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.
Blue text	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

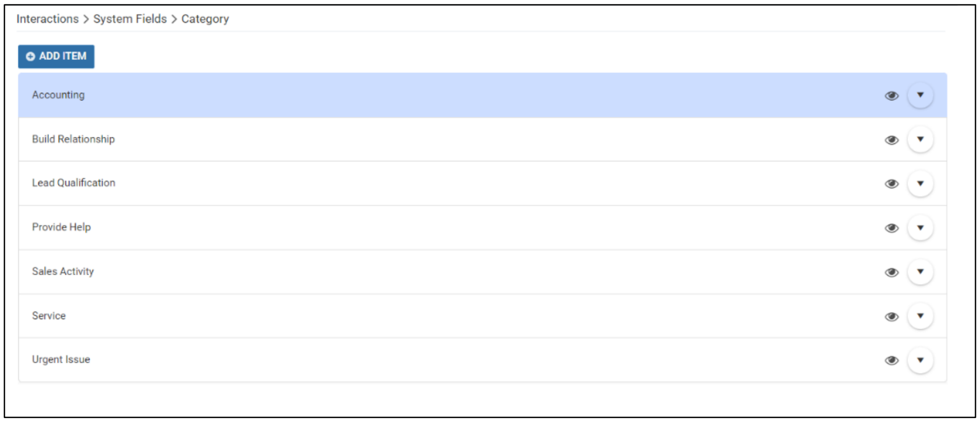
At the time of logging an interaction, you can specify the following details, collectively referred to as ***System Fields***:

- 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.

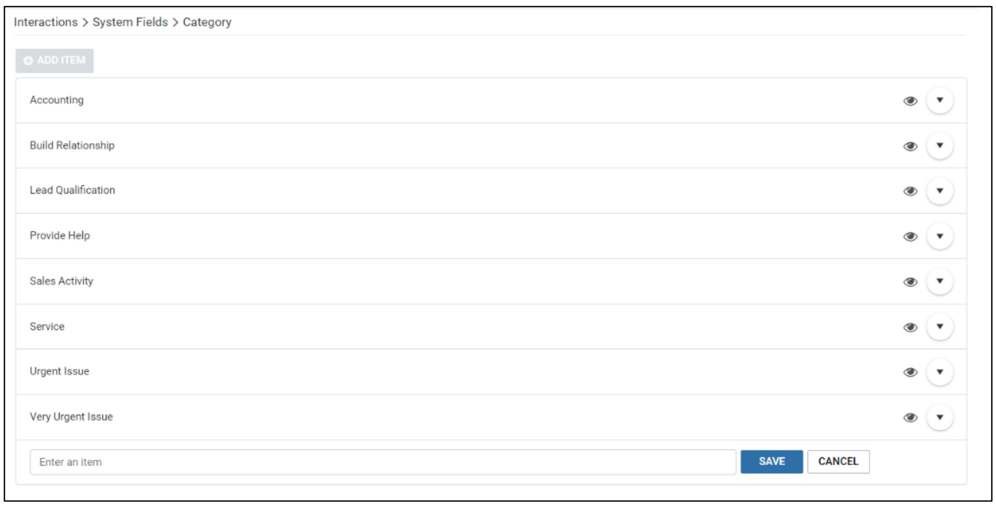
Add a Category

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



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***.



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

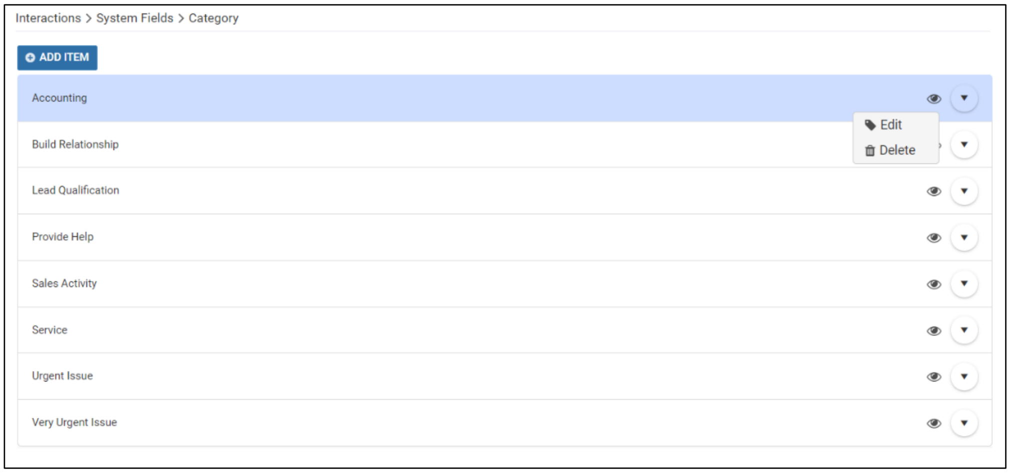
Edit a Category

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***.



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

Delete a Category

> **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

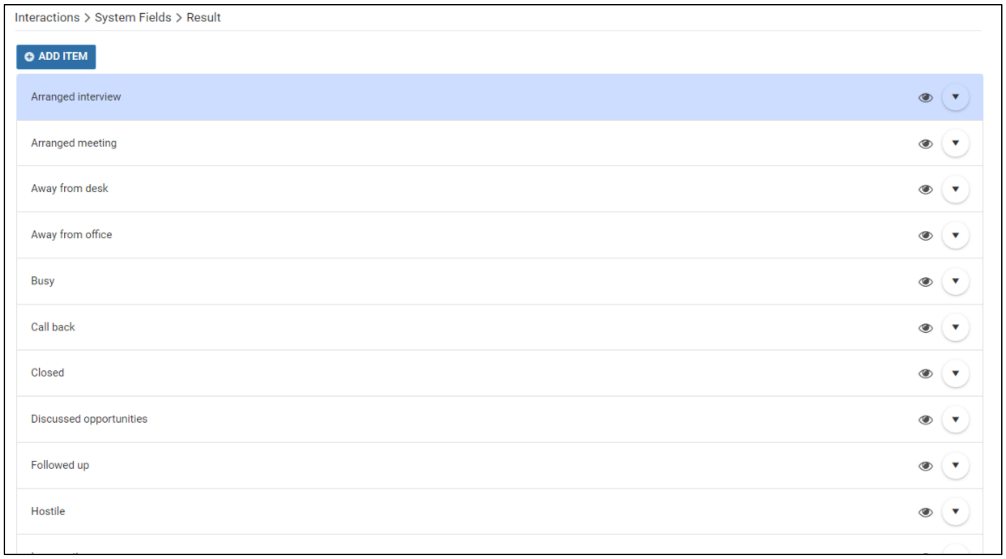
> **Note**: *Follow this procedure for either of these scenarios:*
>
> - *You want to add a* ***Result*** *value that will be applicable for all types of interactions*
> - *You want to add a* ***Result*** *value that is only applicable for phone calls. In the earlier versions, a* ***Result*** *field 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***.

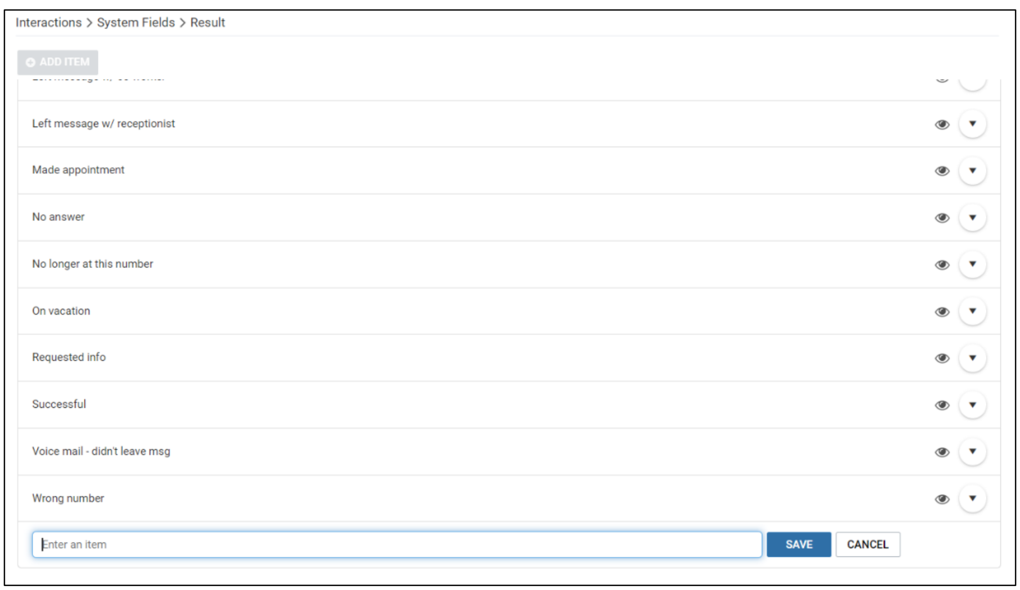
3 Expand ***Interactions***, and then expand ***System Fields***.

4 Click ***Result***.



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***.



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

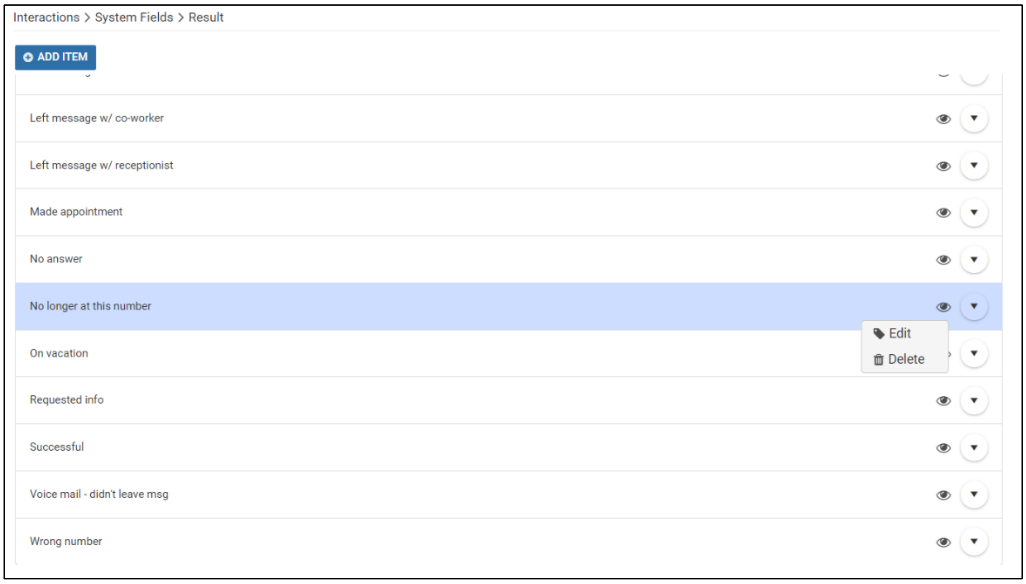
Edit a Result

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***.



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***.

5. Click ***ADD TYPE***.
6. In the text box that appears at the bottom of the list, do the following:

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

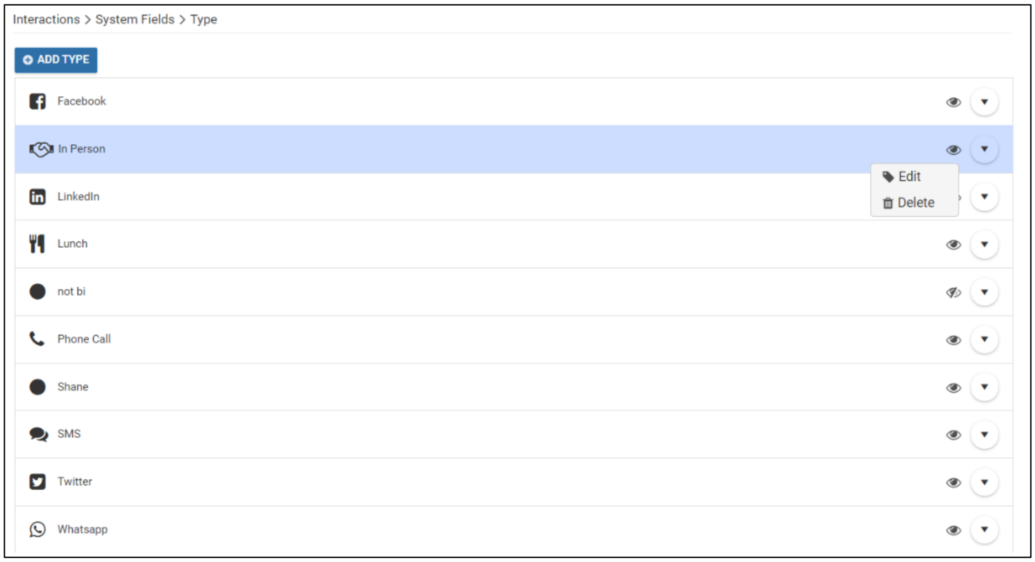
> ***Note**: The types **Phone Call**, **Email**, **SMS**, and **Chat** are available as default types, and therefore, cannot be edited or deleted.*

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***.



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

Delete a Type

> ***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:

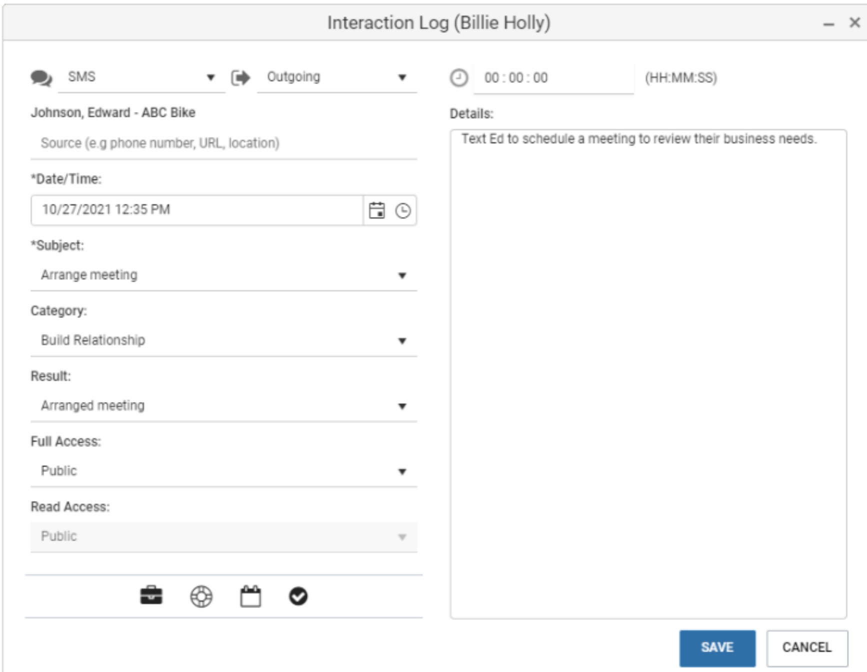
- The Interactions tab replaces the ***Activities*** tab in this release. However, the ***Activities*** tab is still available.
- To show or hide a tab, click the icon next to the tabs, and in the ***Customize your tabs*** window, click the eye icon next to a tab to show or hide it.
- If you created 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:



Field	***Activity***
Interaction type list	Select the desired activity. If the interaction type is bi-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 this 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 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 add a new subject: 1 From the subject list, click ***Edit List***. 2 In the ***Set Up Items*** window, to add a new subject, click ***ADD ITEM***. 3 In the text box that appears at the bottom of the list, type a name for the subject, and click ***SAVE***. The newly-added subject is placed alphabetically in the list. 4 To sort the ***Subject*** list, drag an individual item, and drop it at an appropriate position. Click ***SORT ITEMS*** 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, click the drop-down arrow next to a subject, click ***Delete***, and then click ***Yes***. 7 Click ***Close***.
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 ***Public***. If you set ***Full Access*** to ***Public***, ***Read Access*** is automatically set to ***Public***.
Read Access	Select the user or groups that will have read access to this interaction. To grant read access to everyone, select ***Public***.
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, create an appointment or a hotlist task.

7 Click ***SAVE***.

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

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.

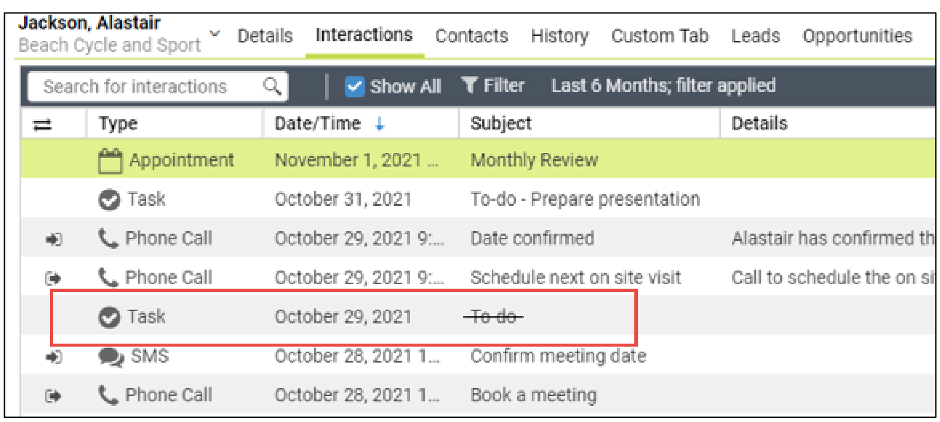
b. In the ***Modify Appointment*** window, select the ***Complete*** check box, and click ***Save***.

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”.



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

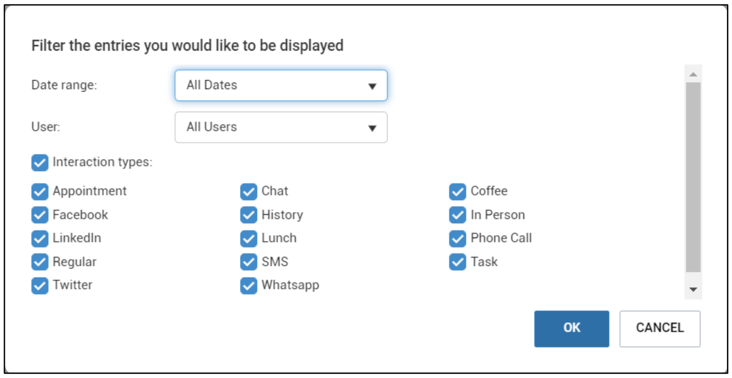
Filter the Interaction List

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

To do that:

1 Ensure that the ***Interactions*** tab is open in the ***Address Book***, ***Opportunities***, ***Customer Service***, or the ***Hotlist module.***

2 Click the icon.



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, modify the interaction, 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.

> ***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-

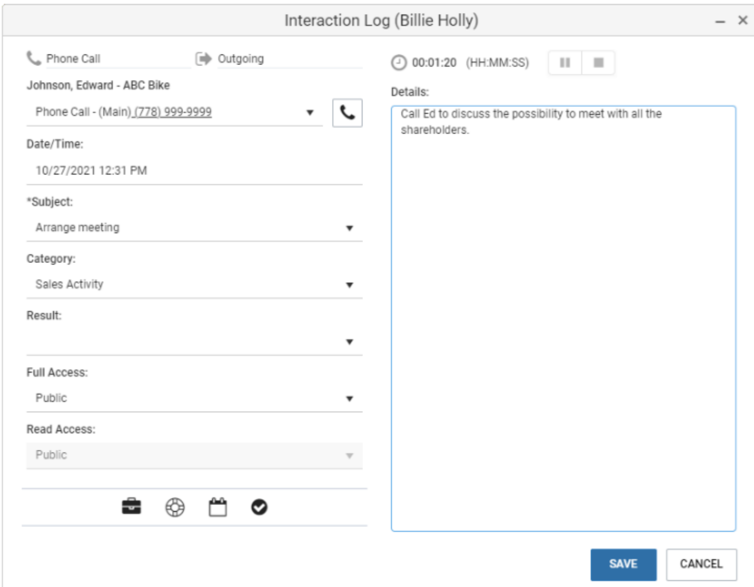
   Select a lead and click the phone number associated with the lead to place the call.

   -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.*



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 this article.

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.

> ***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.*

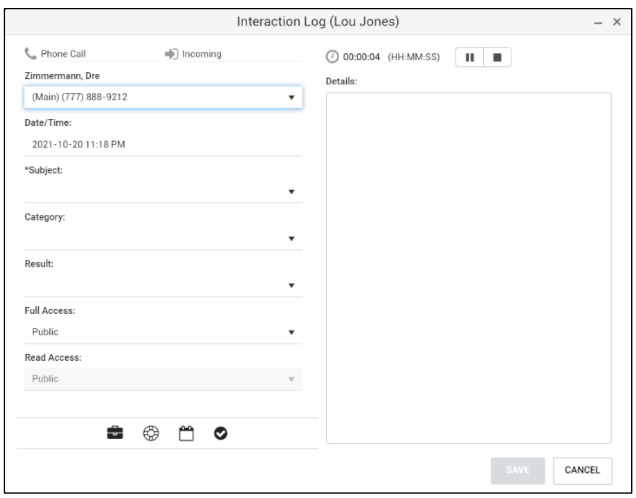
To receive a call:

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***.



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.

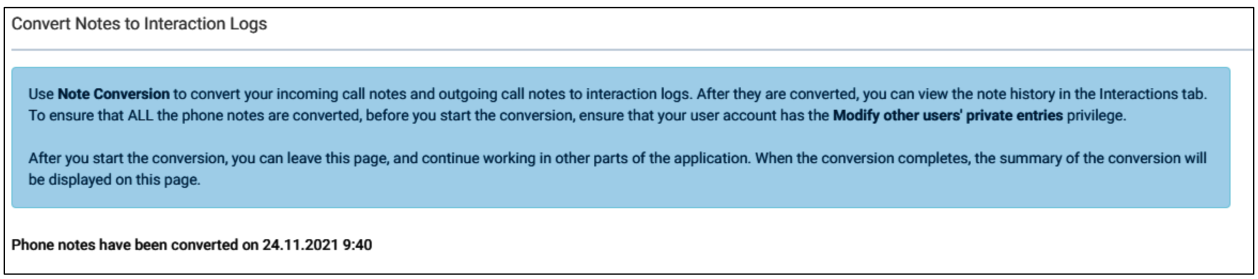
To convert the notes:

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.



***Note**: After the conversion completes, the notes are also retained in the **Notes** tab.*

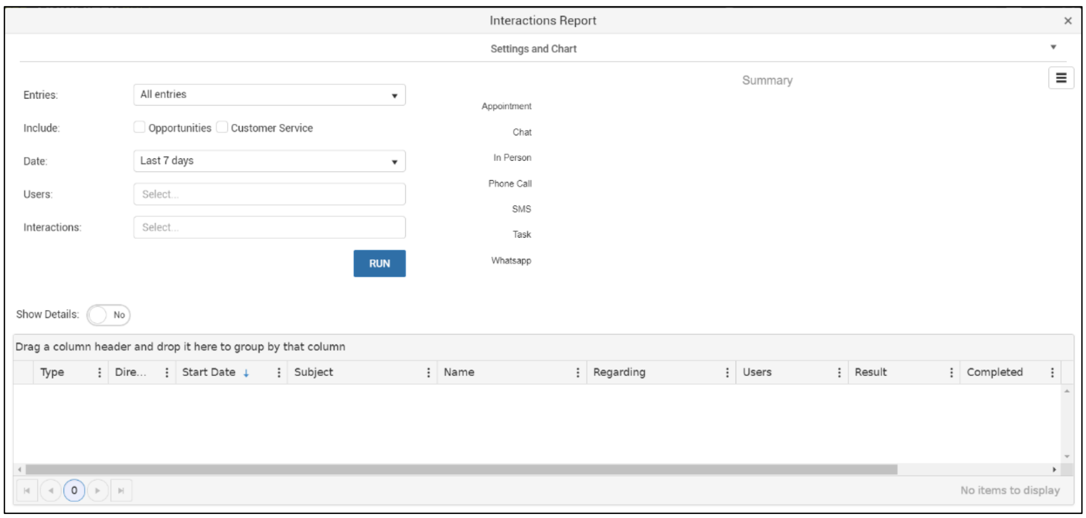
Interactions Report

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.

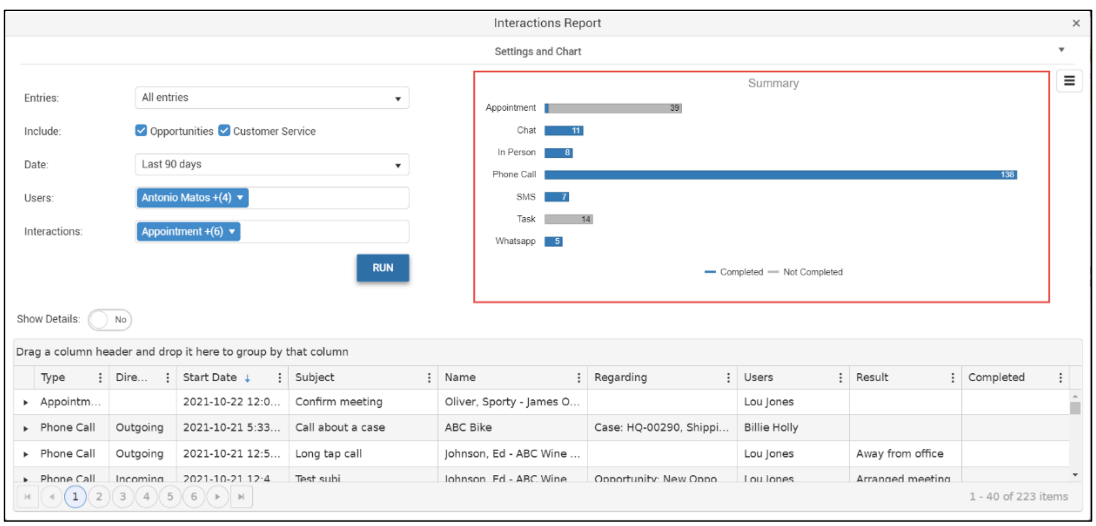


3 Specify the subset of interactions that you want to include in the Interactions report by using the following filters:

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.*

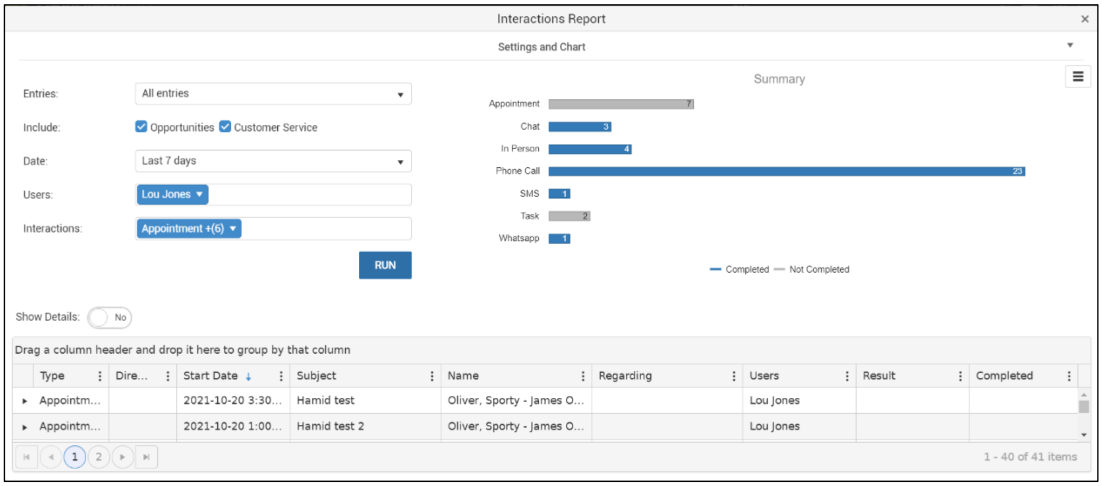
4 Click ***RUN***. Under ***Summary***, a graphical representation of the interactions is displayed. The chart is grouped by interactions type. For interactions such as appointments and tasks that haven been completed, and thus have a completion flag, the bar is broken by the completion status.



5 Sort the column entries by clicking the vertical ellipsis next to a column header and selecting either ***Sort Ascending*** or ***Sort Descending***.

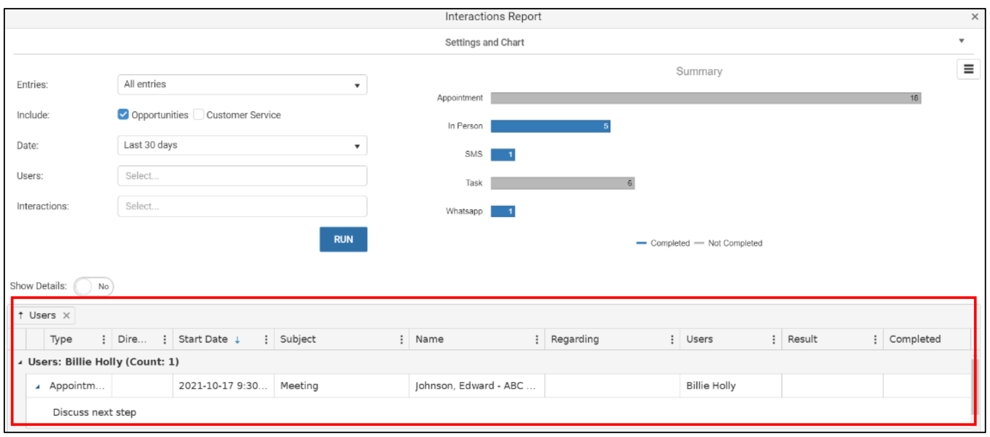
6 To show or hide columns, click the vertical ellipsis next to a column header, click ***Columns***, and then select the column entries to include in the tabular report.

7 To reorder the columns, drag a column header, and drop it to the position of your choice.



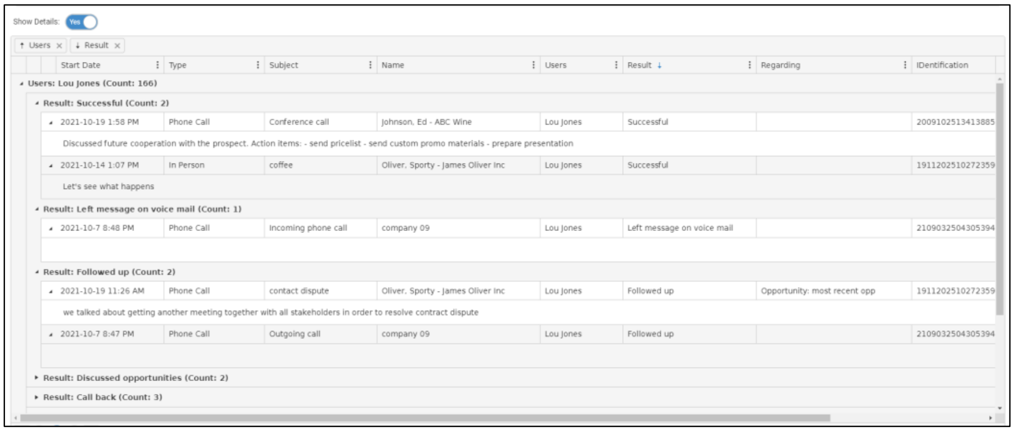
8 To see details for each interaction, expand the record by expanding the arrow icon next to the table entries.

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.



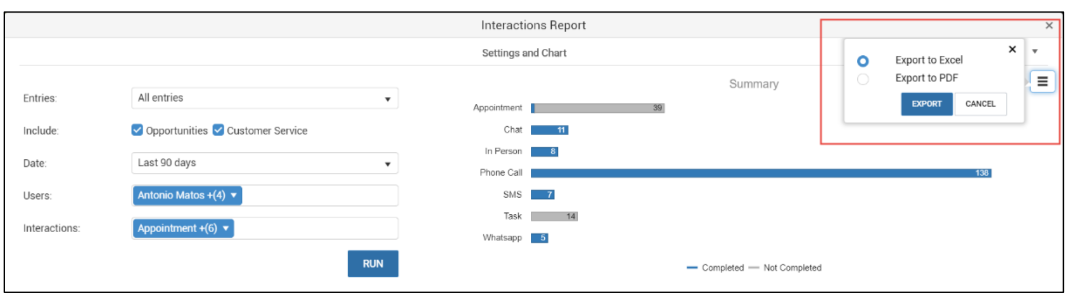
10 You can also use more than one column header to organize the report. To do that, drag multiple column headers, one after the other, and drop them in the row on the top. In this example, the column headers "User" and "Result" are used to organize the report. The column header "User" (placed first in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

the column header “Result” becomes the second level of classification.



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

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



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.

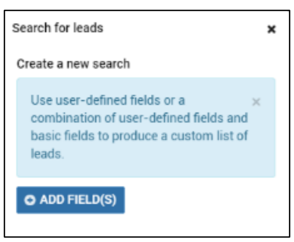
Additionally, you can now archive leads that you no longer need so that the Leads list does not appear cluttered. Consider a scenario where you have multiple unqualified leads that make your Leads list cluttered. The capability of bulk archiving such leads allows you to quickly clear your Leads list 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

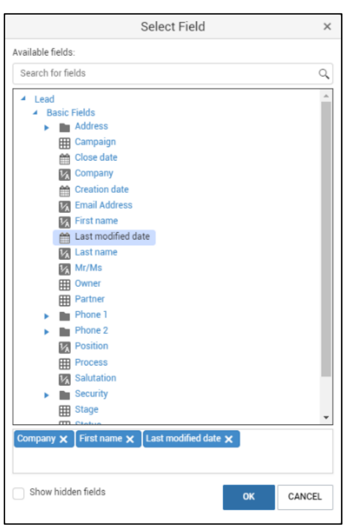
1 Log on to Maximizer CRM and click the ***Leads*** module.

2 In the top-right corner, click the hamburger menu, and click ***Advanced Search***.

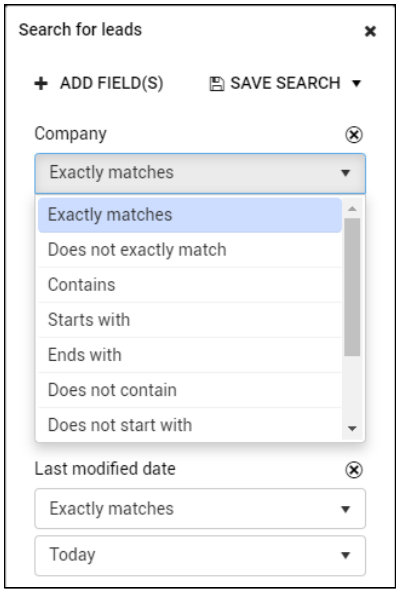
3 In the ***Search for leads*** pane that appears, select the fields in the search query by clicking ⊕ ***ADD FIELD(S)***.



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



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.



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.

8 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.

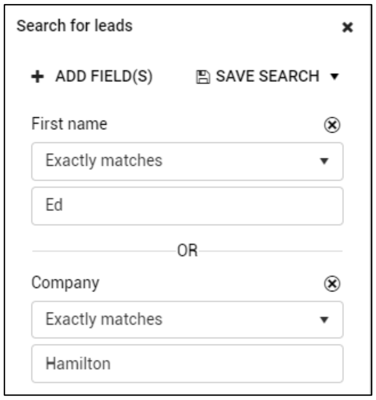
10 To export the search results, go to the hamburger menu, and click ***Export***. The search results are exported in the EXCEL format.

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***.



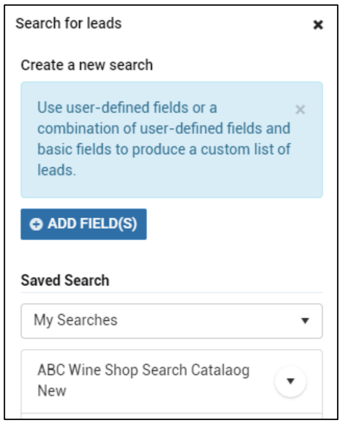
4 In the ***Saved Search Properties*** window, provide the following:

> ***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 ***Public***.
Read Access	Select the user or groups that will have read access to this saved search. To grant read access to everyone, select ***Public***.

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.



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 Update the search as necessary.

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***.

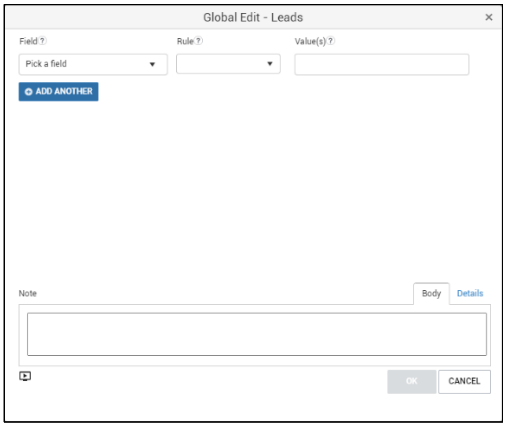
Archive leads

1 Make sure you are logged on, and the ***Leads*** module is selected.

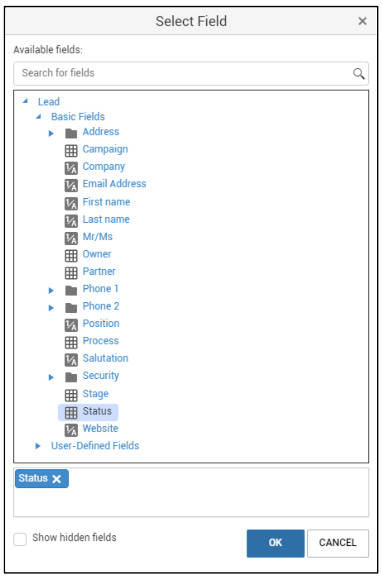
2 Ensure that the leads you want to archive are either ***unqualified*** or ***active***. Maximizer CRM DOES NOT archive converted or previously archived leads.

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.



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



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

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

7 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.

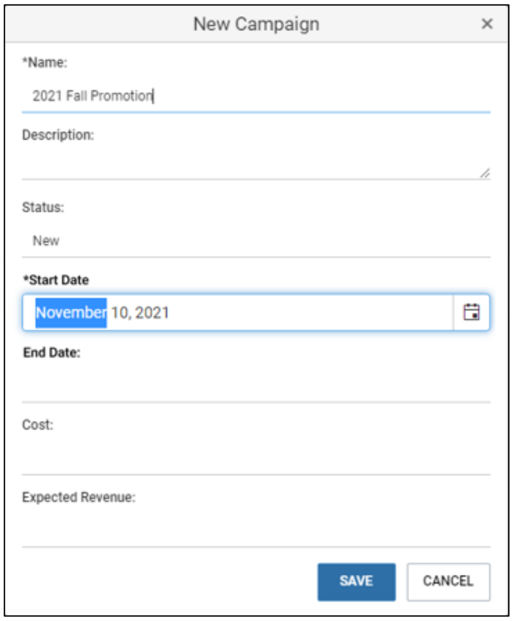
Add a Campaign

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:



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: ***New***, ***Abandoned***, ***Completed***, ***In Progress***, and ***Suspended***.
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 creating a lead.
   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.
   b. 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)***.
   d. Map the field representing campaigns with "Campaigns" at the time of importing the leads.

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.

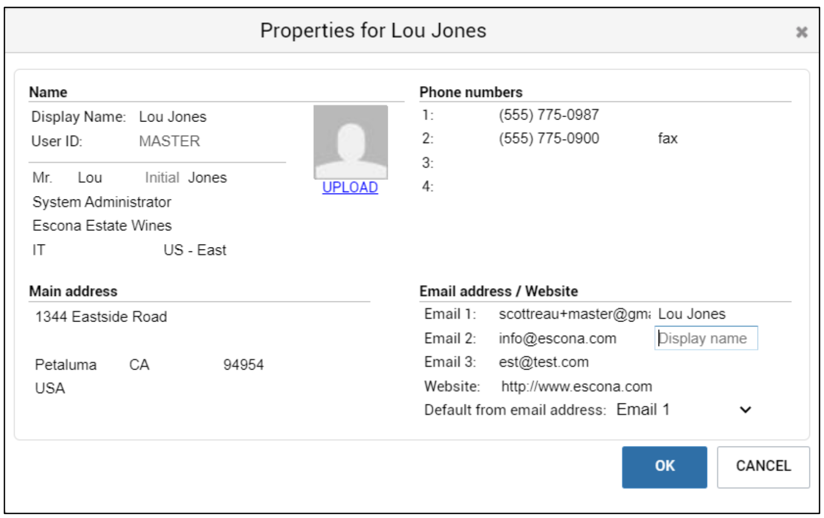
Set the Default From Email Address

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.



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***: techsupport@maximizer.co.uk
- ***Rest of the world***: support@maximizer.com

Chat

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