



– FEATURE GUIDE

MAXIMIZERCRM





WHAT'S NEW

ABOUT US

As a pioneer in the world of Customer Relationship Management software, we know that siloed and scattered data costs businesses a lot of time and money.

We know when you've got complete clarity about your team's performance, you've got the key to exponential growth.

The latest release of **MAXIMIZERCRM** has been renewed to better manage your customer details, track new opportunities and scale sustainably.

We've added major boosts to SAML-based SSO, enhanced mobile biometrics, added new widgets in Insights, introduced more integrations and a lot more.

This document explores some of our latest updates in more detail.

INSIGHTS

IMPROVED VISUAL ANALYTICS.

Customize how you want to analyze and visualize your data in a few clicks and picking from a wide collection of available widgets and formulas.

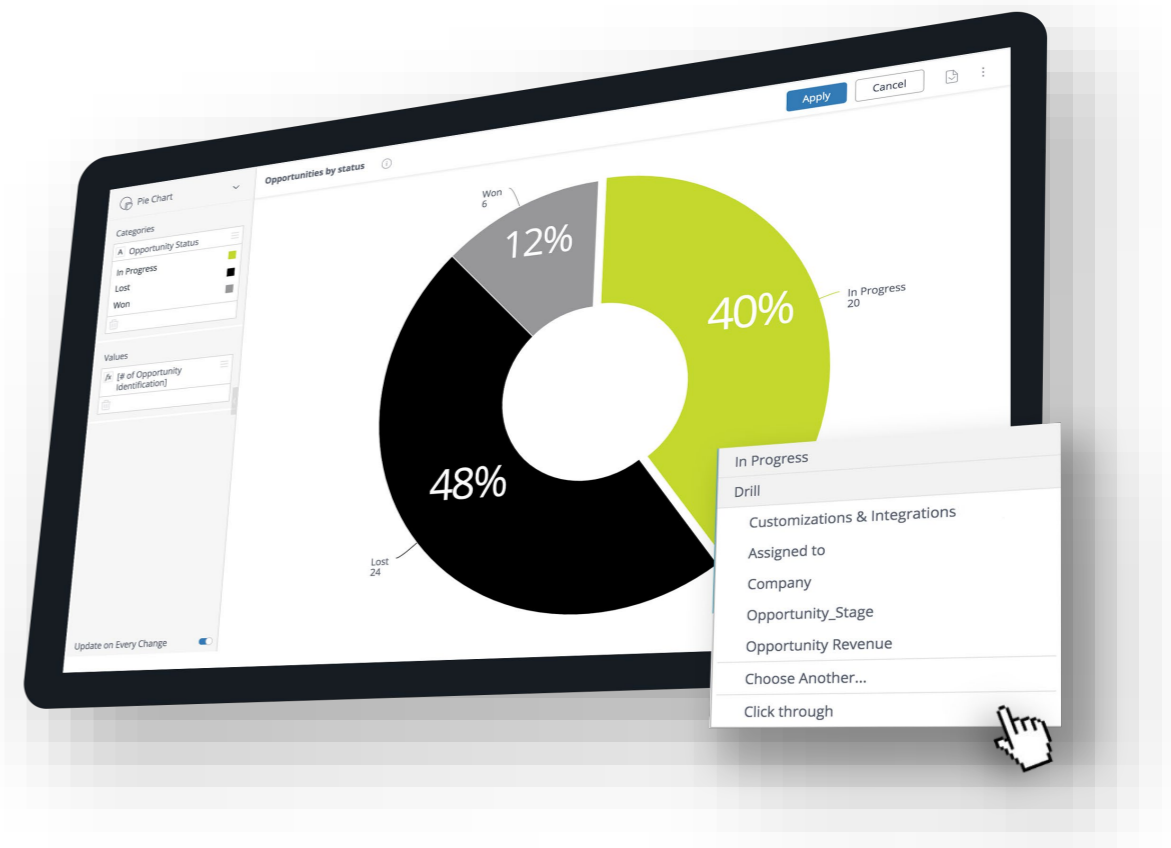
Improved Pie Chart

If you have ever looked at a report and struggled to identify what the "Other" piece of the pie meant in your chart then this one's for you! You can now adjust the definition of 'Others' slice in the pie chart widget, by specifying what category items should be included.

Ex: "Include in the 'Others' slice all categories (slices) smaller than X percent (%).

OR

Show X slices, and group all the rest into the 'Others' slice.



INSIGHTS

TRACK YOUR CHANGES.

Email reports to yourself or your team daily or monthly and get notified when any users make changes to a shared dashboard, so that you always have access to the most accurate data.

Monthly Reporting

In addition to daily and weekly reports, you can now view critical business performance in monthly reports in a few clicks and right from your CRM.

Improved Funnel Chart

You can track the health and validity of any process with our funnel chart that shows stages in a process that are sequentially dependent. Each stage represents a percentage total with the top being the largest and each subsequent stage being a smaller chunk than its predecessor.

New Trend Line

Evaluate KPI trends by adding trend lines to cartesian charts to carefully analyze upward and downward trends and generate actionable data.



MOBILE

ANYTIME. ANYWHERE.

Access **MAXIMIZERCRM** on the go with our Mobile app for a highly optimized mobile experience.

Enhanced Login Process

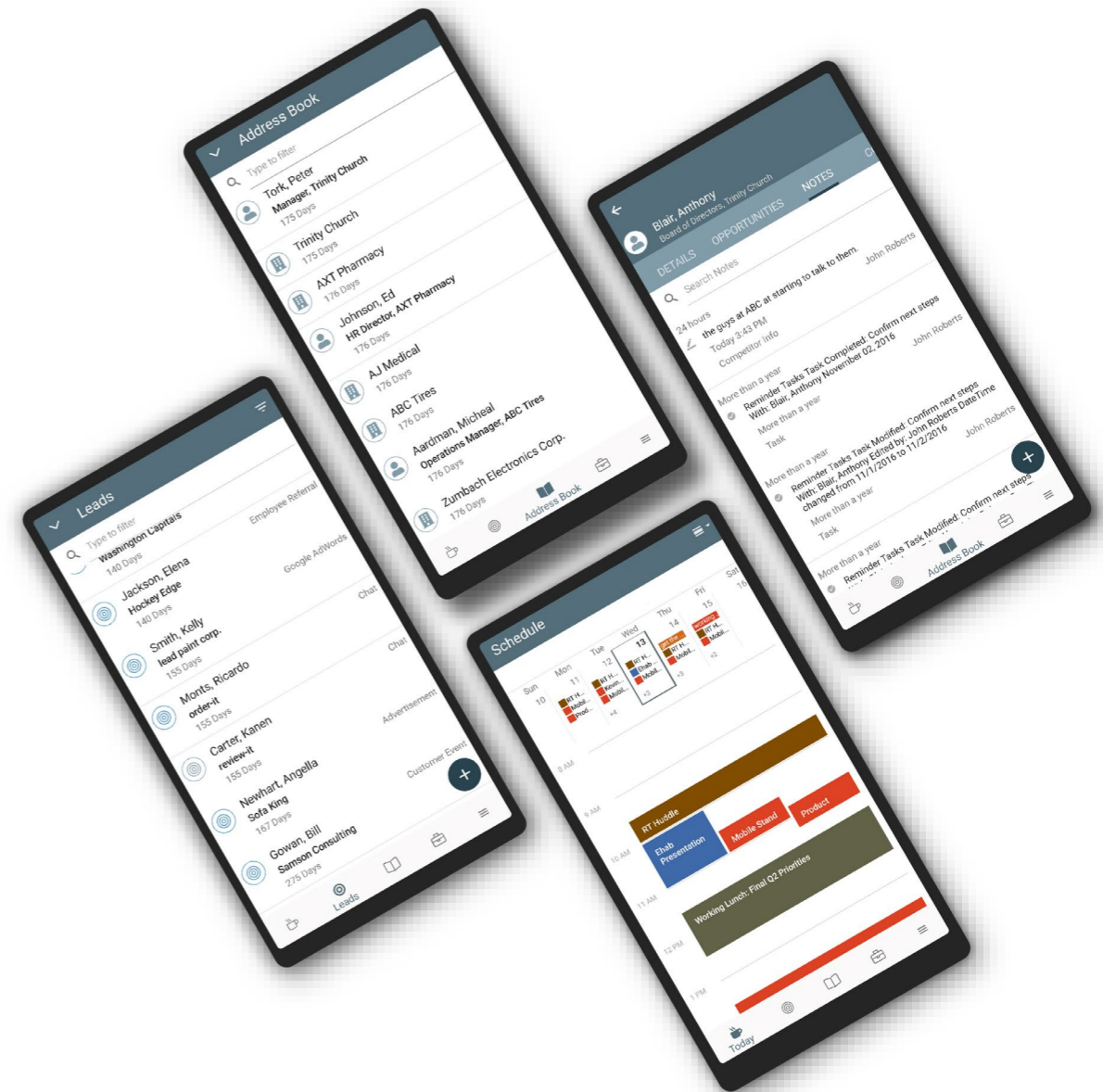
Login with 2FA (PIN) once, with biometrics and increase security and convenience for your teams.

Enhanced Usability

Add up to 5 additional customizable fields to capture the data most appropriate to your business.

Insights Dashboards

Now you can access key data and business insights right from the palm of your hands.



SECURITY

YOUR DATA SECURED.

Single-Sign-On (SSO)

Use a single set of login credentials to access multiple applications so you can focus your time on helping your customers and closing more business.

You can now set up a third-party identity provider to login to **MAXIMIZERCRM** to reduce password fatigue.



+ UPGRADES

FEW CLICKS MORE WINS.

View Address Book Entry History in Cases

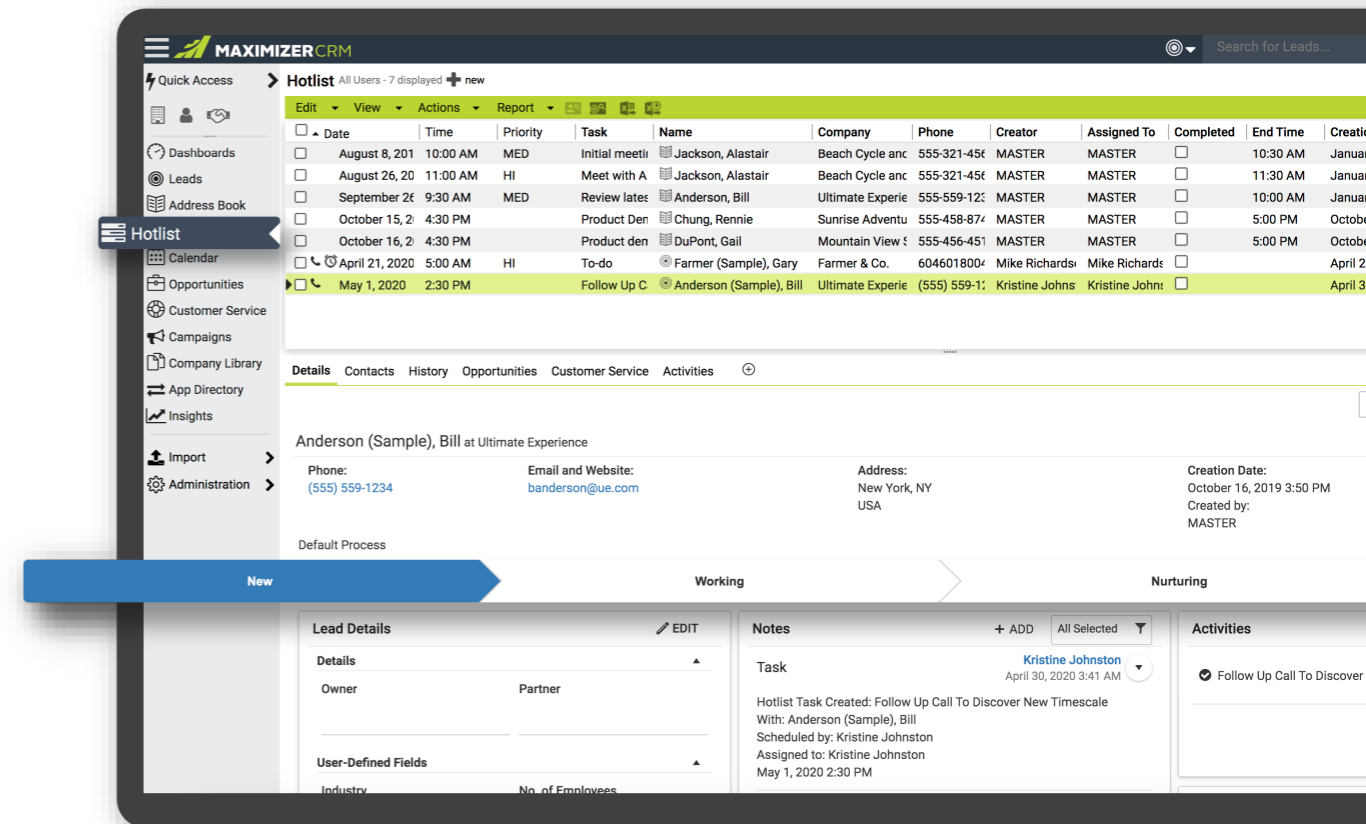
You can now get a 360-degree view of your customers when working on a Case by pulling Address Book entry notes right from the Customer Service Module while boosting productivity and working efficiently.

Navigate to Opportunities & Customer Service Modules from Hotlist

Consistently see the most critical information about your contacts in one click. Hotlists tasks enable you to record actions and follow up on personal activities and interactions with your contacts. You can view details of an Opportunity or a Case associated to your contacts with a simple click from the Hotlists tasks section.

Enhanced System Note Security

Seamlessly control the visibility of sensitive information with our new and enhanced system note security. You now have the option to hide values of user-defined fields in the logging notes, after you make changes to the fields.



+ UPGRADES

ACCESSIBILITY.

Improved Keyboard Shortcuts

In our on-going commitment to accessibility, we've added keyboard shortcuts to ensure you can conduct your work efficiently; this also includes a support screen reader to allow team members with limited vision to use **MAXIMIZERCRM**.

Commonly used keyboard shortcuts include:

- Add a note Alt + Shift + n
- Add a document Alt + Shift + d
- Write an email Alt + Shift + e
- Schedule an appointment Alt + Shift + m
- Schedule a task Alt + Shift + k





PRIVATE CLOUD

ENHANCING ON-PREMISE.

If you are using **MAXIMIZERCRM** On-Premise, there are some key improvements for you.

Single Sign-On (SSO)

Setup a 3rd party identity provider to log in to **MAXIMIZERCRM** directly to secure your data and reduce password fatigue.

Enhanced Lead Management

Continued technical improvements mean your data is kept secure. You can now segment leads by users or teams and keep your data clean and organized by controlling Full and Read Access rights.

MAXIMIZERCRM will give you a 360-degree view of a customer when working on an opportunity or a case by pulling up address book entry history in opportunity and cases.

Auto Complete Address Book and Geo – Codes

MAXIMIZERCRM now provides suggestions when entering addresses and save geocodes of addresses into your database. This will ensure data is entered with accuracy and enable integrations to pinpoint the customers' locations in maps.



INTEGRATIONS

IT TAKES A VILLAGE.

Connect The Tools That Work For You

Having a seamless connection between your CRM and other business tools helps streamline processes and gives you the full picture.

With the latest release, we've made some enhancements to our integrations.

Gmail – You can now create, update and save emails to Address Book, Leads, Opportunities and Customer service records in addition to creating Hotlist tasks.

QuickBooks – This upcoming integration will allow users to view QuickBooks related information right from the Address Book in **MAXIMIZERCRM**.

MailChimp – An enhanced version of this integration will provide users with an option to synchronize records, one-way from Maximizer to MailChimp. Also, you'll be able to start or stop the sync service as per your convenience.

For more [integrations](#), explore Zapier and discover integrations including Gmail, Outlook, or other business solutions.

We're Looking Forward to Working With You.

Reach out to a member of our team anytime with any questions you might have.

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