



– DATASHEET

Features Guide – R1 2021

MAXIMIZER™CRM LIVE





Contents

SAML based single sign-on	3
Setup Custom Identity Provider	3
Login Page	4
View Address Book Entry Notes in Case	5
Accessibility	5
Support of screen reader (JAWS)	5
Keyboard shortcuts	5
Enhanced Security for the Logging Note	6
View in Opportunities and Customer Service in Hotlist	6
Mobile App	6
Login requires 2FA (PIN) once	6
Improved login with biometrics	6
Access to Insights	7
Customization of Module Lists	7
Ability to Filter On Any Field	8
Improved Access to Editing Records Key Field Groups Directly	9
Insights	10
Improved Pie Chart	10
Improved Funnel Chart	11
New Trend Line	12
Schedule Email Reports for Monthly Reporting	14
Pending Update	14
Integration	15
QuickBooks	15
MailChimp Sync Engine Enhancements	15
Deprecation	15



SAML based single sign-on

Single sign-on (SSO) is a user authentication service that permits a user to use one set of login credentials to access multiple applications. In this release, you can set up a 3rd party identity provider (IDP) that allows your users to log in to Maximizer through the IDP.

Setup Custom Identity Provider

To setup a custom identity provider, go to Icon Bar > Administration > Settings > SSO screen.



Maximizer is the default identity provider. To set up a custom IDP, click Add Identity Provider button. In the screen for adding an identity provider, all fields are required. Once the settings have been saved, the custom IDP will be available. In this release, only one custom IDP can be created. [Instruction on how to set up a custom IDP](#)

System Options > Single Sign-On

Single sign-on (SSO) allows your users to log in to Maximizer using external identity providers. In this screen, you can set up your identity provider. You can enable Maximizer authentication and your custom authentication at the same time. Or, you can turn off Maximizer authentication and only make the custom authentication available to your users.

ADD IDENTITY PROVIDER

Maximizer	<input checked="" type="checkbox"/>
Microsoft	<input checked="" type="checkbox"/>

 Edit
 Delete

The identity providers are specified at the database level. Each database in the same server can have different IDPs enabled. One of the following situations can be applied in a database:

- Only Maximizer login is enabled – The users log in using Maximizer user ID and password.
- Both Maximizer login and a custom IDP are enabled – The users can log in using Maximizer login credential or log in through custom IDP.
- Only custom IDP is enabled – The users log in to Maximizer through the custom IDP. In this situation, when the users try to access the Maximizer Login page, they will automatically be redirected to the Login page of the IDP.



Login Page

The login controls in the Login page will be enabled, disabled, or hidden based on the IDP specified for the selected database. SSO login also works in Administrator and Mobile Access.

Both Maximizer login and custom IDP are enabled.
The user can log in using Maximizer user ID and password or the custom IDP.

Log in to:
Escona

User ID

Password

Log In

☐ Remember me

[Forgot your password?](#)

or

Log in with Microsoft

No custom IDP is enabled. Only Maximizer login is enabled. The users can only log in using Maximizer user ID and password.

Log in to:
Escona

User ID

Password

Log In

☐ Remember me

[Forgot your password?](#)

Maximizer login has been turned off. Only the custom IDP is enabled. When the users try to access the Maximizer Login page, they will be re-directed to the IDP Login page.



View Address Book Entry Notes in Case

In our previous release, we introduced the feature for viewing Address Book entry notes. In this release, the same function is available in the Customer Service module. There are two options for displaying notes:

- Case only
- Case and Address Book entry

You can view the notes for the selected case and the notes belonging to the company/individual and all the associated contacts.

Filter the entries you would like to be displayed

Date range: Last 12 Months

Notes for: ☒ Case only ☐ Case and Address Book entries ?

Note types:

<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> History	<input checked="" type="checkbox"/> Incoming calls
<input checked="" type="checkbox"/> Mail-outs	<input checked="" type="checkbox"/> Other	<input checked="" type="checkbox"/> Outgoing calls
<input checked="" type="checkbox"/> Task	<input checked="" type="checkbox"/> Timed notes	

☒ Manual

Customer Service note categories: All Selected, Address Book note categories: All Selected [Edit](#)

OK CANCEL

Accessibility

In the last release, we introduced keyboard navigation in the main screens. You can use tab key to navigate to different areas in the interface and use arrow keys to access the items in each area. In this release, screen reader application (JAWS) is supported, and more keyboard shortcuts have been introduced.

Support of screen reader (JAWS)

The users with impaired vision may not be able to read the text displayed on the screen. With the help of a screen reader application, the users will be able to hear the text spoken by the screen reader. In this release, JAWS is supported. When you use the keyboard to move the focus around the screen, JAWS will read the label or description of the highlighted control.

Note

You need to have JAWS installed. Before you start to use keyboard to move the focus around, press Insert + z to turn the virtual PC cursor off.

Keyboard shortcuts

The following keyboard shortcuts for the commonly used commands have been introduced in this release.

Quick search	/
Add a note	Alt + Shift + n
Add a document	Alt + Shift + d
Write an email	Alt + Shift + e
Schedule a meeting	Alt + Shift + m
Schedule a to-do	Alt + Shift + k

Pressing “/” key will set the focus into the Quick Search field and you can start typing in the search text. Select an entry in the main grid in Address Book, Opportunities and Customer Service module, pressing the shortcut keys for the commands will open the respective dialog.

Note

In Address Book, the action will be applied to the entry selected in the contact switcher.



Enhanced Security for the Logging Note

If you turn on logging notes for opportunities or cases, in Opportunities and Customer Service modules, when you edit a user-defined field, a history note will be generated showing the name of the field and the value changes. The logging notes will be set to public by default. This may cause security issues. For example, the field should only be visible to a specific group of users. But the logging note shows the field to everyone.

In this release, you have an option to hide the values of the user-defined fields in logging notes. You can find the option in Administrator > System Options.

View in Opportunities and Customer Service in Hotlist

In Hotlist, if a task is associated with an opportunity or a case, you can now click a button to view the opportunity or the case in the respective screen. The View in Opportunities or View in Customer Service commands are available in the menu bar and in the right-click menu.

Hotlist All Users - 1 displayed new

Edit ▾ View ▾ Actions ▾ Report ▾ Help ▾					
<input type="checkbox"/> Date:	Time	Pr.	Task	Name	Company
<input checked="" type="checkbox"/> 01/02/2021			To-do - Send Product Info	Atlas Food Inc	Atlas Food Inc

Mobile App

Login requires 2FA (PIN) once

In CRM LIVE, the app now only requires the 4-digit PIN code once. You do not need to get a new PIN every time you log out of the app.

Note

If your email address gets used in another Address Book, you will need to "clear and reset" the login page and receive a new PIN to access the second Address Book.

Improved login with biometrics

Assuming that you have biometrics enabled for your device, we have also improved the biometrics feature of the app. When the feature is enabled (from the settings screen within the app) it will provide easy and secure access to your data.

- Tapping into the password entry area will automatically ask you for your biometric.
- If your biometric has not been registered with the Address Book, you will have to enter the password manually. After a successful password entry, the app will ask you for your biometric for future logins.

Note

Biometrics will not work for databases that have been setup as SSO.

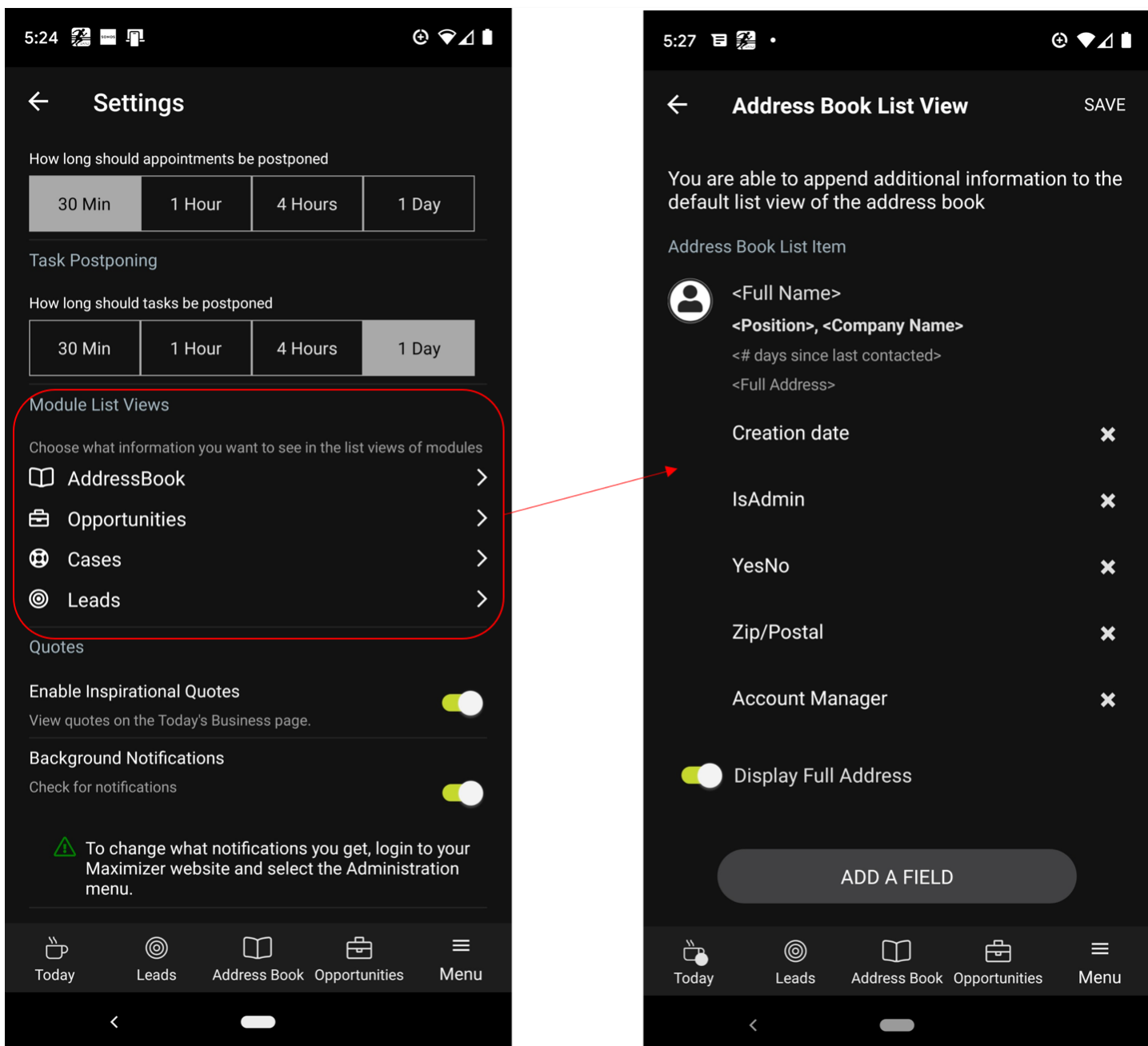


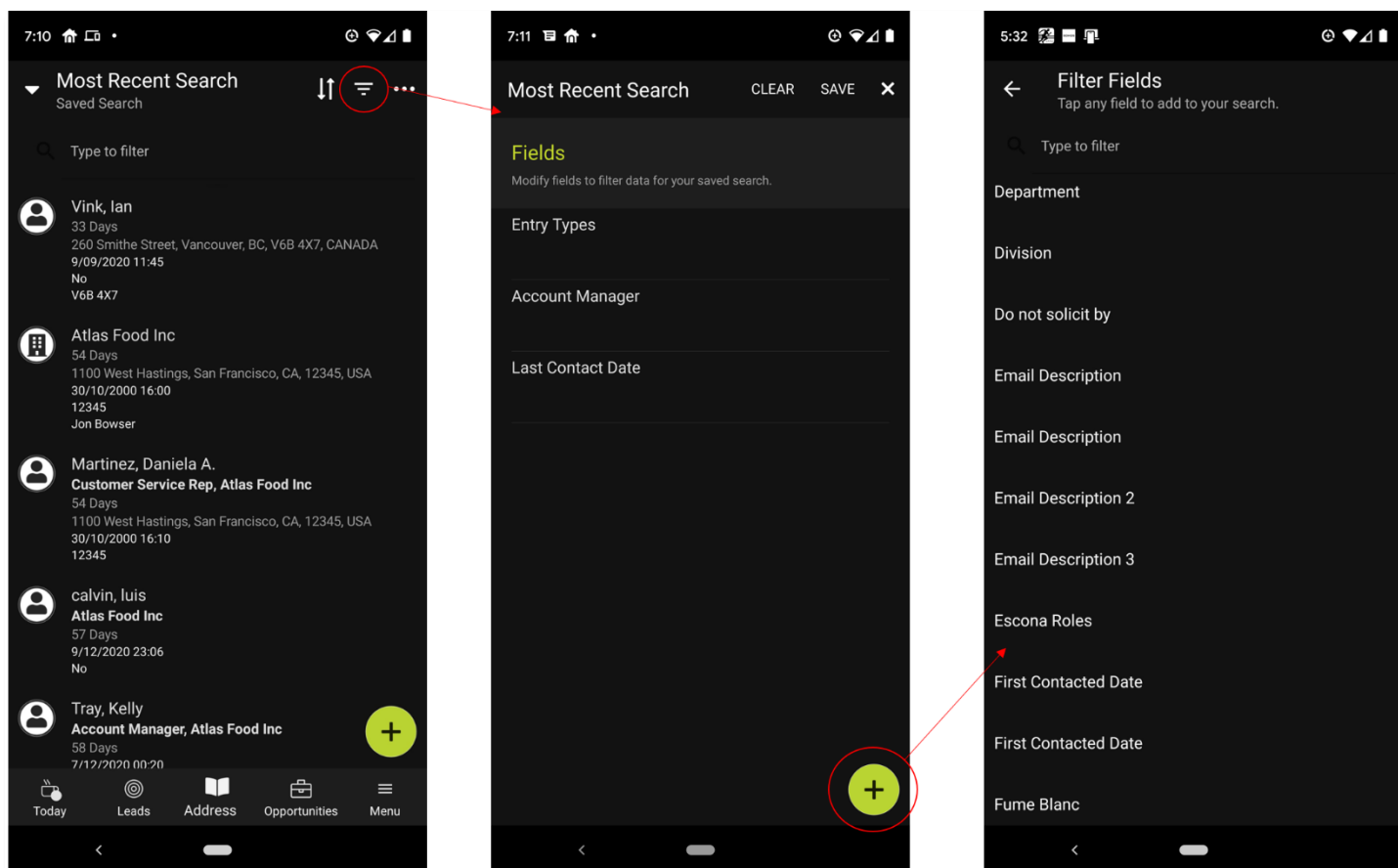
Access to Insights

Customers that have enabled Insights will now have their dashboards accessible from main menu of the app.

Customization of Module Lists

From the settings you are now able to customize the list (up to 5 additional fields) display of modules so that you can see the information that is critical to your business quickly.





Ability to Filter On Any Field

By accessing the filter properties screen, via creating a new search or by the filter button, you will be presented with an ADD button. Tapping this button will allow you to add any field associated with the search type (i.e., Address Book fields if you are on the Address Book, opportunity fields if you are in the opportunity module, etc.)

This is helpful for businesses that have made a custom field (UDF) that is essential for their business and you need to filter your results on it. For example, you have created a field that identifies a technical representative that is associated with an address book entry. This is in addition to the account manager. You are now able to filter records based on that field.

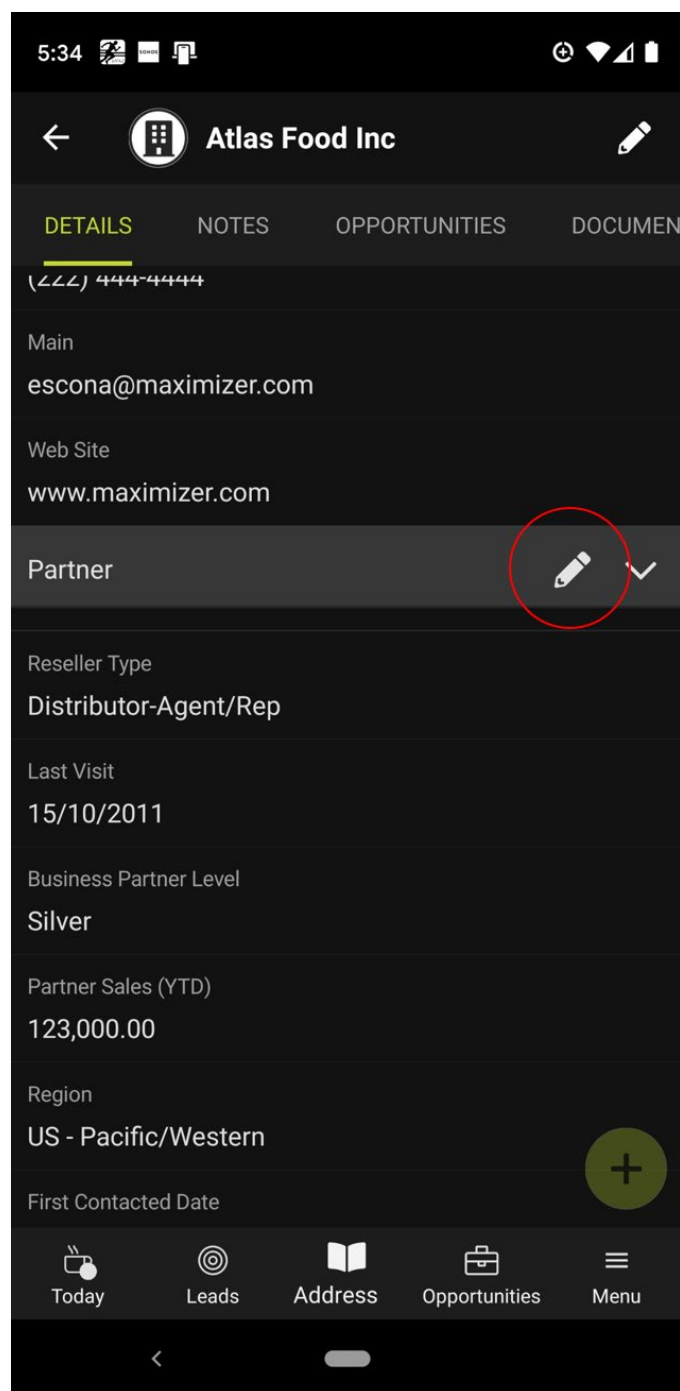
Additionally, you can remove fields from the filter by sliding right on the field you wish to remove. This allows you to only show the fields and their values that are applicable to that search. (This only applies to searches that are made on the mobile.)



Improved Access to Editing Records Key Field Groups Directly

For those who edit their CRM data, we have added a second edit button directly on the Key Field grouping selection control. Tapping this button will take you directly to the edit screen of that Key Field grouping. This will reduce the amount of time needed to change the desired information.

In this example, tapping the second edit button on the Key Field grouping would take you directly to the "Partner" fields for you to edit.





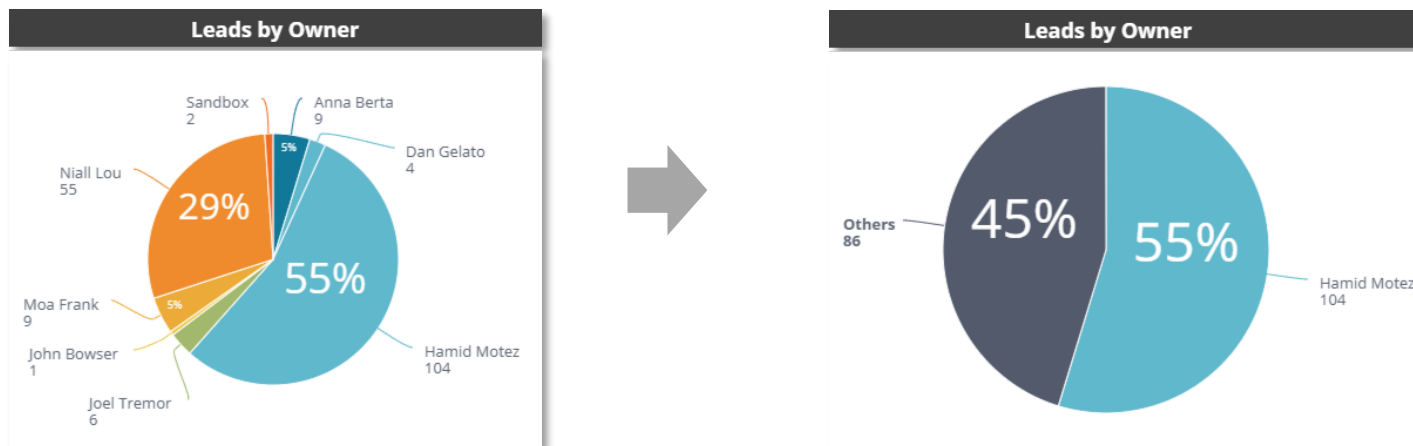
Insights

Note

New features initially will be available for CRM Live customers in North America, Australia, and New Zealand.

Improved Pie Chart

Here is a classic pie chart widget showing distribution of Leads by Owner. However, we would like visually to highlight the fact that more than half of the Leads are assigned to one person, i.e.:



To make the transition from the widget to the left to the widget on the right, go to the edit mode to the Widget Designer > Design Tab > Show 'Others' Slice.

Here you can specify what should be included in the slice 'Others'.

Show 'Others' Slice: Toggle this setting to display the 'Others' slice:

- Include in the 'Others' slice all categories (slices) smaller than X percent (%).

OR


- Show X slices, and group all the rest into the 'Others' slice.

In the example above, to create the widget to the right, choose 'Show one slice' and put the rest of the Lead Owners in the 'Others' segment.

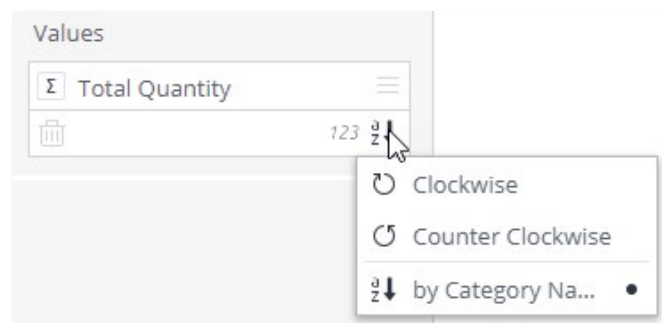
The screenshot shows the 'Design' tab of the Widget Designer. The 'Pie Type' section has three options: 'Classic' (selected), 'Donut', and 'Ring'. The 'Legend' toggle is turned on. The 'Labels' section has four checkboxes: 'Categories' (checked), 'Value' (checked), 'Percent' (checked), and 'Decimals' (unchecked). The 'Show 'Others' Slice' toggle is turned on. Below this, there are two radio button options: 'Include values less than 3 %' (selected) and 'Show 1 slices and 'Others'' (unselected). The 'Show 1 slices and 'Others'' option is highlighted with a red rectangle.



Another improvement is sorting options. Now, you can sort pie slices by Category Names or by Values.

Set the direction of slices: Click the  Sort button in the Values section in the Data panel to set the direction of slices:

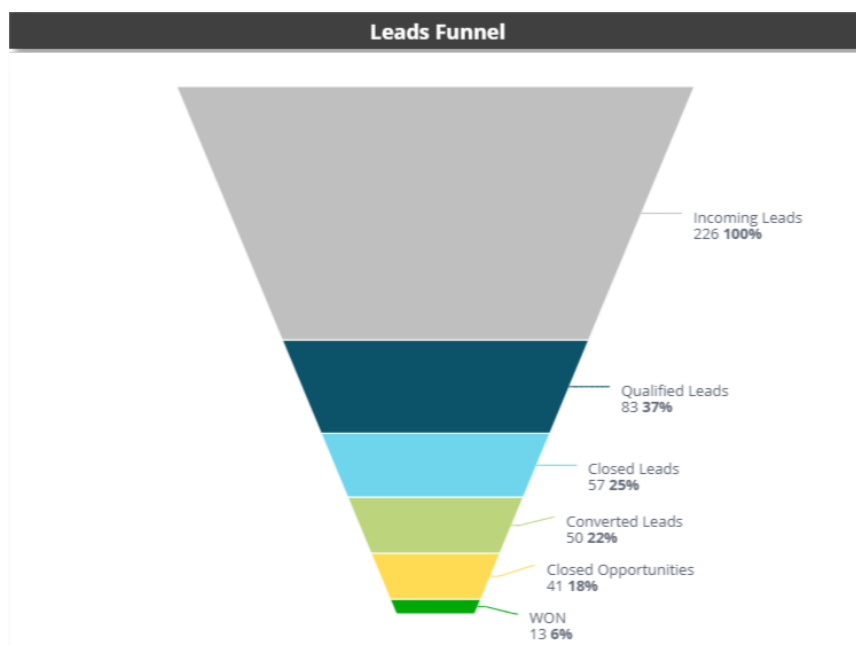
- Clockwise or Counter-Clockwise by category percentages.
- By category name (from A to Z, or from 1 and higher)



Improved Funnel Chart

The funnel chart shows stages in a process that are sequentially dependent. The funnel shape helps you track the health or validity of any process.

Funnel Chart got an updated look and now you can display per centage next to the value labels to visualize how leads move through the funnel as an example below.



Each stage in the chart represents a percentage of the total with the top, thickest stage being the largest, and each subsequent stage thinner than its predecessor.

Note

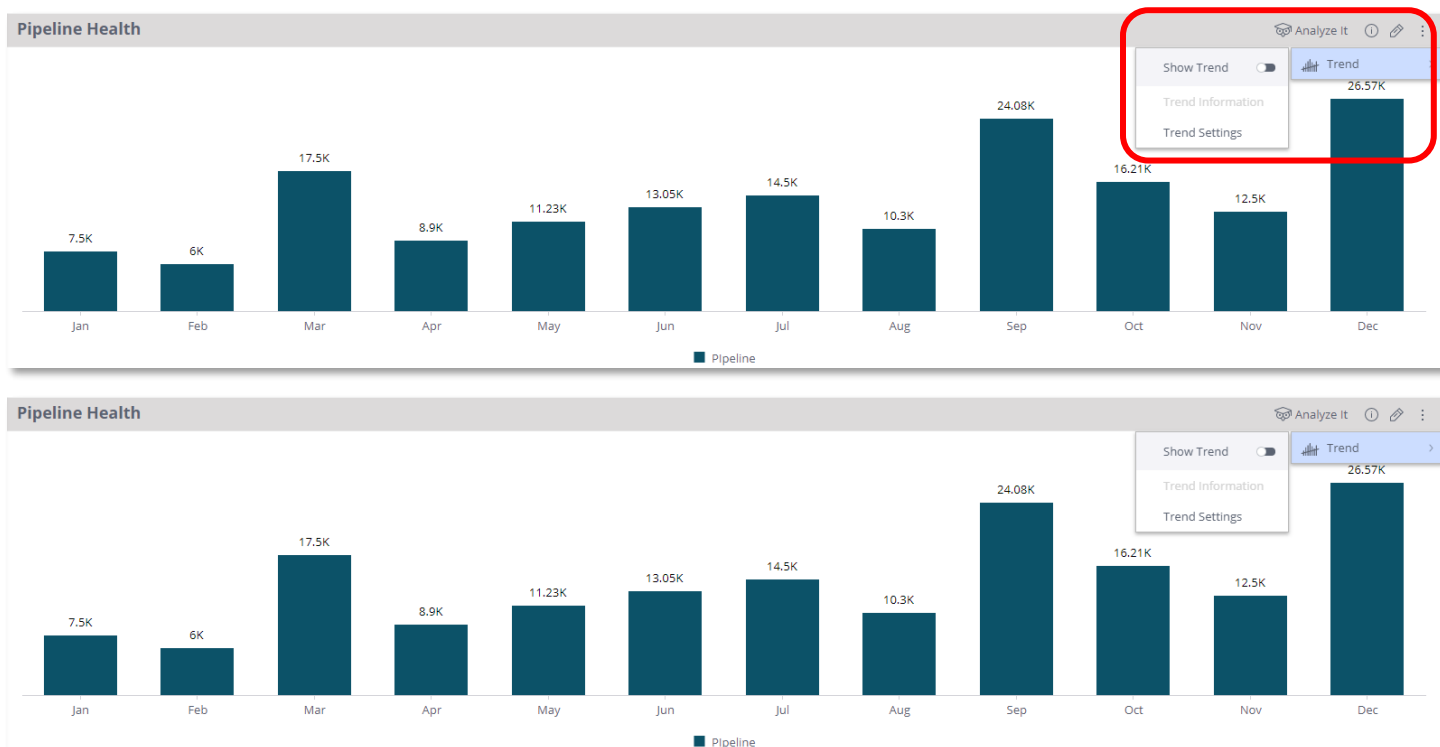
If you already have a funnel widget on a dashboard, you can easily transition to the new one. Go to the edit mode, to the top left corner of the Widget designer and select 'Funnel Chart' instead of 'Funnel' from the Visualization selector.



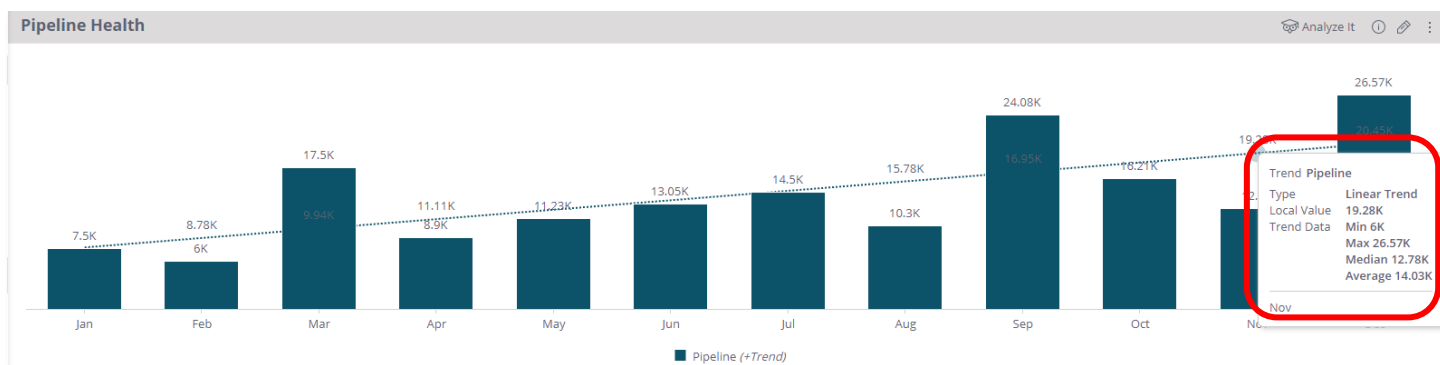
New Trend Line

Sometimes data fluctuates drastically, and it might be hard to assess if the numbers are trending upwards or downwards. Trend line makes it easier to visually evaluate your KPI trends.

To access this feature, click **Analyze It** in the top of the widget and then select **Trend**. If more than one value is displayed on the widget, choose the value to apply the trend line to.



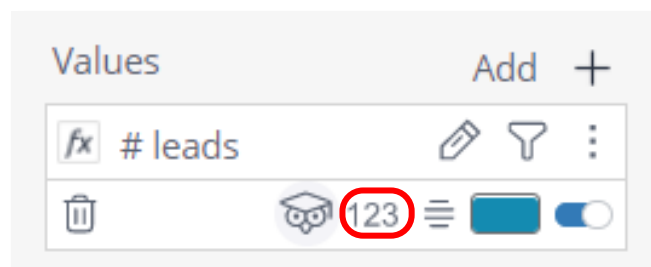
Dashboard Designers and Viewers can interact with this icon and add a trendline by toggling **Show Trend** on. You can even have quick overview of your chart when you hover over the trend line or go to **Trend details**:



After, the trend line is added to the widget. You can right-click on it to open the Quick Settings again and make changes if needed.

Dashboard designers can add trend line while working on a widget as well. Hover over the variable and click this icon:

By default, the linear trend is displayed, but you can change the type in the **Trend Settings**.





Note

If your data does not support a trend type, it will not be enabled.

Trend Settings Show Trend ☒

Trend Variable ⓘ

Pipeline

Trend Type ⓘ

Linear Trend Logarithmic Trend Advanced Smoothing Local Estimates

Applies a straight line to the data to show if the trend is increasing or decreasing at a steady rate.

Compare To Previous Year ⓘ ☐

Ignore Anomalies ⓘ ☐

Close

Four different trend types:

- **Linear Trend:** A linear trend line is a straight line that usually shows when values are increasing or decreasing at a steady rate.
- **Logarithmic Trend:** A logarithmic trend line is a best-fit curved line that is used when the rate of change in the data increases or decreases quickly and then levels out.
- **Exponential Smoothing:** An exponential trend line is a curved line that is most useful when data values rise or fall at increasingly higher rates. You cannot create an exponential trend line if your data contains zero or negative values.
- **Local Estimates:** Local Estimate models add trend lines according to the mean of a time series

In addition, from the **Trend Settings** window, you can:

- **Compare data to previous time periods:** Select to add another trend line based on data from the previous time-period, e.g. Previous Year, Previous Quarter, Previous Month.
- **Ignore anomalies:** Select to ignore data points that differ significantly from the majority of the data points, e.g., Sales peak on “Black Friday”. These points are replaced with the average of the two adjacent points (before and after the detected anomaly).

Note

- Only Cartesian charts are supported: Column, Line, Area, and Bar charts.
- Only time series with a single date dimension are supported.
- Trend line cannot be applied together with the ‘Break By’ feature.
- Exponential Smoothing and Local Estimates require at least 30 data points to run.
- Null values may disrupt the models' calculations.
- ‘Ignore Anomalies’ is not supported when the data is less than 7 points.



Schedule Email Reports for Monthly Reporting

Currently, Insights dashboards can be scheduled for email delivery on the daily or weekly basis.

From this release you can schedule less frequent reports to be delivered monthly.

By default, today's date will be suggested as a day of the monthly delivery, but you can easily adjust it in the settings below.

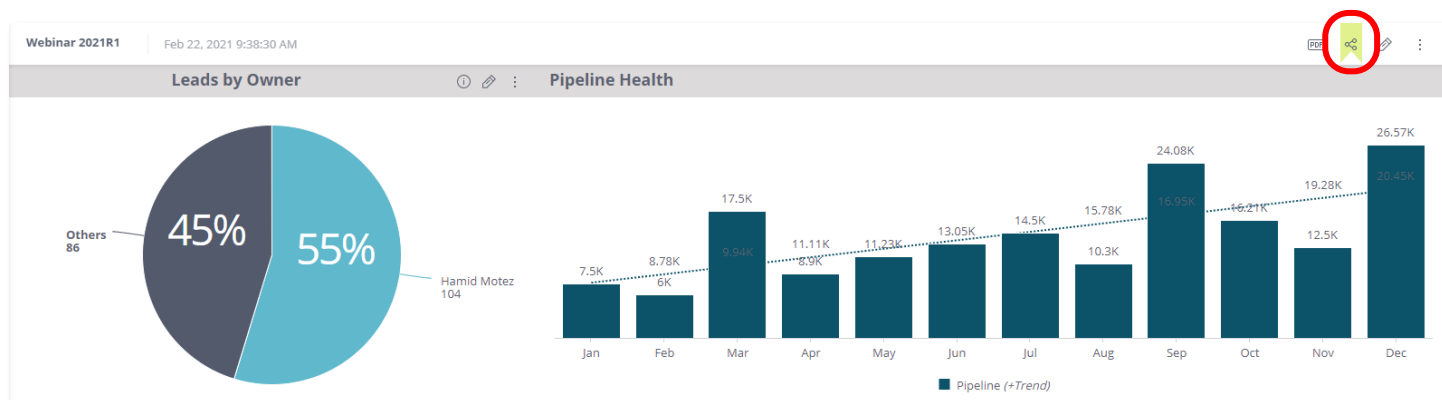
Furthermore, you can choose to send out reports on the multiple days.

The form is titled "Email reporting settings - Leads Demo". It has two tabs: "Email Report Format" and "Schedule". Under "Email Report Format", there are two checkboxes: "Embedded in Email" (checked) and "PDF Attachment" (unchecked). Under "Schedule", there is a "Time zone" dropdown set to "America/Vancouver...". There are three radio button options: "Every ElastiCube update. No more than 1 emails per day" (unchecked), "Daily: Every day at 12:00 AM Start on: Jan 26, 2021" (unchecked), and "Monthly: Every month on day 1 at 12:00 AM Start on: Jan 26, 2021" (checked and highlighted with a red box). At the bottom, there is a "Send me a report now" link, a "Save" button, and a "Cancel" button.

Pending Update

This new feature will help you to make sure that people who you shared your dashboard with will always see the latest version.

In case a dashboard is shared with other users and you did some updates, this light green icon will appear above the 'Share' button as a reminder that the changes you made are not published yet, i.e., they are not visible to the end user.





Integration

QuickBooks

The new QuickBooks integration is being developed by one of Maximizer partners in the EMEA region. This will be a paid integration that allows users to view information from QuickBooks in the Maximizer following tab for any given Address Book entry. More information on a full set of features will be provided once the app has been released to the App Directory. The release date will be communicated in the near future.

MailChimp Sync Engine Enhancements

A new updated MailChimp integration will be available soon after the 2021 R1 has been released. The new MailChimp integration update will provide users with an added ability to synchronize records from Maximizer to MailChimp, but not the other way around. Except for a contact's subscription status in MailChimp, none of the other fields from MailChimp will be updated in Maximizer. The new update will also provide the ability for the user to start/stop the sync service.

Deprecation

- Office 2010 will not be supported.
- Discontinued Insights features include forecasting add-on and save favorite formulas.
- Web search function (search menu > Web) has been discontinued.
- Draw a Map function has been discontinued. The intermedia dialog has been removed. Clicking the menu item will open Google Maps directly.

The following Cloud Elements based integrations have stopped working since January 15th, 2021:

- | | | |
|-------------|-------------------|----------------------|
| • Amazon S3 | • Google Calendar | • Marketo |
| • Box | • Google Drive | • Facebook Lead Ads. |
| • Dropbox | • Google People | • QuickBooks |
| • OneDrive | • Gravity Forms | • SharePoint |
| • Gmail | • HubSpot | • Twilio |



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