User Guide 2022 R1

MAXIMIZERCRM CLOUD

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About This Guide

The ***Maximizer CRM Cloud 2022 R1 User Guide*** provides instructions for using the new features available as a part of the 2022 R1 release. This guide assumes that you have familiarity working with Maximizer CRM.

Who Should Read This Guide

The ***Maximizer CRM Cloud 2022 R1 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 or information exchange between an individual that represents a company, and an existing customer or potential customer. For example, if your marketing campaign identifies a potential lead, and you reach out to them via email, such an exchange can be considered as an interaction. Another example of an interaction is when an existing customer asks you a question over a phone call.

Note:

The ***Interactions*** feature was released in version 2021 R3. To help you better familiarize with this feature, this guide contains the full set of instructions related to Interactions.

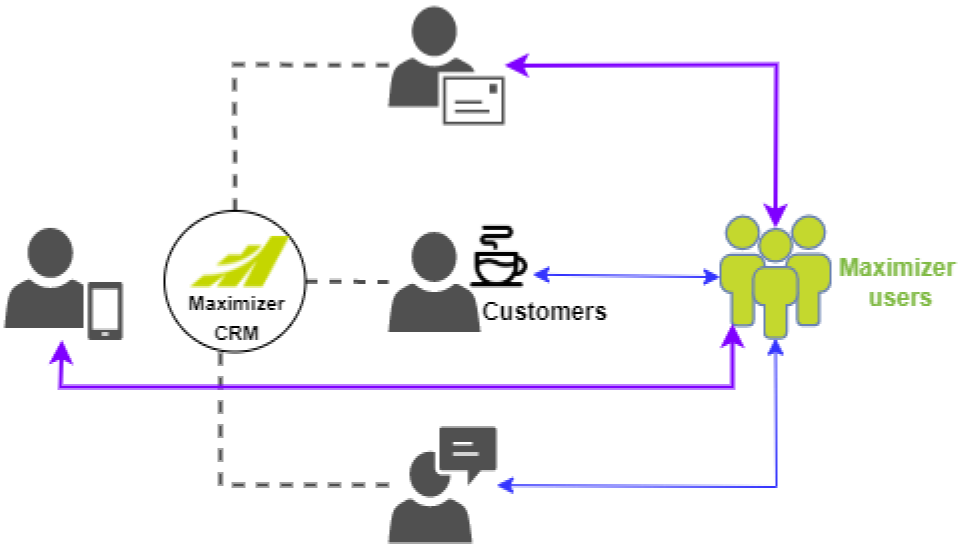
The Interactions Feature

The ***Interactions feature*** in Maximizer CRM introduces the ability to record all such interactions, and associate them with Address Book entries, Opportunities, Cases, and Leads.

The following interactions are categorized as interactions in Maximizer CRM:

- Phone calls
- Emails
- In-person meetings
- Chats
- Texts
- Social media messages
- Tasks
- Appointments

The following image illustrates how interactions are recorded by Maximizer CRM.



Instances of in-person meetings, chats, texts, and social media messages between Maximizer users and customers are manually entered as “interactions” in Maximizer CRM. Phone calls and emails are automatically recorded as interactions. Phone calls can be placed as well as received from Maximizer CRM. When a call is placed this way, Maximizer CRM opens the VOIP app that is configured on your computer, and automatically starts tracking details such as the date and time of the call.

Similarly, when an email is sent from Maximizer, an interaction of type “email” is automatically created, and details related to the email such as body of the email, sender, and receivers, are also recorded. Appointments and tasks are categorized as interactions. There are multiple ways to launch the Add Hotlist Task or the Add Appointment window, and irrespective of the method you use, tasks and appointments are always categorized as interactions.

The ability to record information related to customer interactions provides additional context typical to a customer. For example, email exchanges with customers might have information such as customer asks, commitments, and resulting action plans, which are all necessary to manage relationships with the respective customers.

Purpose of the Interactions Tab/Widget

In the earlier releases, the following types of interactions were recorded by means of the following tabs:

- The ***Notes*** tab was used to record activities associated with Address Book entries, customer service cases, and opportunities.
- The ***Documents*** tab was used to record files created in other applications, and associated with Address Book, Customer Service, and Opportunities. Emails were also saved under the Documents tab.

- The ***Activities*** tab was used to record all tasks and appointments associated with Address Book, Customer Service, Campaigns, and Opportunities.
- The History tab was used to displays notes and documents associated with Address Book, Opportunities, Campaigns, Customer Service, and Hotlist.

Going ahead, only the ***Interactions*** tab, the ***Notes*** tab, the ***Activities*** tab, and the ***Documents*** tab will be available.

Note:

The ***Interactions*** tab replaces ***History*** in this release.

The following table lists the main differences between Interactions, Notes, and Documents.

	Interactions	***Notes***	***Documents***
Purpose	To track and report all types of interactions	Track important notes. For example, a customer's system requirements.	Save important files such as contracts and agreements.
Type of details recorded	Subject, detailed contents, and fields (for tracking interactions) such as categories and results.	Body of notes and the note categories.	Files and document categories.
Available in	Address Book, Opportunities, Customer Service, Leads, and Hotlist	Address Book, Opportunities, Customer Service, Leads, and Hotlist	Address Book, Opportunities, Customer Service, Leads, and Hotlist

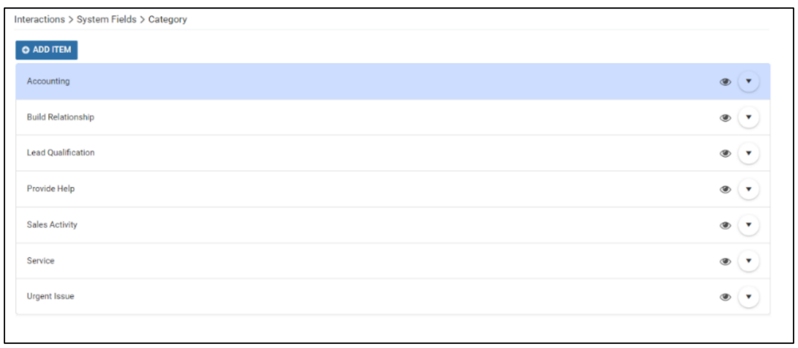
Configuring Interaction System Fields

You can record phone calls, in-person meetings, texts, and communication via social media (Twitter, WhatsApp, Facebook, and LinkedIn) using the Interactions feature. Begin by first setting up Maximizer CRM by specifying the following details, collectively referred to as ***System Fields***:

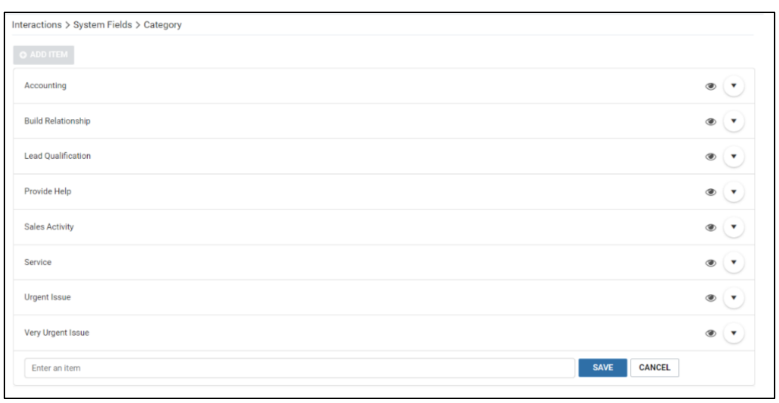
- Category: A distinct class to which interactions belong
- Result: The outcome of the interaction
- Type: The type of the interaction. The following types are available by default, and therefore, cannot be edited or deleted: Chat, Email, SMS, and Phone Call.

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.

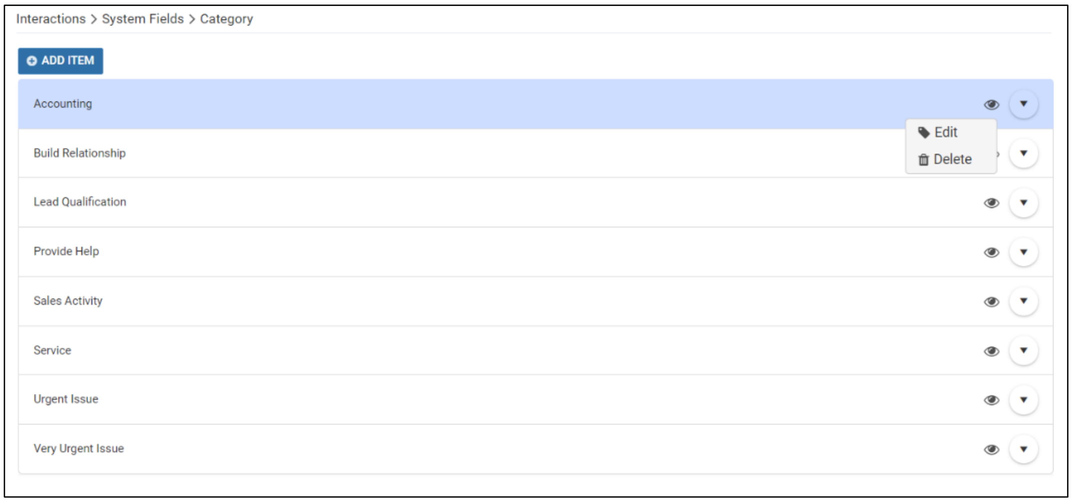
Edit a Category

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

In previous releases, a Result field would be associated with a phone call entry only upon hanging up the call, which is why the Result value could be specified only after the call ended. Going ahead, the Result value for phone calls can be specified at the time of making or receiving a call.

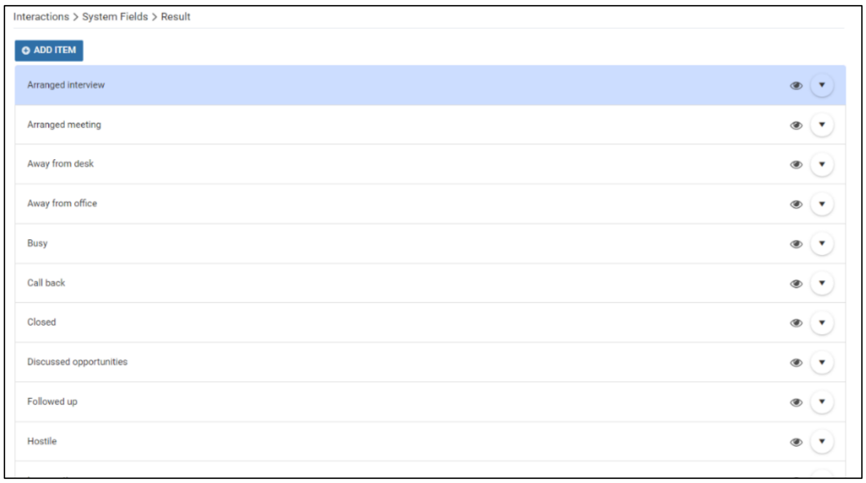
The Result values that you add can thus be used by all types of interactions.

1 Log on to Maximizer CRM.

2 Go to ***Administration*** > ***Settings***.

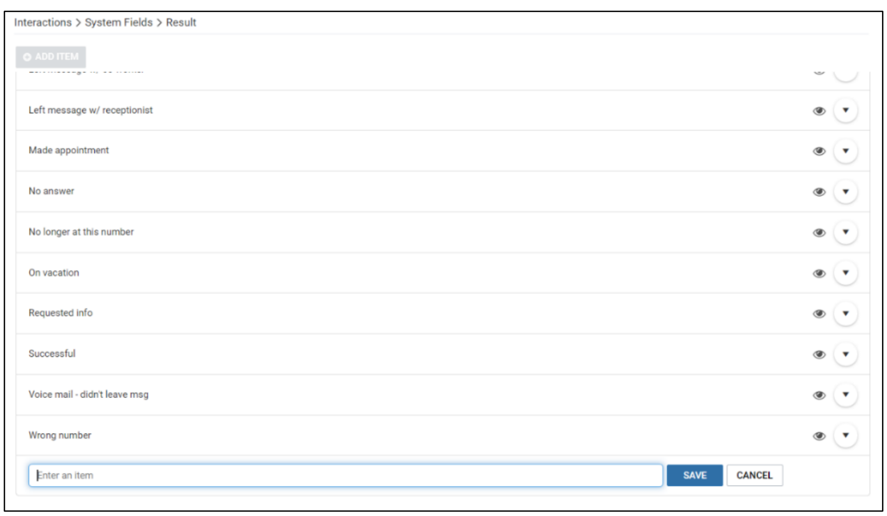
3 Expand ***Interactions***, and then expand ***System Fields***.

4 Click ***Result***.



5 Click ***ADD ITEM***.

6 In the text box 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.

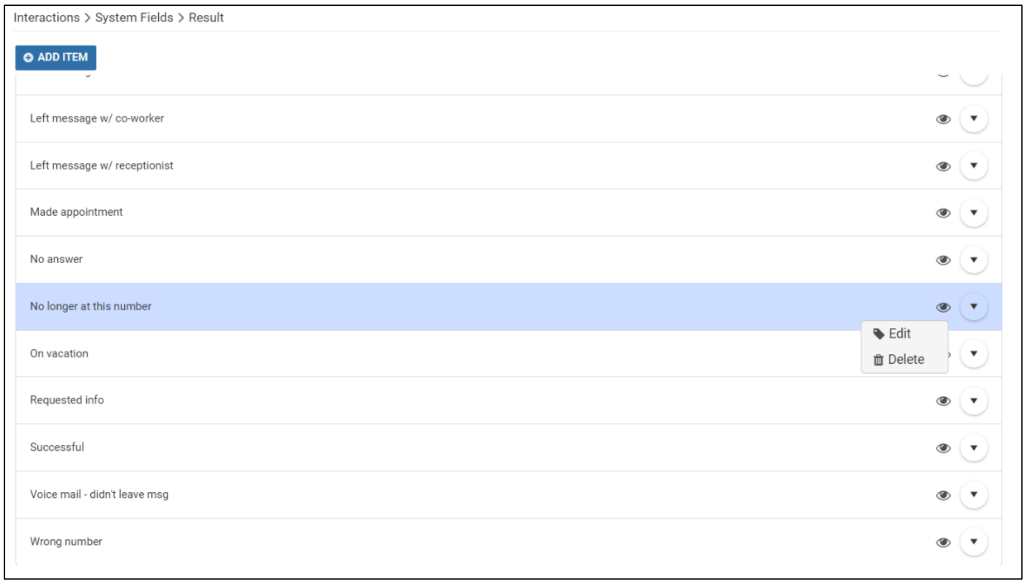
Edit a Result

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

You can add types typical to your business usecase in addition to the default interaction types. For example, if you interact with your customers using web forms, you can create a type called "web forms".

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 interaction	Click this check box if you want to specify the type of the interaction as bidirectional. Once selected, this action cannot be undone. ***Note****: The direction of the interaction can be set as “incoming” or “outgoing” while creating the interaction ONLY if this checkbox is selected.*

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

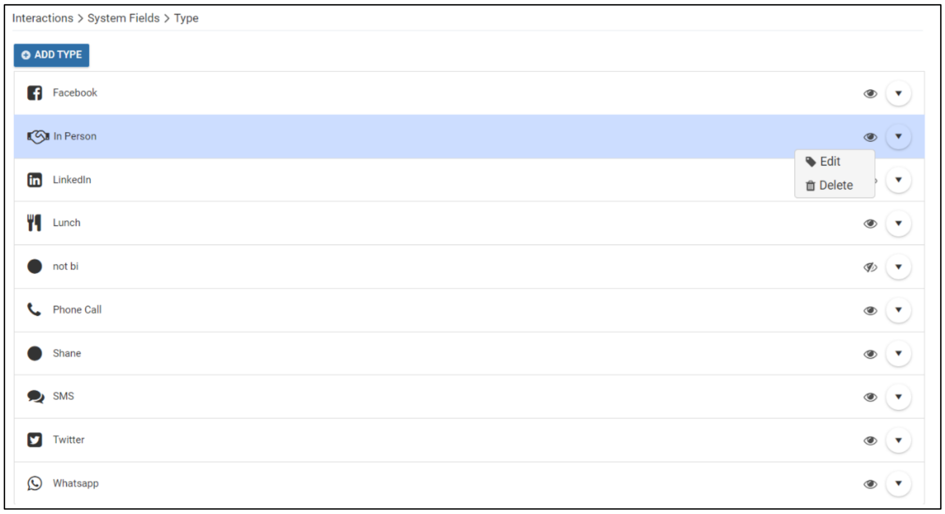
Note*: The types* ***Phone Call, Email, SMS****, and* ***Chat*** *are available as default types, and therefore, cannot be edited or deleted.*

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 or leads, and therefore, can be accessed from the Address Book module and the Leads module respectively. At the time of creating an interaction from the Address Book entry, you can link it to an opportunity or a case, or create an appointment or a task.

Interactions can thus, be accessed from the following modules in addition to Address Book and Leads.

- ***Opportunities***
- ***Customer Service***
- ***Hotlist***

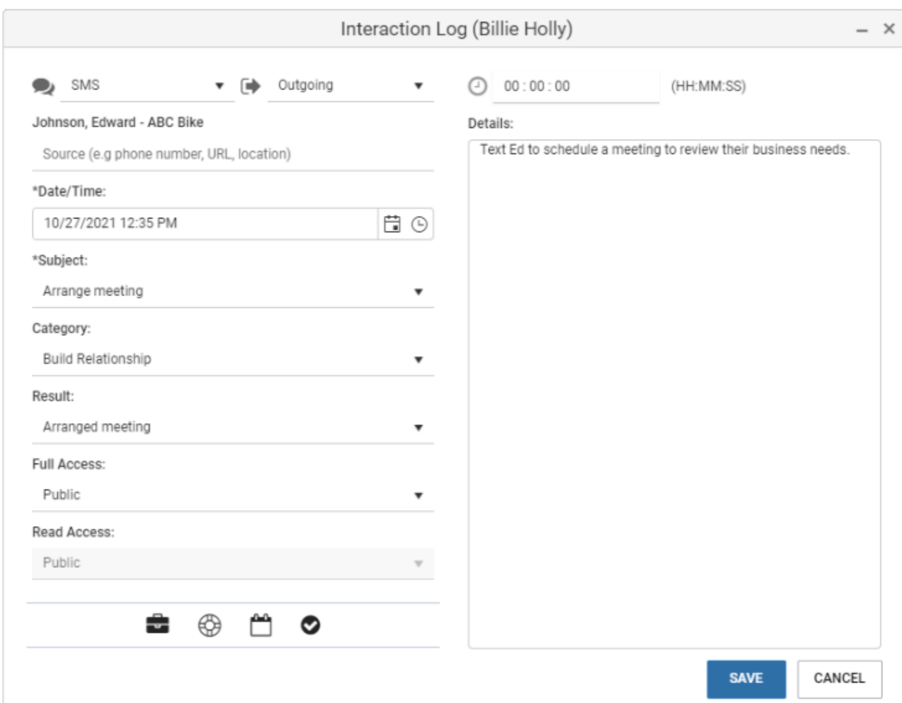
Create an interaction

1 Log on to Maximizer CRM.

2 Open the ***Interaction Log*** window by performing any of the following steps:

- 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.
- In the ***Address Book*** module, the ***Opportunities*** module, the ***Customer Service*** module, or the ***Hotlist*** module, click ***Actions*** > ***Log an interaction***.
- Select a lead, click ***+ ADD*** in the ***Interactions*** panel, and from the list of options, click an interaction type except ***Appointment*** and ***Task***. The options ***Appointment*** and ***Task*** will create an appointment and a task respectively.

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



Field	***Activity***
Interaction type list	Select the interaction type. If the ***Bidirectional interaction*** was selected at the time of adding this type, a direction list appears next to the interaction

	type 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, in which 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	The subject represents the nature of the interaction. From the list, select a subject, or add a new one. You can only add a new subject if you have administrator rights. To add a new subject: 1 From the subject list, click ***Edit List***. 2 In the ***Set Up Items*** window, click ***ADD ITEM***. 3 In the text box that appears, type a subject name, and click ***SAVE***. The newly-added subject is placed alphabetically in the list. 4 To sort the 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 next to it. 6 To delete a subject, click the drop-down arrow next to a subject, click ***Delete***, and click ***Yes***. 7 Click ***Close***.

Category	The category list will contain the categories you added earlier. From the list, select an appropriate category.
Result	The result list will contain the results you added earlier. From the list, select an appropriate result.
Full Access	Select the user or group 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 group 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***.

c. To associate a different opportunity, click the close button next to the ***Regarding to*** field, and repeat this procedure again.

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***.

c. To associate a different case, click the close button next to the ***Regarding to*** field, and repeat this procedure again.

6 If required, create an appointment or a hotlist task.

7 Click ***SAVE***.

Once created, the interaction will be added to the Interactions list. The ***Show All*** check box lists interactions associated with the contacts in the same company. Related appointments and tasks are also listed under the ***Interactions*** tab.

> ***Note***: *If you do not see a tab that you were accustomed to seeing earlier, 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.*

Set Default Entries for Interactions

You might encounter scenarios where the field values for Interactions are the same. For example, for your Maximizer setup, you may designate the Read Access for all the interactions to be the same. In such scenarios, instead of providing the same values every time an interaction is created, you can set up default entries for Interactions. You must set up default entries for each module separately. This is to take into account the difference in the purpose of the modules. For example, a default category in the Address book module can be ***Build Relationship***. However, this has no relevance in the Opportunities module, where a more suitable default category could be ***Sales Activity***.

To set default entries:

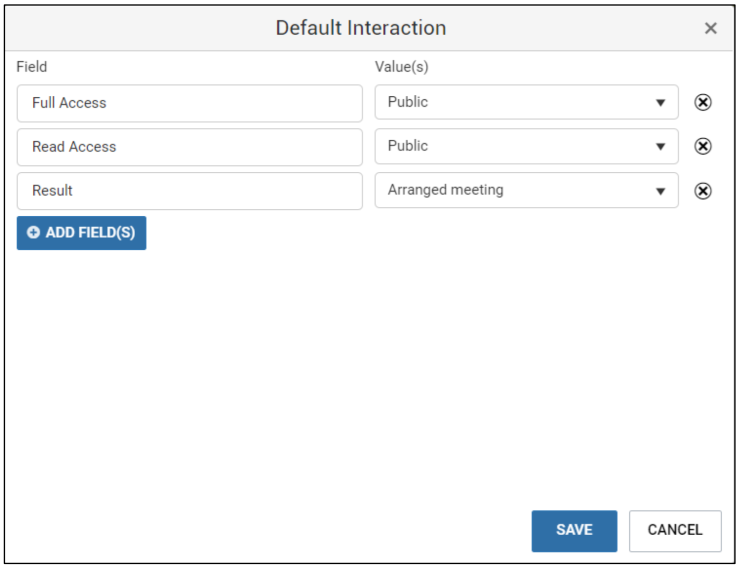
1 Log on to Maximizer CRM.

2 Open either of the following modules: ***Address Book***, ***Opportunities***, ***Leads***, or ***Customer Service***.

3 Do one of the following:

- (Address Book, Opportunities, or Customer Service) Click ***Edit*** > ***Default Interaction***.
- (Leads) Click the triple bar icon in the top-right corner and click ***Default Interaction***.

4 On the ***Default Interaction*** window, set the default values for the fields you select. For example, if you select ***Subject***, provide the value for this field.



5 Click ***SAVE*** once done.

> ***Note***: *The default entries for interactions are unique to the user account that was used to create them.*

Set Default Entries for Emails

You can set up default values for entries that you expect to be the same at the time of composing emails. For example, at the time of composing emails, the value assigned to "Category" might be the same. Instead of specifying the same value multiple times, you can set it beforehand by means of default email entries.

> ***Note:***
>
> In previous releases, emails were saved using Default Document settings. Going ahead, emails will be saved using the Default Email settings.

To do that:

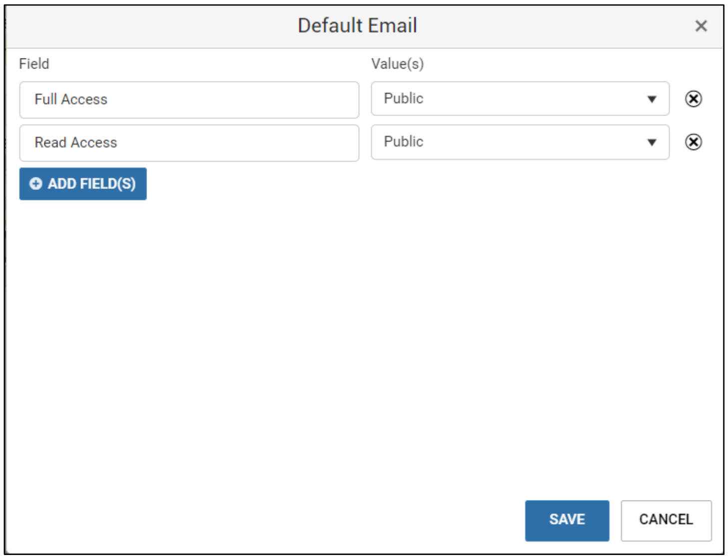
1 Log on to Maximizer CRM.

2 Open either of the following modules: ***Address Book***, ***Opportunities***, ***Leads***, or ***Customer Service***.

3 Do one of the following:

- (Address Book, Opportunities, or Customer Service) Click ***Edit*** > ***Default Email***.
- (Leads) Click the triple bar icon in the top-right corner and click ***Default Email***.

4 On the ***Default Email*** window, set the default values for the fields you select. For example, if you select ***Full Access***, provide the value for this field.



5 Click ***SAVE*** once done.

Note: *The default entries for interactions are unique to the user account that was used to create them.*

Create & Execute a Search Query Using Interactions as Qualifiers

Version 2022 R1 introduces the ability to search records from the following using interactions as qualifiers:

- Address Book
- Leads
- Opportunities
- Cases

As an example, consider a scenario where you call multiple customers with the objective of discussing outstanding payments. Each such call gets recorded as an interaction. Using the search by interaction option, you can search for all such customers in your Address Book, using the "payment related call" as a criterion.

Search queries created using interactions as filters can be saved and run as and when required. 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.

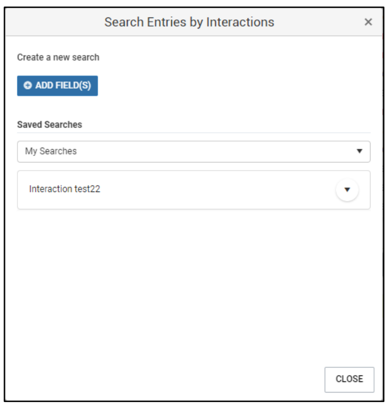
To create a search query:

1 Make sure you are logged on to Maximizer CRM.

2 Open one of the following modules: Address Book, Leads, Opportunities, or Customer Service.

3 Click ***Search*** > ***Interactions***.

4 On the ***Search Entries by Interactions*** window, click ***ADD FIELD(S)*** to add fields related to interactions. The fields will together create the search query.

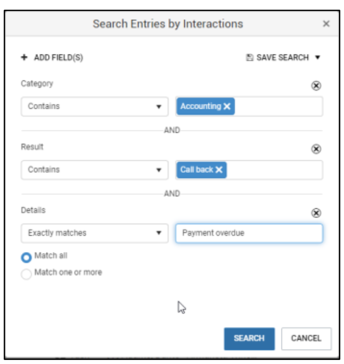


5 On the ***Select Field*** window, do the following:

Field	***Description***
Available fields	Enter a field in the ***Available fields*** bar and click the one of your interest. The field appears in the text box below the fields list. Alternatively, expand the fields list, and select the field you want to use to create the search query. Select ***Contents*** to search the text field across all the interaction related objects, including Subject, Details, Description (appointment), and email message body.
Show hidden fields	Select this check box to display hidden fields, if any.

6 Click ***OK***.

7 On the ***Search Entries by Interactions*** window, specify the filters for each field you selected in step 5. For example, the filter Contains is selected for the "Category" field. The value is set to "Accounting".



8 To use the AND operator to create the query, select ***Match all***.

-OR-

To use the OR operator to create the query, select ***Match one or more***.

> **Note**: *You cannot use AND and OR operators together in the query.*

9 To save this search query click ***SAVE SEARCH***, and then ***Create a New Search*** in the top-right corner.

> **Note**: *If you choose to click **SEARCH**, the query will be executed, but will not be saved.*

10 In the ***Saved Search Properties*** window, provide the following details:

Field	***Description***
Name	The name of this search query.
Description	A meaningful description of this query.
Full Access	The user or group 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	The user or group that will have read access to this interaction. To grant read access to everyone, select ***Public***.

11 Click ***SAVE***.

12 The Saved Search Properties window closes, and on the ***Search Entries by Interactions*** window, a new field representing the name of the search query appears. If necessary, click the pencil icon to change the name.

13 To update the query, click ***SAVE SEARCH***, and then click ***Update the Saved Search***. Make changes as necessary, following the instructions in ***steps 7 through 11***.

14 To execute this query right away, and subsequently add it to the list of saved searches, click ***Search***.

> **Note**: *To only add this query to the list of saved searches, click **Cancel**.*

Execute a Saved Search

You can create and save as many queries as you want, and then execute them as and when necessary. Search queries are not unique to a module. This means that the same query can be used to search records in the Address Book module, the Opportunities module, and the Customer Service module respectively.

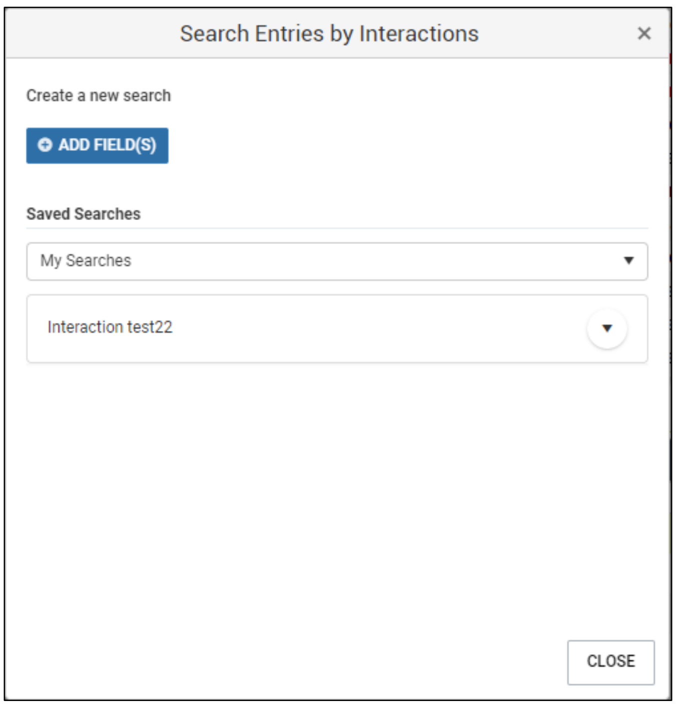
To execute a saved search:

1 Make sure you are logged on to Maximizer CRM.

2 Open one of the following modules: Address Book, Leads, Opportunities, or Customer Service.

3 Click ***Search*** > ***Interactions***.

4 On the ***Search Entries by Interactions*** window, look for the search query you want to execute under Saved Searches.



5 Use the drop-down list to filter the search list, and display one of the following:

- ***All Searches***: Search queries created by others for which you have read access.
- ***My Searches***: Search queries that you created.

6 To run the query, click the query of your interest.

7 (*Optional*) To edit the query, click the drop-down arrow next to it, and click ***View Details***. Proceed to edit the query following instructions in creating a search query using interactions as a criterion.

8 (*Optional*) To delete the query, click the drop-down arrow next to it, and click ***Delete***.

The Interactions Tab

The Interactions tab is available in the ***Address Book***, ***Opportunities***, ***Customer Service***, and the ***Hotlist*** module. Interactions related to an Address Book entry are listed under this tab. You can also perform the following procedures from here:

- Filter the interactions list
- Display additional interactions details
- Add or delete an interaction
- Change the status of a task or appointment

Search for an Interaction

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.

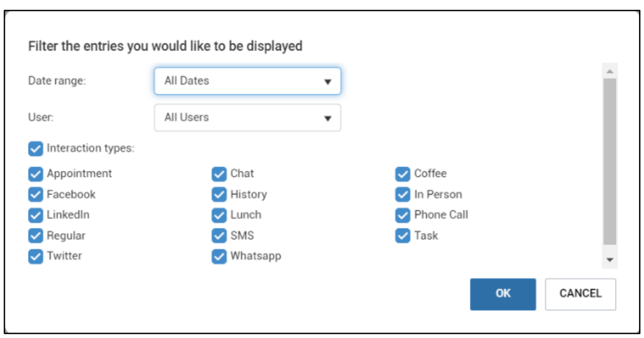
Filter the Interaction List

At any time, you can choose to view a select subset of the interactions 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:

- To include all the interactions, leave the ***Interaction types*** check box selected.

- To include specific interactions, clear the ***Interaction types*** check box, and select the check boxes next to the interactions of your interest.

6 Click ***OK***.

Display Additional Interactions Details

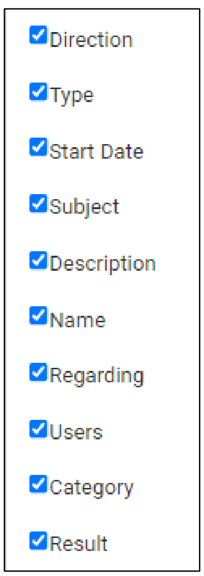
Under the Interactions tab, details related to interactions are displayed on columns. For example, the column "Result" describes the Result that an interaction is associated with. You can choose to hide or display additional columns, depending on the level of detail you desire.

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 vertical ellipsis next to a column and click ***Columns***.

3 On the box, select the columns you want to be displayed. Additional columns will now appear under the ***Interactions*** tab.



4 Re-order any of the columns as necessary:

a. Place your cursor on the column title.

b. Drag and drop it where you need it to appear.

5 Sort the interactions:

a. Click the vertical ellipsis next to any of the columns under the Interactions tab.

b. Click ***Sort Ascending*** to sort the interactions in an ascending order.

c. Click ***Sort Descending*** to sort the interactions in a descending order.

Add or Delete an Interaction

From the ***Interactions*** tab under Address Book, Opportunities, or Customer Service, you can do either of the following:

- Quickly add a new interaction to an existing list of interactions
- Delete an interaction from the list of interactions

To do that:

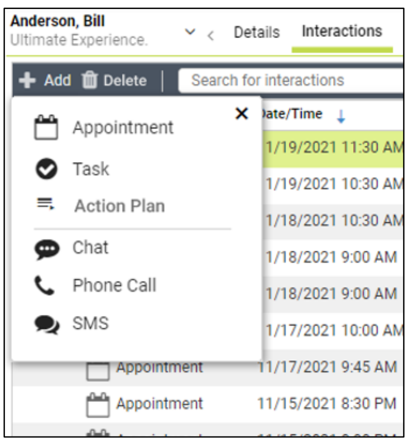
1 Open of these modules: ***Address Book***, ***Opportunities***, ***Hotlist***, or ***Customer Service***.

2 Click the ***Interactions*** tab.

3 Add an interaction:

a. Click ***Add***.

b. On the window that appears, click the type of the interaction you want to create.



c. Create an action plan, interaction, task, or appointment.

4 Delete an interaction:

a. Select the interaction that you want to delete and click ***Delete***.

Change the Status of a Task or Appointment

Appointments and tasks associated with interactions are listed under the ***Interactions*** tab. 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.

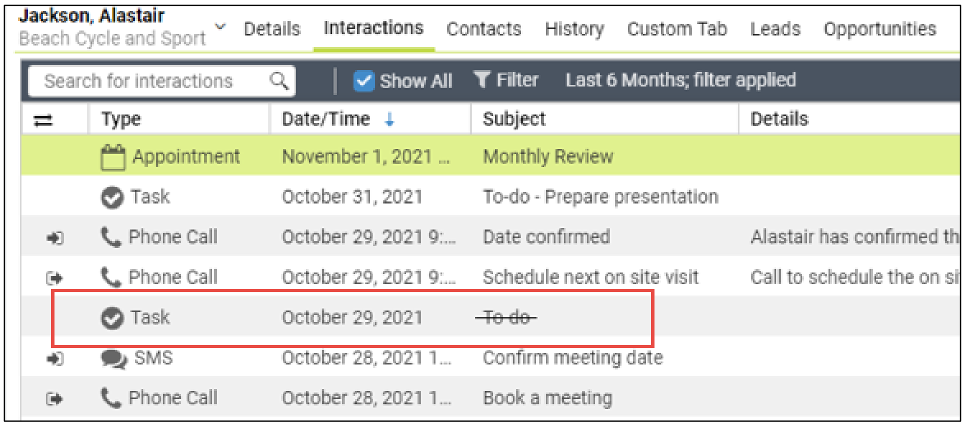
2 Change the status of the appointment:

- From the list of interactions, click the appointment you want to modify.
- In the ***Modify Appointment*** window, select the ***Complete*** check box, and click ***Save***.

3 Change the status of the task:

- From the list of interactions, click the task you want to modify.
- 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.

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 has the ability to automatically log outgoing calls. This can be done using the ***Make a Call*** option. When a call is placed using this option, the VOIP app configured by your administrator is opened, and Maximizer CRM records the date and time of the call, while the timer is used to record the duration. The following details must 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, **Subject** and **Result** values were specifically associated with phone call entries. Going ahead, the **Subject** and **Result** values configured for Interactions, are used instead. The **Subject** and **Result** values associated with phone call entries from earlier releases will be added to the existing set of **Subject** and **Result** values configured for Interactions.*

1 Log on to Maximizer CRM.

2 Open any module that has the Actions panel and click the make a call icon.

 -OR-

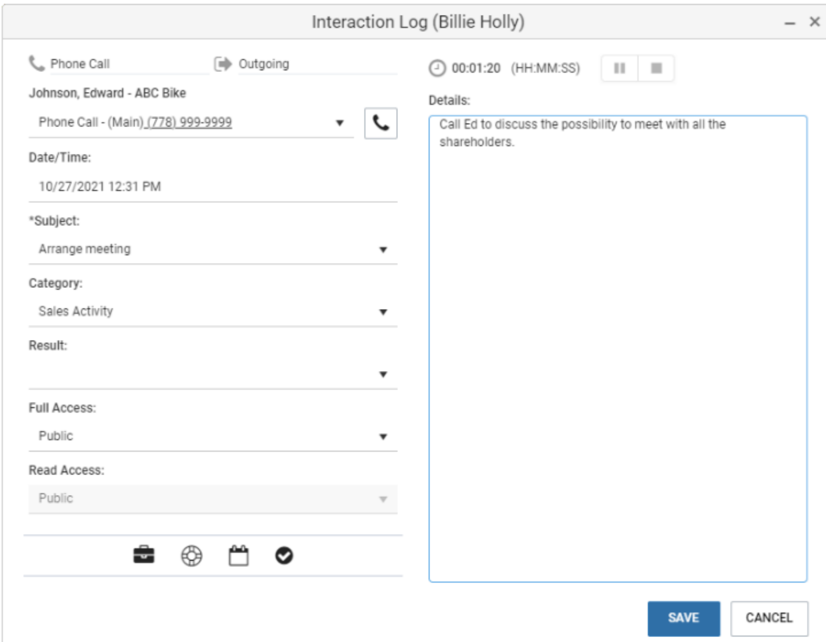
 Select a lead and click the phone number associated with the lead to place the call.

 -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 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 recorded, while the timer is used to track 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.

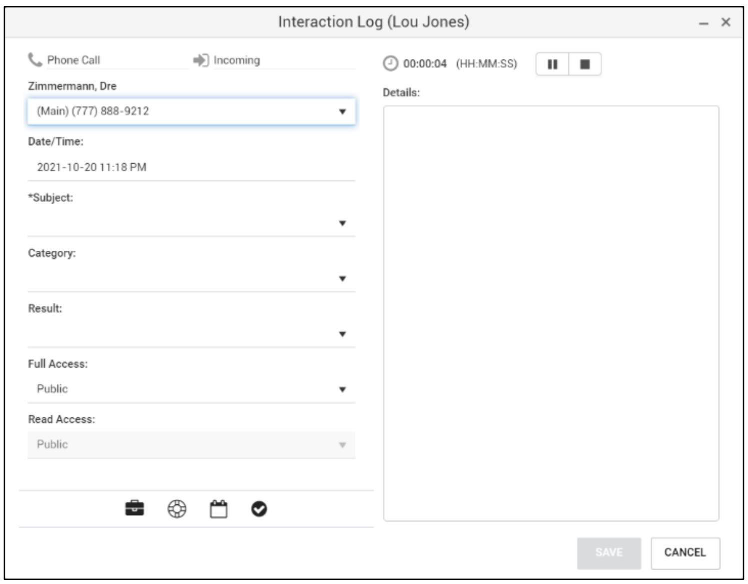
> ***Note****: In the earlier versions,* ***Subject*** *and* ***Result*** *values were specifically associated with phone call entries. Going ahead, the* ***Subject*** *and* ***Result*** *values configured for Interactions, are used instead. The* ***Subject*** *and* ***Result*** *values associated with phone call entries from earlier releases will be added to the existing set of* ***Subject*** *and* ***Result*** *values configured for Interactions.*

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.

8 Click ***SAVE***.

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

Compose an Email

In previous releases, emails that you sent to your Address Book entries were categorized as documents, and hence, available under the Documents tab. However, emails are now categorized as Interactions, and therefore, available under the ***Interactions*** tab in the following modules:

- ***Address Book***
- ***Opportunities***
- ***Customer Service***
- ***Hotlist***

Additionally, emails are also available in the Interactions widget under the ***Leads*** module. At the time of composing an email, you can specify the interaction Category and Result. The Category and Result fields together associate emails with interactions.

There following email composition options continue to remain supported:

- Reply
- Reply All
- Forward
- Print

Note:

To save emails as interactions, you must have the Insert and Modify permissions for ***Documents/Emails***.

1 Log on to Maximizer CRM.

2 Open either the ***Address Book*** module, the ***Opportunities*** module, the ***Customer Service*** module, or the ***Hotlist*** module.

-OR-

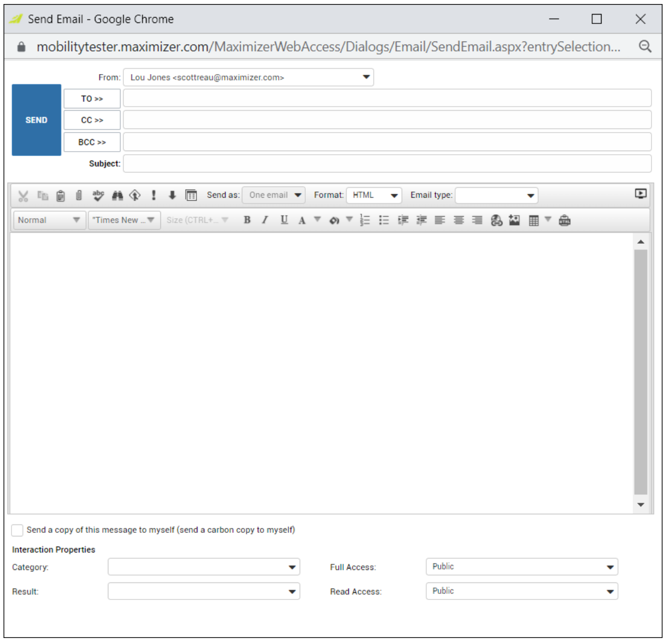
Click ***Leads***, select a lead, and then click the Interactions widget.

> ***Note***: *The choice of the module depends on the reason why you are sending an email. Imagine a scenario where you needed to communicate with an opportunity. You would then open Opportunities, find the correct entry, and then proceed to send an email.*

3 Select an entry for sending an email. The entry represents a contact to which you want to write an email.

4 In the right pane, click ***Write an email***.

5 In the ***Send Email*** window, provide the following details:



Field	***Activity***
Sender and Receiver details	Select the sender and enter the recipients that will be marked in CC and BCC.
Subject	Enter a subject for the email.
Email body	Type the body of the email in the box below. The menu bar contains common formatting options that you can use to compose the email.
Email details	Specify whether this email will have high priority (!) or low priority (↓). Specify the format, and email type.
Email Template	In the menu bar, click the template icon. Select a template from the available options, or create one.

Logging	Specify whether you want to send a copy of this email to yourself.
Category	From the category list, select an appropriate category. This list will contain the categories you added earlier.
Result	The result list will contain the results you added earlier. From the list, select an appropriate result.
Full Access	The user or group that will have full access to this interaction. If ***Full Access*** is set to ***Public***, ***Read Access*** is automatically set to ***Public***.
Read Access	The user or groups that will have read access to this interaction. To grant read access to everyone, select ***Public***.

6 Click ***SEND***.

The email is sent to the intended recipients, and a copy is saved under the ***Interactions*** tab by default.

Modify an Email

You can open previously sent emails at any time and choose to send replies. You can also print the email, and modify the Category or Result associated with the email.

1 Log on to Maximizer CRM.

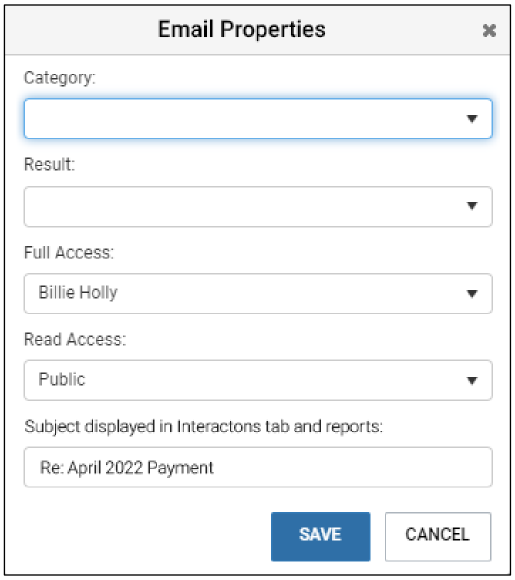
2 Open either the ***Address Book*** module, the ***Opportunities*** module, the ***Customer Service*** module, or the ***Hotlist*** module.

-OR-

Click ***Leads***, select a lead, and then click the Interactions widget.

> **Note**: *The choice of the module depends on the reason why you are sending an email. Imagine a scenario where you needed to communicate with an opportunity. You would then open Opportunities, find the correct entry, and then proceed to send an email.*

3. Under the ***Interactions*** tab, click the email of your interest, and modify the following as necessary:
    - Click ***Reply*** or ***Reply All*** to respond to the email.
    - Click ***Forward*** to send this email as a forward to other recipients.
    - Click ***Print*** to print the email.
4. Click ***Properties*** on the menu bar.
5. On the ***Interactions Properties*** window, change one or more of the following, as necessary:



    - ***Category***: Select a category for this email interaction.
    - ***Result***: Select a result for this email interaction.
    - ***Full Access***: Select the user or groups that will have full access to this interaction. If ***Full Access*** is set 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***.
    - ***Subject displayed in Interactions tab and reports***: By default, this field will be populated with the email subject. Modify it if necessary.
6. Click ***SAVE***.
7. Close the ***View Email*** window.

Convert Existing Phone Notes to Interaction Logs

In the previous releases, activities related to Address Book entries were categorized as "notes". These activities are now categorized as "interactions". Therefore, if you created phone notes in the previous releases, you must convert them to interaction logs.

To convert the notes:

1 Log on to Maximizer CRM.

2 Click ***Administration*** > ***Phone Note and Email Conversion***.

3 Under ***Phone Note Conversion***, 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: *The notes are retained in the* ***Notes*** *tab after the conversion completes.*

Convert Existing Emails

With version 2022 R1, existing emails will no longer be classified as "documents", and displayed under the Documents tab. Instead, they will be classified as "interactions" and will be displayed under the Interactions tab. However, these emails will not be searchable, until they are categorized as interactions. To categorize them as interactions and make them searchable, run the ***Email conversion*** tool.

Note:

Before you begin, ensure that appropriate interaction categories are available. To add categories, read the topic Add a category.

If you have many emails to convert, the conversion process will take longer. We recommend that you run this tool outside of business hours.

To do that:

1 Log on to Maximizer CRM.

2 Click ***Administration*** > ***Phone Note and Email Conversion***.

3 Under ***Email Conversion***, map the document categories to the corresponding interaction categories.

4 Click ***CONVERT EMAILS***.

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. If an error is encountered during conversion, a Restart button will appear. You will need to map the categories, and repeat the procedure again.

Note*: After conversion, emails with attachments are identified by a paperclip icon.*

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. The Interactions report can be exported to Excel or PDF format.

Note:

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.

Generate Interactions report

1 Log on to Maximizer CRM.

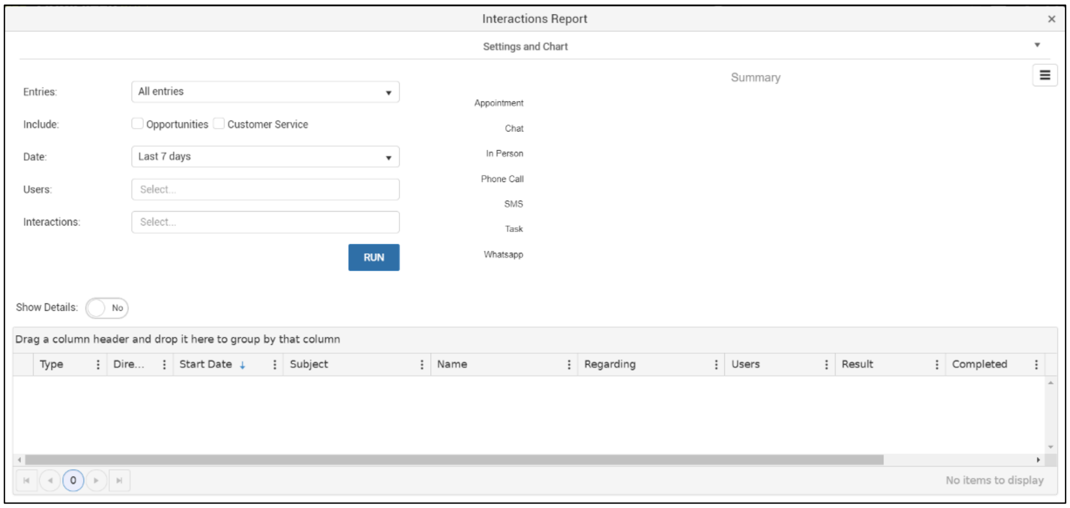
2 In the ***Address Book*** module, the ***Opportunities*** module, the ***Hotlist*** module, or the ***Customer Service*** module, click ***Report***.

3 Open the report type of your interest – ***Consolidated Interactions Report*** or ***Interactions Report***.

In the ***Leads*** module, the reports are available from the hamburger menu in the top-right corner.

> ***Note****: If you select* ***Interactions Report*** *from the* ***Leads*** *module, the* ***Include*** *field does not appear on the Interactions Report window. In the tabular display of the interactions, the* ***Regarding*** *column also does not appear.*
> *If you select* ***Interactions Report*** *from the* ***Hotlist*** *module, the Entries and Include fields do not appear.*

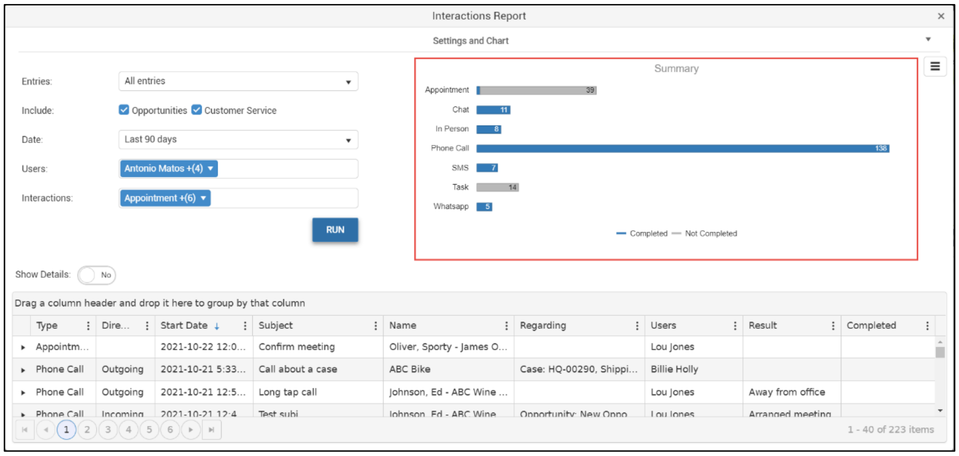
4 On the Interactions Report window, specify the following:



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.*

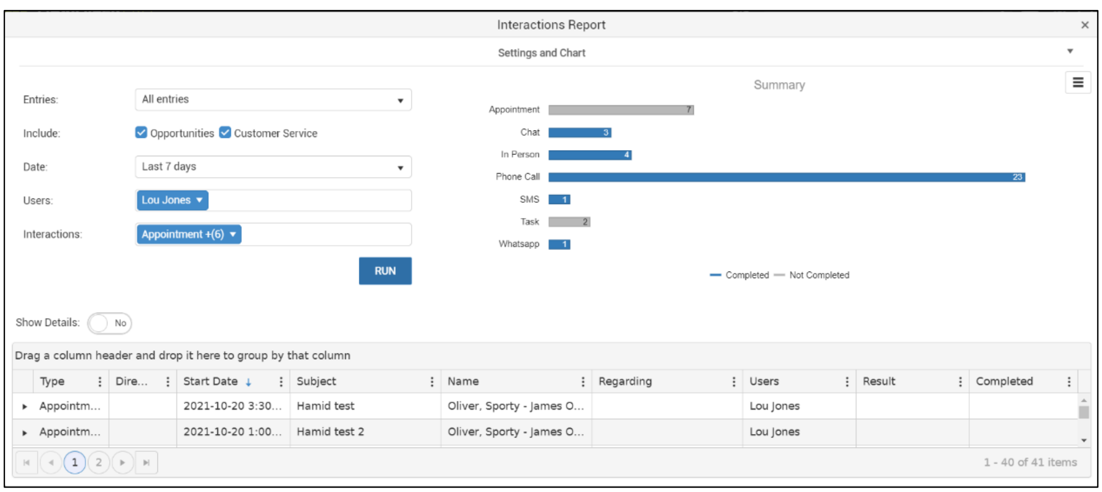
5 Click ***RUN***. Under ***Summary***, a graphical representation of the interactions is displayed. The chart is grouped by interactions type. For interactions such as appointments and tasks that haven been completed, and thus have a completion flag, the bar is broken by the completion status.



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

7 To show or hide columns, open the column picker by clicking the vertical ellipsis next to a column header, clicking ***Columns***, and then selecting the column entries to include in the tabular report.

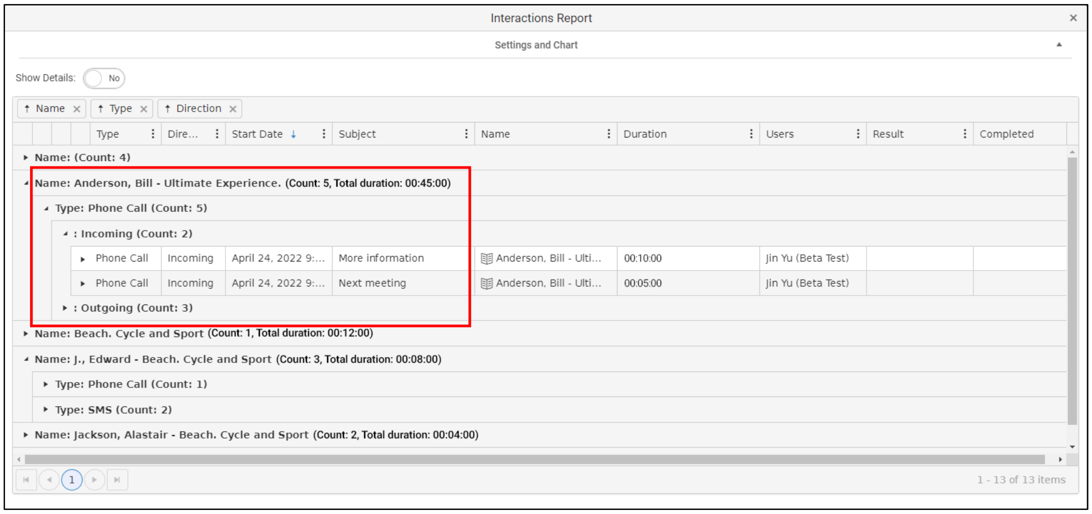
8 To reorder the columns, drag a column header, and drop it to the position of your choice.



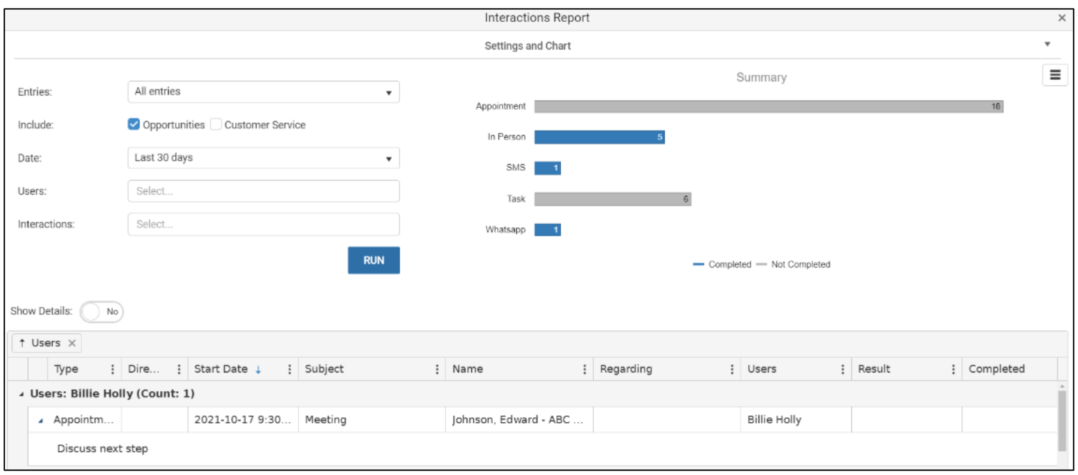
9 To see details for each interaction, expand the record by expanding the arrow icon next to the table entries.

10 To see the total count and duration of interactions, go to the table view, and expand a contact, company, or an individual. The duration and count details are listed against the name of the contact, as well as against each type of interaction.

> ***Note**: You can only view these details if the Duration column has been selected in the column picker as described in step 6.*

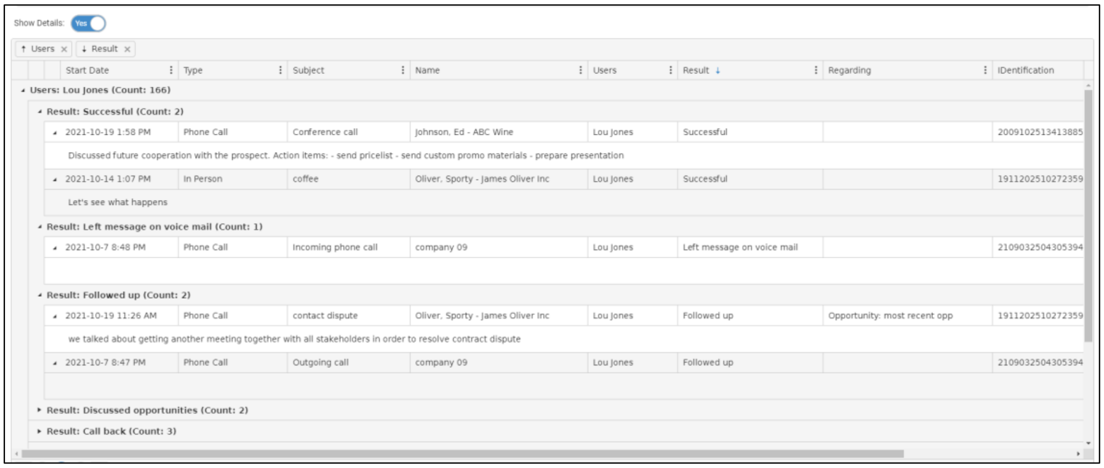


11 Use the column headers to organize the report. To do that, drag a column header, and drop it in the row on the top. In this example, the column header “User” is used to group the items of the interactions report.



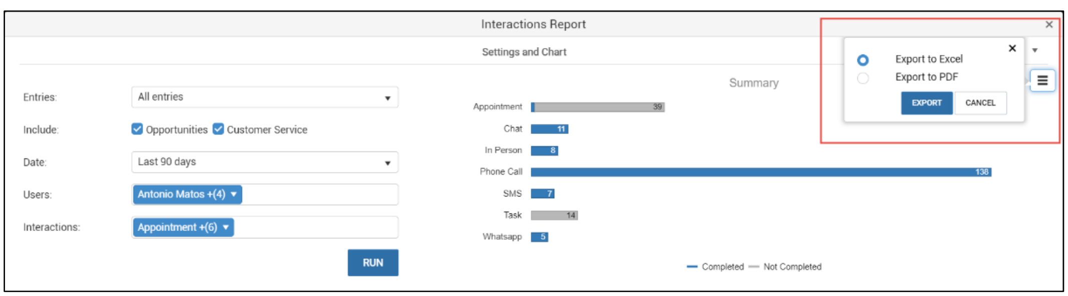
12 You can also use more than one column header to organize the report. To do that, drag multiple column headers, one after the other, and drop them in the row on the top. In this example, the column headers “User” and “Result” are used to organize the report. The

column header “User” (placed first in the row) becomes the top-level classification, while the column header “Result” becomes the second level of classification.



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

14 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.

Changes to the Hotlist Task Creation Procedure

Version 2022 R1 introduces the following changes to the procedure for creating hotlist tasks.

Add a Hotlist Task

Previously, hotlist tasks were categorized as ***Activities***, and were available under the ***Activities*** tab. With version 2022 R1, hotlist tasks are categorized as “interactions”, and can be found under the ***Interactions*** tab.

Therefore, at the time of creating a hotlist task, specify a value for ***Category*** and ***Result*** respectively. This ensures that the task is treated as an interaction and is appropriately categorized in the Maximizer database.

Note:

Interactions replaces the ***History*** tab.

1 Log on to Maximizer CRM.

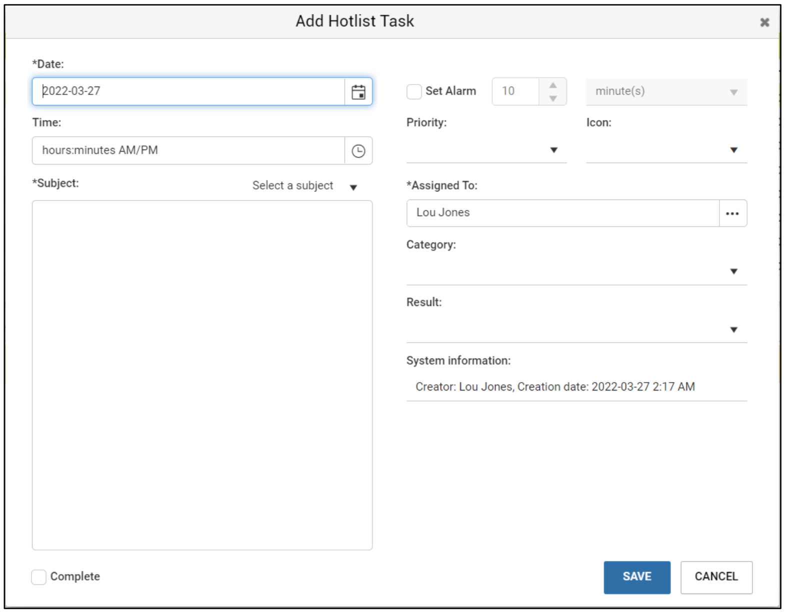
2 In the ***Address Book*** module, the ***Opportunities*** module, the ***Customer Service*** module, or the ***Campaigns*** module, click an entry, and then go to ***Actions*** > ***Schedule a to-do***.

-OR-

Click the hotlist icon in the left pane and click + ***new***.

3 On the ***Add Hotlist Task*** window, provide the following details:

> ***Note***: *The* ***System information*** *field displays the name of the task creator, the time when the task was created, the name of the user who modifies the task and the modification date and time.*



Field	***Activity***
Date	The due date of the task.
Time	The time when the task is due to be completed.
Activity	The type of activity this task related to. For example, breakfast. -OR- Add a new type of activity in the box below.
Set Alarm	Select this check box if you want to be reminded when this task is due. In the date picker box, set a time when you want the reminder to alert you.
Priority	The priority for this task.
Icon	An icon to represent this task.
Assigned To	The user to whom this task is assigned.

Category	A distinct class to which the interaction belongs. Since categories are set beforehand, select the one of your interest from this list.
Result	The outcome of the interaction. Since results are set beforehand, select the one of your interest from this list.
Complete	Indicates whether this task has been completed.

Note: *If the hotlist task that you are creating is associated with the* ***Address Book*** *module, the* ***Opportunities*** *module, the* ***Customer Service*** *module, or the* ***Campaigns*** *module, two additional fields might appear:*

Task with: *The contact, company, or the individual with whom the task is associated.*

Regarding: *The purpose of the task. For example, the Regarding field might contain the reason why the case it is associated to is created.*

Once a task is associated with an opportunity or a case, you cannot change this association.

4 Click ***SAVE***.

The newly-created task can be found under the Interactions tab.

Edit a Hotlist Task

Follow this procedure to edit existing hotlist tasks.

1 Log on to Maximizer CRM.

2 Click a task 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 a task you want to edit, and click ***Edit***.

3 On the ***Hotlist Task*** window, modify the fields of your interest.

> **Note**: *If the task is associated with one of these modules --* ***Address Book, Opportunities, Customer Service****, or* ***Campaigns*** *– modify the additional fields if necessary:*
>
> ***Task with****: The contact, company, or the individual with whom the task is associated.*
> ***Regarding****: The purpose of the task. For example, the Regarding field might contain the reason why the case it associated to is created.*

4 Click ***SAVE***.

Changes to the Appointment Creation Procedure

In the previous releases, ***Appointments*** were categorized as ***Activities***, and were available under the ***Activities*** tab. Version 2022 R1 introduces a change to the categorization of appointments; going ahead, appointments will be categorized as “interactions”, and can be found under the ***Interactions*** tab.

Therefore, at the time of creating an appointment, specify a value for ***Category*** and ***Result*** respectively. This ensures that the appointment is treated as an interaction and is appropriately categorized in the Maximizer database.

Create an Appointment

Follow these steps to create an appointment.

To create an appointment:

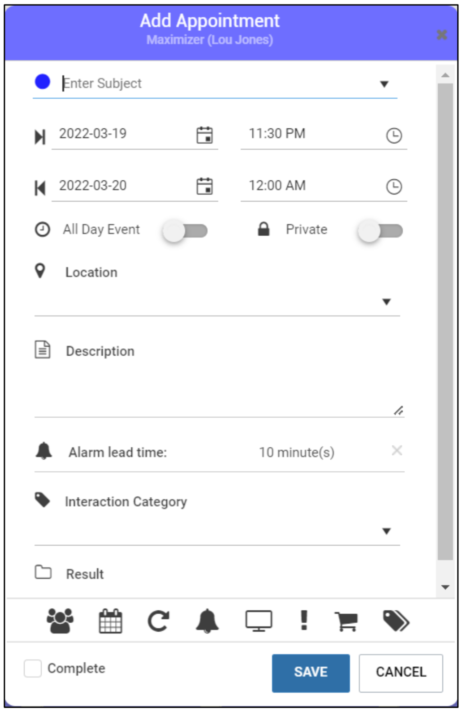
1 Log on to Maximizer CRM.

2 In the ***Calendar*** module, click + ***new***.

-OR-

Right-click the date on which want to create the appointment and click ***Add Appointment***.

3 On the ***Add Appointment*** window, provide the following:



Field	***Activity***
Subject field	The subject or the purpose of the appointment.
Time	The start time and the end time of the appointment. Indicate whether this will be an ***All Day Event.***
Private	Indicate whether this is a private event meant for selected attendees only.
Location	The location of the meeting is scheduled, for example, Google Meet.
Description	Additional details related to the appointment.
Alarm lead time	The time when the notification for the appointment will be sent.

Interaction Category	A distinct class to which the interaction belongs. Since categories are set beforehand, select the one of your interest from this list.
Result	The outcome of the interaction. Since results are set beforehand, select the one of your interest from this list.
Attendees	This is the first icon from the left. When you click this icon, the Invite Others area opens, where you can invite people to the event. Use the ***SCHEDULING*** option to view free time slots for all attendees of the appointment. Indicate whether you want to notify them and whether you want to send them an email reminder. Use the ***ADVANCED*** option to select attendees from the attendees list.
Organizer	When you click this icon, the ***Calendar*** field appears on the Add Appointment window. Select the organizer for this event.
Repeat	Click the repeat icon to schedule a recurring appointment. On the ***Repeat*** window, indicate how often the meeting will appear (daily, weekly, day of month, monthly, yearly), and then click ***SAVE***.
Alert	Click this icon to set an alert for this appointment. On the ***Alert*** box, set the ***Alert Lead Time*** and the ***Reminder Lead Time*** and click ***SAVE***.
Resources	When you click this icon, the ***Resources*** field will appear on the Add Appointment window. Here, select the resources that will be needed for this appointment.
Priority	When you click this icon, the ***Priority*** list will appear on the Add Appointment window. From this list, select the priority for this appointment.

Products/Services	When you click this icon, the ***Products/Services*** list will appear on the Add Appointment window. From the list, select the products and services associated with this appointment.
Product Categories	When you click this icon, the ***Products Categories*** list will appear on the Add Appointment window. From the list, select the product categories associated with this appointment.
Complete	Indicates that this appointment is complete.

4 Click ***SAVE***.

Edit an Appointment

Follow this procedure to edit an existing appointment.

To edit an appointment:

1 Log on to Maximizer CRM.

2 Click an appointment 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 appointment you want to edit, and click ***Edit***.

3 On the ***Modify Appointment*** window, modify the fields as necessary.

4 Click ***SAVE***.

Changes to the Outlook Integration

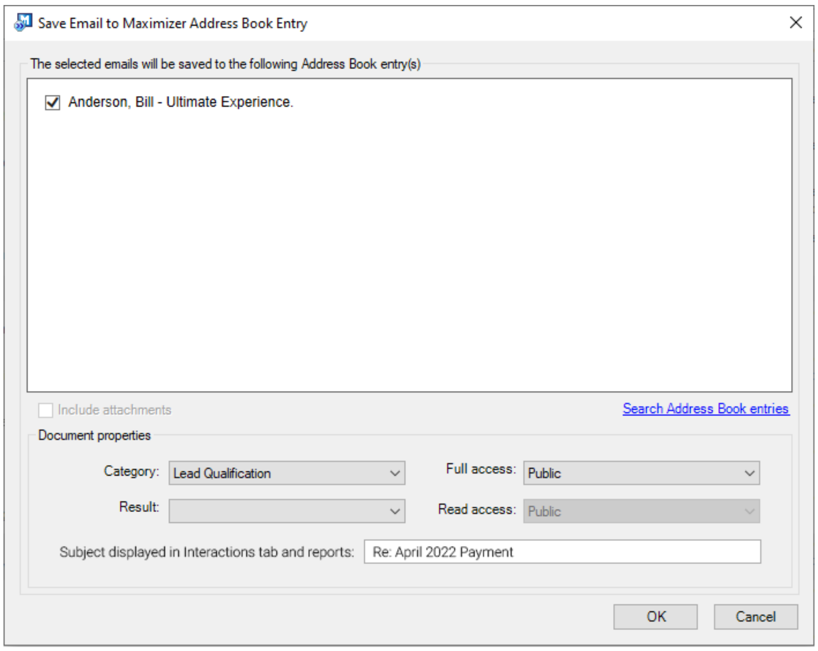
Starting with version 2022 R1, emails will be categorized as interactions. Therefore, Outlook emails will also be categorized as emails. To take this change into account, the window has been modified to add the following new fields:

- ***Category:*** A distinct class to which interactions belong. The category list will contain the categories you added at the time of configuring the interactions system fields.
- ***Result:*** The outcome of the interaction. The result list will contain the results you added at the time of configuring the interactions system fields.

- ***Full Access:*** Indicates 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***: Indicates the user or groups that will have read access to this interaction. To grant read access to everyone, select ***Public***.

  - ***Subject displayed in Interactions tab and reports***: By default, this field will be populated with the email subject. Modify it if necessary.



These fields provide additional details for categorizing the email in the Maximizer database.

Other Changes

- Version 20222 R1 introduces additional accessibility support for Maximizer Web Access. The Details tab in the Address Book module is now with screen readers in the edit mode:
  - When the edit details screen opens, the focus is set to ***Company Name*** or ***Mr/Ms***.
  - Under ***Phone Number*** and ***Email addresses and website***, the screen reader first reads field names and then the field values. The default email can be set by using the tab key.
  - Under ***Address***, the screen reader first reads field names, and then the field values.
- Accessibility support is now introduced for the hotlist task creation process. The Add Hotlist Task window is now full keyboard accessible.
- Recurring appointments can now be added by skipping weeks. For example, an appointment can be added for every other week or every third week.

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***.