



Release Notes 2022 R1

MAXIMIZERCRM CLOUD

Discontinued Features

The following features/UI elements have been discontinued:

- Phone notes and email notes
- History following tab
- Consolidated Activities Report and Incoming vs Outgoing Call Report
- Phone Log
- Import using the XML and Maximizer MXI option, Comma-Separated Values (CSV) (Legacy) option, and the Tab-Delimited (Legacy) option respectively.

New Features

The following new features have been introduced in the 2022 R1 release:

Emails as interactions

- Emails will be categorized as interactions.
- After upgraded to version 2022 R1, the previously saved emails will be displayed in the Interactions tab/widget. They will not be available in the Documents tab/widget anymore.
- Administrators must run the email conversion tool from Administration > Phone Note and Email Conversion. After the emails are converted, they will be searchable in Interactions tab. The emails with attachments will be indicated by a paperclip icon.
- The new emails sent from Maximizer or saved from Outlook will be displayed in the Interactions tab/widget. To save emails as interactions, you must have document Insert and Modify rights.
- In the previous releases, emails were saved using the Default Document settings. Going ahead, emails will be saved using the Default Email settings (Edit menu > Default Email). To have the same default values for your emails, you must set up Default Emails in each module.

Outlook and Word add-ins

- You must install the latest version of Outlook and Word add-ins to work with 2022 R1 release.
- When saving emails from Outlook to Maximizer, edit the interaction-related fields instead of document related fields.

Replacement of the phone call report

Since phone notes are no longer generated, the *Incoming vs Outgoing Call Report* has been discontinued. Instead, phone call details are now available in the Interactions Report. At the time of creating an Interactions Report, make sure the Phone Call type is selected, and the Duration field is added into the column view. After you group the interactions (example, group by users or Address Book entries), the total duration will be calculated and displayed.

Moving interactions when deleting, moving, converting, or combining entries

- When you delete a contact, the interactions with the contact will be moved to the parent company / individual.
- When you convert entries (example, convert an individual to a contact), the interactions will be moved with the entries.
- When you move a contact from one company to another, or combine multiple entries into one, and you choose to delete the source entry, the interactions will be moved to the target entry.
- Duplicating an entry will not copy the interactions from the source entry to the target entry.

Phone note conversion

If you have upgraded from a previous version and have not converted your phone notes to interactions, you should ask your administrator to run the conversion tool from Administration > Phone Note and Email Conversion. After conversion, the communication history will be displayed in the Interactions tab.

User/Group setup right that affects interaction logs

In previous versions, you required Read rights for *User/Group setup* to log an interaction, make a call or receive a call, work with an Excel quote, or create an appointment. This issue has been addressed in the R1 release. You no longer require Read rights to perform these tasks.

Administrator UI label changes

The following labels have been changed in user permissions:

- *Documents* has been changed to *Documents/Emails*
- *User/Group setup* has been changed to *User/Group details*



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**.