



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.

The screenshot shows the Maximizer software interface. At the top, there's a search bar for 'Address Book entries...'. Below it, the 'Address Book' table lists three contacts: ABC Bike, Anderson, Bill, and Johnson, Edward. The 'Anderson, Bill' contact is selected, and the 'Timeline' view is open. The timeline shows a list of interactions for October 2022, including an appointment, a note, a document, another note, and an SMS message. A filter sidebar on the left allows filtering by user (Billie Holly) and activity type (Appointment, Chat, Coffee, Document, Email, Facebook, Listserv).

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

Interaction	Date	Time
Appointment with Anderson, Bill - ABC Bike scheduled for Billie Holly Product demo	10/4/2022	2:30 PM
Note for Anderson, Bill - ABC Bike created By Billie Holly Appointment Created: Product demo Appointment note: Demo the features in the latest release Appointment details: From: Tuesday, October 4, 2022 2:30 PM Until: T...	10/4/2022	2:16 PM
Document for Anderson, Bill - ABC Bike added By Billie Holly Product information and roadmap	10/3/2022	2:36 PM
Note for Anderson, Bill - ABC Bike created By Billie Holly Appointment Created: Discuss new business needs Appointment note: We will discuss new features that will help them to expand and the new pricing to meet their b...	10/3/2022	2:33 PM
SMS message from Anderson, Bill - ABC Bike received by Billie Holly Confirm appointment	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

The screenshot shows the 'Address Book' table with a 'Report' dropdown menu open. The menu options are: Column Report..., Note Report..., Consolidated Interactions Report, Address Book Interactions Report, and Excel Report. The table columns include Name, Phone Number, City, State, Department, Division, and Last Contacted Date.

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

New

The screenshot shows the 'Address Book' table with a 'Report' dropdown menu open. The menu options are: Column Report..., Note Report..., Consolidated Timeline Report, Address Book Timeline Report, and Excel Report. The table columns include Name, Phone Number, City, State, Department, Division, and Date Last Contacted.

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

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

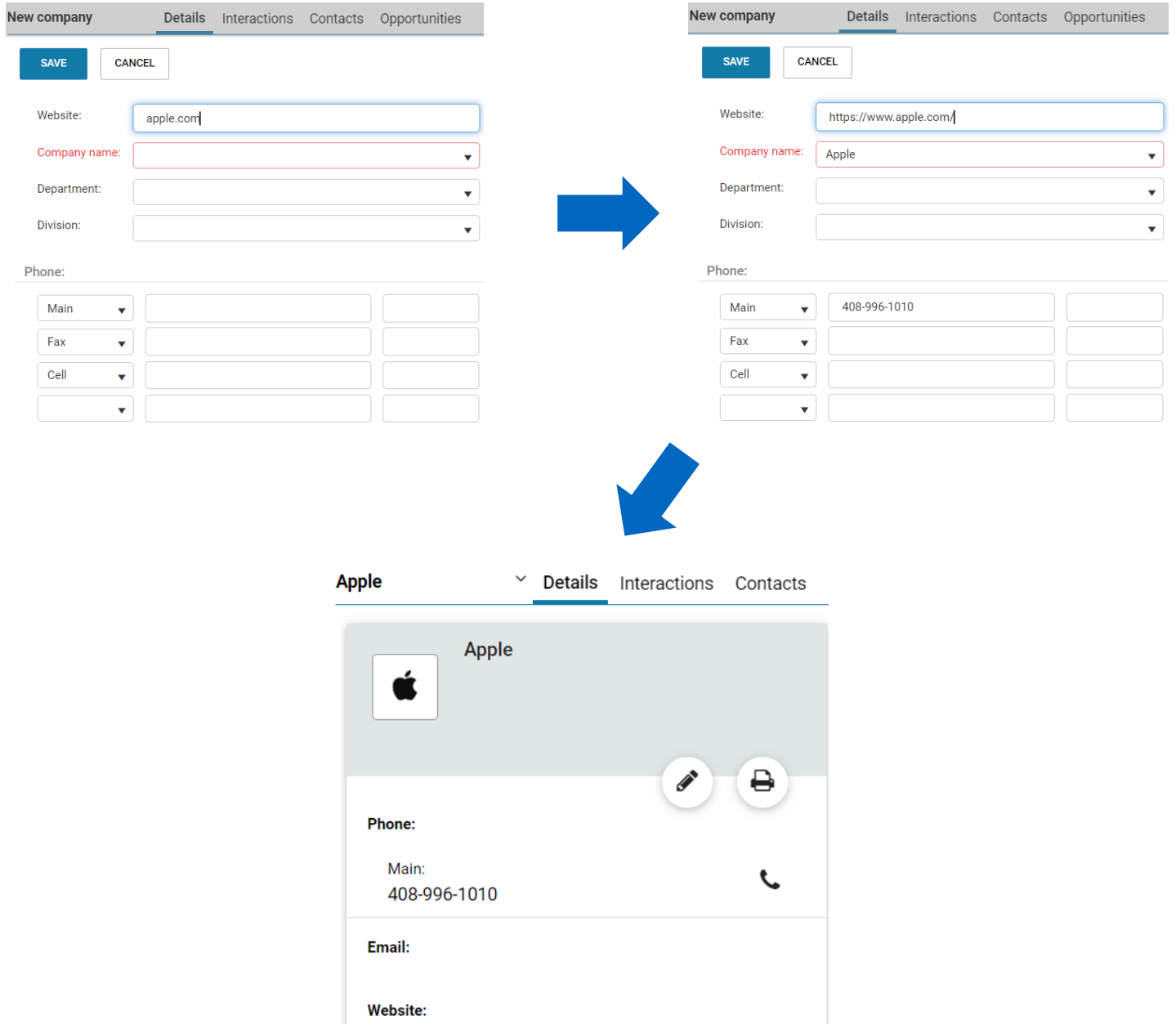
The screenshot shows the 'Old' version of the Maximizer interface. The top navigation bar includes the Maximizer logo, a search bar with 'abc bike' entered, and user profile icons. Below the navigation is the 'Address Book' section, which displays a table with columns: Name, Phone Number, Email Address, City, State, Department, Division, and Last Contacted Date. The table contains three entries: ABC Bike, Anderson, Bill, and Johnson, Edward. The 'Anderson, Bill' entry is selected, and its details are shown in a sidebar. The details view includes a profile card with a placeholder avatar, contact information (1221 Burnaby St, Vancouver BC V6E 1P7, Canada), phone number (623) 234-5678, and email address bill.anderson@abcbike.com. To the right of the profile card is a 'Details' tab with various fields: Category (Analyst, Colleague), Date Last Contacted, Reports To, Starred Entry (No), Full Access (Public), Read Access, Do not solicit by, and Account Type (Normal Account). A vertical 'Actions' menu on the far right lists options like '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', and 'Draw a map'.

New

The screenshot shows the 'New' version of the Maximizer interface. The top navigation bar features the Maximizer logo, a search bar with the placeholder text 'Search for Address Book entries...', and user profile icons. Below the navigation is the 'Address Book' section, which displays a table with columns: Name, Phone Number, Email Address, City, State, Department, Division, and Date Last Contacted. The table contains three entries: ABC Bike, Anderson, Bill, and Johnson, Edward. The 'Johnson, Edward' entry is selected, and its details are shown in a sidebar. The details view includes a profile card with an initial avatar 'EJ', contact information (1221 Burnaby St, Vancouver BC V6E 1P7, Canada), phone numbers (778) 999-9999 (Main) and (604) 555-5555 (Cell), and an email address. To the right of the profile card is a 'Details' tab with two sections: 'Basic Information' and 'Other Information'. The 'Basic Information' section includes fields for Primary Interest (To sell in a restaurant/bar), Do not solicit by (Print), Preferred Language (English), Contact How? (Email), and Reports To. The 'Other Information' section includes fields for Rating (Hot), Category (Consultant, Customer), First Contacted Date (June 3, 2022), Starred Entry (No), Full Access (Billie Holly), and 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 image illustrates the SmartFill process in three stages:

- Initial Input:** The 'New company' form shows the 'Website' field populated with 'apple.com'. The 'Company name' dropdown is empty.
- SmartFill Action:** The 'Website' field is updated to 'https://www.apple.com/' and the 'Company name' dropdown is populated with 'Apple'.
- Final Profile:** The 'Apple' company profile is displayed, showing the Apple logo, the phone number '408-996-1010', and the website field.

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 ▾

☐	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

New

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

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 ▾

☐	Company	Phone Number
▶	Access Asia Pharmacy	

COMPANY
 INDIVIDUAL
 CONTACT

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

Edit ▾ View ▾ Search ▾ Actions

<input type="checkbox"/>	Name	Phone Number	Account
<input type="checkbox"/>	ABC Bike	(555) 555-5555	NEW COMPANY NEW INDIVIDUAL
<input type="checkbox"/>	Anderson, Bill	(623) 234-5678	Person NEW CONTACT
<input checked="" type="checkbox"/>	Johnson, Edward	(778) 999-9999	ed.johnson@abcbike.com

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: ← This is a new field

Mr/Ms: Salutation:

First name: Position:

Last name: Department:

Middle name: Division:

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 ▾

Name	Phone Number	Email Address	City	State	Department	Division	Date Last Contacted
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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**.