



# Feature Review Guide

## MAXIMIZER CRM 2018 R2

Published By



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# IMPORT MANAGER ENHANCEMENTS

## IMPORT VALUES SEPARATED BY COMMAS TREATED AS SEPARATE ITEMS

You can now import values as separate items if one column contains multiple values separated by commas.

For example, in your spreadsheet, the Do Not Solicit By column contains multiple comma-separated values. In the previous release, you would need to modify the spreadsheet such that each field (e.g., email, phone, print and fax) had a separate column. You no longer need to do this.

	A	B	C	D	E
1	Company Name	Contact Last Name	Contact First Name	Do Not Solicit By	Contact Email Address
2	ABC Wine Shop	Johnson	Ed	Email, Phone	<a href="mailto:contact1@maximizer.com">contact1@maximizer.com</a>
3	Carlyle Wines & Spirits	James	Dolton	Email, Fax	<a href="mailto:contact2@maximizer.com">contact2@maximizer.com</a>
4	Edgar Bros.	Torres	Martha	Print	<a href="mailto:contact3@maximizer.com">contact3@maximizer.com</a>
5	Grapes & Grains	Bennington	Albert	Fax, Print	<a href="mailto:contact4@maximizer.com">contact4@maximizer.com</a>
6	Horizon Beverage Company	Kline	Winifred	Email	<a href="mailto:contact5@maximizer.com">contact5@maximizer.com</a>

Now in your Mapping screen, if a column is mapped as a multi-value table field, the dropdown for Field Format allows you to choose whether to import values as separate items. To import as separate items, select the separator that matches the one you use in your spreadsheet.

Import Manager > Source > Rules > Mapping

**File Import**

Match your columns to any Maximizer field to complete your import. The import you selected requires that you match at least 1 column to a corresponding Maximizer record type

Company Contact

Fields to be imported	Destination Maximizer Fields	Match on this	Field Action	Field Format
<b>Company Name</b> <small>ABC Wine Shop, Carlyle Wines &amp; S...</small>	Company <small>Company/Basic Fields</small>	<input type="checkbox"/>	Add when empty	As imported
<b>Contact Last Name</b> <small>Johnson, James, Torres</small>	Last name <small>Contact/Basic Fields</small>	<input type="checkbox"/>	Add when empty	As imported
<b>Contact First Name</b> <small>Ed, Dolton, Martha</small>	First name <small>Contact/Basic Fields</small>	<input type="checkbox"/>	Add when empty	As imported
<b>Do Not Solicit By</b> <small>Email, Phone, Email, Fax, Mail</small>	Do not solicit by <small>Contact/Basic Fields</small>	<input type="checkbox"/>	Add when empty	Separated by ";"
<b>Contact EMAIL ADDRESS</b> <small>EMAIL1@MAXIMIZER.COM, contact2...</small>	Don't Import			As imported
<b>Contact Phone Home</b> <small>(604) 6018000, (604) 6018001, (604) ...</small>	Don't Import			Separated by ";"
<b>Contact Address Line 1</b> <small>329 E MAIN STREET, 111 Johns, 123...</small>	Don't Import	<input type="checkbox"/>	Add when empty	Separated by ";"
<b>Contact Address Line 2</b> <small>CHATEAU...</small>	Don't Import	<input type="checkbox"/>	Add when empty	As imported

When a column is mapped as a multi-value table field, the option for selecting a separator will be available.

BACK NEXT

## UPDATE CONTACT INFORMATION ONLY

While company information doesn't change often, contact information can change frequently. With this month's release, you can now choose to update just contact-level information.

In the Source screen, you can choose to update contact information only. When this option is selected, the Mapping function doesn't check company fields for duplicates.

✔ **What record type(s) does your import file contain?**

Contains **Contact** information only (\*this is an update only option)

The new option to update contact information only.

In the Mapping screen, you only need to map the fields for contacts.

Import Manager > Source > Rules > Mapping

**File Import**

Match your columns to any Maximizer field to complete your import. The import you selected records the following Maximizer record type

**Contact**

Fields to be imported <small>Preview of data</small>	Destination Maximizer Fields <small>Location of the field within Maximizer</small>	Match on this <small>Use to determine if record exists</small>
<b>First Name</b> <small>Edward, Inga, Jing</small>	First name <small>Basic Fields</small>	<input checked="" type="checkbox"/>
<b>Middle Name</b>	Middle name <small>Basic Fields</small>	<input type="checkbox"/>
<b>Last Name</b> <small>Yu, Lin,</small>	Last name <small>Basic Fields</small>	<input checked="" type="checkbox"/>
<b>Title</b>	Position <small>Basic Fields</small>	<input type="checkbox"/>
<b>Suffix</b>	Don't Import	<input type="checkbox"/>
<b>Initials</b>	Don't Import	<input type="checkbox"/>
<b>Web Page</b>	Don't Import	<input type="checkbox"/>
<b>Gender</b>	Don't Import	<input type="checkbox"/>

**First Name**

Available fields:

Search for fields

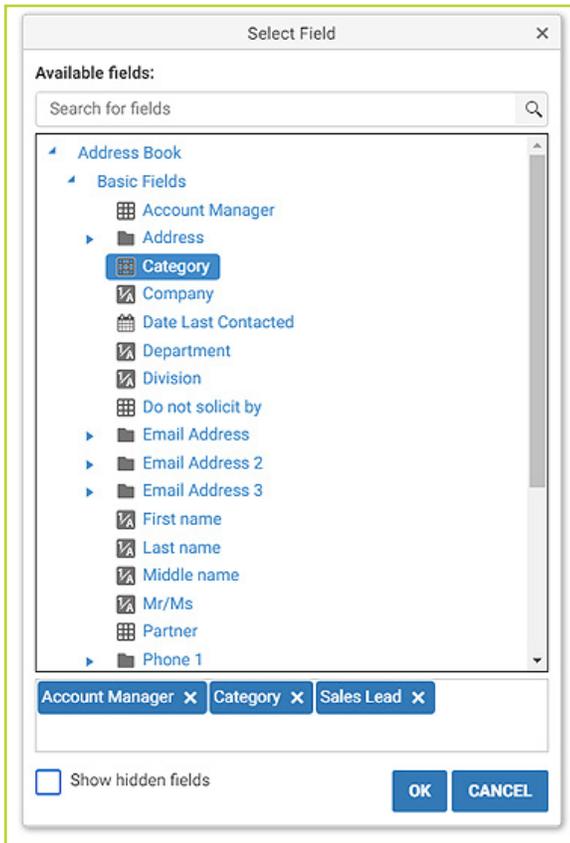
- Contact
  - Basic Fields
  - User-Defined Fields
  - Note

Show hidden fields

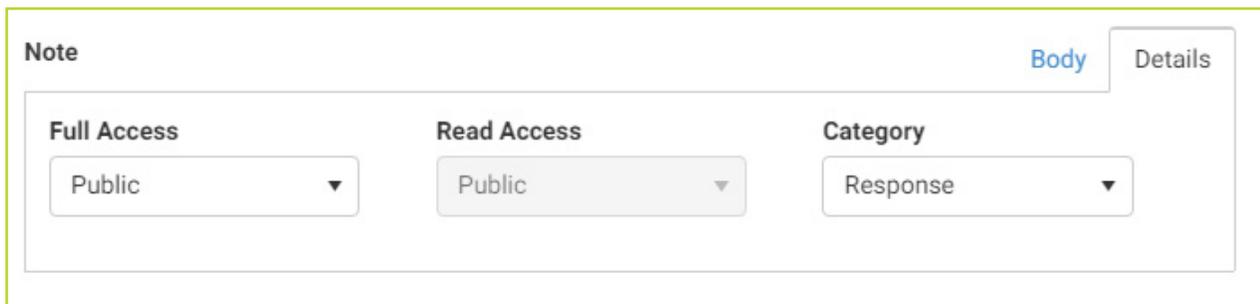
# GLOBAL EDIT

## GENERAL IMPROVEMENTS

You can now use the field picker to select many fields simultaneously, speeding up your global edits.



You can also specify full access, read access and category for notes created through Global Edit.



Global Edit - Address Book ✕

Field	Rule	Value(s)
Full Access ▼	Replace ▼	Joe Napoli ✕ Marketing ✕   ✕
Read Access ▼	Make Public ▼	<div style="border: 1px solid #ccc; padding: 5px;"> <input checked="" type="checkbox"/> Joe Napoli <span style="float: right;">✕</span> </div>
<div style="background-color: #0056b3; color: white; padding: 5px; display: inline-block; border-radius: 3px;"> <span style="font-size: 1.2em;">+</span> ADD ANOTHER         </div>		<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Users</span> <span>✕</span> </div> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Joe Napoli</li> <li><input type="checkbox"/> Lou Jones</li> <li><input checked="" type="checkbox"/> Marketing</li> <li><input type="checkbox"/> Partner Portal Administra...</li> <li><input type="checkbox"/> Partner Portal Configurat...</li> </ul> </div>
<p><b>Note</b> <span style="float: right;">Body Details</span></p> <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 10px;"> <span>▶</span> <div style="background-color: #0056b3; color: white; padding: 5px 15px; border-radius: 3px;">OK</div> <div style="background-color: #0056b3; color: white; padding: 5px 15px; border-radius: 3px;">CANCEL</div> </div>		

## GLOBAL EDIT FOR OPPORTUNITIES

The new Global Edit dialog for editing basic fields and user defined fields is now available in the Opportunities module. The following basic fields can be bulk edited:

- Actual revenue
- Categories
- Close date
- Completion comment
- Contact
- Cost
- Description
- Leader
- Objective
- Product/service
- Reason
- Revenue
- Sales team
- Start date
- Status

The value of some of the basic fields is affected by the value of other fields.

### Completion reason and status

If you want to edit the completion reason, you need to specify a status. Based on the selected status, the completion reasons will be populated accordingly. You can change status without selecting a reason.

The screenshot shows the 'Global Edit - Opportunity' dialog. It has three columns: 'Field', 'Rule', and 'Value(s)'. The 'Field' column has two dropdowns: 'Status' and 'Reason'. The 'Rule' column has two 'Replace' dropdowns. The 'Value(s)' column has a 'Won' dropdown. A blue button with a plus sign and the text 'ADD ANOTHER' is located below the 'Status' and 'Reason' dropdowns. A dropdown menu is open for the 'Reason' field, showing options: 'Excellent Presentation', 'Like Selection', and 'Superior Selection'. A tooltip box points to the 'Reason' dropdown with the text: 'Select a status first. The completion reasons will be populated based on the selected status.'

### Expected revenue / actual revenue and status

The Status field changes how global edit modifies expected revenue and actual revenue. Expected revenue applies to opportunities that are not won, while actual revenue applies to opportunities that have been won. The Global Edit process checks the status of each opportunity and updates the actual revenue for won opportunities and the expected revenue for opportunities with another status.

### Sales team and leader

Sales team and team leader fields need to be edited together. If you only select one of them, you will be prompted to add the other field. The selected leader needs to be a member of the selected team. If the selected team is a "Single User", only that user can be selected as team leader.

Field	Rule	Value(s)
Sales Team	Replace	West Coast Sales
Leader	Replace	Lou Jones

⊕ ADD ANOTHER

❗ Leader is not a member of the selected team.

The selected user needs to be a member of the selected team.

## GLOBAL EDIT FOR CASES

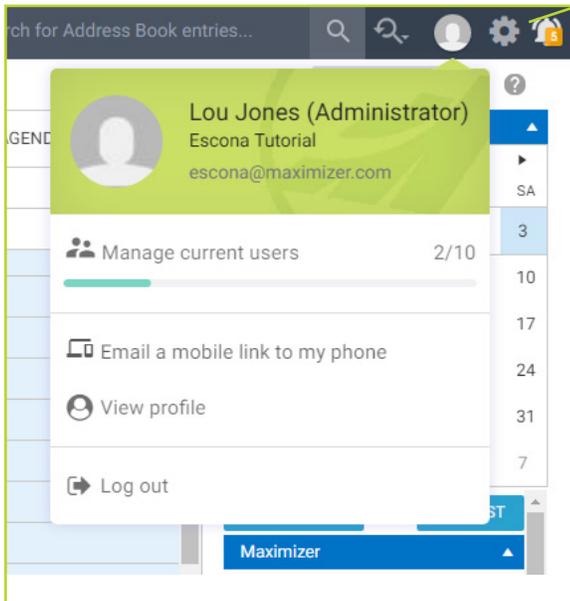
The new Global Edit dialog for editing basic fields and user defined fields is now available in the Customer Service module. The following fields can be bulk edited:

- Assigned to
- Case origin
- Case owner
- Case queue
- Case reason
- Case type
- Categories
- Contact
- Description
- Priority
- Products/services
- Severity
- Status
- Subject

# ENHANCED USER MENU

The user menu has also been given an upgrade.

The icon for the Preferences dialog has been moved to the header bar.



If you are an administrator, you can now see at a glance how many licenses have been used.

You can also click a button to email a Mobile Access link directly to your mobile device.

“View Profile” button provides quick access to your profile. Quickly edit details like your phone number, email address and more.

# OTHER IMPROVEMENTS

## HAVE EMAILS SENT FROM MAXIMIZER AUTOMATICALLY COPIED

If your company wants to track and audit all the emails sent from Maximizer, you can now set up a Bcc email address in Maximizer's Administrator module > Preferences > Email Server Settings screen.

**Preferences**  
for Email Server Settings

Modify Options

**Preferences that apply to all Address Books**

Service cycle time check: 1 Minute(s)

Enable sending in batch mode      Batch size: 0

Character set used by email service: [Dropdown]

URL of Campaign Manager statistics: [Text]

**Preferences that apply to only the current Address Book**

Send a Bcc copy of ALL emails to: **bcc@maximizer.com** Enter an email address

Activate services for the currently open Address Book

Once the Bcc email address has been entered, it will be displayed at the bottom of email creation dialog. All outgoing emails will be copied to this email address, including system emails such as an email reminder or notification.

**Logging**

Send a copy of this message to myself (send a carbon copy to myself)

Include message body in note

Save copy to entry's documents

Include attachments

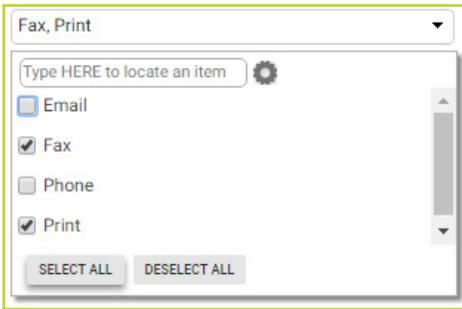
A copy of this email will be sent to bcc@maximizer.com

Text for note: [Text]

Logging Details...

**The Bcc email address will be displayed in email creation dialog.**

## SELECT OR DESELECT ALL ITEMS WHEN EDITING TABLE FIELDS



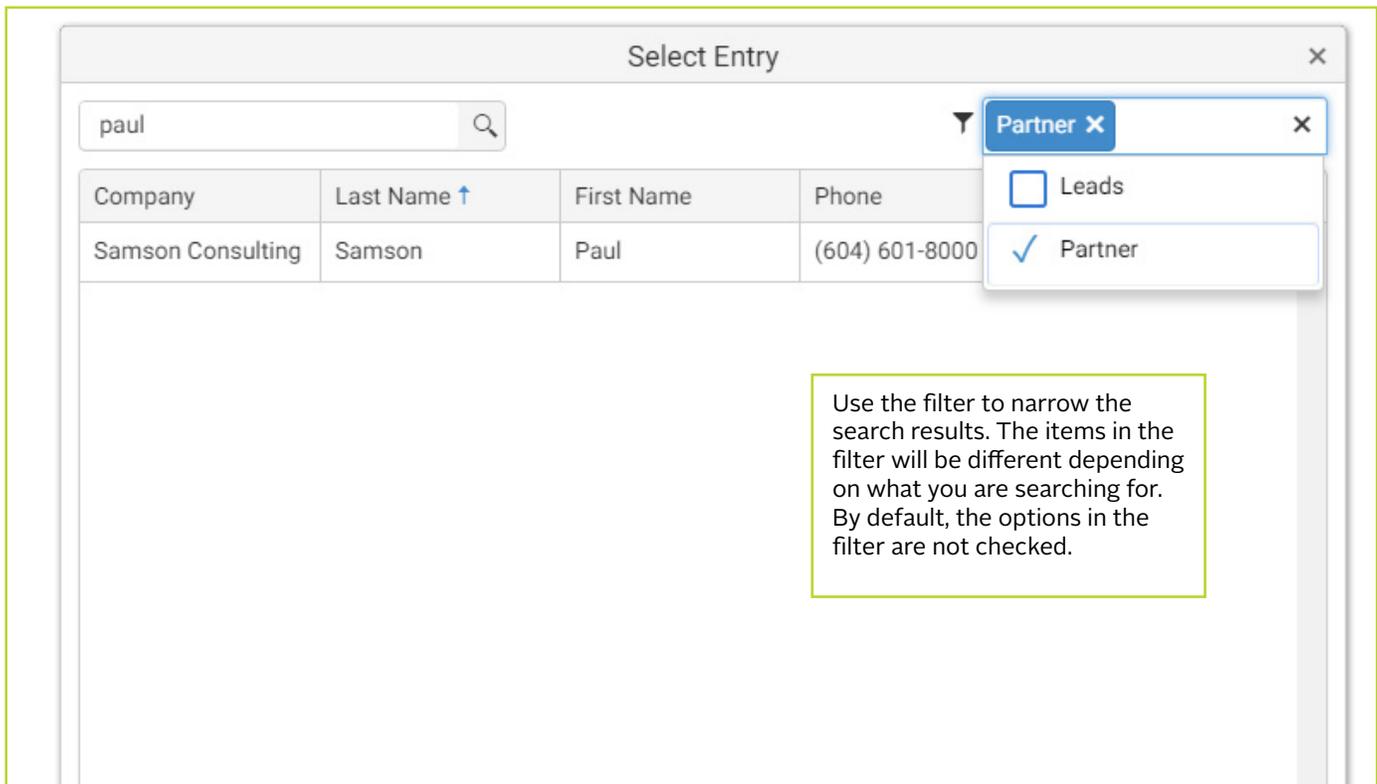
When editing a multi-value table field, you can now select all items or deselect all items.

## NEW SEARCH DIALOG FOR ADDRESS BOOK ENTRIES

There is a new dialog for searching for Address Book entries. This dialog can be accessed from following places:

- Add a related Address Book entry
- Convert an individual to a contact
- Move a contact to another company
- Assign a partner to an Address Book entry
- Assign a company/individual and contact to an opportunity or a case
- Assign partners or competitors to an opportunity
- Change partner for Address Book entries in the Global Edit dialog
- Change contact for opportunities or cases in the Global Edit dialog

You will still need to perform a search to find entries. You can use the filter on the right to narrow the list.



## SELECT A PRINTER BEFORE PRINTING MERGED DOCUMENTS FROM WORD

When you print a merged document in Word using Maximizer's Word add-in, you can now select a printer before printing. If you would like to use this function, you need to download the latest version of the Maximizer Word add-in from App Directory. Note that the latest version of Maximizer Word add-in doesn't work with Microsoft Word 2007.

## BUGS FIXED SINCE LAST RELEASE

### **The name of a Contact List entry in an appointment would not display in the Hotlist column view**

Appointments generated by scheduling an Action Plan now display the name of Contact List entries in your Hotlist column view.

### **Import will fail if any Favorite List for Contact List entries are read only**

Imports will no longer fail if a login user tries to create a Favorite List to track imported entries, but there are some existing Favorite Lists that the login user has the right to read but not modify.

### **Moving a contact from one company to another one loses the assigned partner**

Partners assigned to a contact will no longer be lost when contacts are moved from one company to another.

### **Email saved from the Outlook add-In showing a wrong From Address**

Using Maximizer's Outlook add-in to send an email will no longer show your default "From" address when you use another email address to send the email.

### **An appointment cannot be saved if location is set to a user's office**

You will no longer get an error if you select <User Name>'s office as the location for an appointment.

### **An exception occurs when trying to perform a quick access search in Mobile Access**

Users can now create a saved search that prompts for value in Web Access and use quick access to retrieve this search in Mobile Access, without having their session expire.