Maximizer CRM

Release Date: October 2016

Release Name: Maximizer CRM 2017

New Features:

Automatic Duration/elapsed time calculation:

Automatically update last contact date:

Opportunity Module Enhancements:

Clean Interface and Typeface:

Enhanced Calendar Usability:

Floating Notification Panel:

Navigation Menu:

Accounts Module - (MAXIMIZER CRM WEALTH MANAGER EDITION)

Customise Appointment Notification and Reminder Emails:

Simplified Reporting Setup:

Expanded API Infrastructure: Maximizer Connect for Outlook 365:

Integration with Marketing Automation Systems like MailChimp:

New Features Overview

Productivity Features

Automatic Duration/elapsed time calculation: The new Duration Field automatically calculates time elapsed from a start date. Once set up, users don't have to trigger the calculation; elapsed time is updated in the system automatically.

Users can easily keep track of critical timeframes such as time passed since last contact, contract renewal dates and personal anniversaries. The calculations can be used in custom column views, searches and dashboards.

Automatically update last contact date: The "Last Contact Date" feature automatically tracks when a client was last contacted, based on emails sent, appointments completed, manually-set date and other triggers. Users can also manually update the last contact date if they need to do so because of offline or other contact.

Users no longer need to manually update the last contact date. This feature can be used to highlight clients with pending and overdue contacts and more.

Opportunity Module Enhancements: Users can now set up multiple business processes and opportunity stages, based on unique customer segments and workflows. Users can also track opportunities by stage in the sales process.

You can tailor your business processes and opportunity stages to match the buying lifecycle of each customer group. Gain insight into metrics such as length of time contacts spend in each stage.

User Experience Enhancement

Clean Interface and Typeface: Maximizer CRM has received an interface makeover featuring refreshed colours and easy to read type.

Enhanced Calendar Usability: The calendar has been enhanced to introduce the concept of an "Organizer" who owns the meeting being scheduled. Configurable colour coding makes it significantly easier to see the availability of attendees and resources such as meeting rooms, while the cleaner font makes it easier to read appointment details.

Floating Notification Panel: The less-intrusive Floating Notification Panel alerts users of their events and tasks, even when their browser window is minimized. (Chrome, Firefox only)

Navigation Menu: Colour highlighting and bold text quickly identifies which module users are currently working in.

Customise Appointment Notification and Reminder Emails: Create appointment notification and reminder email templates for different audiences and communication types with headers and footers that reinforce your corporate story.

Elevate the professionalism of your communication and keep your brand top of mind.

Simplified Reporting Setup: Choose a column setup before generating a report to get the exact data needed the first time.

Simplified one-click report generation delivers relevant information faster and easier.

Integration

Expanded API Infrastructure: Maximizer CRM's expanded API platform is designed to help users connect with thousands of applications that bring value to their organization.

Maximizer Connect for Outlook 365: Do more without switching systems and maintain the history of communication with one click. Easily add new contact details and email communications, and quickly set up a sales opportunity or follow-up task in Maximizer, from within Outlook.

Integration with Marketing Automation Systems like MailChimp: Connect for use with MailChimp helps users keep marketing campaign data and contacts in sync, and delivers visibility into MailChimp campaign results within Maximizer.

Integration with Zapier is just the beginning: Maximizer Connect for use with Zapier handles the big task of helping over 500+ applications talk to Maximizer CRM Live, making it easy to bring documents, forms, contacts, tickets and files across. Zapier is just one example of what's possible with Maximizer's expanded API infrastructure.