

User Guide 2021 R3

MAXIMIZERCRM CLOUD



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About This Guide

The *Maximizer CRM Cloud 2021 R3 User Guide* provides instructions for using the new features available as a part of the 2021 R3 release. This guide assumes that you have familiarity working with Maximizer CRM.

Who Should Read This Guide

The *Maximizer CRM Cloud 2021 R3 User Guide* is primarily intended for users that are responsible for overseeing end-to-end business workflows within Maximizer CRM.

Typographic Conventions

In this guide, you might encounter the following conventions:

Convention	Explanation
Note	Information, supplementary in nature, which must be highlighted. Notes usually appear in a green box.
Text appearing in bold	The names of menu items.
<u>Blue text</u>	A hyperlink to a section within this document or a Web site.



Interactions

Interactions are instances of communication between a company and a customer or potential customer. They can be of the following types: chat, phone call, in-person meeting, texts, and communication via social media (Twitter, WhatsApp, Facebook, LinkedIn).

The Interactions feature provides information related to a customer or a potential customer. Such information is often necessary for providing additional context that is typical to that customer. For example, interactions with an existing customer can include phone calls, topics discussed during those calls, as well as resulting action plans.

Note:

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.

Interactions can be logged and edited via the *Interactions* tab in the *Address Book* module the *Opportunities* module, the *Customer Service* module, and the *Hotlist* modules respectively.

The Interactions feature also supports the capability of placing calls directly from Maximizer CRM. Details related to the call, such as the duration of a call, can be included as call details.

Configuring Interaction System Fields

At the time of logging an interaction, you can specify the following details, collectively referred to as *System Fields*:

- Category: A distinct class to which interactions belong
- Result: The outcome of the interaction
- Type: The type of the interaction. The following types are available by default, and therefore, cannot be edited or deleted: Chat, Email, SMS, and Phone Call.

As a first step, add categories and results. You can also add additional interaction types to best match your business usecase.

Add a Category

- 1 Log on to Maximizer CRM.
- 2 Go to **Administration** > **Settings**.
- 3 Expand *Interactions*, and then expand *System Fields*.
- 4 Click **Category**.



teractions > System Fields > Category	
D ADD ITEM	
Accounting	۰ و
Build Relationship	۰ و
Lead Qualification	۰ و
Provide Help	۰ و
Sales Activity	۰ و
Service	۰ و
Urgent Issue	۰ ا

5 Click **ADD ITEM**.

6 In the text box that appears at the bottom of the list, type a name for the category, and click

SAVE.

Interactions > System Fields > Category	
O ADD ITEM	
Accounting	۲
Build Relationship	۲
Lead Qualification	۲
Provide Help	۲
Sales Activity	۲
Service	٠
Urgent Issue	۲
Very Urgent Issue	۲
Enter an item SAVE CANCEL	

The newly-added category is placed alphabetically in the list. Click the eye icon to show or hide it.

Edit a Category

- 1 Log on to Maximizer CRM.
- 2 Go to **Administration** > **Settings**.
- 3 Expand *Interactions*, and then expand *System Fields*.
- 4 Click the drop-down arrow next to a *Category* and click *Edit*.



Interactions > System Fields > Category	
© ADD ITEM	
Accounting	۲
Build Relationship	 ► Edit Im Delete
Lead Qualification	۲
Provide Help	۲
Sales Activity	۲
Service	۲
Urgent Issue	۲
Very Urgent Issue	۲

5 In the text box that appears in place of the category, type a name, and click **SAVE**.

Delete a Category

1 Note: You cannot delete a category that is used in an interaction.

- 1 Log on to Maximizer CRM.
- 2 Go to **Administration** > **Settings**.
- 3 Expand *Interactions*, and then expand *System Fields*.
- 4 Click **Category**.
- 5 Click the drop-down arrow next to a *Category* and click *Delete*.
- 6 On the confirmation message box, click **OK**.

Add a Result

1 Note: Follow this procedure for either of these scenarios:

- You want to add a **Result** value that will be applicable for all types of interactions
- You want to add a **Result** value that is only applicable for phone calls. In the earlier versions, a **Result** field was associated with a phone call entry upon hanging up the call. Starting with version 2021 R3, the **Result** values specific to phone calls are added in the same way as that of the **Result** values applicable to other types of interactions. At the time of creating an interaction of the type **Phone Call**, or at the time of making or receiving a call, you can choose a **Result** value as necessary.



- 1 Log on to Maximizer CRM.
- 2 Go to **Administration** > **Settings**.
- 3 Expand *Interactions*, and then expand *System Fields*.
- 4 Click **Result**.

_		
	Interactions > System Fields > Result	
	© ADD ITEM	
	Arranged interview	٠
	Arranged meeting	٠ 💌
	Away from desk	، ح
	Away from office	، ح
	Busy	، ح
	Call back	٠ 💌
	Closed	، ح
	Discussed opportunities	۰ 💌
	Followed up	۰ 💌
	Hostile	٠

- 5 Click **ADD ITEM**.
- 6 In the text box that appears at the bottom of the list, type a name for the result, and click

SAVE.

nteractions > System Fields > Result		
© ADD ITEM	÷	
Left message w/ receptionist	۲	•
Made appointment	۲	•
No answer	۲	•
No longer at this number	۲	•
On vacation	۲	•
Requested info	۲	•
Successful	۲	•
Voice mail - didn't leave msg	۲	•
Wrong number	۲	•
Enter an item SAVE CANCEL		

The newly-added result is placed alphabetically in the list. Click the eye icon to show or hide it.



Edit a Result

- 1 Log on to Maximizer CRM.
- 2 Go to **Administration** > **Settings**.
- 3 Expand *Interactions*, and then expand *System Fields*.
- 4 Click the drop-down arrow next to a *Result* and click *Edit*.

Interactions > System Fields > Result	
O ADD ITEM	~ 🔾
Left message w/ co-worker	۲
Left message w/ receptionist	۲
Made appointment	۲
No answer	۲
No longer at this number	
On vacation	Delete
Requested info	۲
Successful	۲
Voice mail - didn't leave msg	۲
Wrong number	۲

5 In the text box that appears in place of the result, type in a name, and click **SAVE**.

Delete a Result

() Note: You cannot delete a result that is used in an interaction.

- 1 Log on to Maximizer CRM.
- 2 Go to **Administration** > **Settings**.
- 3 Expand *Interactions*, and then expand *System Fields*.
- 4 Click **Result**.
- 5 Click the drop-down arrow next to a *Result* and click *Delete*.
- 6 On the confirmation message box, click **OK**.



Add a Type

- 1 Log on to Maximizer CRM.
- 2 Go to **Administration** > **Settings**.
- 3 Expand *Interactions*, and then expand *System Fields*.
- 4 Click **Type**.

Interactions > System Fields > Type	
O ADD TYPE	
🗭 Chat	۲
Coffee	۹۵ 💌
Email COMMNS SOON	۹۵ 💌
Facebook	۲
S In Person	۲
in Linkedin	۲
YI Lunch	۰ (
not bi	\$
C Phone Call	۲
Shane	۰ (
Press the eye icon to hide or show an interaction type. If a type is hidden, it will not be available in the dialog for logging an interactoin.	

5 Click **ADD TYPE**.

6 In the text box that appears at the bottom of the list, do the following:

Interactions > System Fields > Type	
O ADD TYPE	
S In Person	۲
in Linkedin	۲
Y Lunch	۲
not bi	1
📞 Phone Call	۲
Shane	۲
NS SMS	۲
Twitter	۲
(O) Whatsapp	۲
Enter a type	Bidirectional interaction (?) SAVE CANCEL



Field	Activity
Icon list	Select an icon for this type.
Text box	Type a name for the interaction type.
Bidirectional direction	Click this check box if you want to specify the type of the interaction as bidirectional. Once selected, this action cannot be undone.
	• Note: You can set the direction as either "incoming" or "outgoing" at the time of creating an interaction.

7 Click **SAVE**.

The newly-added type is placed alphabetically in the list. Click the eye icon to show or hide it.

Edit a Type

() Note: The types Phone Call, Email, SMS, and Chat are available as default types, and therefore, cannot be edited or deleted.

- 1 Log on to Maximizer CRM.
- 2 Go to **Administration** > **Settings**.
- 3 Expand *Interactions*, and then expand *System Fields*.
- 4 Click the drop-down arrow next to a *Type* and click *Edit*.



Interactions > System Fields > Type	
O ADD TYPE	
Facebook	٠
C In Person	
C Linkedin	Edit Delete
₩¶ Lunch	۰ (۲
not bi	\$ T
C Phone Call	٠
Shane	۰ (
🙊 SMS	٠
V Twitter	٠ (•
(S) Whatsapp	۰ (

5 Change the icon or the name of the type and click **SAVE**.

Delete a Type

1 Note: You cannot delete a type that is used in an interaction.

- 1 Log on to Maximizer CRM.
- 2 Go to **Administration** > **Settings**.
- 3 Expand *Interactions*, and then expand *System Fields*.
- 4 Click *Type*.
- 5 Click the drop-down arrow next to a *Type* and click *Delete*.
- 6 On the confirmation message box, click **OK**.



Logging an Interaction

Interactions are associated with *Address Book* entries, but can also be accessed from the following modules:

- Opportunities
- Customer Service
- Hotlist

Therefore, an interaction can be created from all these modules, as well as from the *Leads* module. At the time of creating an interaction, you can link it to an opportunity or a case. You can also create a related appointment or a hotlist task.

Note:

- The Interactions tab replaces the *Activities* tab in this release. However, the *Activities* tab is still available.
- To show or hide a tab, click the 🔁 icon next to the tabs, and in the **Customize your tabs** window, click the eye icon next to a tab to show or hide it.
- If you created phone notes previously, use *Note Conversion* to convert them to Interaction logs.

Create an interaction

- 1 Log on to Maximizer CRM.
- 2 Open the *Interaction Log* window by performing any of the following steps:
 - a. Under the *Interactions* tab in the *Address Book* module, the *Opportunities* module, the *Customer Service* module, or the *Hotlist* module, click the 🕜 icon in the right pane.
 - b. In the *Address Book* module, the *Opportunities* module, the *Customer Service* module, or the *Hotlist* module, click *Actions* > *Log an interaction*.
 - c. Select a lead, click + *ADD* in the *Interactions* panel, and from the list of options, click an interaction type except *Appointment* and *Task*.

• Note: The options Appointment and Task will create an appointment and a hotlist task respectively.



3 On the *Interaction Log* window, do the following:

Interaction L	og (Billie Holly)	- ×
SMS V Dutgoing V	(HH:MM:SS)	
Johnson, Edward - ABC Bike	Details:	turi con conte
Source (e.g phone number, URL, location)	lext Ed to schedule a meeting to review their	business needs.
*Date/Time:		
10/27/2021 12:35 PM		
*Subject:		
Arrange meeting 🔹		
Category:		
Build Relationship 🔹		
Result:		
Arranged meeting 🗸		
Full Access:		
Public 🗸		
Read Access:		
Public v		
🚔 🛞 🗂 🛇		
	SA	CANCEL

Field	Activity								
Interaction type list	Select the desired activity. If the interaction type is bi-								
	Activity Select the desired activity. If the interaction type is directional, another list will appear next to the interaction type list. From this list, select the direction of the communication, incoming or outgoing. In the duration picker box, enter the duration of the interaction in the HH:MM:SS format. If you select Phone Call in this list, the Source list changes to a combo box. You can either type a								
	interaction type list. From this list, select the direction								
	of the communication, incoming or outgoing.								
	In the <i>duration picker box</i> , enter the duration of this								
	In the <i>duration picker box</i> , enter the duration of this								
	interaction in the HH:MM:SS format.								
	interaction in the HH:MM:SS format.								
	In the <i>duration picker box</i> , enter the duration of this interaction in the HH:MM:SS format. If you select <i>Phone Call</i> in this list, the Source list changes to a combo box. You can either type a								
	In the <i>duration picker box</i> , enter the duration of this interaction in the HH:MM:SS format. If you select <i>Phone Call</i> in this list, the Source list changes to a combo box. You can either type a								
	phone number or select one from the available								
	options.								
Source	Enter a source of the interaction. For example, for a								
	phone call, type the phone number of the contact.								



Date/Time	Set a date and time for the interaction.
Subject	 From the list, select a subject, or add a new one. The subject represents the nature of the interaction. To odd a new subject: 1 From the subject list, click <i>Edit List</i>. 2 In the <i>Set Up Items</i> window, to add a new subject, click <i>ADD ITEM</i>. 3 In the text box that appears at the bottom of the list, type a name for the subject, and click <i>SAVE</i>. The newly-added subject is placed alphabetically in the list. 4 To sort the <i>Subject</i> list, drag an individual item, and drop it at an appropriate position. Click <i>SORT ITEMS</i> to make the sorting order alphabetical. 5 To hide or show a subject, click the eye icon next to it. 6 To delete a subject, dlick <i>Toelete</i>, and then click <i>Yes</i>. 7 Click <i>Close</i>.
Category	From the list, select an appropriate category. This list will contain categories that you added at the time of configuring Interactions.
Result	From the list, select an appropriate result. This list will contain results that you added at the time of configuring Interactions.



Full Access	Select the user or groups that will have full access to this interaction. To grant full access to everyone, select <i>Public</i> . If you set <i>Full Access</i> to <i>Public</i> , <i>Read</i> <i>Access</i> is automatically set to <i>Public</i> .
Read Access	Select the user or groups that will have read access to this interaction. To grant read access to everyone, select <i>Public</i> .
Details	Enter notes, if necessary.

() Note: You can either link an opportunity or a case to this interaction.

- 4 Link an opportunity:
 - a. Click the **Opportunities** icon.
 - b. On the *Select Entry* window, click an opportunity, and then click *OK*.
- 5 (If you choose to NOT link an opportunity) Link a case:
 - a. Click the Customer Service icon.
 - b. On the *Select Entry* window, click a case, and then click *OK*.
- 6 If required, <u>create an appointment</u> or a <u>hotlist task</u>.
- 7 Click **SAVE**.

Once created, the interaction will be added at the top of the Interactions list.

1 Note: The Show All check box lists interactions with all contacts that belong to the same company. Appointments and tasks associated with interactions are also listed under the **Interactions** tab.



You can use the search bar to search for an interaction of your interest.

To do that:

• Type a search keyword in the search bar. Once the interactions list is filtered, click the close button next to the search keyword to display the full list of interactions again.

Change the Status of a Task or Appointment

If you associate appointments and tasks with interactions, they will be listed under the Interactions tab, as well the Interactions widget along with the other interactions. After the appointments and tasks are completed, you can mark them as "complete" following the procedure below.

1 Ensure that the *Interactions* tab is open in the *Address Book*, *Opportunities*, *Customer*

Service, or the Hotlist module.

-OR-

Select a lead and open the *Interactions* panel of the lead.

- 2 Change the status of the appointment:
 - a. From the list of interactions, click the appointment you want to modify.
 - b. In the *Modify Appointment* window, select the *Complete* check box, and click *Save*.
- 3 Change the status of the task:
 - a. From the list of interactions, click the task you want to modify.
 - b. In the *Hotlist Task* window, select the *Completed* check box, and click *OK*.

For example, the highlighted task is marked as "Complete".

Jackson Beach C	n, Alastair Cycle and Sport 🎽 De	etails Interactions Co	ntacts History Custom Tab	Leads Opportunities
Sear	ch for interactions	🔍 🛛 🗹 Show All	TFilter Last 6 Months; filter	applied
≓	Туре	Date/Time \downarrow	Subject	Details
	Appointment	November 1, 2021	Monthly Review	
	🕏 Task	October 31, 2021	To-do - Prepare presentation	
*	📞 Phone Call	October 29, 2021 9:	Date confirmed	Alastair has confirmed th
	📞 Phone Call	October 29, 2021 9:	Schedule next on site visit	Call to schedule the on si
	🕑 Task	October 29, 2021	- To do-	
*)	🗩 SMS	October 28, 2021 1	Confirm meeting date	
۲	📞 Phone Call	October 28, 2021 1	Book a meeting	

Once a task or an appointment is marked as "Complete", its subject will appear with a strikethrough.



Filter the Interaction List

At any time, you can select a subset of the interactions list by using the filter option.

To do that:

- Ensure that the *Interactions* tab is open in the *Address Book*, *Opportunities*, *Customer Service*, or the *Hotlist module*.
- 2 Click the \mathbf{T} icon.

Date range:	All Dates	•		
User:	All Users	•		
Interaction types:				
Appointment	🗸 Chat		Coffee	
Facebook	History		🔽 In Person	
🗸 LinkedIn	🗸 Lunch		🗸 Phone Call	
🗸 Regular	SMS		🗸 Task	
V Twitter	Vhatsapp			

- 3 Enter a *Date range* for filtering the interactions.
- 4 In the *Users list*, select a user that created the interaction.
- 5 Select interaction types:
 - a. To include all the interactions, leave the *Interaction types* check box selected.
 - b. To include specific interactions, clear the *Interaction types* check box, and select the check boxes next to the interactions of your interest.
 - c. Click **OK**.

Edit an Interaction

1 Click an interaction listed under the Interactions tab in the *Address Book* module, the

Opportunities module, the *Customer Service* module, or the *Hotlist* module.

-OR-

Select a lead, go to the *Interactions* panel, click the drop-down arrow next to an interaction you want to edit, and click *Edit*.

2 On the *Interaction Log* window, <u>modify the interaction</u>, and save your changes.

• Note: If you click an appointment, the Modify Appointment window will open. If you click a task, the Hotlist Task window will open.



Make a Call

The Interactions feature supports making calls directly from Maximizer CRM. The call option on the Interactions Log window, opens the VOIP app that is configured on your computer. When a call is placed this way, the date and time of the call are automatically tracked, while the timer is used to record the duration. The following details can be added manually:

- The reason for making the call
- The outcome of the call

At the time of logging the outgoing call, Maximizer CRM saves the phone number, and not the VOIP string that you see in the Phone Number list. For example, if the display string is "3CX – (Main) 555-555-5555", Maximizer CRM will only save the phone number (Main) 555-555-5555.

(1) Note: In the earlier versions, the Subject and Result fields were associated with phone call entries. Starting with version 2021 R3, the Subject and Result fields available in the Interaction Log window, are used instead.

The **Subject** and **Result** associated with phone call entries created in the earlier releases will be available as the **Subject** and **Result** fields under the **Interactions** tab.

To make a call:

- 1 Log on to Maximizer CRM.
- 2 Open any module that has the Actions panel and click the make a call icon.

-OR-

Select a lead and click the phone number associated with the lead to place the call.

-OR-

Under *Address Book*, click a contact, and then click the call icon next to the contact's phone number under *Details*.

The *Interaction Log* window opens with interaction type selected to *Phone Call*, and the phone call direction set to *Outgoing*.

() Note: The interaction of the type **Phone Call** is configured to be bi-directional by default.



	Interaction Log (Billie Holly)	_ >
Cutgoing Outgoing	④ 00:01:20 (HH:MM:SS)	
Johnson, Edward - ABC Bike	Details:	
Phone Call - (Main) (778) 999-9999	 Call Ed to discuss the possibility to meet with all the 	
Date/Time:	shareholders.	
10/27/2021 12:31 PM		
*Subject:		
Arrange meeting	•	
Category:		
Sales Activity	•	
Result:		
	•	
Full Access:		
Public	•	
Read Access:		
Public	v	
🖻 💮 📛 🛇		
	SAVE	CANCEL

- 3 In the Phone number list, select a phone number that you want to dial.
- 4 Click the phone icon. This will open the VOIP app on your computer, and the call is started. For more information, see <u>this article</u>.
- 5 To start tracking the call, click the Play icon on the timer.
- 6 Once the call is completed, click the Stop icon on the timer.
- 7 Select the following: *Subject*, *Category*, and *Result*.
- 8 Enter notes if any, in the *Details* box.
- 9 Click **SAVE**.

() Note: The Date/Time field is set at the time the call starts. This field cannot be edited.

Receive a Call

The Interactions feature also supports the ability to receive calls using the VOIP app or a regular phone. When you receive a call this way, the date and time of the call are automatically tracked, while the timer is used to record the duration. The reason for making the call and the outcome are manually entered.

At the time of logging the incoming call, Maximizer CRM saves the phone number, and not the VOIP string that you see in the Phone Number list. For example, if the display string is "3CX – (Main) 555-555-5555", Maximizer CRM will only save the phone number (Main) 555-555-5555.



1 Note: In the earlier versions, the **Subject** and **Result** fields were associated with phone call entries. Starting with version 2021 R3, the **Subject** and **Result** fields available in the **Interaction Log** window, are used instead.

The **Subject** and **Result** associated with phone call entries created in the earlier releases will be available as the **Subject** and **Result** fields under the **Interactions** tab.

To receive a call:

- 1 Log on to Maximizer CRM.
- 2 When you receive a call (using a regular phone or a VOIP app) from a contact, search for this contact under the *Address Book* module.
- 3 In the *Actions* panel, click *Receive a Call*.

The *Interaction Log* window opens with interaction type selected to *Phone Call*, and the phone call direction to *Incoming*.

	Interac	ction Log (Lou Jones)	-
📞 Phone Call	Incoming	② 00:00:04 (HH:MM:SS)	
Zimmermann, Dre		Details:	
(Main) (777) 888-9212		•	
Date/Time:			
2021-10-20 11:18 PM			
*Subject:			
		•	
Category:			
		•	
Result:			
		•	
Full Access:			
Public		•	
Read Access:			
Public		v	
Ū	⊕ □		
		SAVE	CANCEL

- 4 In the Phone number list, select a phone number from which you will receive a call. When the call starts, the call timer starts automatically.
- 5 Once the call is completed, click the Stop icon on the timer.
- 6 Select the following: *Subject*, *Category*, and *Result*.
- 7 Enter notes if any, in the *Details* box.

• Note: The Date/Time field is set at the time the call starts. This field cannot be edited.



Convert Existing Phone Notes to Interaction Logs

The Interactions feature is intended to be used in place of Notes, which was used to track customer interactions up until the 2021 R2 release. If you created phone notes previously, follow this procedure to convert these notes to interaction logs.

To convert the notes:

- 1 Log on to Maximizer CRM.
- 2 Click Administration > Note Conversion.
- 3 Under Convert Notes to Interaction Logs, click CONVERT NOTES.

After the conversion starts, you can leave this page, and continue working in other parts of the application. When the conversion completes, the summary of the conversion will be displayed on this page.

Convert Notes to Interaction Logs Use Note Conversion to convert your incoming call notes and outgoing call notes to interaction logs. After they are converted, you can view the note history in the Interactions tab. To ensure that ALL the phone notes are converted, before you start the conversion, ensure that your user account has the Modify other users' private entries privilege. After you start the conversion, you can leave this page, and continue working in other parts of the application. When the conversion completes, the summary of the conversion will be displayed on this page. Phone notes have been converted on 24.11.2021 9:40

(f) Note: After the conversion completes, the notes are also retained in the Notes tab.



Interactions Report

The Interactions Report is a new type of report that contains interactions, and details related to them. Interactions reports can be customized to include details such as different types of interactions, opportunities, and cases by using filters and data grouping capabilities. To generate an Interactions report, specify a subset of the interactions by using users, interaction types, and the date as filters. The Interactions report can be exported to Excel or PDF format.

Generate Interactions report

- 1 Log on to Maximizer CRM.
- 2 In the *Address Book* module, the *Opportunities* module, or the *Customer Service* module,

click **Report** > **Interactions Report**. The **Interactions Report** window appears.

		Interactio	ns Report			
		Settings an	d Chart			Ŧ
Entries:	All entries	▼ Annointment		Summary		
Include:	Opportunities Customer Service	Chat				
Date:	Last 7 days	▼ In Person				
Users:	Select	Phone Call				
Interactions:	Select	SMS				
		RUN Whatsapp				
Show Details:	No					
Drag a column he	ader and drop it here to group by that column					
Туре :	Dire : Start Date ↓ : Subject	: Name	: Regarding	: Users	Result	: Completed :
4					_	•
	M					No items to display

3 Specify the subset of interactions that you want to include in the Interactions report by using the following filters:



Field	Activity
Entries	 All entries: To display the interactions associated with all the entries of the module from which you accessed the Interactions Report, select All entries. This is also the option that is selected by default. Selected entries: To display the interactions associated with the selected entries of the module from which you accessed the Interactions Report, choose this option. Note: This option does not work if the maximum number of entries is greater than 2000.
Include	 Select Opportunities to display interactions related to the Opportunity Objectives in the Regarding column. Select Customer Service to display interactions related to case numbers in the Regarding column. Note: These check boxes are only available if you access the Reports feature from the Address Book module.
Date	Choose one of the duration options from the Date list. To specify your own, select Custom from this list, and from the date pickers that appear, set your own duration, and click Apply . Default value: Last 7 days .



Users	Select the users whose interactions you want to include in the report. You can choose individual users, users belonging to teams, and Security Groups. By default, all the users are selected.
Interactions	Select the interaction types that you want to include in the report. By default, all the interactions are selected.
	• Note: The interaction types that are marked as visible (by using the show/hide button under Settings > Interactions > System Fields > Type) can be included in the Interactions report.

4 Click *RUN*. Under *Summary*, a graphical representation of the interactions is displayed. The chart is grouped by interactions type. For interactions such as appointments and tasks that haven been completed, and thus have a completion flag, the bar is broken by the completion status.

					Interactions	Rep	ort							×
					Settings and C	Chart								٣
									Summary					
Entries:	All entr	ries	•		Appointment		39							
Include:	🔽 Oppo	ortunities 🗹 Customer S	ervice		Chat	11								
Date	Last 9	0 davs	•		In Person	8								
Date.					Phone Call								138	
Users:	Antoni	o Matos +(4) 🔻			SMS	7								
Interactions:	Appoir	ntment +(6) 🔻			Task	1	4							
					Whatsapp 5									
			RUN				_ 0	Corr	pleted — Not Complet	ed				
Show Details: 🔘 🕅	No													
Drag a column head	der and dro	op it here to group by	that column											
Type : I	Dire	Start Date ↓ :	Subject	: Nam	ie	:	Regarding	:	Users	:	Result	:	Completed	:
 Appointm 		2021-10-22 12:0	Confirm meeting	Oliv	er, Sporty - James	0			Lou Jones					•
▶ Phone Call	Outgoing	2021-10-21 5:33	Call about a case	ABC	Bike		Case: HQ-00290, Shippi.		Billie Holly					
► Phone Call	Outgoing	2021-10-21 12:5	Long tap call	John	son, Ed - ABC Win	e			Lou Jones		Away from office			
Phone Call	Incomina	2021-10-21 12.4	Test subi	lohr	son Ed - ABC Win	e	Opportunity: New Oppo		Lou lones		Arranged meeting	3		-
H 4 1 2	3 4 5	6 1											1 - 40 of 223 i	tems

- 5 Sort the column entries by clicking the vertical ellipsis next to a column header and selecting either *Sort Ascending* or *Sort Descending*.
- 6 To show or hide columns, click the vertical ellipsis next to a column header, click **Columns**, and then select the column entries to include in the tabular report.
- 7 To reorder the columns, drag a column header, and drop it to the position of your choice.



					Interactions Re	eport							
					Settings and Cha	t							٣
Entries:	All entri	ies	¥		Appointment		7	Summary					=
Include:	🗹 Oppor	rtunities 🗹 Customer S	ervice		Chat	3							
Date:	Last 7 d	lays	•		Phone Call	4						23	
Users:	Lou Jor	nes 🔻			SMS 1 Task	2							
Interactions:	Appoint	tment +(6) ▼			Whatsapp 1								
			RUN				— Con	npleted — Not Completer	d				
Show Details:	No												
Drag a column hea	der and dro	p it here to group by t	hat column										
Type :	Dire	Start Date \downarrow 🛛 🗄	Subject	:	Name	Regarding	:	Users	:	Result	:	Completed	:
 Appointm 		2021-10-20 3:30	Hamid test		Oliver, Sporty - James O.			Lou Jones					
 Appointm 		2021-10-20 1:00	Hamid test 2		Oliver, Sporty - James O.			Lou Jones					
н (1) 2)	N											1 - 40 of 41 ite	ems

- 8 To see details for each interaction, expand the record by expanding the arrow icon next to the table entries.
- 9 Use the column headers to organize the report. To do that, drag a column header, and drop it in the row on the top. In this example, the column header "User" is used to group the items of the interactions report.

				Interacti	ons Report							×
				Settings a	nd Chart							*
							S	Summary				≡
Entries:	All entries	•		Appointment							18	
Include:	Opportunities 🗌 Custome	Service		In Person		5						
Date:	Last 30 days	•		SMS	1							
Users:	Select			Task			6					
Interactions:	Select			Whatsapp	1							
		RUN					- Complet	ed — Not Completed				
Show Details: No												
\uparrow Users \times												
Type :	Dire : Start Date 🕴	: Subject	:	Name	:	Regarding	:	Users	Result	:	Completed	
✓ Users: Billie Hol	ly (Count: 1)											
Appointm	2021-10-17 9	0 Meeting		Johnson, Edwar	rd - ABC			Billie Holly				
Discuss next	step											

10 You can also use more than one column header to organize the report. To do that, drag multiple column headers, one after the other, and drop them in the row on the top. In this example, the column headers "User" and "Result" are used to organize the report. The column header "User" (placed first in the row) becomes the top-level classification, while



the column header "Result" becomes the second level of classification.

Show D	etail:	S: Yes							
† Us	ers	× + Result ×							
		Start Date	Type I	Subject :	Name	Users :	Result 4	Regarding	IDentification
∦ Us	ers:	Lou Jones (Count: 166)							
4	Re	sult: Successful (Count:	2)						
		2021-10-19 1:58 PM	Phone Call	Conference call	Johnson, Ed - ABC Wine	Lou Jones	Successful		2009102513413885
		Discussed future cooper-	ation with the prospect. Ac	tion items: - send pricelist - se	end custom promo materials - prepare pre	sentation			
	4	2021-10-14 1:07 PM	In Person	coffee	Oliver, Sporty - James Oliver Inc	Lou Jones	Successful		1911202510272359
		Let's see what happens							
-	Re	sult: Left message on v	oice mail (Count: 1)						
		2021-10-7 8:48 PM	Phone Call	Incoming phone call	company 09	Lou Jones	Left message on voice mail		2109032504305394
	Re	sult: Followed up (Coun	t: 2)						
	4	2021-10-19 11:26 AM	Phone Call	contact dispute	Oliver. Sporty - James Oliver Inc	Lou Jones	Followed up	Opportunity: most recent opp	1911202510272359
		we talked about getting	another meeting together	with all stakeholders in order	to resolve contract dispute				
		2021-10-7 8:47 PM	Phone Call	Outgoing call	company 09	Lou Jones	Followed up		2109032504305394
	Re	sult: Discussed opportu	nities (Count: 2)						
	Re	sult: Call back (Count: 3	:)						
E									

11 To see the details for all interactions in the tabular representation, move the Details slider

to Yes.

Show Details: Yes									
† Users ×									
Type :	Direction :	Start Date 🕴 🕴 🗄	Subject :	Name :	Regarding :	Users :	Result	Completed	:
 Users: Anup Gup 	ta (Count: 1)								Â
 Users: Billie Holl 	y (Count: 2)								
✓ Users: Lou Jones	(Count: 169)								
 Phone Call 	Outgoing	2021-10-19 1:58 PM	Conference call	Johnson, Ed - ABC Wine		Lou Jones	Successful		
Discussed fut	ture cooperation w	ith the prospect. Action i	tems: - send pricelist - send	custom promo materials -	prepare presentati	on			
∡ Chat		2021-10-18 4:07 PM	interview	Oliver, Sporty - James		Lou Jones	Arranged intervi		
we talked a b	it								

12 Click the hamburger menu in the top-right corner, select *Export to Excel* or *Export to PDF*, and click *Export*.

		Interactions Report		×
		Settings and Chart		 Export to Excel
Entries:	All entries 🔹	Appointment 39	Summary	Export to PDF
Include:	🗹 Opportunities 🗹 Customer Service	Chat 11		
Date:	Last 90 days 🔹	In Person 8 Phone Call		138
Users:	Antonio Matos +(4) 🔻	SMS 7		
Interactions:	Appointment +(6) 💌	Task 14 Whatsapp 5		
	RUN	- 0	Completed Not Completed	1

The Interactions report is saved to your computer in the format you choose.



Improvements to the Leads Module

The 2021 R3 release introduces *the advanced search feature* for the Leads module. You can now specify additional fields as requirements for filtering search results. Maximizer CRM supports complex queries using default fields as well as user-defined fields, if they are of either of the following types: alphanumeric, numeric, table, and date.

Version 2021 R3 also supports **saved searches** that you can run at any time. Saved searches allow you to store the criteria for a search operation, which is helpful when the same complex search query might need to be created frequently.

Additionally, you can now archive leads that you no longer need so that the Leads list does not appear cluttered. Consider a scenario where you have multiple unqualified leads that make your Leads list cluttered. The capability of bulk archiving such leads allows you to quickly clear your Leads list in one single operation. When leads are archived, they are marked as inactive, but their records are associated, and the data are preserved.

Perform an advanced search

- 1 Log on to Maximizer CRM and click the *Leads* module.
- 2 In the top-right corner, click the hamburger menu, and click **Advanced Search**.
- 3 In the **Search for leads** pane that appears, select the fields in the search query by clicking

ADD FIELD(S).



4 On the **Select Fields** window, select as many fields as necessary, and click **OK**.

Select Field	×
Available fields:	
Search for fields	Q,
Lead Baic Fields Baic Company Congany Creation date Congany Creation date Congany Creation date Congany Minis Owner Partner Partn	4 ×
Show hidden fields OK CANCEL	



5 For each field that you selected, select a search filter. For example, for the "Company" field, from the available filters, the filter "Exactly matches" is selected.

arch for leads	:
+ ADD FIELD(S)	🖺 SAVE SEARCH 🔻
Company	۲
Exactly matches	•
Exactly matches	<u>^</u>
Does not exactly m	natch
Contains	
Starts with	
Ends with	
Does not contain	
Does not start with	۱ •
ast modified date	۲
Exactly matches	•
Today	•

- 6 Select the appropriate operator for the query:
- 7 To have the search results contain all the fields, select *Match all*. This will create a search query using the AND operator. Using the previous example, the search results will contain entries that contain the Company (that exactly matches the given phrase) AND the Last modified date (that exactly matches the given date). This is also the default selection.
- To have the search results contain at least one of the selected fields, select *Match one or more*. This will create a search query using the OR operator. Again, using the previous example, the search results will contain entries that contain either the Company (that exactly matches the given phrase) OR the Last modified date (that exactly matches the given date).
- 9 Click **SEARCH**. The search results are displayed on the **Leads** page.
- 10 To export the search results, go to the hamburger menu, and click *Export*. The search results are exported in the EXCEL format.



Create a saved search

- 1 Make sure you are logged on, and the *Leads* module is selected.
- 2 Perform steps 2 through 8 of the advanced search procedure.
- 3 In the **Search for leads** pane, click **SAVE SEARCH > Create a New Search**.

Search for leads	×
+ ADD FIELD(S)	🖺 SAVE SEARCH 🔻
First name	۲
Exactly matches	•
Ed	
	OR
Company	۲
Exactly matches	•
Hamilton	

4 In the *Saved Search Properties* window, provide the following:

() Note: Creator is set to the name of the user who creates this saved search.

Field	Activity
Name	Enter a name for this search.
Description	Enter an appropriate description for this search.
Full Access	Select the user or groups that will have full access to this saved search. To grant full access to everyone, select <i>Public</i> .
Read Access	Select the user or groups that will have read access to this saved search. To grant read access to everyone, select <i>Public</i> .

5 Click **SAVE** and then click **SEARCH**.

6 The search is saved, and the search results are displayed on the *Leads* page. The saved search is placed at the bottom of the Saved Search list in the Search for leads pane.

Search for leads	
Create a new search	
Use user-defined fields or a × combination of user-defined fields and basic fields to produce a custom list of leads.	
ADD FIELD(S) Saved Search	
My Searches 🔹	
ABC Wine Shop Search Catalaog New	

The saved search will be listed under *My searches* in the *Search for leads* pane.

Edit a saved search

- 1 Make sure you are logged on, and the *Leads* module is selected.
- 2 In the top-right corner, click the hamburger menu, and click **Advanced Search**.
- 3 In the **Search for leads** pane that appears, look for the saved search of your interest under **Saved Search**.
- 4 If necessary, use the drop-down list below **Saved Search**, and select **All Searches**. By default, you will only see the saved searches you created.
- 5 To edit the search, click the drop-down arrow next to the search, and click *View Details*.
- 6 <u>Update the search as necessary</u>.
- 7 Click SAVE SEARCH > Update the Saved Search.
- 8 Do one of the following:
 - a. To exit, click **Cancel**.
 - b. To run the updated search, click **SEARCH**. Export the search results if necessary.
- 9 To delete the search, click the drop-down arrow next to the search, and click *Delete*.

Archive leads

- 1 Make sure you are logged on, and the *Leads* module is selected.
- Ensure that the leads you want to archive are either *unqualified* or *active*. Maximizer CRM
 DOES NOT archive converted or previously archived leads.
- 3 Select the leads that you want to archive and click *Edit* in the top-right corner.



4 Click the *Field* box on the *Global Edit – Leads* window.

	Global Ed	lit - Leads	
Field ?	Rule?	Value(s) ?	
Pick a field	•	•	
O ADD ANOTHER			
Note			Body Details

5 In the *Select Field* window, click *Status*, and click *OK*. The Status field will allow you to archive the leads you selected.

vailable fields: Search for fields Lead Lead Abdrees	Q
Search for fields Lead Basic Fields Address	୍
Lead Basic Fields Address	
Basic Fields Address	
Address	
P Hudicou	
E Campaign	
1 Company	
KA Email Address	
🙀 First name	
1/A Last name	
Mr/Ms	
Owner	
Partner	
Phone 1	
Phone 2	
VA Position	
Process	
1/A Salutation	
Security	
I Stage	
I Status	
VA Website	
 User-Defined Fields 	
Status 🗙	
Show hidden fields	CANOFI

6 (*Optional*) Select other fields the values for which you want to replace.

3 Note: The values of the **Process** and **Stage** fields are not modified, even if you choose to change their value.

- For the *Status* field, ensure that the *Rule* list is set to *Replace*, and the *Value* list is set to
 Archived.
- 8 In the *Notes* box, enter your notes that describe this archival operation.



• Note: If you leave the Notes box blank, the leads you selected will not be archived.

- 9 Click the *Details* tab, and do the following:
 - a. Set *Full Access* to the user, or group that you want to grant full access to. To grant everyone full access, select *Public*.
 - b. Set *Read Access* to the user, or group that you want to grant read access to. To grant everyone read access, select *Public*.

• Note: If you set Full Access to Public, Read Access is automatically set to Public.

- 10 (*Optional*) Set the values for other fields that you selected.
- 11 Click **OK**.

The archival operation starts, and its progress is indicated by the progress bar that appears at the top of the Leads page.

Improvements to the Campaign Module

Version 2021 R3 introduces a new type of campaign that can be customized according to business needs. For example, you can now create a pay-per-click campaign for driving traffic to your website. Previously, Maximizer CRM only supported automated campaigns that were created using templates. The new type of campaign is generic in nature and can be used to track leads and opportunities. It can also be analyzed and presented in a report.

Add a Campaign

- 1 Log on to Maximizer CRM.
- 2 Click the **Campaigns** module.
- 3 On the menu bar, click *Edit* > *Add Campaign*. The *New Campaign* window appears.



4 Provide the following:

	New Campaign	×
*Name:		
2021 Fall Promotion		
Description:		
		11
Status:		
New		
*Start Date		
November 10, 2021		
End Date:		
Cost:		
Expected Revenue:		
	SAVE	CANCEL

Field	Activity				
Name	Enter a name for this campaign.				
Description	Enter a description for this campaign.				
Status	Select a status for this campaign. Choose one of the following: <i>New, Abandoned, Completed, In Progress,</i> and <i>Suspended</i> .				
Start Date	In the date picker, set the date when you want this campaign to start.				
End Date	In the date picker, set the date when you want this campaign to end.				
Cost	Set the expected cost for this campaign.				
Revenue	Enter a value representing the revenue this campaign is expected to generate.				

5 Click **SAVE**.



Link a Campaign to a Lead

Version 2021 R3 introduces the capability to link campaigns to leads. At the time of creating a lead, you can associate a campaign to it. If the lead is converted to an opportunity, the campaign will also be associated with the opportunity. This allows tracking of lead generation related to campaigns and provides an insight into the ROI of the campaigns.

To link a campaign to a lead:

- 1 Log on to Maximizer CRM.
- 2 Create a lead:
 - a. Click the *Leads* module.
 - b. Begin the procedure for <u>creating a lead</u>.
 - c. Select a campaign:
 - i. Locate the *Campaign* box and begin typing the name of the campaign.
 - ii. Select one from the list of matching results.
 - d. Save your changes.
- 3 Import a lead:
 - a. Ensure that you have a compatible file type that contains details related to leads.
 - Ensure that this file contains a field that can be mapped to "Campaign". For example, if you have an XLS file, make sure that it has a column that contains all the campaigns associated with the leads.
 - c. Go to Import > File Import (XLS, CSV, TAB etc).
 - Map the field representing campaigns with "Campaigns" at the time of <u>importing</u> <u>the leads</u>.



Changes to the Default Email Address of User Profiles

Version 2021 R3 introduces the capability of selecting an email address that will be used as a default "From" address for your account. To uniquely identify user profiles, Maximizer CRM Cloud requires *Email 1* associated with user accounts to be set to unique email addresses.

Consider a scenario where you share an email address with your team, and you want to have the same "From" address as your team while sending emails. This is where the capability to set a default "From" email address is helpful; you can continue to have a unique email associated with your account, while having emails sent from the same shared email.

Set the Default From Email Address

- 1 Log on to Maximizer CRM.
- 2 Click the user profile icon in the top-right corner.
- 3 Click *View profile*.
- 4 On the properties window, set **Default from email address** under **Email address / Website**

to *Email 1, Email 2*, or *Email 3*, depending on your needs.

Name		Phone numbers				
Display Name:	Lou Jones		1:	(555) 775-0987		
User ID:	MASTER		2:	(555) 775-0900	fax	
Mr. Lou	Initial Japan		3:			
Evotom Admini	atrotor	UPLOAD	4:			
System Admini Eccona Estate	Wines					
IT	US - East					
Main address			Email addr	ress / Website		
1344 Eastside Road		Email 1:	scottreau+master@g	im; Lou Jones		
			Email 2:	info@escona.com	Display name	
Petaluma	CA 94954		Email 3:	est@test.com		
USA			Website:	http://www.escona.co	om	
			Default fro	om email address: En	nail 1 🗸 🗸	

5 Click **OK**.



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**: <u>techsupport@maximizer.co.uk</u>
- Rest of the world: support@maximizer.com

Chat

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

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