

# Questions and Answers

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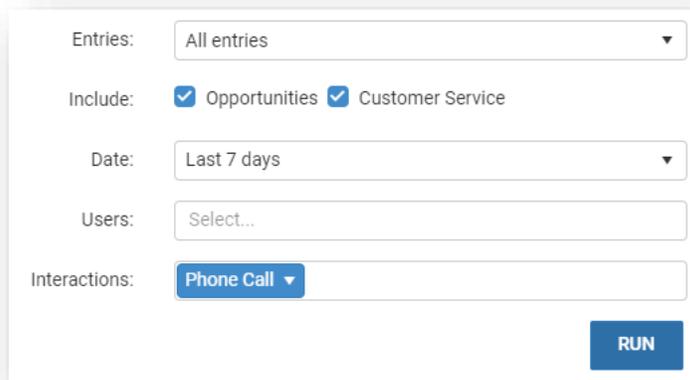
**MAXIMIZER**CRM 2022 R1

## How to create a phone call report?

**Question:** The Incoming vs Outgoing Call report has been discontinued in 2022 R1 release. How can I create a phone call report that shows the performance of my team members?

**Answer:** You can create a phone call report using the Interactions Report.

1. Go to Reports menu in Address Book, Opportunities, Customer Service or Hotlist module and click Consolidated Interactions Report.
2. Specify the search criteria for the report.
  - Select the desired date range.
  - Select the users for the report. If you do not select any users, the report will include all users.
  - In the Interactions field, select Phone Call.
  - Click RUN button to generate the report.



Entries: All entries

Include:  Opportunities  Customer Service

Date: Last 7 days

Users: Select...

Interactions: Phone Call

RUN

3. The phone calls will be displayed in the report.
4. Make sure the Duration field has been added into the column view.

Drag a column header and drop it here to group by that column

Type	Dire...	Start Date ↓	Subject	Name	Duration	Users
▶ Phone Call	Incoming	5/11/2022 10:16...	Need more product info...	📖 Sporty, Oliver - Jame...	2 minutes	Lou Jones
▶ Phone Call	Incoming	5/11/2022 10:15...	Confirm appointment	📖 Sporty, Oliver - Jame...	5 minutes	Lou Jones
▶ Phone Call	Incoming	5/10/2022 11:39...	Payment request	📖 Kline, Winifred - All T...	5 minutes	Billie Holly
▶ Phone Call	Incoming	5/10/2022 11:36...	Confirm deadline	📖 Johnson, Edward - A...	3 hours 20 minu...	Billie Holly
▶ Phone Call	Outgoing	5/10/2022 11:32...	Follow-up	📖 Johnson, Edward - A...	1 hour 40 minutes	Billie Holly
▶ Phone Call	Incoming	5/10/2022 11:31...	Arrange meeting	📖 Anderson, Bill - ABC ...	1 hour 40 minutes	Billie Holly
▶ Phone Call	Outgoing	5/10/2022 11:28...	Conference call	📖 Anderson, Bill - ABC ...	1 minute 57 sec...	Billie Holly

**Note:** If you do not see the Duration field in the column view, click the button with three dots to open the menu and click Columns. In the field selection pop-up, check the Duration field.

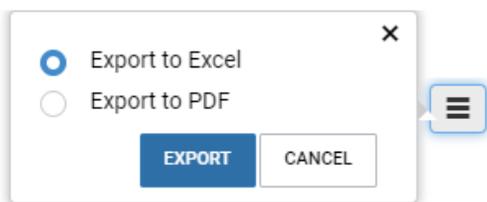
- Group the interactions by User and Direction by dragging the fields into the header bar.
- The count of the phone calls and the total duration will be displayed in each group. Expand the group to see the details. You will see how many calls each user made, the total duration of incoming calls vs outgoing calls and the details of each call.

Type	Directi...	Start Date ↓	Subject	Name	Duration
<b>Users: Billie Holly (Count: 5, Total duration: 06:47:13)</b>					
<b>Direction: Incoming (Count: 3, Total duration: 05:05:12)</b>					
Phone Call	Incoming	5/10/2022 11:39 AM	Payment request	Kline, Winifred - All The B...	5 minutes
Phone Call	Incoming	5/10/2022 11:36 AM	Confirm deadline	Johnson, Edward - ABC Bike	3 hours 20 minutes
Phone Call	Incoming	5/10/2022 11:31 AM	Arrange meeting	Anderson, Bill - ABC Bike	1 hour 40 minutes
<b>Direction: Outgoing (Count: 2, Total duration: 01:42:01)</b>					
Phone Call	Outgoing	5/10/2022 11:32 AM	Follow-up	Johnson, Edward - ABC Bike	1 hour 40 minutes
Phone Call	Outgoing	5/10/2022 11:28 AM	Conference call	Anderson, Bill - ABC Bike	1 minute 57 seconds
<b>Users: Lou Jones (Count: 2, Total duration: 00:07:00)</b>					

- You can also group the calls by entries (Address Book entries or leads). You can see how much time your team has spent on calling with the customers.

Type	Directi...	Start Date ↓	Subject	Name	Duration
<b>Name: Anderson, Bill - ABC Bike (Count: 2, Total duration: 01:42:03)</b>					
<b>Direction: Incoming (Count: 1, Total duration: 01:40:06)</b>					
Phone Call	Incoming	5/10/2022 11:31 AM	Arrange meeting	Anderson, Bill - ABC Bike	1 hour 40 minutes
<b>Direction: Outgoing (Count: 1, Total duration: 00:01:57)</b>					
Phone Call	Outgoing	5/10/2022 11:28 AM	Conference call	Anderson, Bill - ABC Bike	1 minute 57 seconds
<b>Name: Johnson, Edward - ABC Bike (Count: 2, Total duration: 05:00:10)</b>					
<b>Name: Kline, Winifred - All The Best Spirits (Count: 1, Total duration: 00:05:00)</b>					
<b>Name: Sporty, Oliver - James Oliver Inc (Count: 2, Total duration: 00:07:00)</b>					

- Export the report to a PDF file for printing or sharing with other users.



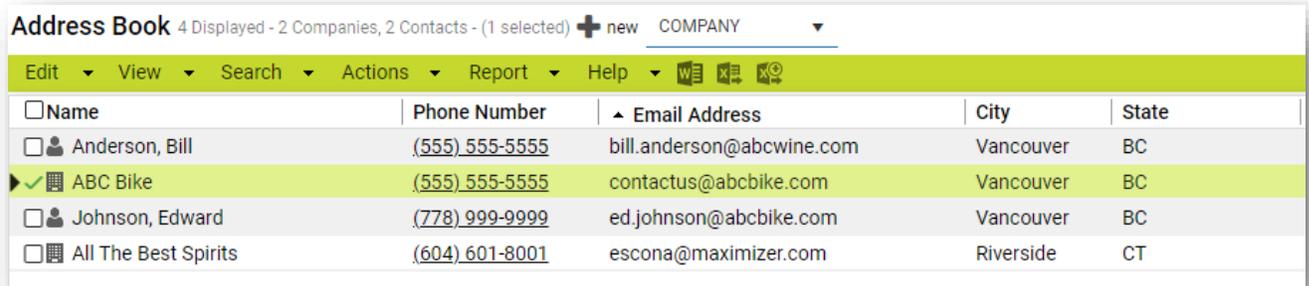
Note: The duration calculation can also be applied to other types of interactions such as chat or in person interactions. You can select the types in your search criteria and show the total duration by grouping the interaction types.

## How to report the interaction history of an Address Book entry?

**Question:** I used to print the Notes Report to show the interactions with my key accounts. How can I report the interactions with one of my account now?

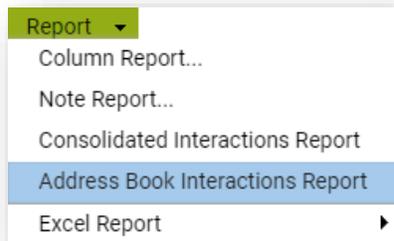
**Answer:** You can use the Interactions Report to show the interaction history of an Address Book entry.

1. In Address Book module, select an entry you want to report.

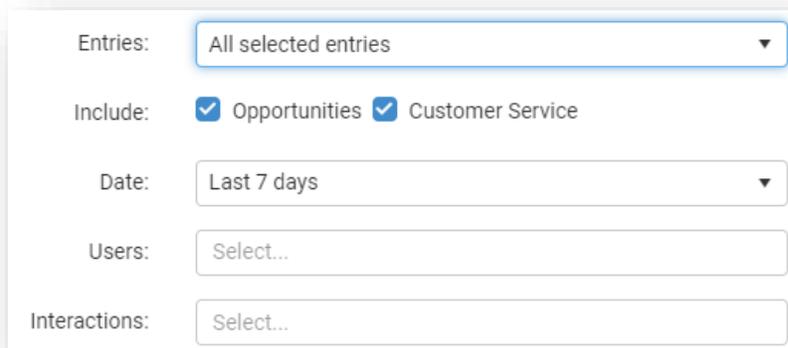


<input type="checkbox"/> Name	Phone Number	<input type="checkbox"/> Email Address	City	State
<input type="checkbox"/> Anderson, Bill	(555) 555-5555	bill.anderson@abcwine.com	Vancouver	BC
<input checked="" type="checkbox"/> ABC Bike	(555) 555-5555	contactus@abcbike.com	Vancouver	BC
<input type="checkbox"/> Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com	Vancouver	BC
<input type="checkbox"/> All The Best Spirits	(604) 601-8001	escona@maximizer.com	Riverside	CT

2. Go to Report menu > Address Book Interactions Report



3. In search criteria section, select "All selected entries" in the Entries field.



Entries:

Include:  Opportunities  Customer Service

Date:

Users:

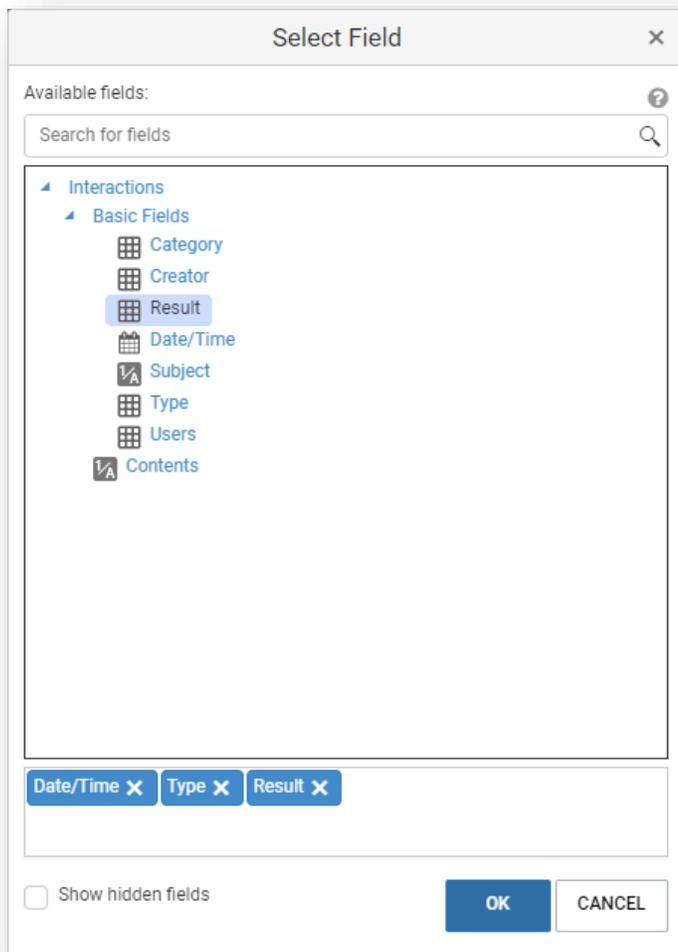
Interactions:

4. Specify a date range
5. Select the users and interaction types. If you leave the fields blank, all users and all types will be selected.
6. Click the RUN button to generate the report. You will see the interaction history of the selected entry.
7. You can export the report to a PDF file and print it or email it to other users.

## How to create a saved search based on interactions?

**Question:** I need to search for entries based on interactions. For example, I called some contacts, but some of them did not answer. I need to find those contacts and call them again. How can I find the entries by phone call results?

**Answer:** The new search entries by interactions will help you to achieve this. Note that your administrator should pre-define interaction results for no answer, such as No Answer and Left a Message. Make sure you log the result when you complete each phone call.



- Go to Search menu > Interactions
- In the search dialog, click the ADD FIELD(S) button to open the field picker. The interaction related fields will be available.
- Select the interaction fields. For example, you want to search entries by phone calls with no answer. You can select Date/Time, Type and Result fields.
- Click OK button when you finish selecting fields.

Note that the Contents field is a very useful field that allows you to search across all text fields in the interaction related objects, including Subject field, Details field in interaction log, Description field in appointment and email message body.

- In the search dialog, enter the values for each fields. In our example, select the result for no answer.
- If you would like to repeat the search in the future, you can save the search criteria by clicking SAVE SEARCH button.
- Click the SEARCH button to execute the search.

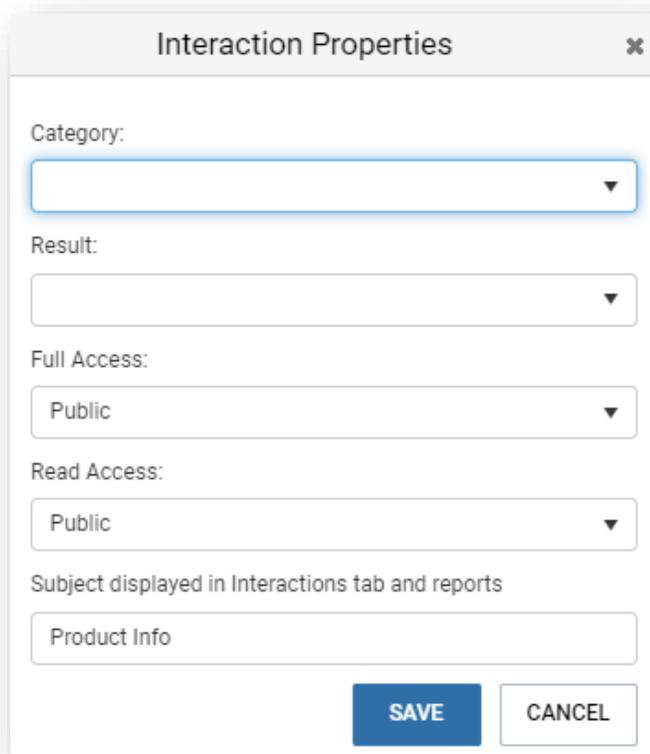
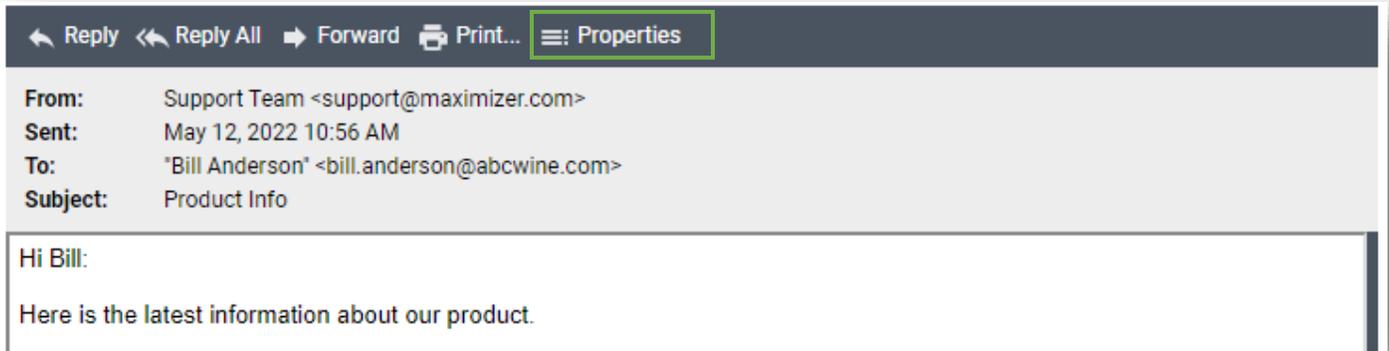
Your saved searches will be displayed in the Search dialog. To retrieve the search again, simply click the name of the search.

## How to change the email subject displayed in Interactions tab?

**Question:** I have saved an email from Outlook to Maximizer. Can I change the subject displayed in the Interactions tab?

**Answer:** Yes. You can change the subject in the email properties dialog.

In the Interactions tab, click an email to open the email message. In the tool bar of the email message dialog, click Properties button.



In the Properties dialog, you can change the subject displayed in the Interactions tab and Interactions report.

## How to log interactions efficiently?

**Question:** I used to write a note to record an interaction. It is easy and fast. Now I need to use the Interaction dialog, which involves more clicks to log an interaction.

**Answer:** Writing a note is easy and fast. However, it does not provide the structure data such as fields to track categories and results. It is very hard to create meaningful reports based on notes. Using the interaction dialog can help you to standardize the process for logging interactions and you always have consistent data for your reports. Here are a few ways to help you working with the Interactions dialog efficiently.

1. Set up default values for interactions

To reduce data entry, you can setup default interaction for each module. For example, in Address Book module, you can set the default Category to “Build Relationship”. In Opportunities module, you can set the default Category to “Sales Activities”. In Leads module, you can set the Category to “Lead Qualification”. You can also set the default values for Full and Read Access fields.

Default Interaction can be found under the Edit menu in Address Book, Opportunities and Customer Service module. It is under the general menu in Leads module.

2. Use keyboard navigation to work through the fields

Keyboard navigation is fully supported in the Interaction Log dialog. You can use the tab key to go through all the fields. Use Alt + down arrow key to open a drop-down. Use up / down arrow key to change the date and time. At any point, you want to save the change, press Alt + Shift + s. Or, press Shift + Esc to cancel.