



# **New Features Guide 2021 R3**

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**MAXIMIZERC** CRM CLOUD

## Overview of Version 2021 R3

Maximizer CRM 2021 R3 introduces several new features described in this section.

### **i** *Note:*

The full set of instructions for using the new features is available in the **Maximizer CRM Cloud 2021 R3 User Guide**.

## Interactions help you better manage customer communication

Version 2021 R3 introduces Interactions, a new way to manage customer communication. Interactions represent instances of communication between a company and a customer or potential customer. In the CRM lifecycle, tracking interactions helps by providing additional details and context about a particular customer.

As an example, consider the following scenario. A potential customer recorded as an address book entry, establishes communication via Twitter. This in turn, leads to an in-person meeting eventually concluding at a sale. Using the Interactions feature, every communication instance with this customer is recorded.

The Interactions feature also introduces changes to the way calls are placed or received. When you place a call from the Actions panel or the details view of a lead, Maximizer CRM redirects you to the VOIP configured on your computer, while automatically tracking additional details related to the call. Similarly, when you receive a call, Maximizer CRM automatically starts tracking the duration of the call using the new Interactions feature. This ensures a seamless experience and makes the task of recording calls simpler to manage.

### **i** *Notes:*

- In previous releases, Maximizer CRM used **Notes** to add details related to customer interactions. Going ahead, **Interactions** will be used instead of **Notes** for this purpose.
- In previous releases, phone call entries were associated with **Subject** and **Result** fields that provided additional information related to the phone calls. With version 2021 R3, the **Subject** and **Result** fields available on the Interaction Log window will be used instead for this purpose.
- If you created phone notes previously, use **Note Conversion** to convert them to Interaction logs.
- This feature is also available in the Maximizer CRM Mobile App.

## Interactions Report offers additional customer insights

Version 2021 R3 introduces a new type of report, known as the Interactions Report, which contains the interactions that you track in a consolidated manner. The report serves as a valuable tool allowing you insight into details such as how actively your team members interact with customers, what are the most common results of these interactions, etcetera.

Like the other types of reports, the Interactions Report too, can be accessed from the following modules: Leads, Address Book, Opportunities, and Customer Service.

## Perform advanced searches in the Leads module

Maximizer CRM Cloud 2021 R3 introduces advanced search capabilities for the Leads module. You can now specify additional fields and parameters using which Maximizer CRM refines search results. Maximizer CRM supports complex queries using default fields as well as user-defined fields and presents results that are the most relevant to you.

The Advanced Search feature is simple to use. A series of qualifiers, filter operators, and fields can be used in conjunction with Boolean operators to build effective search queries. The experience is like using search engines, thereby making the Advanced Search feature a powerful tool capable of searching through large volumes of data.

Search operations can also be saved using the Save Search option. This way, complex search queries that need to be run frequently need not be constructed again and again.

## Perform a bulk archive operation of leads

Version 2021 R3 introduces the ability to archive multiple leads at one time. This way leads that you no longer need can be quickly cleared from the Leads list, so that the Leads list does not appear cluttered.

## Create your own unique campaign

Version 2021 R3 introduces a new type of campaign, which is generic in nature and can be customized for your specific business needs. Previously, Maximizer CRM only supported automated campaigns created using templates. An example of the new generic campaign is a pay-per-click campaign for driving traffic to your website.

The new generic campaign can be analysed for qualitative performance. You can determine the effectiveness of your campaign by tracking the number of leads arising from the campaign, as well as monitoring the conversion of these leads to opportunities. The generic campaigns can also be exported into reports for further analysis.

## Choose a Default Email for Your Account

Version 2021 R3 comes with the ability to choose a default email for your account. Maximizer CRM Cloud requires the **Email 1** field to be set to a unique email address. However, you can opt to set either **Email 1**, **Email 2**, or **Email 3** as the default “From” address. This is essential in scenarios where you share a common email with your team, and you require this email address to be the default from address.

## Other Improvements

Version 2021 R3 also introduces the following improvements:

- The character limit on the **Activity** field associated with hotlist tasks of **Action Plan** templates is now 9216 characters. Previously, it was only 255 characters.
- Users can now re-send the validation email at any time. In the releases predating 2021 R3, if an email was initially validated, and then followed by a subsequent validation of another email address, database administrators continued to receive email alerts for the old email address. This behaviour has now been fixed.
- The Insights module now comes with the following changes:
  - Create dashboards using the following new details related to opportunities:
    - The number of deals closed through partners
    - The number of deals closed without partner assistance
  - Analyze and identify the main competitors to whom you are losing deals
  - Analyze entries that are starred in the Address Book
  - Contact Position field is added to Insights
  - Leads security rules are available under Insights



# Contacting Support

If you have problems with or questions about Maximizer CRM or Maximizer CRM Cloud, contact the Maximizer Support team. To do that, you can use one of the following channels:

## Phone

- **North America:** 1-866-275-1254 (Monday through Friday, 5:00 AM to 7:30 PM, PST; Sunday 11:00 AM to 7:30 PM, PST)
- **Europe, Middle East, Africa:** +44 13 4476 6904 (Monday through Friday, 9.00 AM to 5.30 PM, GMT)
- **Australia & New Zealand:** + 61 2 9957 2011 (Monday through Friday, 5:00 AM to 7:30 PM, PST; Sunday 11:00 AM to 7:30 PM, PST)

## Email

Write to the support team at:

- **EMEA:** [techsupport@maximizer.co.uk](mailto:techsupport@maximizer.co.uk)
- **Rest of the world:** [support@maximizer.com](mailto:support@maximizer.com)

## Chat

The chat window can be accessed from within Maximizer CRM. Go to **Help Center > Support Chat**.