

Overview

Welcome to the Spring 2022 release! This release introduces several improvements and changes to enhance your Maximizer experience!

Improvements to the Interactions feature

- Emails are now categorized as interactions, and are available under the Interactions tab, or the Interactions Widget, and not under the Documents tab and widget. This logical grouping makes it simpler to access all types of interactions, including emails, from a single place. To account for this change, the procedure for composing emails has changed to include specifying four fields related to Interactions – Category, Result, Full Access, and Read Access.
- You can now set default values for interactions as well as emails. Default entries represent the shared values of the fields across multiple interactions or emails. For example, The Subject and Result value might be the same for all the interactions, and therefore, specifying these values as “default values” saves time in creating interactions. Similarly, the default value for “Full Access” might be the same for all emails, and therefore, specifying it beforehand saves times in composing emails.
- Default and custom interaction types can now be added to an existing Interactions list from under the Interactions tab. A new Add button is available under the Interactions tab, using which you can quickly add a new interaction. Similarly, interactions that are not required anymore can be deleted from the Interactions tab. A new Delete button is available under the Interactions tab for this purpose.
- You can choose to display additional details related to interactions. This can be done by selecting additional columns under the Interactions tab. The columns can be re-ordered using the drag-and-drop feature, and the interactions list can be sorted in an ascending or a descending order.

Additional Interactions Report

- Maximizer CRM supports two types of Interactions report – the Consolidated Interactions report and the module-specific Interactions report. The Consolidated Interactions Report is available in Address Book, Opportunities, Customer Service, Leads and Hotlist, and reports the interactions of users. On the other hand, module-specific interactions reports contain details related to interactions associated with a module. The following module-specific interactions reports are available: Address Book Interactions Report, Opportunities Interactions Report, Customer Service Interactions Report, and Leads Interactions Report. These reports are for the interactions with the entries in the respective module.

- In both types of the Interactions Report, two additional details have been added -- duration of phone calls and the duration of all interactions. Previously, the duration of incoming and outgoing calls was available in the Incoming vs Outgoing Call report.

Changes to Hotlist Tasks & Appointments

Two new fields related to Interactions -- Category and Result -- are added to the **Hotlist Task** and **Appointment** windows respectively. These fields together help associate appointments and tasks with interactions. This allows the tasks and appointments to be accessed from a single place and can also be effectively represented in the Interactions report.

Accessibility of the Address Book

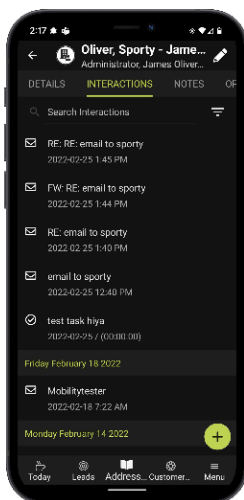
This release introduces additional accessibility support for Maximizer Web Access. The Details tab now works with screen readers in the edit mode.

Advanced Search Using Interactions as Qualifiers

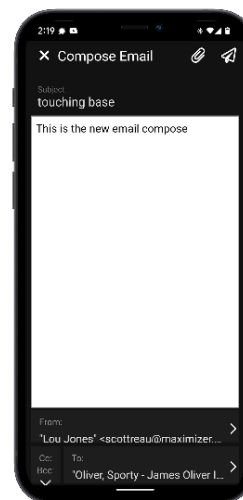
You can now search records from the following modules using interactions as search qualifiers: Address Book, Leads, Opportunities, and Customer Service. Using a combination of the interactions fields, you can create complex search queries to filter the records. Saving the search queries allows you to store the criteria for a search operation, which is helpful when the same complex search query might need to be created frequently.

Changes to the Mobile App

The following features and changes are added to the mobile app:



Emails are displayed under **Interactions**.



The email composer has a new look.

The other changes to the mobile app are as follows:

- Previously, in the saved search results, the description was a single line field. The Description field is now a multiline text field, and displays the following behaviours:
 - At the time of viewing the search result, opens as a pop-up box with description
 - At the time of editing a saved search, functions as a full text editor
- In addition to being automatically updated, the saved search list can also be manually updated. To do this, refresh the saved search list by pulling it down.

Other Changes

- The History tab is no longer available. Instead, the Interactions tab and the Notes tab will together be used to track notes, communication, and activities.
- The Add Hotlist Task window has a new interface. Additionally, two new fields -- Category, and Result -- are now available on this window. These fields allow for tasks to be categorized as interactions.
- The following reports are no longer supported: Consolidated Activities Report and Incoming vs Outgoing Call Report.
- Phone logs are no longer supported. If you added phone notes in a previous release, convert them to interactions logs.
- Phone notes, email notes, and activity notes will not be generated. The related preference settings have been removed.
- Recurring appointments can now be added by skipping weeks. For example, an appointment can be added for every other week or every third week.
- You can now search entries by interaction in the Quick Search bar.



Contacting Support

If you have problems or questions, contact the Maximizer Support team. To do that, 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**.