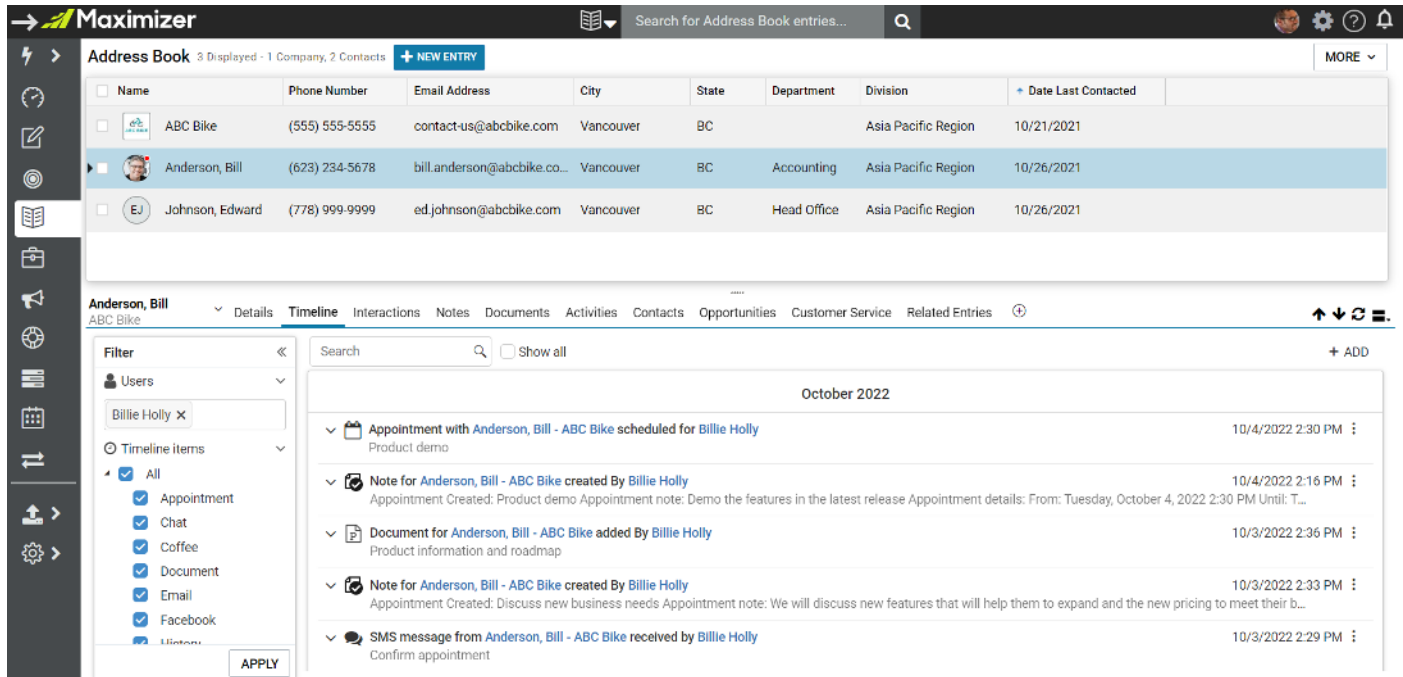




Release Notes – October 2022

Introducing Timeline. Your Customer Interactions Organized.

Your consolidated interaction history for your clients is finally here. Grouped chronologically by month, you can now see everything you need in one place: notes, documents, emails, phone calls, appointments, tasks and interactions. You can **expand** each item to see each its full details, **filter** through activity types and use the **search** bar to locate specific key words. Timeline will also be available in the Leads, Hotlist, Opportunities and Customer Service modules to keep your customer touchpoints organized and more accessible throughout your day.



Address Book 3 Displayed - 1 Company, 2 Contacts **+ NEW ENTRY** MORE ▾

Name	Phone Number	Email Address	City	State	Department	Division	Date Last Contacted
ABC Bike	(555) 555-5555	contact-us@abcbike.com	Vancouver	BC		Asia Pacific Region	10/21/2021
Anderson, Bill	(623) 234-5678	bill.anderson@abcbike.co...	Vancouver	BC	Accounting	Asia Pacific Region	10/26/2021
Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com	Vancouver	BC	Head Office	Asia Pacific Region	10/26/2021

Anderson, Bill Details **Timeline** Interactions Notes Documents Activities Contacts Opportunities Customer Service Related Entries

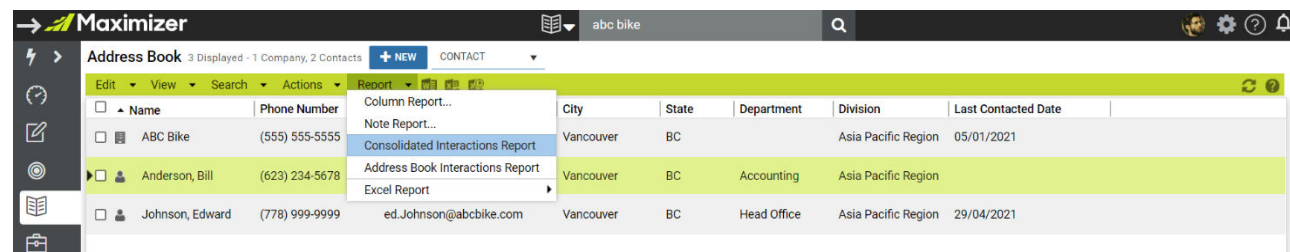
Filter Users: Billie Holly X Timeline items: All Appointment Chat Coffee Document Email Facebook

October 2022

- Appointment with Anderson, Bill - ABC Bike scheduled for Billie Holly 10/4/2022 2:30 PM
- Note for Anderson, Bill - ABC Bike created by Billie Holly 10/4/2022 2:16 PM
- Document for Anderson, Bill - ABC Bike added By Billie Holly 10/3/2022 2:36 PM
- Note for Anderson, Bill - ABC Bike created by Billie Holly 10/3/2022 2:33 PM
- SMS message from Anderson, Bill - ABC Bike received by Billie Holly 10/3/2022 2:29 PM

The reporting has been updated to a Consolidated Timeline Report and will replace the previous Interactions Report. The filter option is available for filtering by user and activity type if needed. Notes, documents, and any interaction will be displayed in the Timeline report to export your sales activities so you can easily prepare for your next meeting.

Old

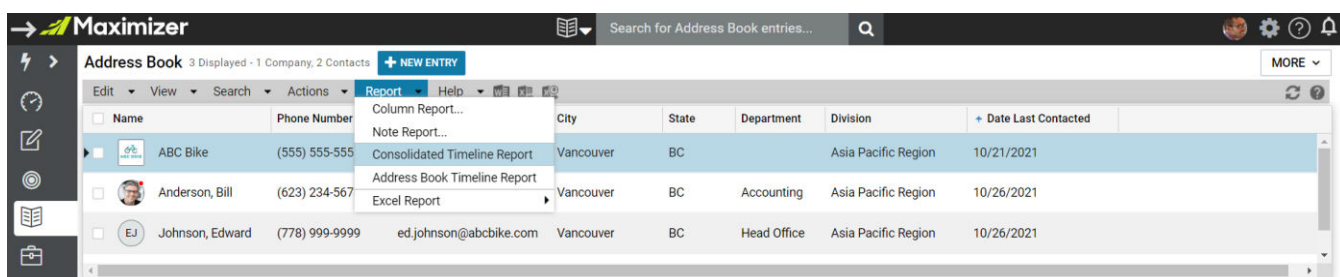


Address Book 3 Displayed - 1 Company, 2 Contacts **+ NEW** CONTACT

Name	Phone Number	City	State	Department	Division	Last Contacted Date
ABC Bike	(555) 555-5555	Vancouver	BC		Asia Pacific Region	05/01/2021
Anderson, Bill	(623) 234-5678	Vancouver	BC	Accounting	Asia Pacific Region	
Johnson, Edward	(778) 999-9999	Vancouver	BC	Head Office	Asia Pacific Region	29/04/2021

Report Column Report... Note Report... Consolidated Interactions Report Address Book Interactions Report Excel Report

New



Address Book 3 Displayed - 1 Company, 2 Contacts **+ NEW ENTRY** MORE ▾

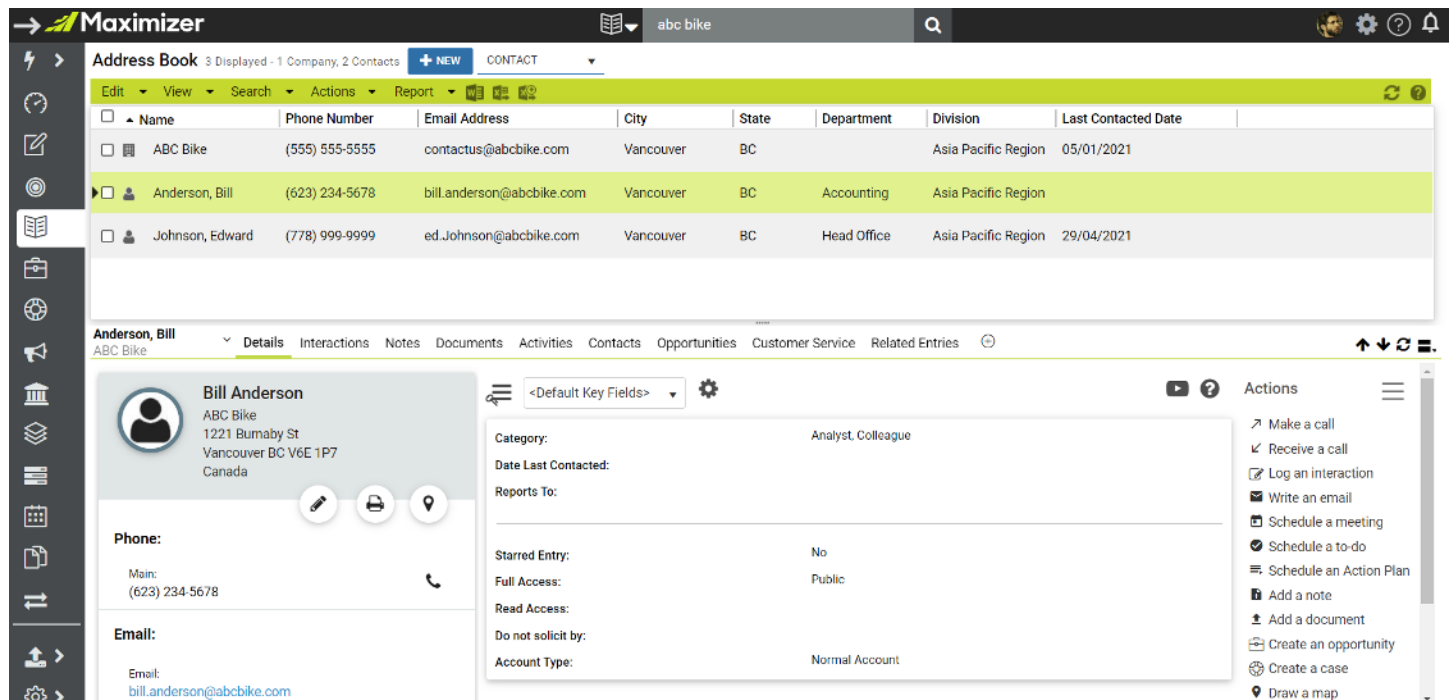
Name	Phone Number	City	State	Department	Division	Date Last Contacted
ABC Bike	(555) 555-5555	Vancouver	BC		Asia Pacific Region	10/21/2021
Anderson, Bill	(623) 234-5678	Vancouver	BC	Accounting	Asia Pacific Region	10/26/2021
Johnson, Edward	(778) 999-9999	Vancouver	BC	Head Office	Asia Pacific Region	10/26/2021

Report Column Report... Note Report... Consolidated Timeline Report Address Book Timeline Report Excel Report

We Continue to Bring People Front & Center

Avatars for People are now included in the Name column in the Address Book grid and Initial Avatars for Address Book entries in the Details tab when a photo is not available.

Old



Address Book 3 Displayed - 1 Company, 2 Contacts **+ NEW** CONTACT

Name	Phone Number	Email Address	City	State	Department	Division	Last Contacted Date
ABC Bike	(555) 555-5555	contactus@abcbike.com	Vancouver	BC		Asia Pacific Region	05/01/2021
Anderson, Bill	(623) 234-5678	bill.anderson@abcbike.com	Vancouver	BC	Accounting	Asia Pacific Region	
Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com	Vancouver	BC	Head Office	Asia Pacific Region	29/04/2021

Anderson, Bill Details Interactions Notes Documents Activities Contacts Opportunities Customer Service Related Entries

Bill Anderson
ABC Bike
1221 Burnaby St
Vancouver BC V6E 1P7
Canada

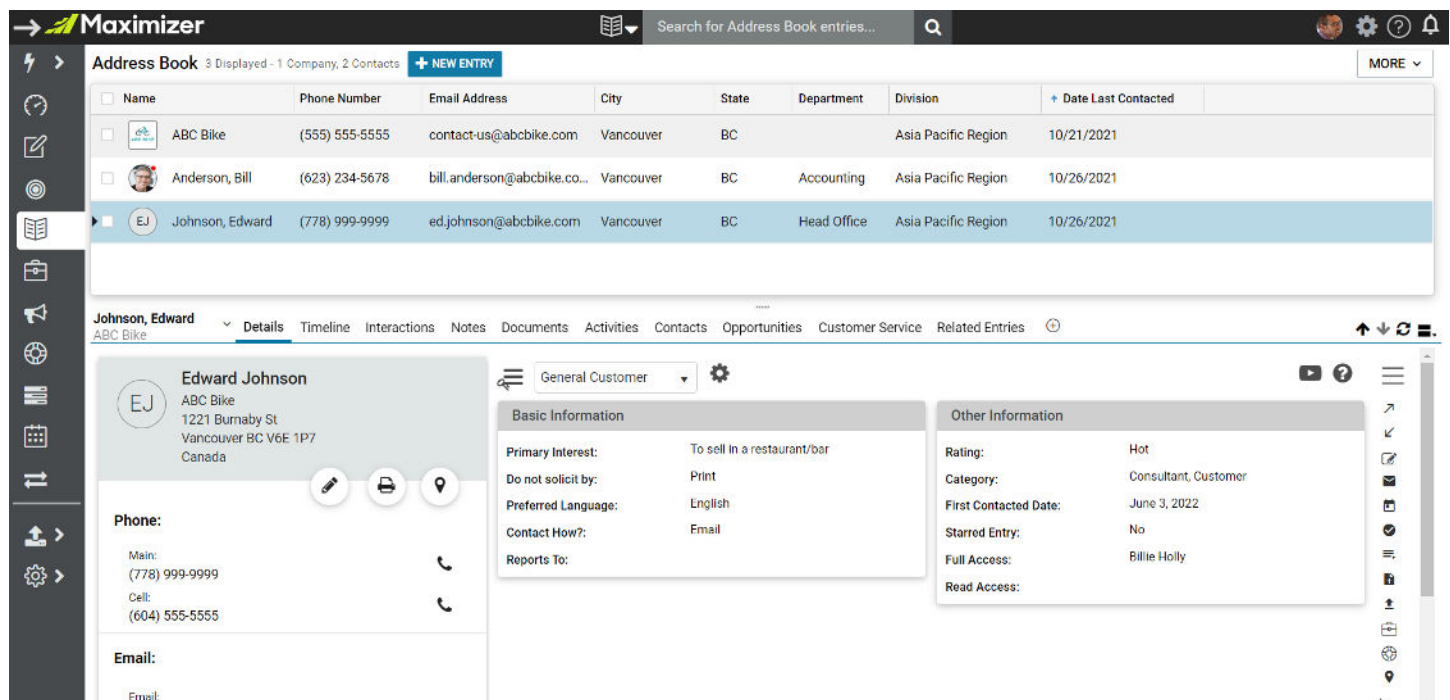
Phone:
Main: (623) 234-5678

Email:
Email: bill.anderson@abcbike.com

Category: Analyst, Colleague
Date Last Contacted:
Reports To:
Starred Entry: No
Full Access: Public
Read Access:
Do not solicit by:
Account Type: Normal Account

Actions
Make a call
Receive a call
Log an interaction
Write an email
Schedule a meeting
Schedule a to-do
Schedule an Action Plan
Add a note
Add a document
Create an opportunity
Create a case
Draw a map

New



Address Book 3 Displayed - 1 Company, 2 Contacts **+ NEW ENTRY**

Name	Phone Number	Email Address	City	State	Department	Division	Date Last Contacted
ABC Bike	(555) 555-5555	contact-us@abcbike.com	Vancouver	BC		Asia Pacific Region	10/21/2021
Anderson, Bill	(623) 234-5678	bill.anderson@abcbike.co...	Vancouver	BC	Accounting	Asia Pacific Region	10/26/2021
EJ Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com	Vancouver	BC	Head Office	Asia Pacific Region	10/26/2021

Johnson, Edward Details Timeline Interactions Notes Documents Activities Contacts Opportunities Customer Service Related Entries

Edward Johnson
ABC Bike
1221 Burnaby St
Vancouver BC V6E 1P7
Canada

Phone:
Main: (778) 999-9999
Cell: (604) 555-5555

Email:
Email:

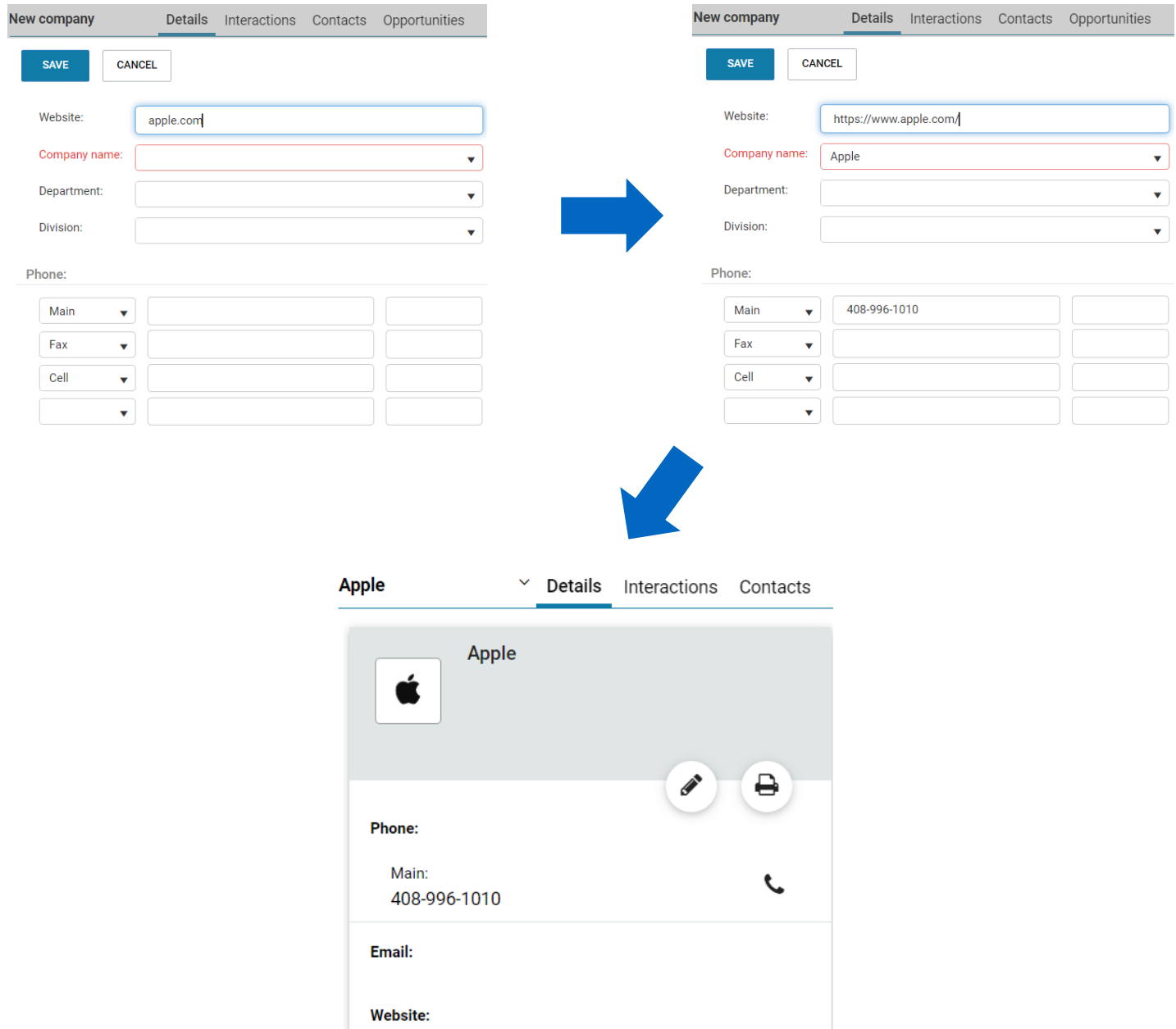
General Customer

Basic Information
Primary Interest: To sell in a restaurant/bar
Do not solicit by: Print
Preferred Language: English
Contact How?: Email
Reports To:

Other Information
Rating: Hot
Category: Consultant, Customer
First Contacted Date: June 3, 2022
Starred Entry: No
Full Access: Billie Holly
Read Access:

SmartFill Makes Data Entry a Breeze

When creating a new company, just start typing their website and leave the admin to us. SmartFill is our way of defining how some company details like company name and logo will automatically populate so that entering data has never been easier. We will continue to work on this to keep adding more relevant company details to bring the information to your fingertips without breaking a sweat.



The diagram illustrates the SmartFill process in three stages:

- Initial Input:** A form titled "New company" with tabs for Details, Interactions, Contacts, and Opportunities. The "Details" tab is active. The "Website" field contains "apple.com". The "Company name", "Department", and "Division" fields are empty. The "Phone" section has four rows for Main, Fax, Cell, and an additional line, each with a dropdown menu and two input fields.
- SmartFill Process:** A large blue arrow points from the initial input stage to the next stage.
- SmartFill Result:** The "Website" field now contains "https://www.apple.com/". The "Company name" dropdown menu is populated with "Apple". The "Department" and "Division" fields remain empty. The "Phone" section now has the "Main" field populated with "408-996-1010".

Below the diagram, a screenshot shows the final result of the SmartFill process. The "Apple" company profile is displayed, showing the Apple logo, the company name "Apple", and the phone number "408-996-1010". The "Details" tab is selected, and the "Interactions" and "Contacts" tabs are visible. The "Phone" section is expanded, showing the "Main" field with the number "408-996-1010". The "Email" and "Website" fields are also visible.

UI/UX Improvements

Consistent Grid Style and Colors Across All Modules

The header bar of the grid in Address Book, Opportunities, Customer Service, Campaigns and Hotlist is now consistent with the style in the Leads module. We've added a new color for highlighting an entry and for the menu bar to create consistency.




Old

Address Book 3 Displayed - 1 Company, 2 Contacts + NEW CONTACT

Edit	View	Search	Actions	Report					
<input type="checkbox"/>	Name	Phone Number	Email Address	City	State	Department	Division	Last Contacted Date	
<input type="checkbox"/>	ABC Bike	(555) 555-5555	contactus@abcbike.com	Vancouver	BC		Asia Pacific Region	05/01/2021	
<input checked="" type="checkbox"/>	Anderson, Bill	(623) 234-5678	bill.anderson@abcbike.com	Vancouver	BC	Accounting	Asia Pacific Region		
<input type="checkbox"/>	Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com	Vancouver	BC	Head Office	Asia Pacific Region	29/04/2021	

New

Address Book 3 Displayed - 1 Company, 2 Contacts + NEW ENTRY MORE

<input type="checkbox"/>	Name	Phone Number	Email Address	City	State	Department	Division	Date Last Contacted	
<input type="checkbox"/>	 ABC Bike	(555) 555-5555	contact-us@abcbike.com	Vancouver	BC		Asia Pacific Region	10/21/2021	
<input type="checkbox"/>	 Anderson, Bill	(623) 234-5678	bill.anderson@abcbike.co...	Vancouver	BC	Accounting	Asia Pacific Region	10/26/2021	
<input checked="" type="checkbox"/>	 Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com	Vancouver	BC	Head Office	Asia Pacific Region	10/26/2021	

New Entry Button and Dropdown for Creating Address Book Entries

Before there was a drop-down for selecting an entry type, making you click the dropdown first, then the entry type and last the new button in order to create an entry.

Address Book 11 Displayed - 11 Companies + NEW COMPANY

Edit	View	Search	Actions	Report	
<input type="checkbox"/>	Company	Phone Number			
<input checked="" type="checkbox"/>	Access Asia Pharmacy				

The drop-down is shown only after clicking the New Entry Button. The purpose of this change is to show the hierarchy of the entries. The Company and Individual are at the Account level whereas Contacts are under at the Company or Individual level.

+ NEW ENTRY

Address Book 3 Displayed - 1 Company, 2 Contacts




Account

Edit ▾ View ▾ Search ▾ Actions ▾

NEW COMPANY
NEW INDIVIDUAL

Person

NEW CONTACT

<input type="checkbox"/>	Name	Phone Number
<input type="checkbox"/>	 ABC Bike	(555) 555-5555
<input type="checkbox"/>	 Anderson, Bill	(623) 234-5678
<input checked="" type="checkbox"/>	 Johnson, Edward	(778) 999-9999

Easily Create a New Contact

Before, you were not able to create a contact without searching for the company first. Now, go straight to adding a new contact and search for the company inside the contact creation form.

New contact Details Activities Interactions Leads Custom Tab Contacts

SAVE
CANCEL

Company / Individual:

Mr/Ms: Salutation:

First name: Position:

Last name: Department:

Middle name: Division:

This is a new field

Changes in Product




Hide the menu bar by default

The menu bar will now be hidden by default to create a clean and updated look.

Address Book 3 Displayed - 1 Company, 2 Contacts




+ NEW ENTRY

MORE ▾

<input type="checkbox"/>	Name	Phone Number	Email Address	City	State	Department	Division	+ Date Last Contacted
<input type="checkbox"/>	 ABC Bike	(555) 555-5555	contact-us@abcbike.com	Vancouver	BC		Asia Pacific Region	10/21/2021
<input type="checkbox"/>	 Anderson, Bill	(623) 234-5678	bill.anderson@abcbike.co...	Vancouver	BC	Accounting	Asia Pacific Region	10/26/2021
<input checked="" type="checkbox"/>	 Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com	Vancouver	BC	Head Office	Asia Pacific Region	10/26/2021

Click the MORE button to expose the menu bar. The purpose of this change is to simplify the UI and move towards removing the menu bar in the future. The menu bar is an old Windows-style interface that is not common in today's web applications.

Address Book 3 Displayed - 1 Company, 2 Contacts [+ NEW ENTRY](#) MORE ▾

<input type="checkbox"/>	Name	Phone Number	Email Address	City	State	Department	Division	+ Date Last Contacted
<input type="checkbox"/>	 ABC Bike	(555) 555-5555	contact-us@abcbike.com	Vancouver	BC		Asia Pacific Region	10/21/2021
<input type="checkbox"/>	 Anderson, Bill	(623) 234-5678	bill.anderson@abcbike.co...	Vancouver	BC	Accounting	Asia Pacific Region	10/26/2021
<input checked="" type="checkbox"/>	 Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com	Vancouver	BC	Head Office	Asia Pacific Region	10/26/2021

Leader has been changed to Owner in Opportunities

The term "Leader" in Opportunities has been changed to "Owner" to be consistent with the industry standards.

Leader has been changed to **Owner**

Purchase product


ABC Bike

CAD10,000.00 (Weighted: CAD2,500.00)

Contact: Anderson, Bill

Status: In Progress

Owner:



Billie Holly

West Coast Sales

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**.