is not a number (in the culture that is selected in Preferences)*

## Enhancement in managing default entries

### New default entry dialogs

Address Book, Opportunities and Customer Service modules have new default entry dialogs. The new dialog looks similar to the Global Edit dialog. You can select the fields that you want to set the default values and enter the values in those fields.

Field	Value(s)
Account Manager	Lou Jones
Full Access	Public
Read Access	Public
Industry	Finance

ADD FIELD(S)

SAVE CANCEL

### Administrators manage default entries for others

To ensure every user sets up the right default values, reduce data entry and prevent errors, the administrators can now manage default entries for all users. For example, the administrator can specify a process for all members of a sales team to ensure that everyone uses the same process to work with opportunities. The administrator can edit the default entry for each user or perform Global Edit to update default entries for a group of users in Settings screen

	User ↑	Account Manager	Category	Full Access	Read Access
<input type="checkbox"/>	EMAILUSER			Public	Public
<input checked="" type="checkbox"/>	Joe Napoli	Joe Napoli	Partner	Public	Public
<input checked="" type="checkbox"/>	Lou Jones	Lou Jones	Analyst	Public	Public
<input type="checkbox"/>	WEBUSER			Public	Public

## Enhancement in Notes Report

If your team uses Note Report to track activities and interactions, you will appreciate these enhancements. We made changes to the concise view of the Note Report, the detailed view remains the same.

### Report layout

The concise report has now four columns: Type, Date, Details, and Creator.

Type - indicates notes type ('Task' for tasks and appointments, 'Email', 'Outgoing call', 'Incoming call', 'Opportunity', 'Customer Service', 'Timed notes', and 'Manual' for non-automated notes).

Date – shows the date and time when the note was created.

Details – displays the beginning of the notes.

Creator – shows who created the note.

### Report sorting

If your common practice is to mix Companies/Individuals and Contacts from different companies in one report, you'll notice a great improvement. Now contacts belonging to the same company are grouped together under the company.

Previously, the report was sorted by contact's last name regardless the company they belong. It made it hard to track historical communication as you had to search for the contacts working in the same company throughout the report. Now the primary sorting of the report is changed to alphabetical order by Company/Individual, and after within the same company by the contact's last name.

Albert's Steak House Zamber, Rick (Accountant)			Department: Accounting
10 Camino del Inca Suite 200 Albuquerque NM 89393 USA Web site: www.maximizer.com			Main 6046018000 Fax 6046018001
Type	Date	Details	Creator
Outgoing call	3/23/2020 3:26 PM	Rick gave me address to send samples. Said that Albert informed him about the interest and if samples are good, they thinking about the order of ~1000\$. ...	Lou Jones
Horizon Beverage Company Shannon, Eve Adele (Store Manager)			Department: Operations
80 Stockwell Dr  Avon MA 02322 USA Web site: www.maximizer.com Main: escona@maximizer.com			Main (604) 601-8000 Fax (604) 601-8001
Type	Date	Details	Creator
Outgoing call	3/23/2020 3:48 PM	Result: Left Message Number: (604) 601-8000...	Lou Jones
Monro Estates			
1 Clark Drive  Dover 4RR3 0891 England Web site: www.maximizer.com Main: escona@maximizer.com			Main (604) 601-8000 Fax (604) 601-8001
Type	Date	Details	Creator
Incoming call	3/23/2020 1:35 PM	Drew called to request an additional sample. Availability is to be confirmed. W/H indicated we were low last week. ...	Daniel Brown
Monro Estates Sanders, Andy (Chief Financial Officer)			
1 Clark Drive  Dover 4RR3 0891 England Web site: www.maximizer.com			Main (604) 601-8000 Fax (604) 601-8001
Type	Date	Details	Creator
Incoming call	3/23/2020 2:11 PM	Sander's called to ask about taxes ...	Lou Jones
Outgoing call	3/23/2020 1:32 PM	Result: Busy Number: (604) 601-8000...	Daniel Brown

## Accessibility

### Navigation using keyboard

To the visually impaired users, it is hard to position the cursor at the right position in order to click a button or a link. It will be easier for them to use keyboard to navigate around the product. In this release, you can now use left / right arrow keys to highlight the items in the header bar. Once an item is highlighted, simply press the Enter key to open a drop-down, a panel or a dialog.



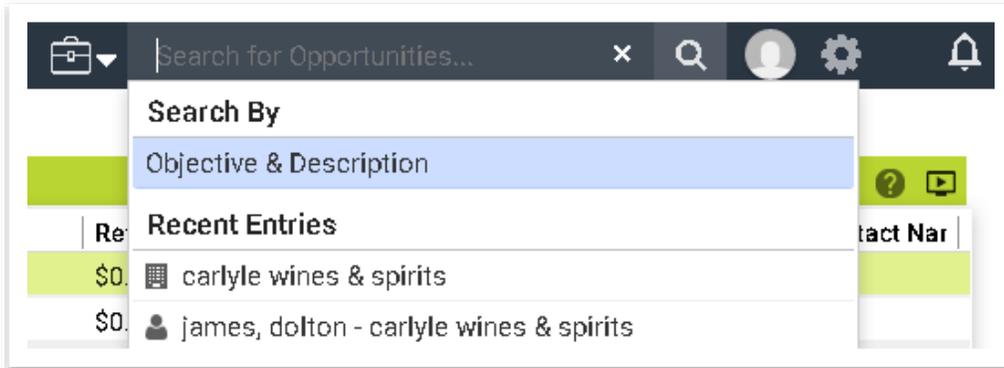
### Note

We will continue improving accessibility and will allow you to navigate all the interface elements using keyboard in future release.

## Quick search

### Change the default search for searching for opportunities and cases

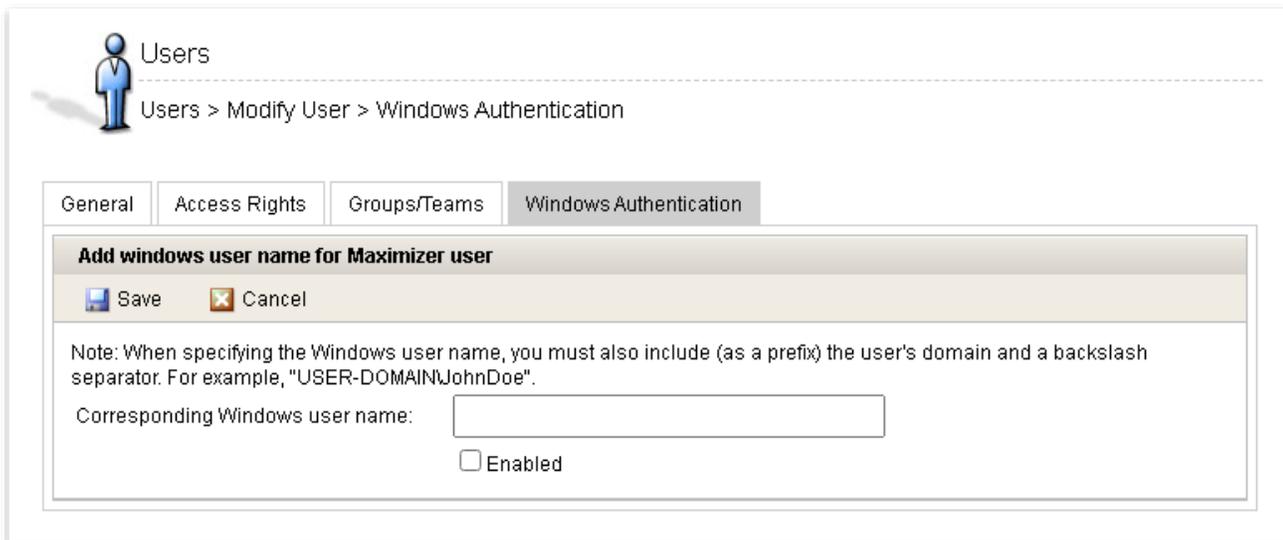
In previous release, the default search for opportunities is by objective and description fields. In this release, the default search has been changed to search by Address Book entries. You can enter the name of the Address Book entries in the Quick Search field and retrieve the opportunities associated with that entry. To search opportunities by Objective and Description fields, select the Quick Search parameter from the drop-down.



The same change has been made for searching for cases. By default, search will retrieve cases by Address Book entries. To search by case Subject and Description, use Quick Search parameter. Note that you can search case by Case Number without using the parameter. You need to include the prefix for the case numbers. For example, your string should look like: HQ-00014.

## Administrator - Windows Authentication tab in user properties

You can now map a Maximizer user to a Windows user in Web Administrator.



## Technical Features

### TLS 1.2 support

To keep up with more complex security requirements, the product is now fully functional with TLS 1.2.

### Hash and salt and single sign-on (SSO)

To increase security and protect your users' passwords, salted password and hashing have been introduced. With the changes in security model, you can integrate with SAML identity provide or Active Directory Federation Services (ADFS) to create single sign-on to access Maximizer and your other applications.

### Installation

The installation for Maximizer CRM 2020 R1 will install 64-bit Web Access, Mobile Access and API. Administrator module remains in 32-bit. Some of the modules have been deprecated in 2020 R1 release and have been removed from installation, including the Customer and Partner Portal, Print and Fax service.

Group edit has been completely removed from the installation. You are not allowed to leave the PSN field blank and install a Group Edition trial version. To install a trial version, enter a trial PSN for Enterprise Edition.

To support the enhanced security feature, a System User has been introduced in the product. If you choose to apply SQL Authentication during installation, a new wizard page will be displayed where you need to enter a password for the System User. To install Maximizer Server and Maximizer Components for IIS in different machines, the same password for the System User needs to be entered in every installation.

### Security changes affecting integrations

Starting from version 2020 R1, authentication through user ID and password will no longer be supported. If you have any integrations using user ID and password to authenticate, you will need to change to token based authentication.

## 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.

## Mobile

### Manage cases

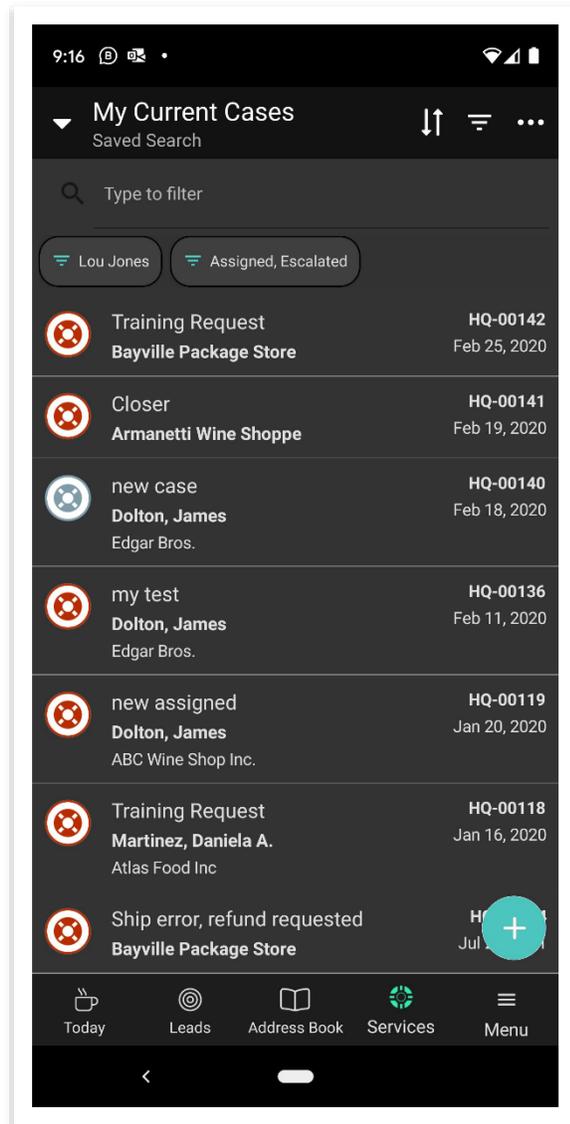
In order to view a complete 360 degree view of your contacts, you now have the ability to view active and past cases that are associated to your Address Book entries directly from their record. As well as the capability to add and modify cases while you are away from your desk. The Customer Service module allows you to search for lists of cases and get to the details of those cases with just a tap.

### Dark mode

For those who work late nights, Dark Mode is now an option. Within the settings of the app, you can choose between following the phones default setting, Light or Dark.

### Related entries

Relationships between different contacts can be more than just family or co-workers, from the Address Book record you are able to view those relationships you have set up with the contact as well as add new ones or remove the ones that don't have meaning anymore



## Manage leads

Leads are important to any business, with R1 you now have the capability to add and modify your leads to ensure that the information recorded with the lead is current and accurate. As you move leads through your business process and the different stages of working them, your end goal is always to create a business opportunity. When that time comes, you are able to convert the lead into your address book and create that opportunity directly from the phone.

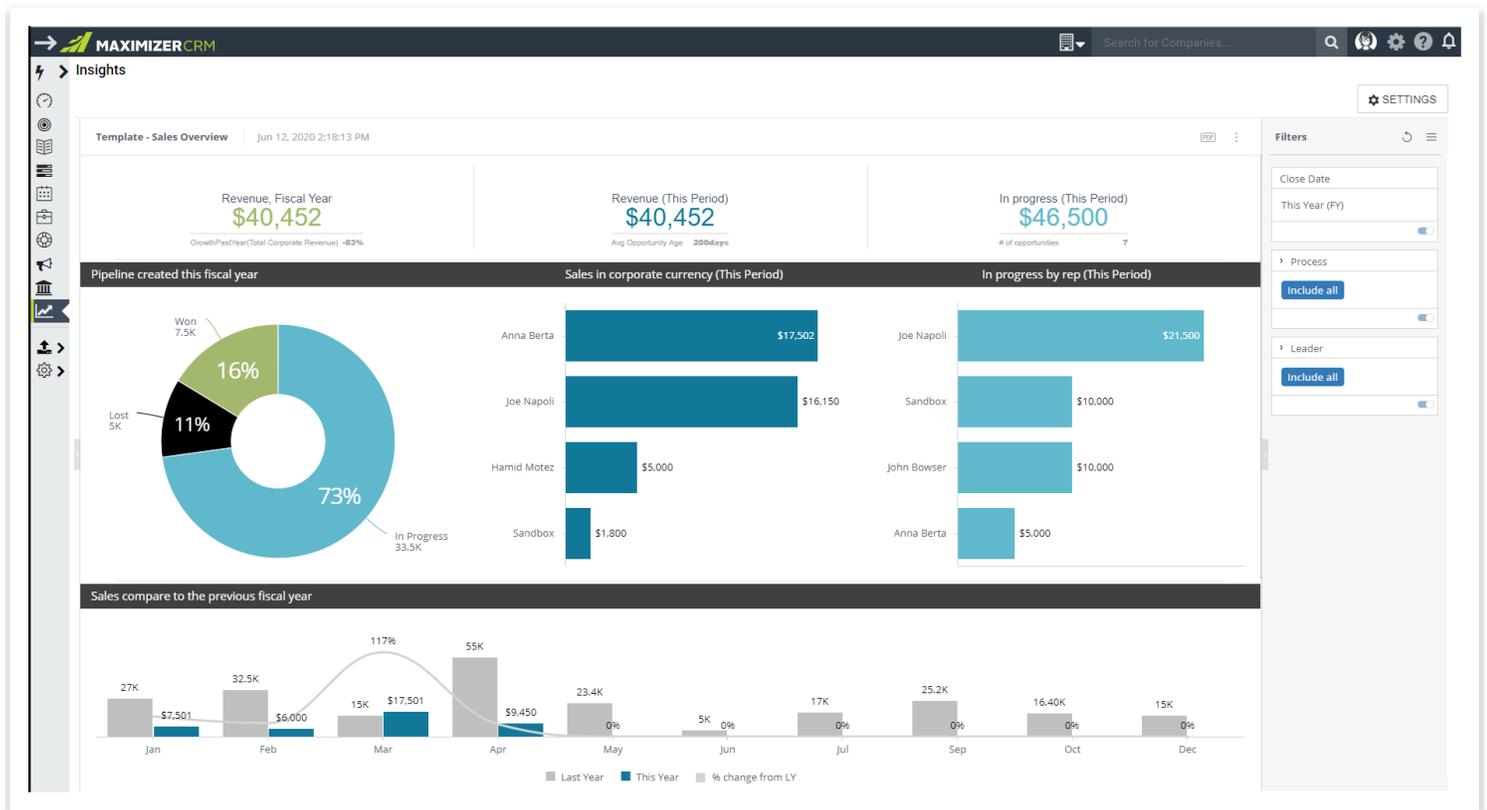
## Import from phone

With cloud services such as Google Photos and Microsoft Lens, the ability to take a picture of a business card and have that information be added to your phone's contact list is easier than ever. Once the contact information is on your phone, you can use Maximizer to import that contact as either a Lead or an Address Book entry.

## Insights

Insights add-on is now available for on-premise deployments. It is an easy-to-use self-served analytics add-on that will help you to make data-driven decisions and reveal trends and patterns in your CRM data. Whether it's understanding your existing pipeline, knowing which sector your clients are coming from, or forecasting future revenue, Maximizer Insights can do it all. Contact your account manager to learn more.

Note: to leverage the power of Insights your Maximizer deployment requires SQL Server 2016 version or higher.



## New features in Zapier integration

### Create new entries or update existing entries in Maximizer

Now you can integrate with 3<sup>rd</sup> party applications to create new entries or update existing entries in Maximizer. For example, you can create a connection between a web form application and Maximizer. When a new customer submits the form, a new Address Book entry will be created in Maximizer. If an existing customer submits the form, the information in the Maximizer entry will be updated.

### Poll for new records or changes to existing entries inside Maximizer

This feature detects whenever a user creates a new entry or changes an existing entry in Maximizer. Zapier checks for any changes in Maximizer every 5 mins or 15 mins depending on the account type. So if there are any changes or additions, all necessary information/details about the entry are forwarded to the 3<sup>rd</sup> party integration. For example, you connect Maximizer with your MailChimp account. If you update the information of a contact in Maximizer, the corresponding contact in MailChimp will be updated. These actions are applicable to: Address Book entries, leads, cases, opportunities, appointments, tasks and notes.