



Release Notes – July 2022

MAXIMIZERCLOUD

Notes Function is Back

- Logging notes for phone calls, emails and appointments/tasks creation, modification, and completion.
- Email notes will be created when sending emails from Maximizer email compose dialog and Outlook add-in.
- The logging note options have been added back into Preferences dialog.
- **Note:** If you manually log an interaction, the logging notes will not be created.

A Fresh New Look

- Introduce the new style for the Icon Bar with bigger icons and bold text.
- Increase the row height of the grids to provide more space and reduce clutter.

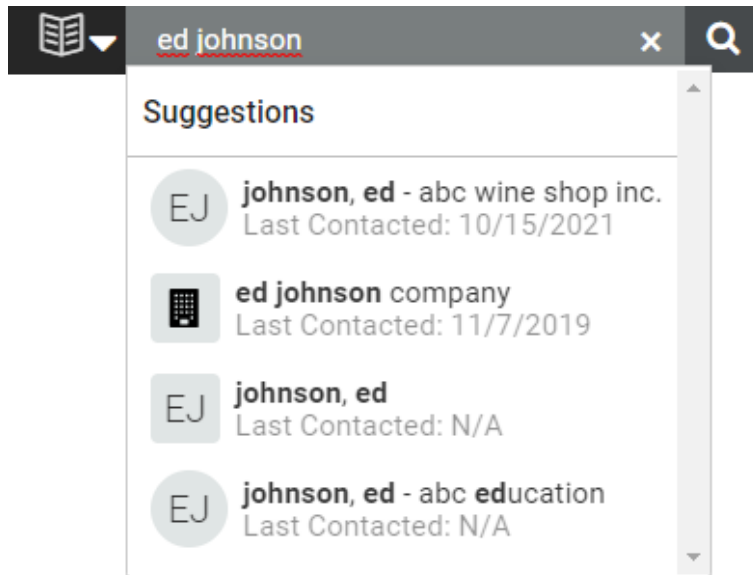
The screenshot displays the Maximizer CRM interface. At the top, there is a search bar for Address Book entries. Below it is a table with columns: Name, Phone Number, Email Address, City, State, Department, Division, and Date Last Contacted. The table contains four entries, with the first one highlighted in green. Red arrows point to the new icon bar on the left and the increased row height of the table.

Name	Phone Number	Email Address	City	State	Department	Division	Date Last Contacted
ABC Bike	(555) 555-5555	contactus@abcbike.com	Vancouver	BC		Asia Pac...	10/21/2021
All The Best Spirits	(604) 601-8001	escona@maximizer.com	Riverside	CT			6/6/2021
Anderson, Bill	(555) 555-5555	bill.anderson@abcwine.com	Vancouver	BC			10/26/2021
Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com	Vancouver	BC			10/26/2021

Below the table, the details for 'ABC Bike' are shown. The contact information includes: 1221 Burnaby St, Vancouver BC V6E 1P7, Canada. The contact details are: Main: (555) 555-5555 1245, Fax: (666) 666-6666. The email address is contactus@abcbike.com. The account information includes: Primary Interest: As an agent/distributor, Last Visit: December 15, 2021, Annual Sales: 200000.00, Retail Wine Cost: \$101+, Region: US - Southeast, Industry: Food Services, Size of Client: Large, First Contacted Date: February 1, 2022. The 'Do not solicit by' section includes: Category: Customer, Territory: West, Territory Status: Set By Manager, Account Manager: Billie Holly, Full Access: Public, Read Access: Partner, Starred Entry: No, Rating: No.

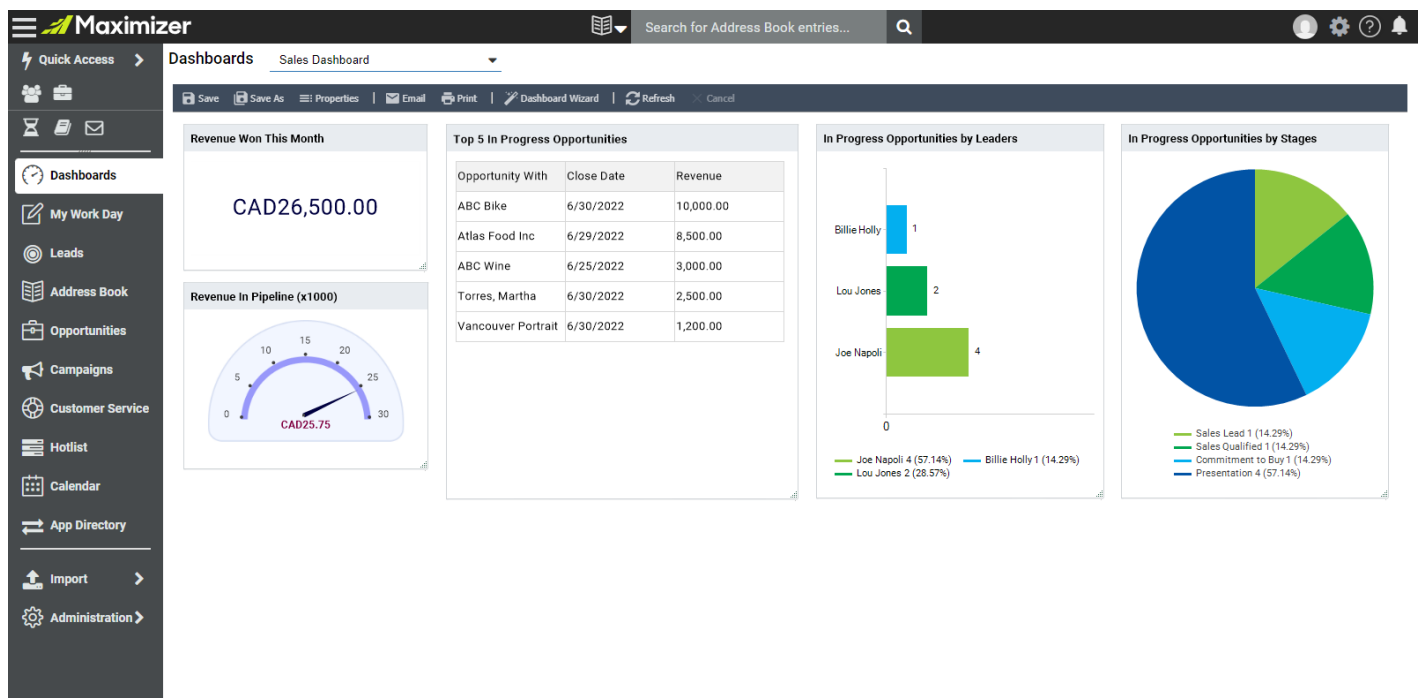
Optimized Quick Search Bar

- Quick Search field is now top center of the header bar.
- The Last Contacted Dates of typed entries now shows up in Suggestions. This will help you to decide which entry to select if multiple entries with the same name have been found.
- New Display of avatars for individuals, contacts and leads in Suggestions.

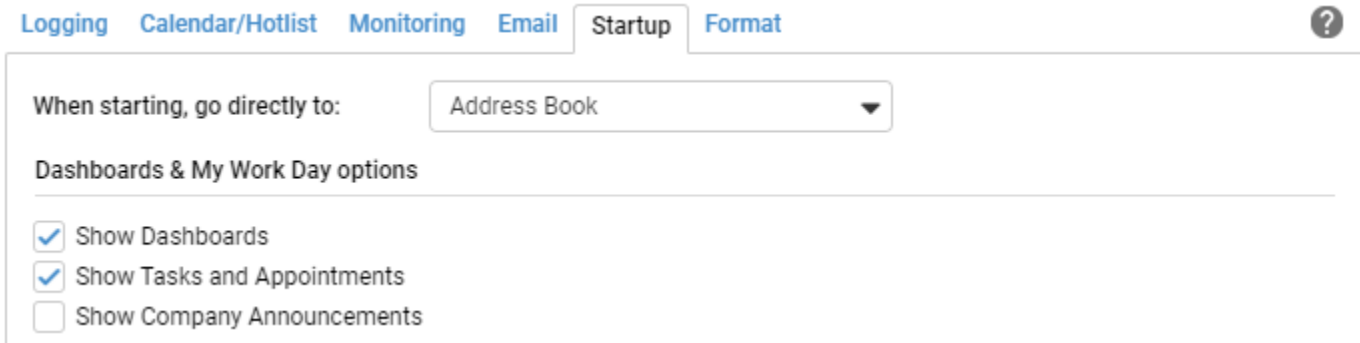


Cleaner Dashboards

- An updated display of the Dashboards to look clean and simple
- Separate Dashboard for My Work Day module. You can now turn on or off each module independently.



Please Note: The options for Show Dashboards and Show Tasks and Appointments in Preferences dialog have been removed.

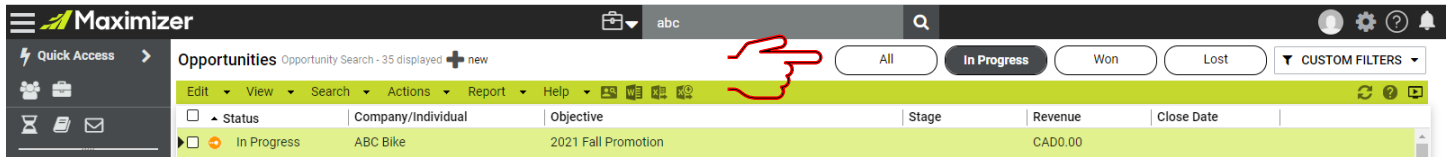


Enhancement in Opportunities Module

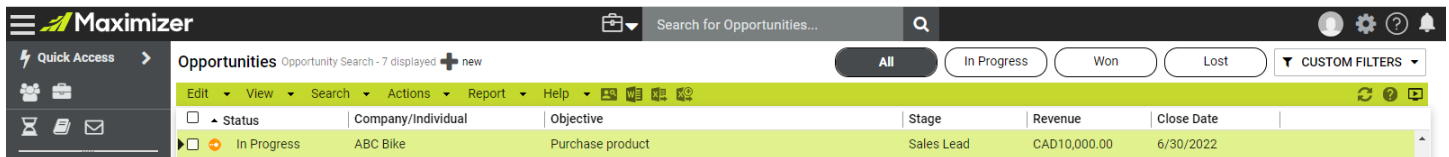
1) Opportunity Status Filter

The opportunity status filters are now available in Opportunities module. You can quickly filter the search results by status.

After you have performed a Quick Search to search for Opportunities, In Progress is selected by default. You will see the In Progress Opportunities of the search results. Click Won or Lost to see the Opportunities in their respective status. Or, click All to see all available Opportunities search results including those Abandoned and Suspended.



Note: If you perform an Opportunity search by Leader, Advanced Search, or retrieve a Favorite List, All will be selected by default. You can click In Progress, Won or Lost to see Opportunities in their respective status.



Clicking the Custom Filters button will present a drop-down. The items in the drop-down are the same as those under the Search menu. You can perform a search using one of the menu items seen below:

All In Progress Won Lost CUSTOM FILTERS ▾

- Status...
- Company/Individual...
- Contact Name...
- Sales Objective...
- Team Name...
- Leader...
- Stage...
- Confidence Rating...
- Revenue...
- undefined
- Competitor...
- Close Date...
- Creator...
- Campaign...

2) Change Stages in your Sales Process

To move the sales stage forward, you can now simply click a stage in the process and click the Set Stage button.

Opportunities Current Opportunities - 1 displayed new

Status	Company/Individual	Objective	Stage	Revenue	Close Date
In Progress	ABC Wine	Sell Escona Wine	Sales Qualified	CAD3,000.00	6/25/2022

Details Interactions Contacts Notes Files User-Defined Fields Activities

Sales Lead (Age: 1 day) **Sales Qualified (Age: 6 days)** Presentation Proposal Commitment to Buy Won **SET STAGE**

Sell Escona Wine
 ABC Wine

In Progress
 Appleseed, John
 Hot

Description:
 Opportunity to introduce our basic California production. Also interested in domestic sparkling.

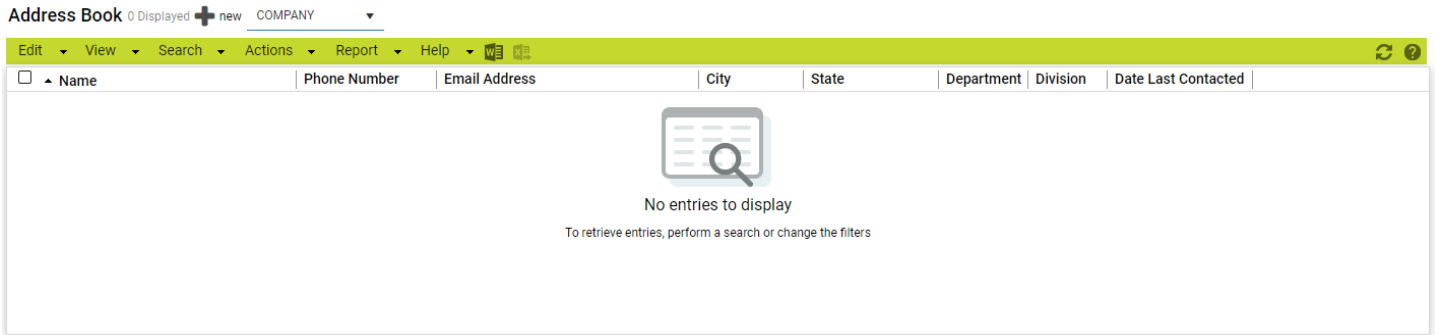
Products / Services:
 Cabernet, Chardonnay, Chenin Blanc

General Opportunities

Region:	Mid West	Status:	In Progress
Store size:	Over 3,000 square feet	Currency:	Canadian Dollar
Wine Preference:	Imported, Domestic	Start Date:	June 15, 2022
Number of Retail Lines:	10+	Close Date:	June 25, 2022
Number of Distributors:	5	Next Action:	Gather requirements
		Revenue:	CAD3,000.00
		Cost:	CAD100.00
		Sales Team:	Channel Sales
		Leader:	Lou Jones
		Campaign:	

New Blank Screen Display

When a screen is blank, a graphic with instruction will now be displayed.





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**.