



– DATASHEET

Feature Updates ●

MAXIMIZERCRM





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Outlook Sync

In previous versions, recurring appointments that cross Daylight Saving Time boundaries would offset one hour after the Daylight Saving Time starts or ends. This issue has been fixed in this release.

Note

This fix only affects any new appointments created in Outlook and synced to Maximizer CRM. The bug fix will not affect any existing appointments that are already in your calendar.

Lead Security

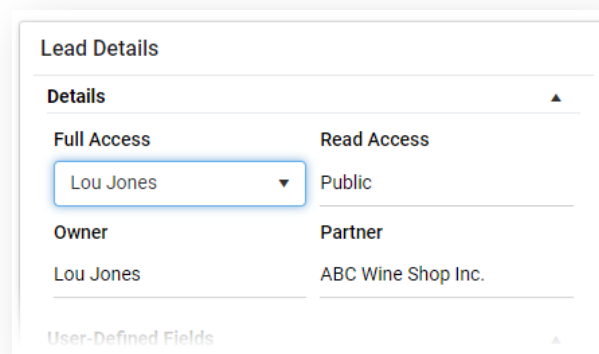
Full and read access for leads

You can now control who can see your leads and who can edit them with full and read access for leads.

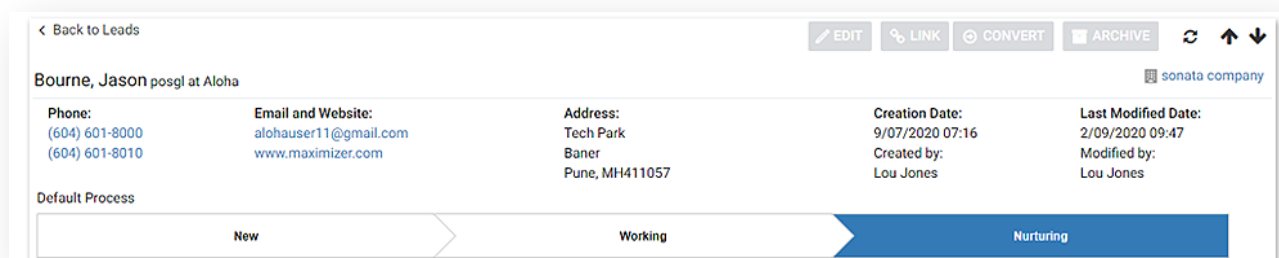
Full and read access fields are available in add / edit lead screen and in the Lead Details widget. You can also change the access rights for leads using Global Edit.

Note

The full and read access fields for leads only support single user or group. If you don't have full access to a lead, you won't be able to edit the lead. In Lead Details screen, you cannot link the lead to an Address Book entry, convert or archive the lead. You cannot apply a process to the lead or change the stage in a process.



The screenshot shows the 'Lead Details' widget. It has a 'Details' section with two columns: 'Full Access' and 'Read Access'. Under 'Full Access', there is a dropdown menu currently showing 'Lou Jones'. Under 'Read Access', it shows 'Public'. Below these, there are fields for 'Owner' (Lou Jones) and 'Partner' (ABC Wine Shop Inc.). At the bottom, there is a section for 'User-Defined Fields'.



The screenshot shows a lead details form for 'Bourne, Jason posgl at Aloha'. The form includes fields for Phone, Email and Website, Address, Creation Date, Last Modified Date, and Created by. Below these fields is a 'Default Process' section with a progress bar showing three stages: 'New', 'Working', and 'Nurturing'. The 'Nurturing' stage is currently selected and highlighted in blue. The form also includes a 'sonata company' logo in the top right corner.



Convert or archive leads

To convert or archive a lead, you need to be the owner of the lead or a sales manager and have full access to the lead.

During lead conversion, the access rights of the leads will be copied to the Address Book entries following these rules:

If a lead is linked to an existing contact, the full and read access of the contact will not be changed.

If a lead is linked to a company or an individual but a new contact will be created during conversion, the full and read access of the company / individual will not be changed. The full and read access of the lead will be copied to the contact.

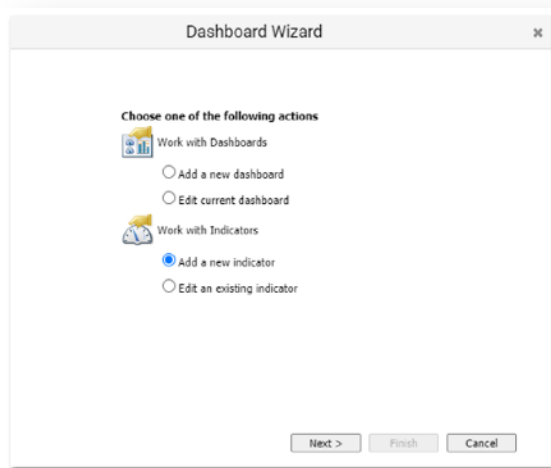
If a new company or individual and a new contact will be created during lead conversion, the full and read access will be copied to both the company / individual and the contact.

Set opportunity start date when converting a lead

When you convert a lead and create an opportunity, the start date of the opportunity will be set to today's date.

Dashboard Wizard

In this release, the wizard screens for the Dashboard have been simplified.





New Notes tab in Address Book, Opportunities, Customer Service, Campaigns and Hotlist modules

The Note filter has a refreshing new look.

The Notes following tab has been re-written in this release. It looks similar to the previous tab but performs better and is responsive to fit in any screen sizes.

The new Notes tab has following changes compared to the previous tab:

- Date and time are displayed in one column to save space.
- A new column, Associated Entry, has been introduced. In Address Book, if Show All option is on, you can see which Address Book entries the notes belong to.

Filter the entries you would like to be displayed

Date range: All Dates

Note types:

- ☒ Accounting
- ☒ History
- ☒ Opportunity
- ☒ Task
- ☒ Customer Service
- ☒ Incoming calls
- ☒ Other
- ☒ Timed notes
- ☒ Email
- ☒ Mail-outs
- ☒ Outgoing calls
- ☒ Transfer log

☒ Manual Address Book note categories: All Selected [Edit](#)

OK CANCEL

	Date/Time	Type	Text	Associated Entry	Creator	Full Access	Read Access
<input type="checkbox"/>	September 2, 2020 ...	Email	Subject: Price information	ABC Wine Shop Inc.	Billie Holly	Public	Public
<input type="checkbox"/>	August 20, 2020 1:...	Manual	Ed wants to schedule a meeting to show the new feature to their	Johnson, Ed - ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>	July 7, 2020 9:09 AM	Manual	ABC Wine will open 3 new locations next month.	ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>	July 3, 2020 12:34 ...	Outgoing calls	Result: Busy	ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>	June 2, 2020 8:46 P...	Customer Se...	Case created: HQ-00183	ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>	May 27, 2020 7:20 ...	Manual	Derek sent an email today asking for more information about pricing.	Park, Derek - ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>	April 22, 2020 3:30 ...	Email	Partner assignment email sent.	Shao, Hua - ABC Wine Shop Inc.	EMAILUSER	Public	Public
<input type="checkbox"/>	April 22, 2020 1:15 ...	Email	Partner assignment email sent.	Shao, Hua - ABC Wine Shop Inc.	EMAILUSER	Public	Public

The new Notes tab is responsive. When the screen size is getting smaller, the buttons in the toolbar will be moved into the drop-down menu.

	Date/Time	Type	Text
<input type="checkbox"/>	September 2, 2020 10:3...	Email	Subject: Price information
<input type="checkbox"/>	August 20, 2020 1:31 PM	Manual	Ed wants to schedule a meeting to show the new
<input type="checkbox"/>	July 7, 2020 9:09 AM	Manual	ABC Wine will open 3 new locations next month.
<input type="checkbox"/>	July 3, 2020 12:34 AM	Outgoing calls	Result: Busy
<input type="checkbox"/>	June 2, 2020 8:46 PM	Customer Service	Case created: HQ-00183

Print Note(s)
Filter
Video Help
Help



View Address Book entry notes in opportunities

When you are working on a sales opportunity, you need to know the history about the client and review the recent communications. In previous versions, it required switching from Opportunities to Address Book in order to view the notes. Now you can review and edit the Address Book entry notes directly in Opportunities.

In the Note filter in Opportunities module, there are two options for displaying notes:

- Opportunity only
- Opportunity and Address Book entry

To view Address Book entry notes, select “Opportunity and Address Book entries” option. It will display the notes for the opportunity and the notes belonging to the company/individual and all the associated contacts.

Note

- If the contact of the opportunity is from another company, the notes for this contact won't be displayed.
- Some of the history notes for Address Book entries, such as notes for Accounting, Customer Service, Opportunities, and Transfer Log, will not be displayed.

When you turn on the option to display Address Book entry notes, the selected note types will be applied to both opportunity and Address Book entry notes. In manual note section, you can select note categories for opportunities and Address Book entries separately.

When the notes are displayed in the Notes following tab, you can use the Associated Entry column to identify which notes belong to the opportunity and which one belong to the Address Book entries.



Search for competitors in opportunities

When assigning a competitor to an opportunity, the competitor filter will be turned on by default.

The same change has been made in the dialog for searching for a partner in Opportunities, Leads and Address Book modules. The filter for partner will be turned on by default.

Auto complete address and geocoding

If you would like ensure that the addresses you enter are correct and consistent, the new address suggestion feature will help you. In this release, a search field has been added into each address. While you are typing in the search field, the suggestions from Google will appear. You can select an address from the suggestions. The address fields will be populated accordingly.

If you create or edit an address using Google suggestions, the address will be associated with the geocodes. The latitude and longitude of the address will be saved into database. This allows you to integrate with map apps and pinpoint the location of your customers in the maps.



When an address is associated with geocodes, two buttons will be available below the address. The Information button indicates that the address is linked to geocodes. Clicking the button will show a tooltip for more information. The Remove Geocodes button allows you to remove the geocodes associated with the address. It will be useful if you try to change the address, but Google cannot find the new address. You can remove the geocodes and manually enter an address.

Note

- When an address is associated with geocodes, all the fields are editable. If you manually change part of the address such as street number or zip/postal code, it may cause the incorrect geocodes associated with the address. It is recommended to use the search field to find a new address. This will update the address and the geocodes.
- If you only select a city from the suggestion or if Google cannot provide address line 1, the Address Line 1 field will be blank. In this case, the address will not be associated with geocodes.

You can still create an address manually. If you do not use suggestions, the address will not be associated with geocodes.

The existing addresses will not be linked to geocodes automatically. If you would like to make sure an address is correct and linked to geocodes, you need to perform a search and select the same address from the suggestions.





Support long or short date format

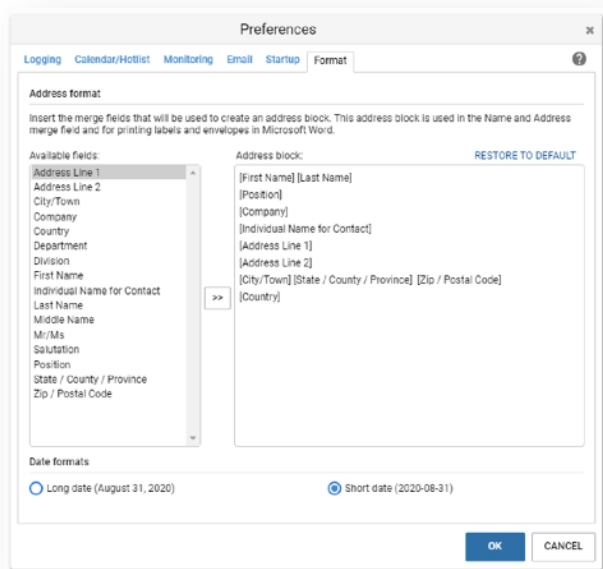
The options for displaying a long or short date format are now available in Preferences. If you have many columns in a column view and wish to have more space to display data, you can use the short date format to save some space.

The setting for the date format is located in Preferences > Other Preferences > Format tab. You can select a long format or a short format. The short date format will follow the locale setting you have selected in Preferences.

There are some places where the dates do not follow the Preferences setting, including:

- Details, Documents and Activities following tab
- Notification panel
- Some dialogs such as document properties in Company Library, modify task date in Hotlist.

We will continue work in these places in the future release and make the dates displayed consistently across the whole product.



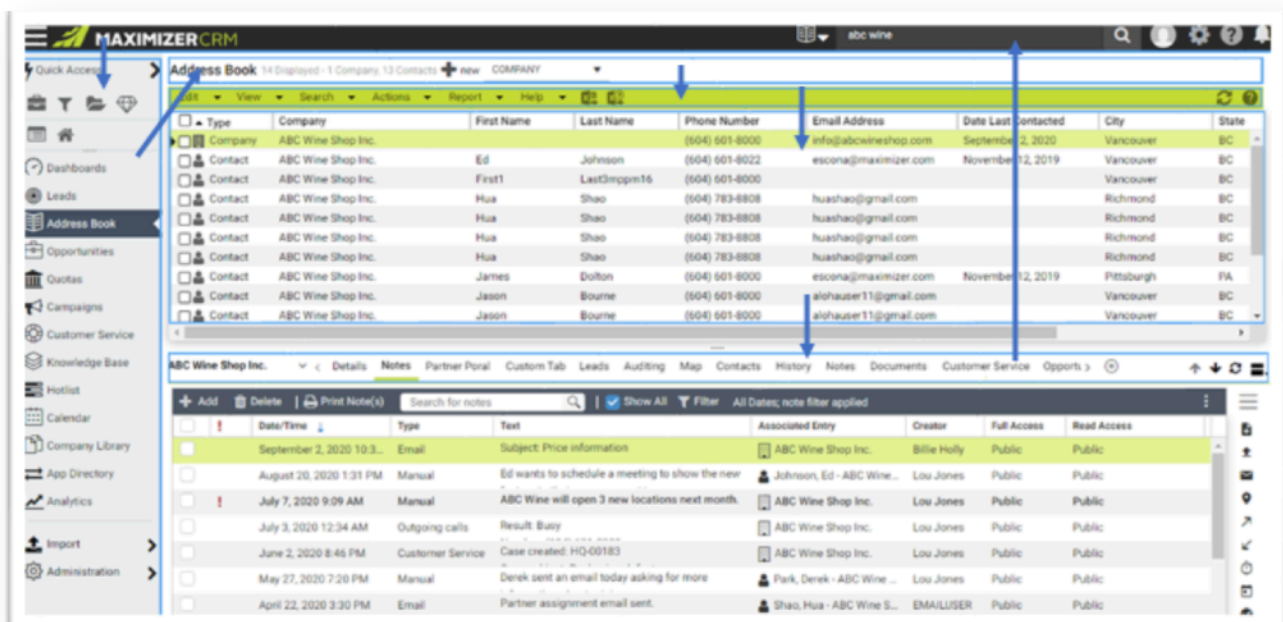


Accessibility

In our continued effort to improve accessibility, we have focussed on navigating all the main areas using the keyboard.

The interface is divided into several main areas. Pressing Tab key will move the focus from one area to next one in following order: Product Header > Icon Bar > Module Header > Menu Bar > Main Grid > Following Tab.

When the following tab gets focus, pressing Tab key will move the focus back to Product Header.



Click an empty space in any area to activate it. Pressing left or right arrow key will highlight the first item in the area. Continue pressing left / right arrow key to move the highlight to the next item. When an item is highlighted, press Enter key to execute the command such as creating a new entry, opening a dialog or a drop-down menu, refreshing a list etc. To move to next area, press Tab key. To move to previous area, press Shift + Tab key.

Note

- If the focus is in the Quick Search field, you need to press Tab key to get out the field.
- In Icon Bar, you will need to press the up / down arrow key. In other area, use left / right arrow key.



Download mobile app from Mobile Access

You can now easily download the native mobile app. The link to the app store is available in the Mobile Access login screen.

Mobile App

Document management

Retrieve documents that are associated with Address Book entries, Opportunities, services cases, and leads. Documents will download and open in the associated app on the mobile device. (Need Maximizer CRM 2019 R3 or above)

Documents associated with the record will be found on the documents following tab.

If you are using Maximizer CRM 2020 R1, you can also attach files to records. Tapping the ADD button while on the Documents following tab or on the details tab of the record will present the following options:

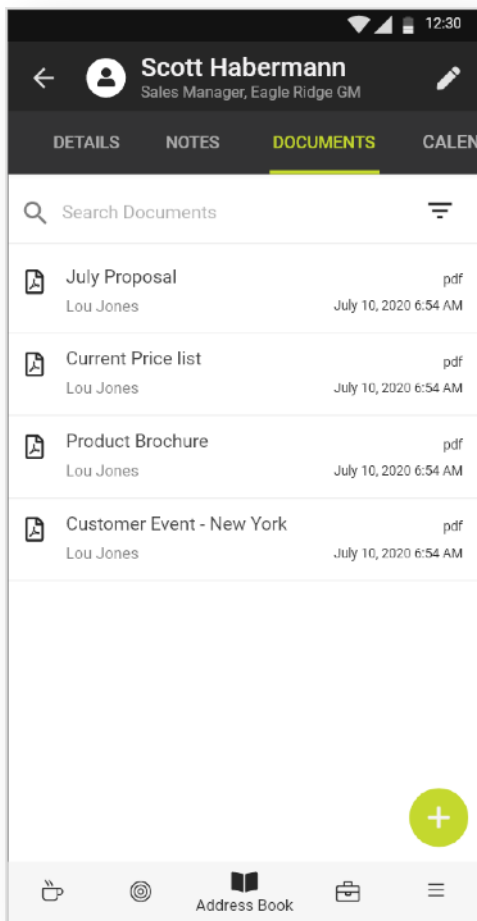
- File (Android only) - browse the device for any file
- Image (Android & iOS) - browse the gallery for images that you have previously taken
- Camera (Android & iOS) - access the camera to take a picture and directly upload it

Duplicate Searches

Want to run a search that you regularly use but tweak it a bit without affecting the original? Each search will now have an arrow indicator that will expand to show the available options. Tapping the duplicate option will present you with a dialog to give the copy a new name.

Updated the login page

The login page has been updated to make it easier to know if you are accessing the CRM Live offering or your On Premise installation.



Insights

Insights dashboard templates can now be deleted. Insights comes with 4 dashboard templates, which you previously couldn't delete. Now Maximizer CRM administrators will be the dashboard templates owners. They can share the templates with other users or delete the templates. The dashboard templates are not available out of the box now, but have to be downloaded from the Insights module.

Integration

Maximizer CRM for Gmail is coming soon. This integration provides following functions:

- Save emails to Address Book entries, leads, opportunities, and service cases.
- Update and/or create new entries for Address Book, Leads, Opportunities, and Customer Service.
- Create Hotlist tasks

Deprecation

Office 2010 will not be supported in 2020 R2 release.

As of December 31st 2020, we will discontinue support for the following Cloud Elements based integrations, which will stop working on January 15 2021:

- Dropbox
- OneDrive
- Google Calendar
- Google Drive
- Hubspot
- QuickBooks
- SharePoint
- Twilio



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