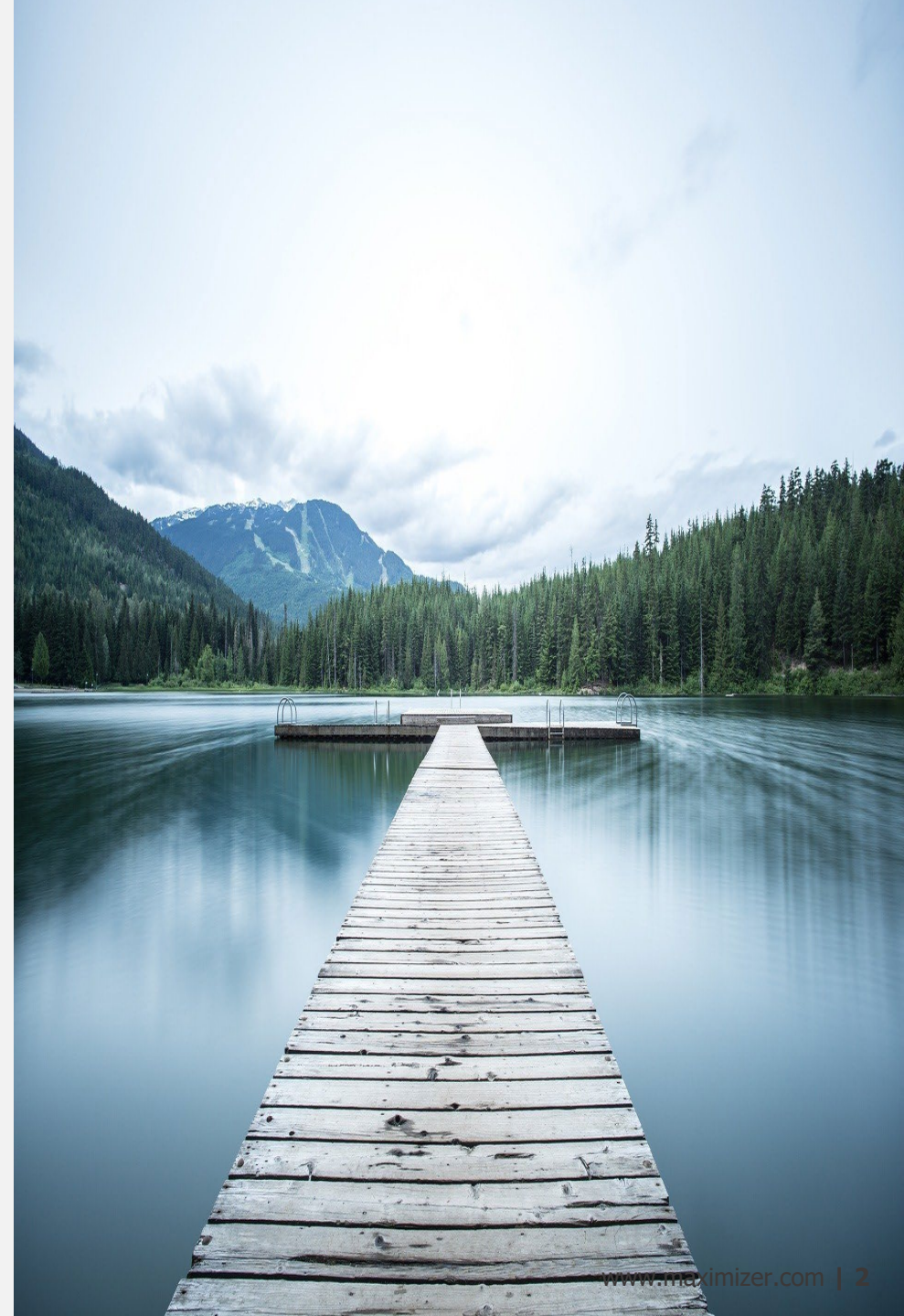


MAXIMIZER CRM

Latest Release (for On-Premise)

What's New

- SAML based single sign-on
- Lead security – Full and read access for leads
- New Notes tab
- View Address Book entry notes in opportunities and cases
- Support long and short date format
- Auto-complete address
- Accessibility - Keyboard navigation and keyboard shortcut
- Help Center
- View in Opportunities and Customer Service in Hotlist
- Enhanced security for the logging notes



SAML Based Single Sign-On (SSO) (1/2)

Set up custom Identity provider (IDP)

- Go to Icon Bar > Administration > Settings > Single Sign-on.
- Click ADD IDENTITY PROVIDER button.
- Enter the values in the fields. [Click here to view the instruction on how to set up a custom identity provider.](#)
- Click the SAVE button.
- Your custom identity provider will be available.
- If you have multiple databases in the server, repeat this process in other databases. Each database can have different SSO settings. For example, one database has Maximizer login enabled. The other one only has the custom IDP enabled.

Note

- You can only create one identity provider.
- You can turn on both Maximizer login and custom identity provider or turn on only one of them. But you cannot turn off both.
- **Make sure you test your custom IDP and ensure it works before turning off Maximizer login. If Maximizer login has been turned off and your custom IDP does not work, you will not be able to login.**

System Options > Single Sign-On

Single sign-on (SSO) allows your users to log in to Maximizer using external identity providers. In this screen, you can set up your identity provider. You can enable Maximizer authentication and your custom authentication at the same time. Or, you can turn off Maximizer authentication and only make the custom authentication available to your users.

ADD IDENTITY PROVIDER

Maximizer

System Options > Single Sign-On

Single sign-on (SSO) allows your users to log in to Maximizer using external identity providers. In this screen, you can set up your identity provider. You can enable Maximizer authentication and your custom authentication at the same time. Or, you can turn off Maximizer authentication and only make the custom authentication available to your users.

ADD IDENTITY PROVIDER

Maximizer



Microsoft



Edit

Delete



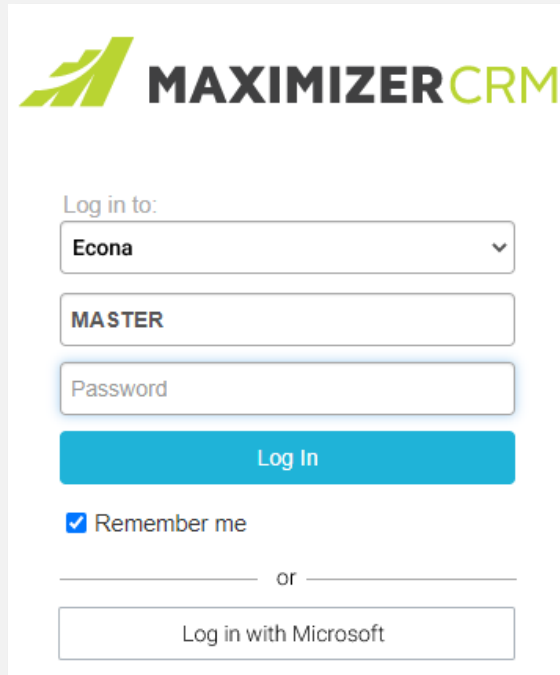
SAML Based Single Sign-On (SSO) (2/2)

Login page

- Go to the Maximizer Login page and select a database from the drop-down list.
- The login controls will be displayed based on the SSO settings of the selected database.

Note

If there is only one database in a server , and only the custom IDP has been turned on (Maximizer login has been turned off), going to the Maximizer Login page will automatically re-direct to the Login page of the custom IDP.



MAXIMIZER CRM

Log in to:

Econa

MASTER

Password

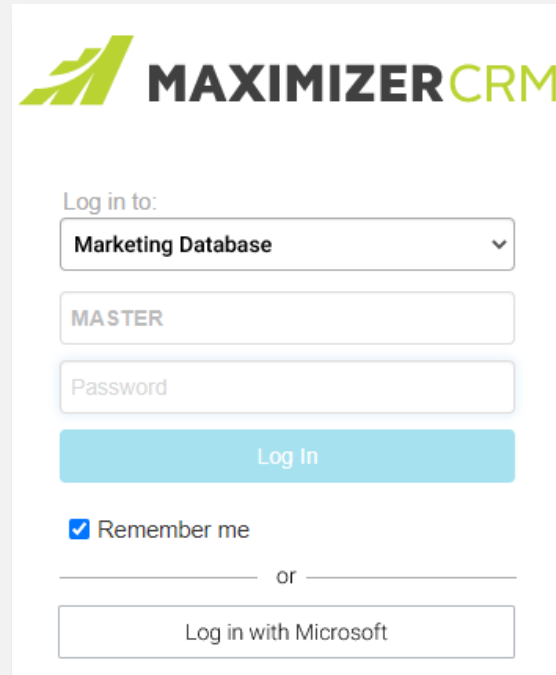
Log In

Remember me

or

Log in with Microsoft

Both Maximizer and custom IDP are enabled.



MAXIMIZER CRM

Log in to:

Marketing Database

MASTER

Password

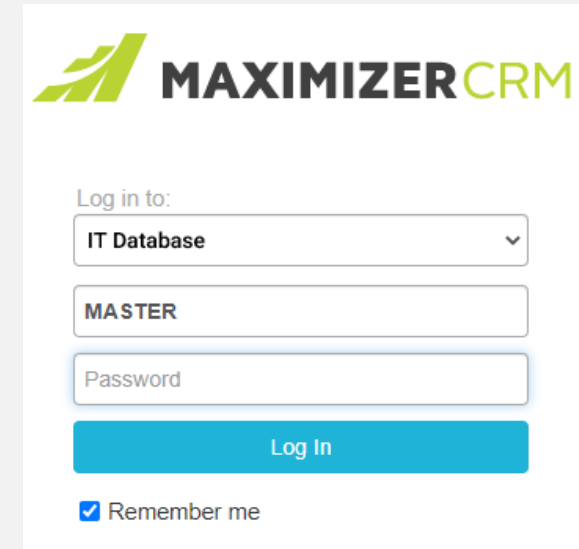
Log In

Remember me

or

Log in with Microsoft

Only custom IDP is enabled. Maximizer login controls are disabled.



MAXIMIZER CRM

Log in to:

IT Database

MASTER

Password

Log In

Remember me

Only Maximizer login is enabled.



Lead Security (1/3)

Create a new lead, and specify full and read access

- Go to Leads module and create a new lead.
- Set full access to a security group which you are a member of.
- Set read access to Public.
- Set owner to yourself.
- Save the lead.

Open a lead as the owner

- Open the lead you just created.
- In Lead Details screen, all the buttons are enabled.
- If you haven't applied a process to the lead, you can now select a process. If you have applied a process, you can change the stage in the process.
- You can edit all the fields in the Lead Details widget.
- You can convert or archive the lead.

Note

During lead conversion, if new Address Book entries will be created, the access rights from the lead will be copied to the new entries. If the lead is linked to an existing Address Book entry, the access rights from the lead will not overwrite the access rights in the existing entry.

This screenshot shows the configuration options for a lead's process and stage. The 'Process' dropdown is set to 'Full Access' with a sub-selection of '[West Coast Sales Team]'. The 'Owner' is listed as 'Billie Holly'. The 'Stage' dropdown is currently empty. The 'Read Access' is set to 'Public', and the 'Partner' field is empty.

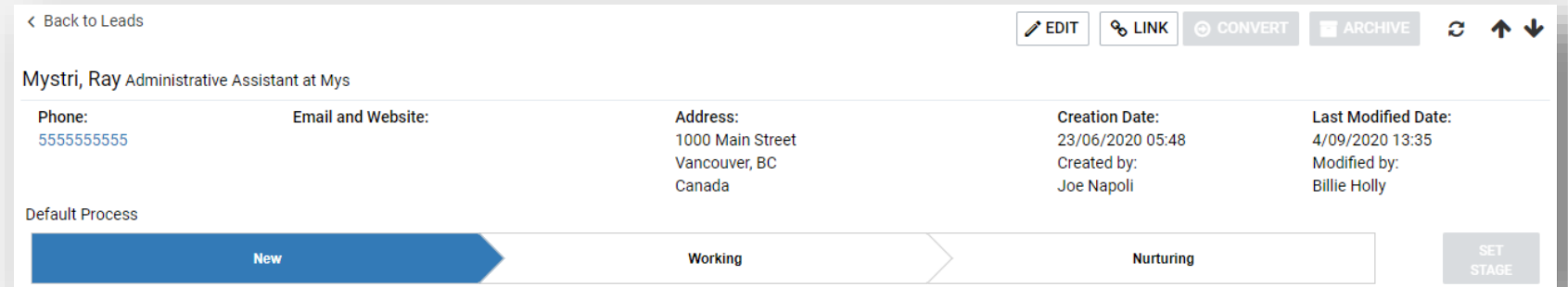
This screenshot shows the 'Lead Details' screen for a lead named 'Bourne, Jason posgl at Aloha'. The lead is associated with 'sonata company'. The contact information includes phone numbers (604) 601-8000 and (604) 601-8010, email alohauser11@gmail.com, and website www.maximizer.com. The address is Tech Park, Baner, Pune, MH411057. The lead was created on July 9, 2020, at 7:16 AM by Lou Jones and last modified on July 14, 2020, at 4:03 PM by Lou Jones. The 'Default Process' is shown as a progress bar with stages 'New', 'Working', and 'Nurturing', with 'Working' being the current stage. The 'Lead Details' section shows 'Full Access' set to 'Lou Jones' and 'Read Access' set to 'Public'. The 'Notes' section shows a task 'Hotlist Task Completed: Lead Task With: Bourne, Jason' dated July 9, 2020. The 'Activities' section shows a 'Lead-Task' activity dated July 9, 2020.



Lead Security (2/3)

Open a lead as a team member

- Log out and log in as a user in the security group that you have assigned to the full access field in the lead.
- Open the lead.
- In Lead Details screen, Convert and Archive buttons are disabled. Even you have full access right to a lead, you still need to be the owner of the lead or a sales manager to convert or archive the lead.
- All the other buttons are enabled. You can change stage in the process and edit the fields in Lead Details widget.



< Back to Leads

EDIT LINK CONVERT ARCHIVE

Mystri, Ray Administrative Assistant at Mys

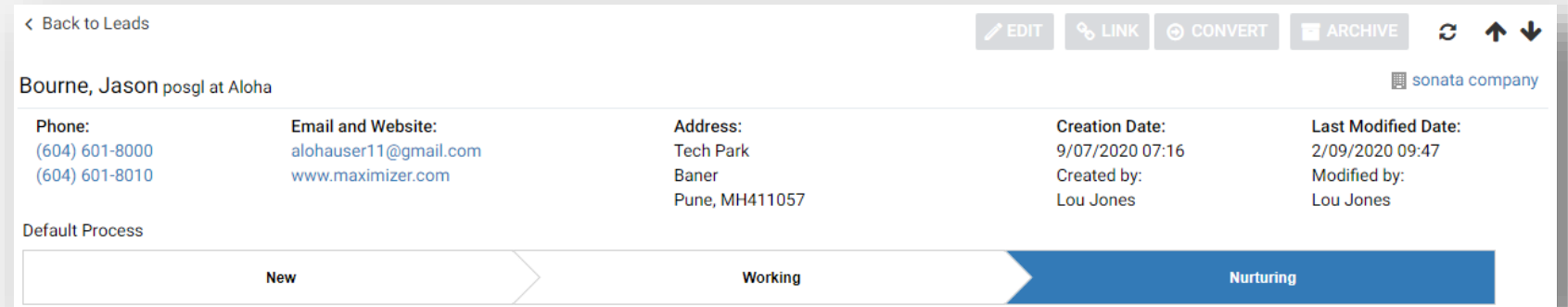
Phone: 5555555555	Email and Website:	Address: 1000 Main Street Vancouver, BC Canada	Creation Date: 23/06/2020 05:48 Created by: Joe Napoli	Last Modified Date: 4/09/2020 13:35 Modified by: Billie Holly
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Default Process

New Working Nurturing SET STAGE

Open a lead as a user who is not in the security group

- Log out and log in as a user who is **NOT** in the security group that you have assigned to the full access field in the lead.
- Open the lead.
- All the buttons are disabled.
- You cannot change stage in the process.
- You cannot edit the fields in Lead Details widget.



< Back to Leads

EDIT LINK CONVERT ARCHIVE

Bourne, Jason posgl at Aloha sonata company

Phone: (604) 601-8000 (604) 601-8010	Email and Website: alohauser11@gmail.com www.maximizer.com	Address: Tech Park Baner Pune, MH411057	Creation Date: 9/07/2020 07:16 Created by: Lou Jones	Last Modified Date: 2/09/2020 09:47 Modified by: Lou Jones
--	--	--	---	---

Default Process

New Working Nurturing



Lead Security (3/3)

Leads 9 displayed + new

All Leads Creation Date: All Dates, Status/Stage: 3 item(s) selected

<input type="checkbox"/>	Status	Last Name	First Name	Company
<input type="checkbox"/>	Active	Smith	Jonh	ABC Com
<input type="checkbox"/>	Active	Bourne	Jason	Aloha
<input type="checkbox"/>	Active	Mystri	Ray	Mys

Select Field

Available fields:

Search for fields

- Lead
 - Basic Fields
 - Address
 - Company
 - Email Address
 - First name
 - Last name
 - Mr/Ms
 - Owner
 - Partner
 - Phone 1
 - Phone 2
 - Position
 - Process
 - Salutation
 - Security**
 - Full Access
 - Read Access
 - Stage
 - Website
 - User-Defined Fields

Show hidden fields

OK CANCEL

Last updated at: 08/09/2020 09:54 REFRESH

Full Access	Read Access
Public	Public
Lou Jones	Public
Public	Public

Edit a lead in Leads screen

- Select a lead that you have the full access right to. The **Edit** button will be enabled.
- Select a lead that you don't have the full access right to, the Edit button will be disabled.

Change lead security by Global Edit

- Select multiple leads and click the **Edit** button.
- The Global Edit dialog will open.
- In field picker, expand **Basic Fields > Security** branch; select Full Access, Read Access or both.
- Perform Global Edit.
- Note that Global Edit will make changes in the leads that you have full access right and ignore the leads that you don't have the right to edit.



New Notes Following Tab

ABC Wine Shop Inc. ▾ Details **Notes** Custom Tab Leads Auditing Map Contacts History Customer Service Opportunities Activities User-Defined Fields Related Entries ⊕

+ Add Delete | Print Note(s) Search for notes | Show All Filter All Dates; note filter applied

<input type="checkbox"/>	!	Date/Time ↓	Type	Text	Associated Entry	Creator	Full Access	Read Access
<input type="checkbox"/>		September 2, 2020 ...	Email	Subject: Price information	ABC Wine Shop Inc.	Billie Holly	Public	Public
<input type="checkbox"/>		August 20, 2020 1:...	Manual	Ed wants to schedule a meeting to show the new feature to their	Johnson, Ed - ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>	!	July 7, 2020 9:09 AM	Manual	ABC Wine will open 3 new locations next month.	ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>		July 3, 2020 12:34 ...	Outgoing calls	Result: Busy	ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>		June 2, 2020 8:46 P...	Customer Se...	Case created: HQ-00183	ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>		May 27, 2020 7:20 ...	Manual	Derek sent an email today asking for more information about pricing.	Park, Derek - ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>		April 22, 2020 3:30 ...	Email	Partner assignment email sent.	Shao, Hua - ABC Wine Shop Inc.	EMAILUSER	Public	Public
<input type="checkbox"/>		April 22, 2020 1:15 ...	Email	Partner assignment email sent.	Shao, Hua - ABC Wine Shop Inc.	EMAILUSER	Public	Public

View notes in Address Book module

- Go to Address Book module, search and find some entries.
- Go to the Notes tab, check **Show All** option.
- The notes for the company/individual and all the associated contacts will be displayed.
- Use the Associated Entry column to identify which Address Book entry each note belongs to.
- You can search for notes using the search field in the toolbar.
- Make the screen size smaller. Notice that some of the buttons in the toolbar will be moved into the drop-down menu.

+ Add Delete | Search for notes | Show All All Dates; note filter applied

<input type="checkbox"/>	!	Date/Time ↓	Type	Text	Print Note(s)	Filter	Video Help	Help
<input type="checkbox"/>		September 2, 2020 10:3...	Email	Subject: Price information				
<input type="checkbox"/>		August 20, 2020 1:31 PM	Manual	Ed wants to schedule a meeting to show the new				
<input type="checkbox"/>	!	July 7, 2020 9:09 AM	Manual	ABC Wine will open 3 new locations next month.				



Display Address Book Entry Notes in Opportunities

View Address Book entry notes in an opportunity

- Go to Opportunities module, search and find some entries.
- Go to the Notes tab and open the filter.
- Select the option of **Opportunity and Address Book entries**.
- Select the note types (The note types will be applied to both opportunity and Address Book entry notes).
- Click the **Edit** button in Manual section and select note categories for opportunity and Address Book entry notes.
- Click **OK** button to save the setting. The opportunity and Address Book entry notes will be displayed.
- Use the Associated Entry column to identify which notes belong to the opportunity and which one belong to the Address Book entries.

Note

- If the contact of the opportunity is from another company, the notes for that contact won't be displayed.
- Some of the system notes for Address Book entries, such as Accounting, Customer Service, Opportunities and Transfer Log will not be displayed.
- The similar function is also available in the Customer Service module.

	Date/Time	Type	Text	Associated Entry	Creator	Full Access	Read Access
<input type="checkbox"/>	2/09/2020 22:55	Task	Appointment Created: Product Demo	Sell Escona Wine	Billie Holly	Public	Public
<input type="checkbox"/>	2/09/2020 22:41	History	'Actual Close Date' has been changed from	Sell Escona Wine	Billie Holly	Public	Public
<input type="checkbox"/>	2/09/2020 22:36	Demo (Manual)	We will demo the new feature to their management team next week.	Sell Escona Wine	Billie Holly	Public	Public
<input type="checkbox"/>	2/09/2020 22:35	Email	Subject: Price information	ABC Wine Shop Inc.	Billie Holly	Public	Public
<input type="checkbox"/>	2/09/2020 22:35	Email	Subject: Price information	Sell Escona Wine	Billie Holly	Public	Public
<input type="checkbox"/>	20/08/2020 13:31	Manual	Ed wants to schedule a meeting to show the new feature to their	Johnson, Ed - ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>	7/07/2020 09:09	Manual	ABC Wine will open 3 new locations next month.	ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>	3/07/2020 00:34	Outgoing calls	Result: Busy	ABC Wine Shop Inc.	Lou Jones	Public	Public
<input type="checkbox"/>	29/06/2020 16:09	Task	Appointment Created: Meeting with				

Filter the entries you would like to be displayed

Date range: Last 12 Months

Notes for: Opportunity only Opportunity and Address Book entries

Note types:

- Email
- Mail-outs
- Task
- History
- Other
- Timed notes
- Incoming calls
- Outgoing calls

Manual Opportunity note categories: All Selected, Address Book note categories: All Selected Edit

OK **CANCEL**



Long & Short Date Format

Specify a date format

- Go to Preferences > Other Preferences > Format tab.
- Select **Shot date** in Date Formats section.

Display dates in the grid

- In the main grid, all the dates will be displayed in the short format.
- In the following tabs, the date will be displayed in the short format. (Except Details, Documents and Activities tab. The dates in those tabs are always displayed in long format).
- Go to Preferences dialog and change the locale. The short date format will follow the locale setting.

Note

There are some places where the dates do not follow the Preferences setting, including:

- Details, Documents and Activities following tab
- Notification panel
- Some dialogs such as document properties in Company Library, modify task date in Hotlist.
- The date range in Calendar weekly, agenda and availability views are always displayed in short format because of the spacing issues caused by the long dates.
- These places will be addressed in future releases.

The screenshot shows the 'Preferences' dialog box with the 'Format' tab selected. The 'Address format' section is active, displaying a list of 'Available fields' on the left and an 'Address block' on the right. The 'Available fields' list includes: Address Line 1, Address Line 2, City/Town, Company, Country, Department, Division, First Name, Individual Name for Contact, Last Name, Middle Name, Mr/Ms, Salutation, Position, State / County / Province, and Zip / Postal Code. The 'Address block' contains the following merge fields: [First Name] [Last Name], [Position], [Company], [Individual Name for Contact], [Address Line 1], [Address Line 2], [City/Town] [State / County / Province] [Zip / Postal Code], and [Country]. A 'RESTORE TO DEFAULT' link is visible in the top right of the address block area. Below the address format section, the 'Date formats' section shows two radio buttons: 'Long date (August 31, 2020)' and 'Short date (2020-08-31)'. The 'Short date' option is selected. At the bottom right, there are 'OK' and 'CANCEL' buttons.



Auto-Complete Addresses

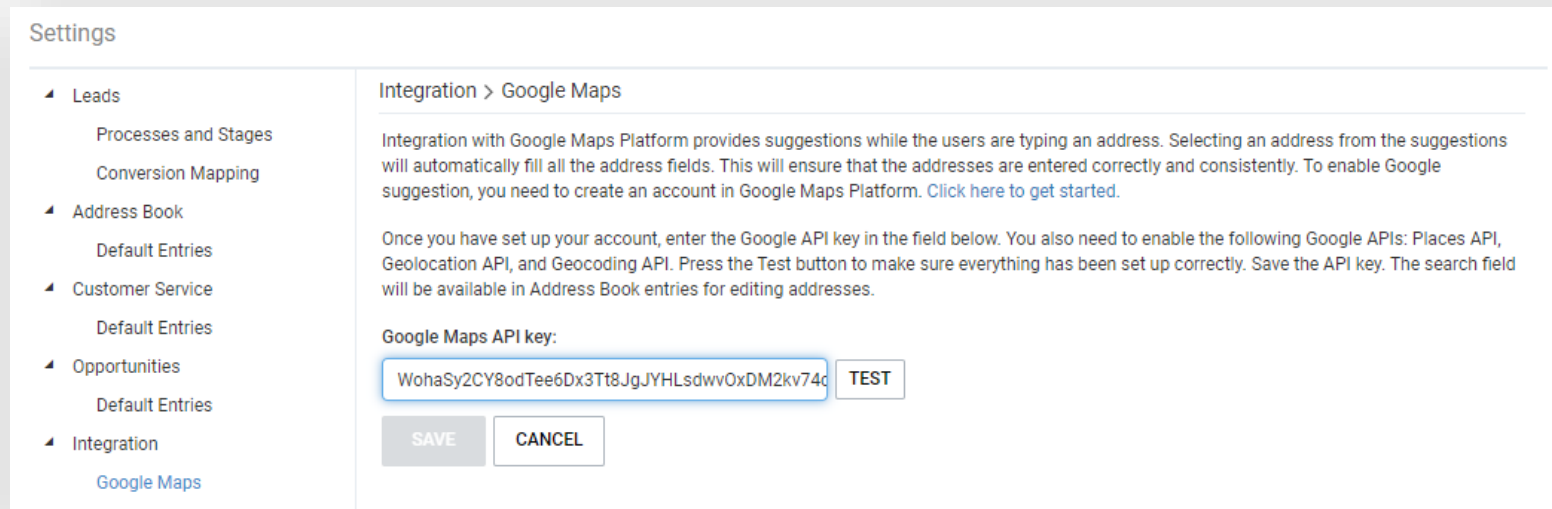
(1/4)

Create an account in the Google Maps Platform

- To enable the address auto completion feature, you need to create an account in Google Maps Platform. [Click here for information about how to create the account](https://developers.google.com/maps/gmp-get-started) (https://developers.google.com/maps/gmp-get-started)
- Once you create the account, turn on the following Google API: **Places API**, **Geolocation API**, and **Geocoding API**.

Enter Google API key in Maximizer

- Go to Maximizer Icon Bar > Administration > Settings > Integration > Google Maps.
- Click EDIT button. The field for entering the Google API will be enabled.
- Enter the Google API which can be found in your Google account.
- Click the TEST button to ensure the API is valid and the required APIs have been turned on.
- Click the SAVE button.
- Go to Address Book, create a new entry or edit an existing entry. You will find the search field in each address section.



The screenshot shows the 'Settings' page in Maximizer, specifically the 'Integration > Google Maps' section. On the left is a navigation menu with categories: Leads (Processes and Stages, Conversion Mapping), Address Book (Default Entries), Customer Service (Default Entries), Opportunities (Default Entries), and Integration (Google Maps). The main content area is titled 'Integration > Google Maps' and contains the following text: 'Integration with Google Maps Platform provides suggestions while the users are typing an address. Selecting an address from the suggestions will automatically fill all the address fields. This will ensure that the addresses are entered correctly and consistently. To enable Google suggestion, you need to create an account in Google Maps Platform. [Click here to get started.](#)' Below this is another paragraph: 'Once you have set up your account, enter the Google API key in the field below. You also need to enable the following Google APIs: Places API, Geolocation API, and Geocoding API. Press the Test button to make sure everything has been set up correctly. Save the API key. The search field will be available in Address Book entries for editing addresses.' There is a text input field containing the API key 'WohaSy2CY8odTee6Dx3Tt8JgJYHLsdwv0xDM2kv74c' and a 'TEST' button to its right. At the bottom are 'SAVE' and 'CANCEL' buttons.



Auto-Complete Addresses

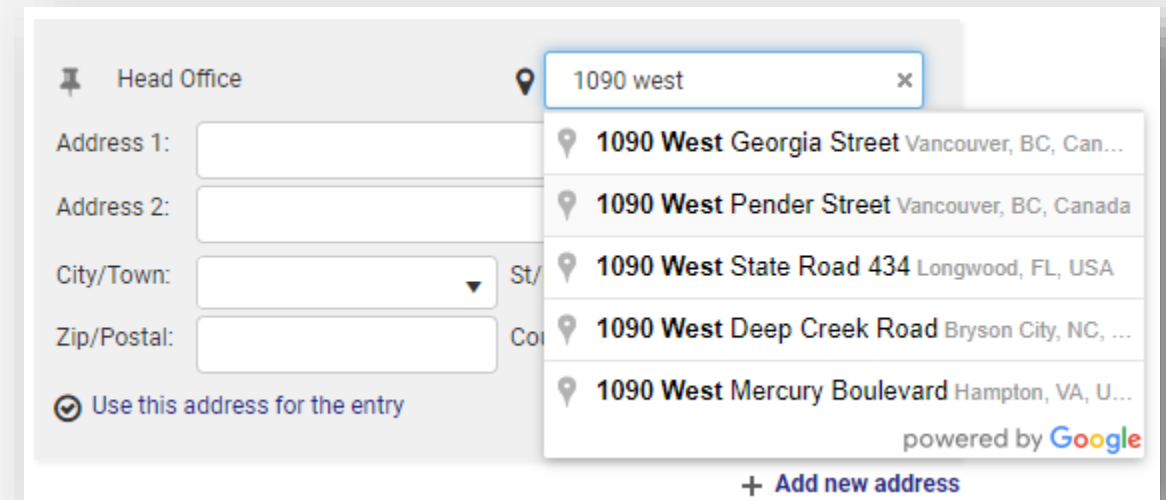
(2/4)

Enter a new address using suggestions from Google

- Go to Address Book module; edit an existing entry or create a new entry.
- In the address section, click **Add new address** button
- Enter a name for the address; press Tab key to set the focus in the **Search address** field.
- Start typing an address. The suggestions from Google start to appear while you are typing.
- Select an address from the suggestions. The address fields will be populated.
- The address fields will be disabled. But you can still edit address 2. For example, you can enter a room number. The reason that the address fields are disabled is because this address is now associated with geocodes (latitude and longitude). The geocodes will be saved to the database when the Address Book entry is saved.

Note

If you only select a city from the suggestion, the address will not be associated with the geocode. All the fields will be enabled.



The screenshot shows a web form for adding a new address. The form has several fields: 'Head Office' (with a pin icon), 'Address 1:', 'Address 2:', 'City/Town:' (with a dropdown arrow), 'Zip/Postal:', 'St/Province:' (with a dropdown arrow), and 'Country:' (with a dropdown arrow). A search input field is active, containing the text '1090 west'. A dropdown menu of suggestions is displayed below the search field, listing several addresses starting with '1090 West'. The suggestions are: '1090 West Georgia Street Vancouver, BC, Canada', '1090 West Pender Street Vancouver, BC, Canada', '1090 West State Road 434 Longwood, FL, USA', '1090 West Deep Creek Road Bryson City, NC, ...', and '1090 West Mercury Boulevard Hampton, VA, U...'. Below the suggestions, there is a radio button labeled 'Use this address for the entry' which is selected. At the bottom right of the form, there is a '+ Add new address' button. The text 'powered by Google' is visible at the bottom right of the suggestions dropdown.



Auto-Complete Addresses

(3/4)

Edit an address that is associated with geocodes

- To edit an address that is associated with geocodes, use the **Search address** field.
- Type in a new address and select one from the suggestions.
- The address fields will be updated.

Enter a new address that is not associated with geocodes

- Go to Address Book module; edit an existing entry or create a new entry
- In the Address section, click **Add New Address** button
- Manually type values into the address fields. This address is not associated with geocodes. All the fields are enabled. You can always manually edit the address.

The screenshot shows a form for editing an address. At the top, there is a pin icon, the text 'Head Office', and a search box labeled 'Search address'. Below this are two address fields: 'Address 1' containing '1090 W Pender St' and 'Address 2' containing 'Room 200'. The 'Address 2' field is highlighted with a blue border. Below the address fields are four dropdown menus: 'City/Town' with 'Vancouver', 'St/Prov' with 'BC', 'Zip/Postal' with 'V6E 2N7', and 'Country' with 'Canada'. At the bottom left, there is a checked radio button next to the text 'Use this address for the entry'. At the bottom right, there is a blue 'X Delete' button and a help icon.



Auto-Complete Addresses

(4/4)

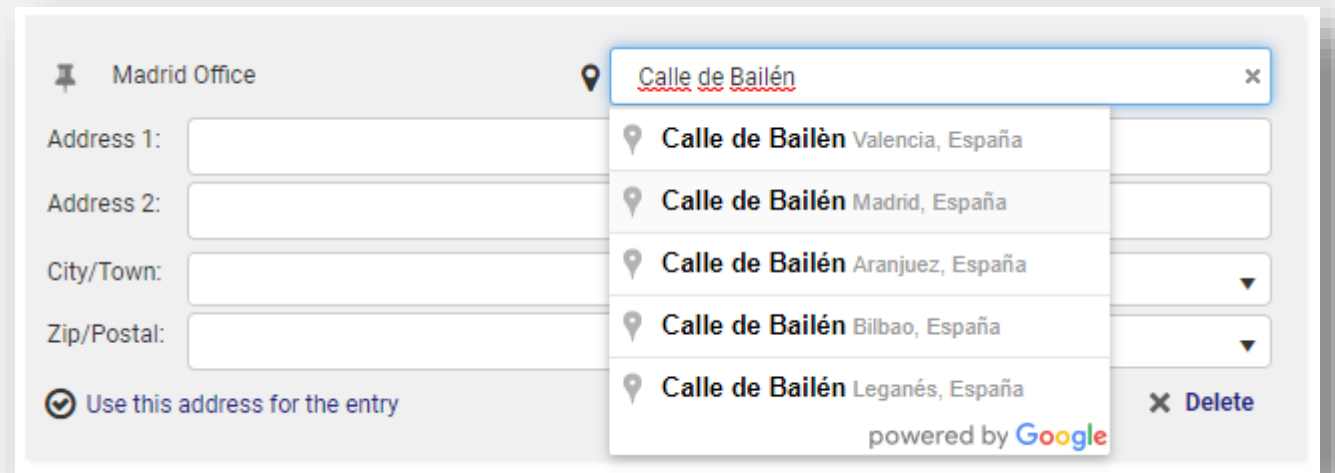
Localize suggestions based on locale setting

The suggestions will be translated into different languages based on your locale setting.

- Open Preferences and set the locale to Spanish (Spain) [es-ES].
- Edit an Address Book entry and create a new address in Spain.
- When you are typing an address, the suggestions are displayed in Spanish.
- Select one from suggestions, the address fields will be populated. The field values are displayed in Spanish.

Note

Google has some issues to get all the locale settings correctly. If Google cannot get the locale correctly, it will use the default language setting in your web browser. In Chrome, you can set the language in Settings > Advanced > Language section.



The screenshot shows a web form for an address book entry titled "Madrid Office". The form has fields for "Address 1:", "Address 2:", "City/Town:", and "Zip/Postal:". A search input field at the top right contains the text "Calle de Bailén" and has a dropdown menu open showing five suggestions, each with a location pin icon and the text "Calle de Bailén" followed by a city and "España":

- Calle de Bailén Valencia, España
- Calle de Bailén Madrid, España
- Calle de Bailén Aranjuez, España
- Calle de Bailén Bilbao, España
- Calle de Bailén Leganés, España

At the bottom left of the suggestions menu, there is a checked radio button and the text "Use this address for the entry". At the bottom right, there is a "Delete" button with an 'X' icon. The text "powered by Google" is visible at the bottom of the suggestions menu.



Accessibility (1/3)

The screenshot shows the Maximizer CRM interface with several callouts identifying key accessibility areas:

- Product Header:** The top bar containing the Maximizer CRM logo and navigation icons.
- Module Header:** The header for the current module, 'Address Book', including filters and actions.
- Menu Bar:** The top right area containing utility icons like search, settings, and help.
- Main Grid:** The central data table displaying contact information for 'ABC Wine Shop Inc.' and 'Albert's Steak House'.
- Icon Bar:** The left sidebar containing navigation icons for various CRM functions.
- Following Tabs:** The tab bar below the main grid, currently showing 'Albert's Steak House' and other tabs like 'Details', 'New Notes', etc.

Name	Phone Number	Email Address	City	State	Department	Division	Date Last Contacted
ABC Wine Shop Inc.	(604) 601-8000	info@abcwineshop.com	Vancouver	BC	Sales	North American	9/2/2020
Albert's Steak House	6046018000	escona@maximizer.com	Albuquerque	NM			3/21/2020

Date/Time	Type	Text	Associated Entry	Creator	Full Access	Read Access
4/13/2020 7:29 AM	Customer Service	Case created: HQ-00158	Albert's Steak House	Lou Jones	Public	Public
4/10/2020 1:16 PM	Customer Service	Case created: HQ-00154	Albert's Steak House	Lou Jones	Public	Public
4/10/2020 1:12 PM	Comment (Man...	Test note	Albert's Steak House	Lou Jones	Public	Public
3/23/2020 3:34 PM	Outgoing calls	Talked to Albert. The order is confirmed.	Bennington, Albert	Lou Jones	Public	Public
3/23/2020 3:27 PM	Task	Hotlist Task Created: Send 5 samples to Albert steak house	Zamber, Rick	Lou Jones	Public	Public

Structure of the interface

The interface is divided into 6 main areas. Press the Tab key to navigate from one area to the next one. Inside an area, use left / right arrow key to highlight the items.

- Clicking any empty space in an area will activate it. When you press left or right arrow key, the first item will be highlighted. Continue pressing the left / right arrow key will move the highlight to next item in the area. Once an item is highlighted, press the Enter key to execute a command or open a drop-down menu. Note that in Icon Bar, you need to use the up / down arrow key.
- Press Tab key will set focus to the next area and highlight the first item. The tab order is Product Header > Icon Bar > Module Header > Menu Bar > Main Grid > Following Tabs > Product Header. Press Shift + Tab key will move the focus backwards.



Accessibility (2/3)

- When it is highlight, press **Enter** key to open the drop-down. Press **Esc** key to close the drop-down.
- Use the up / down arrow key to navigate the items in the drop-down.

When the focus is in the search field, pressing left / right arrow key will move the cursor. Press **Tab** key to move out of the search field and highlight the search button.



Product Header

- Click any empty to activate the area.
- Press left or right arrow key, the highlight will appear on the first item on the left-hand side.
- Press left or right arrow key to move the highlight to next item. When a button is highlighted, press Enter key to open a drop-down menu or a dialog.
- Pressing Tab key will move the highlight to the Icon Bar

When this button is highlighted, pressing **Enter** key will open the Notification Panel. Pressing **Enter** key again will close the panel.

Press **Enter** key to open the dialog for creating a new entry.

To select an Address Book entry type, press **Alt + down arrow** key. Press **Esc** to close the drop-down.

Address Book 2 Displayed - 2 Companies **+ new** COMPANY

Edit View Search Actions Report Help

<input type="checkbox"/> Name	Phone Number	Email Address	City	State	Department	Division	Date Last Contacted
<input type="checkbox"/> ABC Wine Shop Inc.	(604) 601-8000	info@abcwineshop.com	Vancouver	BC	Sales	North American	9/2/2020
<input checked="" type="checkbox"/> Albert's Steak House	6046018000	escona@maximizer.com	Albuquerque	NM			3/21/2020

Module Header

- Click any empty to activate the area.
- Press left or right arrow key, the highlight will appear on the title of the module.
- Press left or right arrow key to move the highlight to next item.
- Pressing Tab key will move the highlight to the Menu Bar



Accessibility (3/3)

Menu Bar

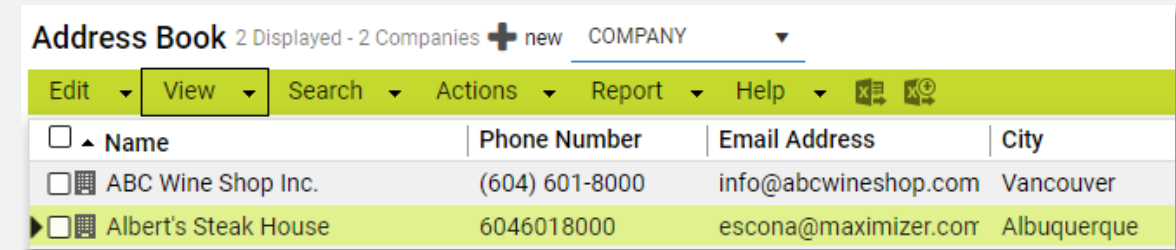
- Click any empty to activate the area.
- Press left or right arrow key, the highlight will appear on the first menu on the left-hand side.
- Press left or right arrow key to move the highlight to next menu. After going through all the menus, the highlight will be moved to the buttons.
- When a menu is highlighted, pressing the Enter key will open the drop-down menu. Use the up / down arrow key to navigate through the items. If a menu item has a sub-menu, press left arrow key to open it.
- Press Esc key to close the menu.
- Pressing Tab key will move the highlight to the Main Grid. Use the up / down key to move the highlight in the grid.

Icon Bar

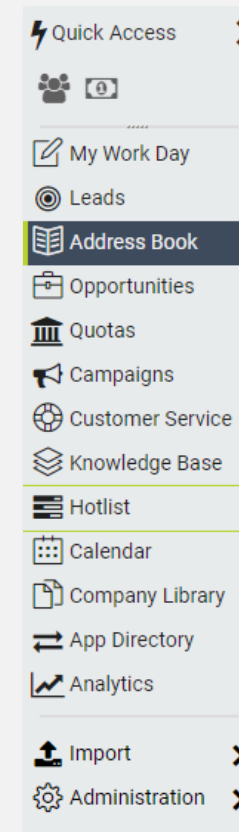
- Click any empty to activate the area.
- Because the vertical layout, in Icon Bar, you will use the up / down arrow key to navigate the items.
- If you have Quick Access shortcuts created, use the up / down arrow key to navigate through the shortcuts. Press Enter key to retrieve the Favorite List or Saved Search.
- When a module icon is highlighted, pressing Enter key will load the module.
- Note that the panels in Icon Bar (Quick Access, Import and Administration) cannot be open using keyboard in this release.

Screen reader (JAWS)

If you have JAWS installed, you can hear the label or description of the highlighted item when you move the focus around using keyboard. Please note that, before you start the keyboard navigation, press **Insert + z** to turn the virtual PC cursor off.



<input type="checkbox"/> Name	Phone Number	Email Address	City
<input type="checkbox"/> ABC Wine Shop Inc.	(604) 601-8000	info@abcwineshop.com	Vancouver
<input checked="" type="checkbox"/> Albert's Steak House	6046018000	escona@maximizer.com	Albuquerque



Keyboard Shortcuts (1/2)

Keyboard shortcuts for Quick Search

In any screen, press “/” key will set the focus in the Quick Search field.

Keyboard shortcuts for commonly used commands

The following shortcuts have been introduced:

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

The shortcuts work in Address Book, Leads, Opportunities, Customer Services and Hotlist modules.

The screenshot shows the 'Address Book' interface with a table of contacts. The table has columns for First Name, Last Name, Company, Phone Number, City / Town, State / Province, and Date Last Contacted. Two contacts are listed: Rennie Chung and another contact with the same name. Below the table, the contact details for Rennie Chung are shown, including his title as Chairman & CEO of Sunrise Adventures and his address. A callout box points to the 'Contact Switcher' area, stating: 'In Address Book, the shortcuts will perform actions against the entry selected in the Contact Switcher.'

First Name	Last Name	Company	Phone Number	City / Town	State / Province	Date Last Contacted
		Sunrise Adventures	555-458-8745	Irving	TX	24/02/2020
Rennie	Chung	Sunrise Adventures	555-458-8745	Irving	TX	24/02/2020

Rennie Chung
Chairman & CEO
Sunrise Adventures
1222 Burnaby Dr.
Irving TX 874551

Category: Distributor, Partner
Date Last Contacted: 24 February 2020



Keyboard Shortcuts (2/2)

Try the shortcuts in following situations:

The Address Book, Opportunities, Customer Service or Hotlist screen is loaded and:

- You don't click anywhere, press the shortcut combination.
- You click in the main grid or in the following tab, and then press the shortcut combination.
- You click in the Icon Bar and then press the shortcut combination.
- You click the Notification panel and then press the shortcut combination.

The shortcuts don't work in the modules where you cannot apply actions against an entry, including: Dashboard/My Work Day, Company Library, Knowledge Base, Quotas, and Calendar.

Opportunities Current Opportunities - 3 displayed + new

Edit View Search Actions Report [Icons]

Status	Company/Individual	Objective	Stage	Revenue	Close Date
<input type="checkbox"/> In Progress	ABC Wine Shop Inc. (Sa	Do Seasonal Promotion	Not started	£0.00	
<input checked="" type="checkbox"/> In Progress	Heritage Wine & Liquor	Do Seasonal Promotion		£25,000.00	30/03/2021
<input type="checkbox"/> In Progress			Not started	£5,000.00	31/12/2020

In other modules, the shortcuts will perform the actions against the selected entry in the main grid.

< Back to Leads

In Leads module, open a lead and use the shortcuts to perform actions.

EDIT LINK CONVERT ARCHIVE [Icons]

Jackson (Sample), Alastair District Manager at Beach Cycle and Sport / Jackson, Alastair - Beach Cycle and Sport

Phone: (555) 321-4567	Email and Website: jackson@bcs.com	Address: San Diego, CA USA	Creation Date: 24/10/2019 09:46 Created by: MASTER	Last Modified Date: 21/01/2021 11:19 Modified by: Jin Yu
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Default Process

New Working Nurturing SET STAGE



Help Center

During installation

In the installation wizard > Select Options screen, check Help Improving Maximizer option.

Help Center in Maximizer

In Web Access, you will find the button for Help center in the lower right corner. Clicking this button to access the help articles, step-by-step walkthroughs and live chat.

Turn on / off Help Center in administrator

If you haven't turned on the Help Center during installation, go to Administrator > Preferences > System Options, and turn on "Enable anonymous usage tracking".

Click the button to access the Help Center.

The screenshot displays the Maximizer CRM interface. The top navigation bar includes the Maximizer CRM logo, a search bar, and several utility icons. A green callout box points to a question mark icon in the top right corner, labeled "Click the button to access the Help Center." The main content area is divided into two sections: "Address Book" and "Notes". The "Address Book" section shows a table of contact information for "ABC Wine Shop Inc." and other contacts. The "Notes" section shows a table of notes for the selected contact. A "Help Center" overlay is visible on the right side of the screen, containing sections for "What's new", "Maximizer Academy", "Onboarding", "Useful links", and "Support Chat".

Name	Phone Number	Email Address	City	State	Department
ABC Wine Shop Inc.	6046018000	info@abcwineshop.com	Vancouver	BC	Sales
All The Best Spirits	(604) 601-8001	escona@maximizer.com	Riverside	CT	
Bourne, Jason	(604) 601-8000	alohaus11@gmail.com	Vancouver	BC	Sales
Dolton, James Jimmy	(604) 601-8000	escona@maximizer.com	Pittsburgh	PA	Sales
Johnson, Ed	6046018022	escona@maximizer.com	Vancouver	BC	Sales

Date/Time	Type	Text
2/23/2021 10:57 AM	Manual	The customer needs more information about the pr
2/18/2021 4:53 PM	Opportunity	Opportunity created for: ABC Wine Shop Inc.
2/15/2021 8:16 AM	Task	Hotlist Task Created: Test task
2/21/2021 9:44 PM	Customer Service	Case created: HQ-00265

Usage Tracking

Enable anonymous usage tracking

As part of our ongoing efforts to improve our products and services, we may need to collect some aggregated usage information of how you use our products. This information may include what modules you access, your navigation within our products, and other anonymized usage statistics. Turning this on will also allow you to receive notifications on new releases, access to video tutorials, help documents as well as the occasional survey to help us determine our product direction. For more information, see our [Privacy Policy](#).

Note: this setting will be applied to all Address Books in your server.

Turn on or off Usage Tracking option in Administrator will show or hide the Help center.



View in Opportunities & Customer Service in Hotlist

In Hotlist, if a task is associated with an opportunity or a case, you can now click a button to view the opportunity or the case in the respective screen. The View in Opportunities or View in Customer Service commands are available in the menu bar and in the right-click menu.

- Create a task that is associated with a case.
- Go to Hotlist module, select the task.
- Notice that the button in the menu bar for View in Customer Service is enabled.
- Click the button; switch to Customer Service and highlight the case.
- Create a task that is associated with an opportunity.
- Repeat the steps above to view the opportunity in Opportunities module.

Button for View in Opportunities and View in Customer Service.

Hotlist 3 selected users - 3 displayed + new

<input type="checkbox"/> ▲ Date	Time	Priority	Task	Name	Company
<input type="checkbox"/> 11/9/2020			Send Letter	Martinez, Daniela A.	Atlas Food Inc
<input type="checkbox"/> 11/9/2020			Phone Call	Smith, Jonh	ABC Company
<input type="checkbox"/> 11/9/2020			Prepare Demo	Johnson, Ed	ABC Wine

- Add Task...
- Delete Current Entry...
- Reassign...
- Modify Task Date...
- Mark As Completed
- Phone ▶
- Schedule an Action Plan...
- Write an email...
- Time a task...
- Print Task Details
- View in Address Book
- View in Customer Service
- Export to Excel
- Advanced Export to Excel

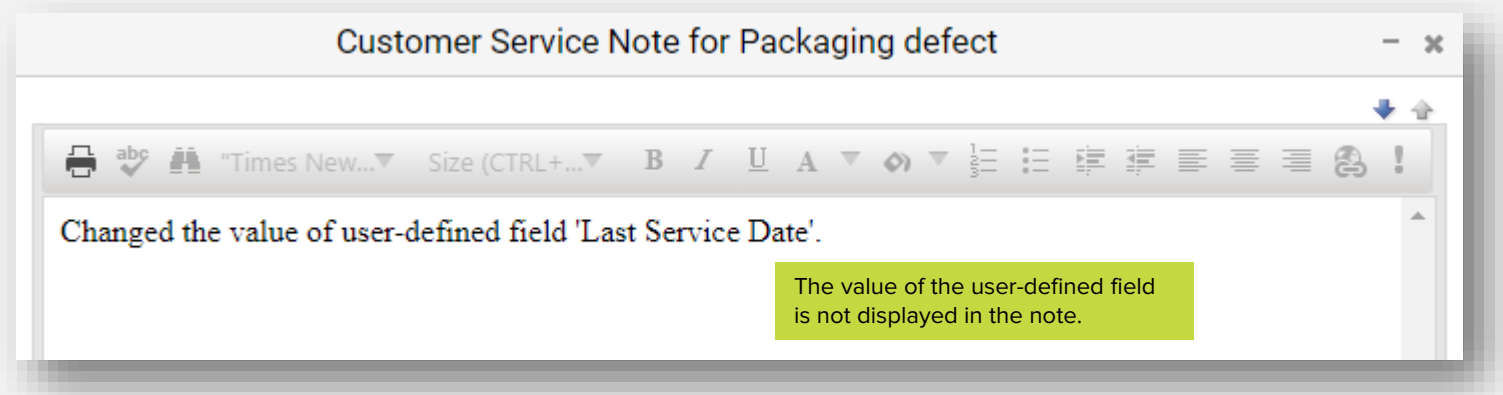
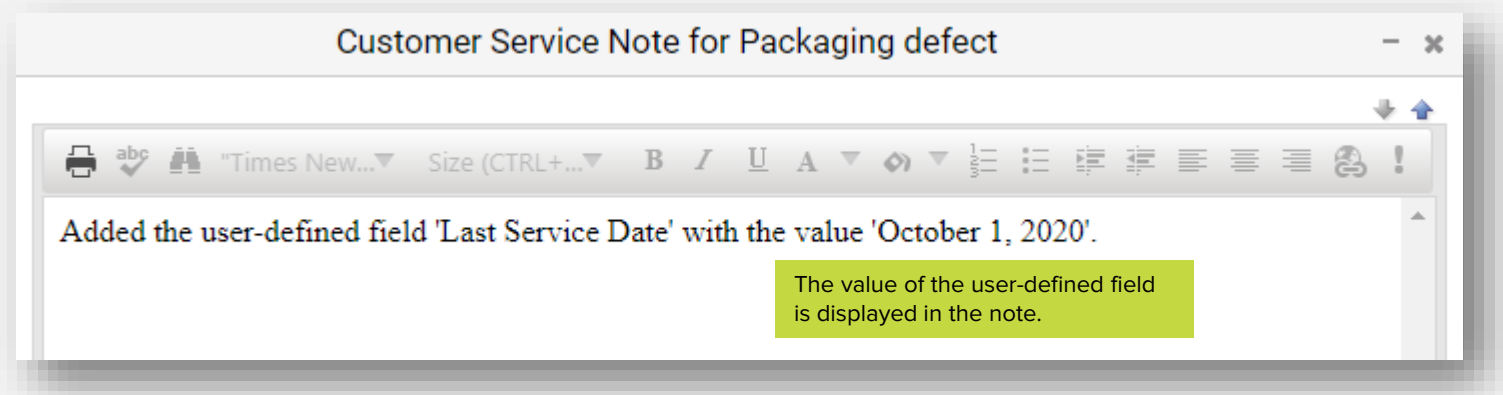
The command can also be found in the right-click menu



Enhanced Security for the Logging Notes

Make sure you have turned on the logging note options for opportunities and Customer Service cases in Preferences > Logging tab.

- Select an opportunity or a case and change the value of an user-defined field in Details tab or in User-defined Fields tab.
- Go to Notes tab. Make sure the History type is selected in the note filter.
- Open the history note. The value of the user-defined field is displayed in the note.
- Go to Administrator module > Preferences > System Options, select the option of “Hide values of user-defined fields in opportunity and case logging notes” in System Default section.
- Go back to Opportunities or Customer Service and change the value of an user-defined field.
- Open the history for this change. The value of the user-defined field is not displayed in the note.



A wide-angle landscape photograph of a vast, open plain with rolling hills and a winding river. The scene is captured during the golden hour, with warm, low-angle sunlight creating long shadows and a soft glow. The sky is filled with scattered, light-colored clouds. The overall color palette is dominated by earthy tones of brown, tan, and blue.

Thank You