Maximizer CRM Live 2020 R1 (Project Capilano)

Feature Review Guide

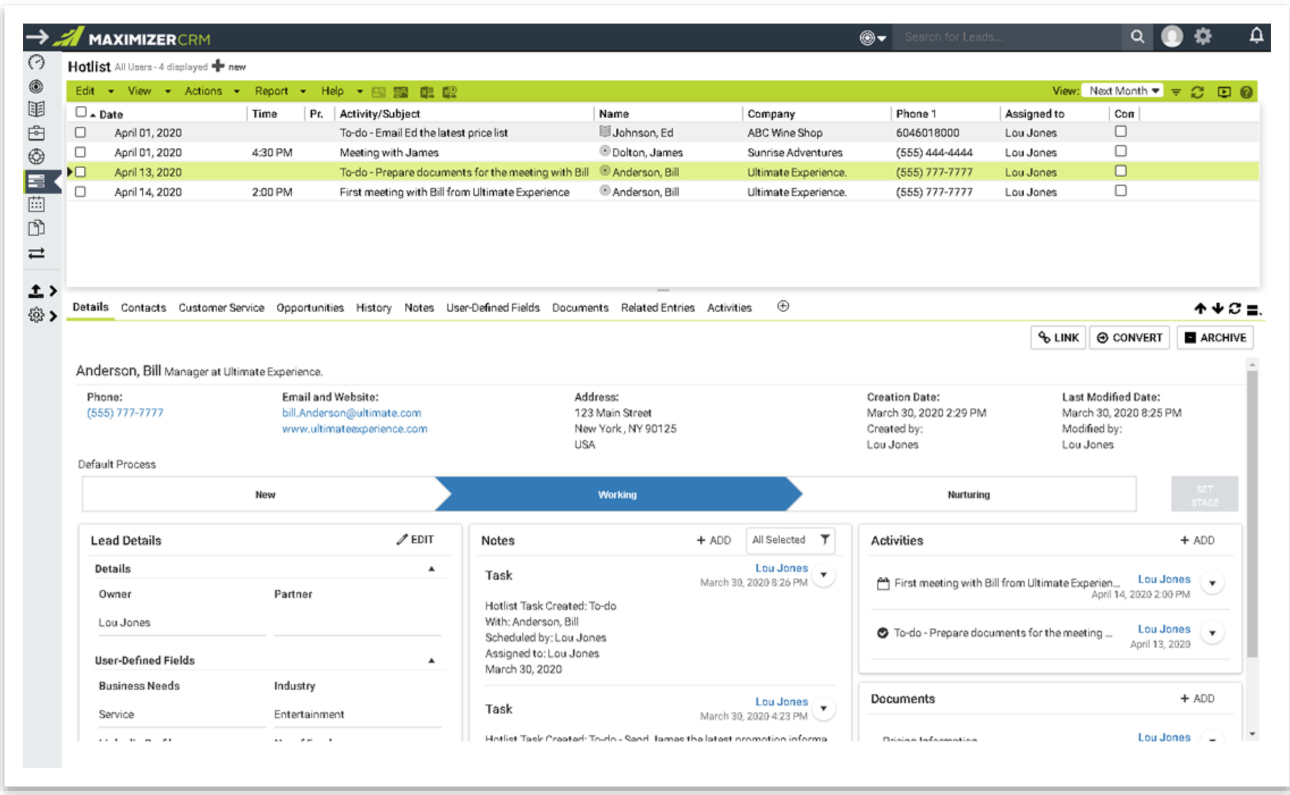
Contents

Enhancements to the 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 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.

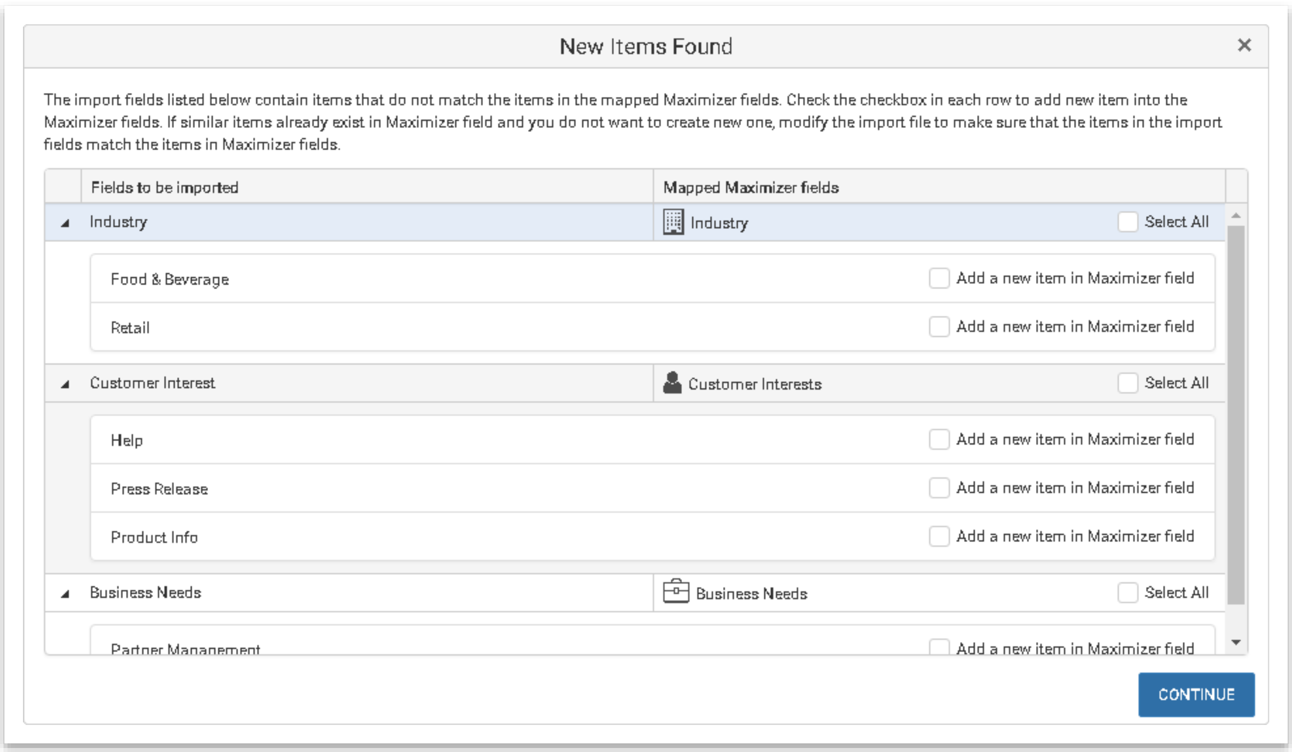


Enhancements in Import Manager

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.



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". This is very inconvenient because it is hard to find out the IDs for the users. 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

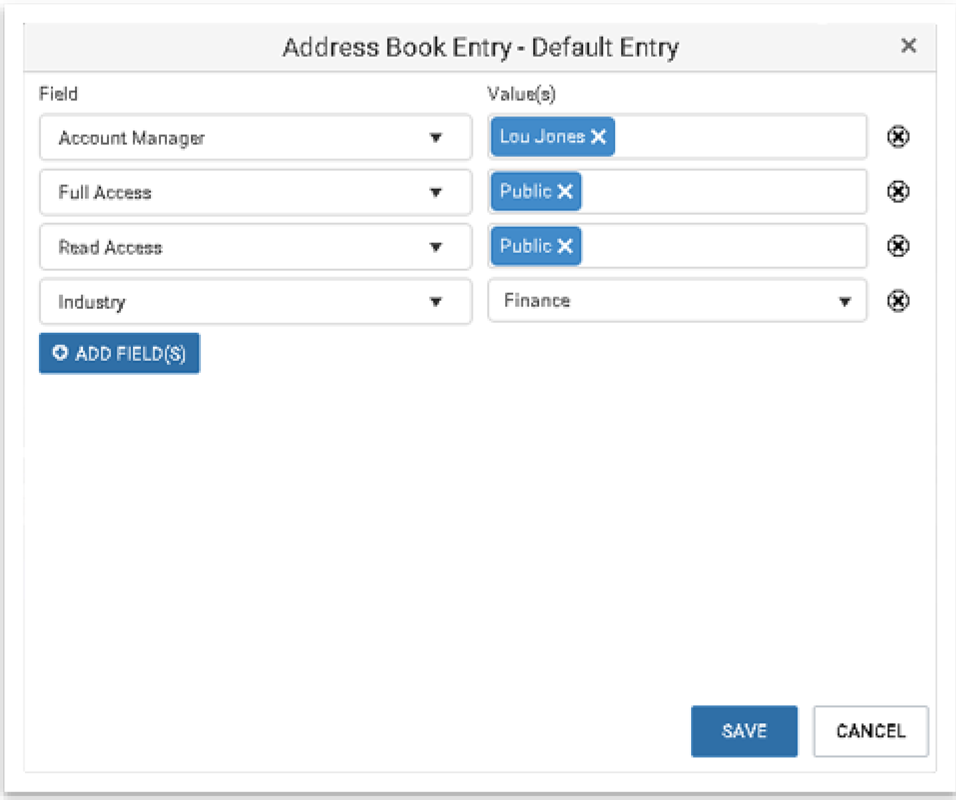
When an import fails, you can check the problems in the log file. In previous release, the name of the user-defined field is not displayed in the log file. For example, a message looks like this:
In column SIN mapped to Udf/$TYPEID(1182): The cell value '740 598 545' is not a number (in the culture that 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

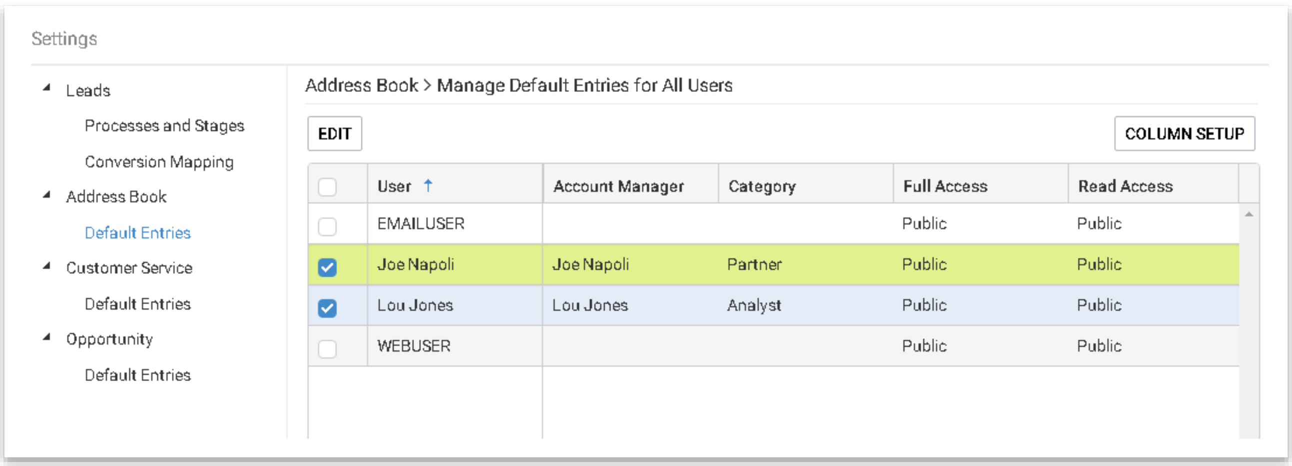
Address Book, Opportunities and Customer Service modules have new default entry dialogs. The new dialog looks similar to the Global Edit dialog. You can select the fields that you want to set the default values and enter the values in those fields.



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.



Enhancement in Note 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.

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 089I
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 089I
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

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.

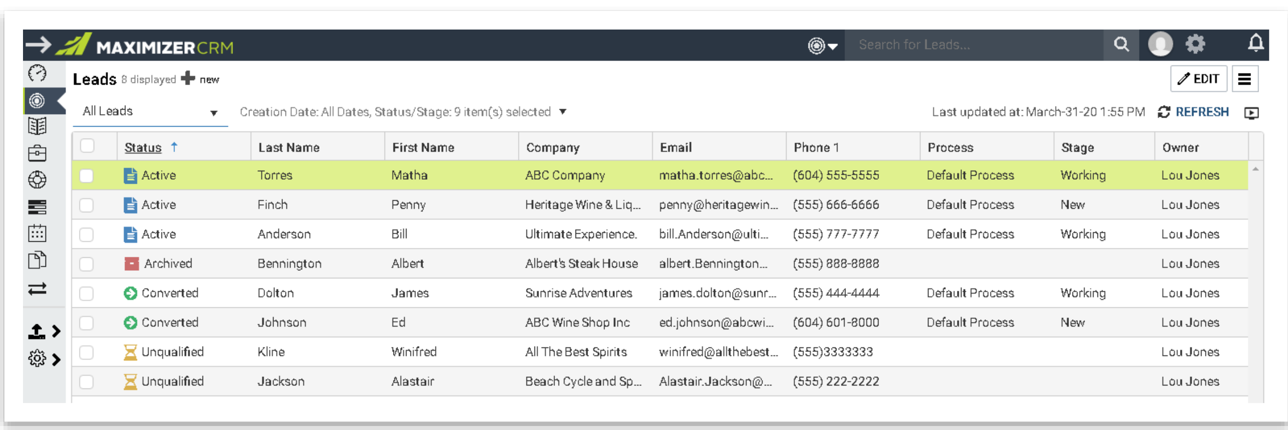
Changes in Leads module

Lead status, process and stage

In previous release, lead status (Unqualified, Converted and Archived) and stages (e.g. New, Working and Nurturing) are grouped in Stage field. In this release, Status and Stage are separate fields. There are four status, including Unqualified, Active, Converted and Archived. 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 changed to Active automatically. After you complete the process, you will either convert or archive the lead. The lead status will be set to Converted or Archived.

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

You need to view status, process and stage to understand the current state of the leads. The active leads always have an applied process and current stage. The unqualified leads always have blank process and stage because no process has been applied to those leads. The converted or archived leads may or may not have process. If a lead has a process applied before being converted or archived, you will see the process and the last stage before the lead being converted or archived. If a lead is converted or archived directly from the Unqualified status, the Process and Stage column will be blank.



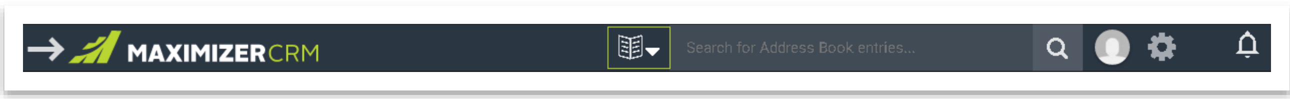
View details about a lead after it is converted or archived

When a lead is converted or archived, the widgets for lead details, notes, documents and activities will still be available in the Lead Details screen. This allows you to review the history about the leads after the leads have been closed. This can be very useful in some situations. For example, by reviewing the history of an archived lead, you may be able to find a sales opportunity and decide to unarchive the lead.

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.



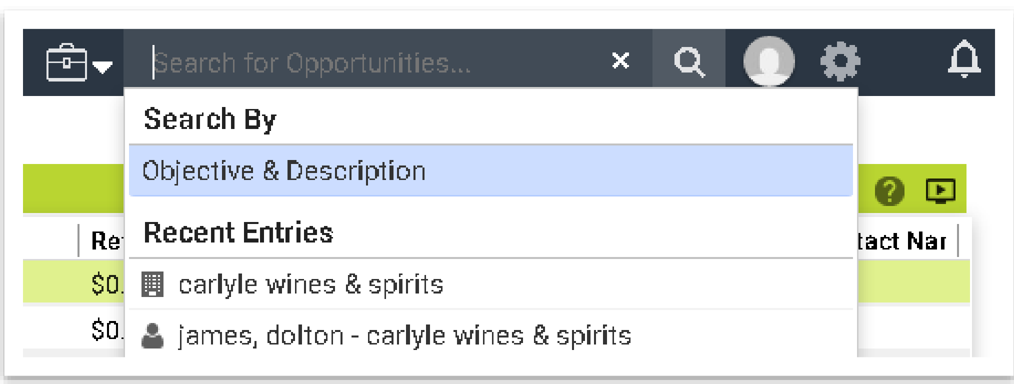
Note

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 still search a case by Case Number without using the search parameter. But you need to enter the prefix of the Case Number. For example, the search text should look like: HQ-00004.

New features in Zapier integration

Create new entries or update existing entries in Maximizer

Now you can integrate with 3rd 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 3rd 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.

Security enhancement

TLS 1.2 support

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

Password hash and salt

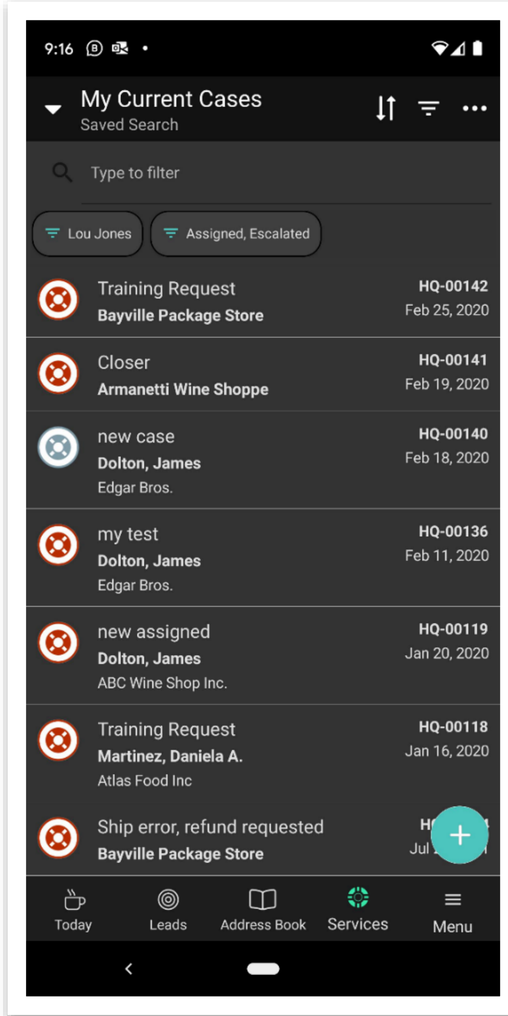
To increase security and protect your users' passwords, salted password and hashing have been introduced.

Note that 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. See more details in the datasheet.

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 Google Photos and Microsoft Lens, the ability to take a picture of a business card and have that information be added to your phones 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.