



## What's New Feature Guide

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# Table of Contents

## **SECURITY ENHANCEMENTS**

Compliance with SQL password complexity rules	4
Two level security for documents	4

## **MOBILE ACCESS ENHANCEMENTS**

Prompt for value when retrieving a saved search	5
Select a predefined subject line for a task or an appointment	5
Inviting multiple Address Book entries to an appointment	6
Show the location of an appointment in map	6
Mobile Access Home Screen	7
Retain the contents of a note or an email when a session expires or the device is dis-connected	7
Allow changing the maximum number of entries to be retrieved in Mobile Access	7

## **HOTLIST IMPROVEMENTS**

View multiple users' activities	8
Monitor tasks that you have delegated to other users	8
Excel report for Hotlist	9
Allow batch editing task dates	10

## **INTERFACE AND USER EXPERIENCE IMPROVEMENTS**

Details tab for Customer Service cases	11
Allow performing other actions while editing a note	12
Allow selecting multiple types in the filter for Notes or Documents following tab	12
Automatically adjust the row height to fit the stacked fields in a column setup view	12
Place Maximizer Outlook integration buttons into Outlook Home tab	13
Dashboard improvements	14
Notification for maintenance contract expiry	14
New look of the notes and column report	14

## **OTHER IMPROVEMENTS**

Allow ignore year for rolling date range searches	15
Support document categories in the filter for Documents following tab	15
Note and document search returns notes/documents that match the search criteria	15
Allow import opportunities	16
Allow default document	16
Allow creating a note against Maximizer entry when saving an email in Outlook add-in	16
Allow merge fields for user information in email	16
Retrieving partners in Address Book page	17
Shows more information about cases in Notes report for cases	17
Remove the message after an email message is sent in Web Access	17
Improve performance for adding campaign subscribers	17
More columns may be added when searching for Address Book entries	17
Opportunities forecast report	17
Allow specifying name and description when saving an email from Outlook add-in	18

## **TECHNICAL CHANGES AND IMPROVEMENTS**

Discontinue MaxExchange	19
Upgrade SQL engine for Group edition	19
Dedicated service user	19
New email server settings page in Administrator	20
Support Chrome browser	20
Support Windows 10	20

## **ISSUES FIXED SINCE MAXIMIZER CRM 2015 R2**

# Security Enhancements

## Compliance with SQL password complexity rules

Maximizer password can now be fully complied with SQL password complexity rules. As a result of new password security requirements, when you upgrade to Maximizer CRM 2016 from an earlier version of Maximizer, you will be prompted to reset your password the first time you log in to Maximizer. The prompt for changing password will be performed in Web Access, Windows Access, and Mobile Access.

## Two level security for documents

The documents now have Full access and Read access rights. The two level securities for documents have been implemented in Web Access, Windows Access, Mobile Access, Outlook and Word add-in.

**Add Document for ABC Wine Shop Inc.**

**Name and description**

Name:

Category:

Description:

**Properties**

Date:

Time:

**Details**

Full access:

Read access:

Creator:

**Upload file**

No file selected

# Mobile Access Enhancements

## Prompt for value when retrieving a saved search

Cancel Retrieve Saved Search Search

**Specify Values for Saved Search**  
Saved search: Leads by City  
Search condition: Match all

**Lead status =**  
Hot  
Match all Match any

**Primary Interest =**  
To sell in a restaurant/bar  
Match all Match any

**City/Town =**  
Vancouver

When you retrieve a saved search in Mobile Access, you can specify values for each field included in the search. This expands the search capability in Mobile Access to include all basic fields and user-defined fields. This function is available in Address Book, Opportunities and Customer Services screen.

Note that the saved searches with prompt for value option need to be created in Web Access.

The value specified in the saved search will be displayed by default. The user can change the value before executing the search.

## Select a predefined subject line for a task or an appointment

Cancel Add Task Save

**Activity\*:**  
Follow-up on invoice

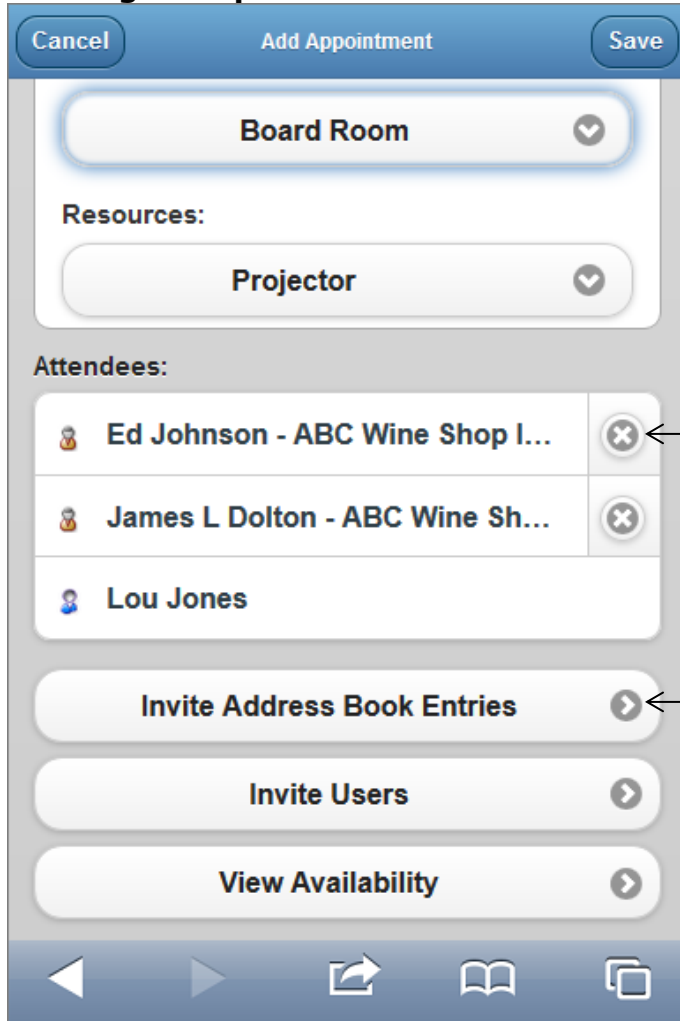
**Date:**  
2015-08-13

**Time:**

When you create a task or an appointment, you can select a pre-defined activity or subject. You will still be able to type in an activity or a subject.

The drop-down includes all the activities that have been created in Web Access. There is an "Enter Activity" item in the drop-down. Selecting this item will show a text field for you to type in an activity.

## Inviting multiple Address Book entries to an appointment

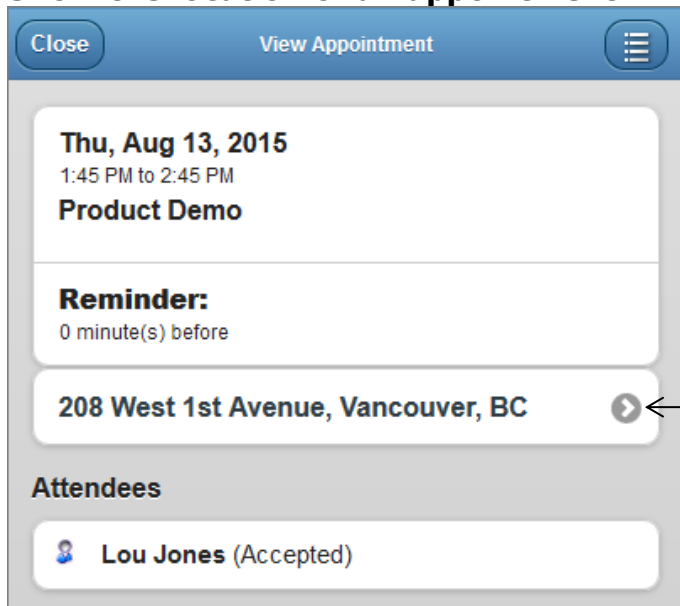


Now you can invite multiple Address Book entries to an appointment in Mobile Access. You can also remove Address Book entries from an appointment.

Pressing the button will remove the Address Book entry from the appointment.

More Address Book entries can be invited. Pressing this button will open the screen for searching for other Address Book entries.

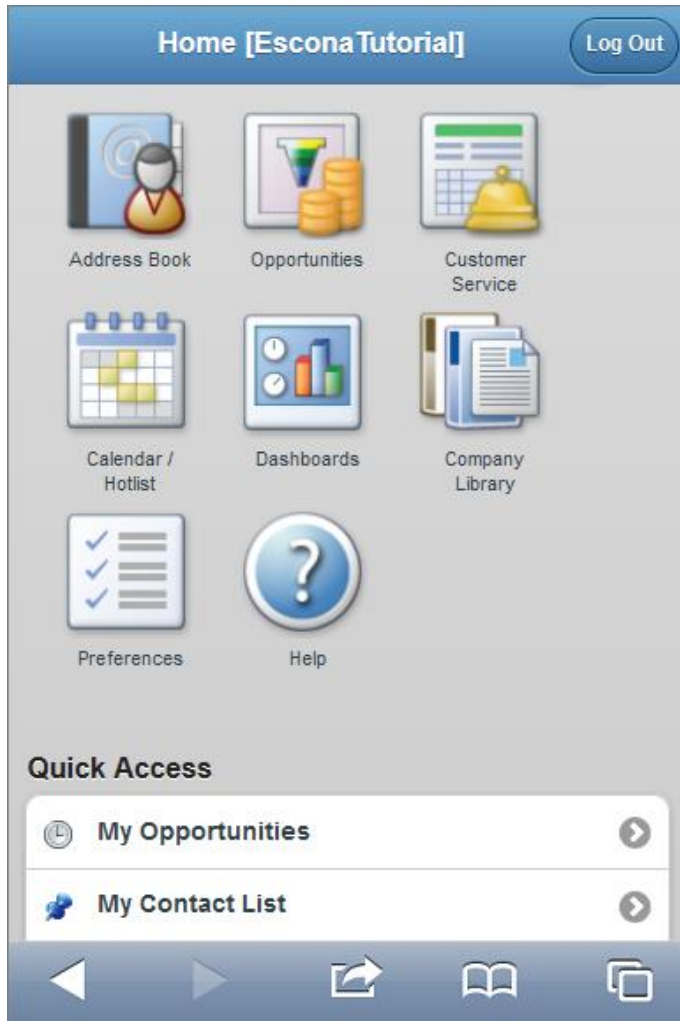
## Show the location of an appointment in map



If the location of an appointment has a valid address, you can show it Google Maps.

Pressing the address will show the location in Google Maps.

## Mobile Access Home Screen



### Preferences module

A new Preferences module has been added into Mobile Access. In this module, you can specify which screen you want to access when you launch Mobile Access. For example, if you always want to check your activities of the day when you launch Mobile Access, you can specify Calendar/Hotlist as the startup screen. When you log in to Mobile Access, Calendar/Hotlist screen will be displayed.

### Quick access

You may have some saved searches or Favorite Lists that you need to retrieve frequently. In Web Access, you have created quick access shortcuts to access them. Now these quick access shortcuts are available in the Home screen of Mobile Access. Pressing a quick access shortcut will switch to the respective screen and retrieve the entries from the saved search or Favorite List.

### Retain the contents of a note or an email when a session expires or the device is dis-connected

You may have the experience of losing a note or an email while using Mobile Access. For example, if your device is disconnected when you try to save a note or send an email, the note or email will be lost. In 2016 release, you will be informed that no internet connection is available. You will stay in the note or email screen. You can save the note or send the email when the connection is available again. You won't lose the content of the note or email even if you close your browser. You can log in to Mobile Access again, find the same entry and write a note or compose an email. The contents of the note or email that you previously entered will be retrieved.

### Allow changing the maximum number of entries to be retrieved in Mobile Access

Now you can easily change the maximum number of entries that a search can retrieve. The setting is available In Web Access Administrator module, System Option page. The default value is 500.

# Hotlist Improvements

## View multiple users' activities

It is hard to view all your team members' activities in previous release, because you can only select one user in the Hotlist filter. In 2016 release, you can view multiple users' activities at the same time.

## Monitor tasks that you have delegated to other users

You may delegate some of your tasks to other users. Once the tasks have been assigned to others, they are removed from your Hotlist and it is hard to track the status of these tasks. Now you have the option to view the tasks created by you but assigned to other users in Hotlist filter.

The screenshot displays a CRM interface with a Hotlist table and a filter dialog box. The table lists tasks with columns for Date, Time, Priority, Task, Name, Company, Phone, Assigned to, and Completed. The filter dialog box, titled "Filter the activities you would like to be displayed", has a "Show" section with radio buttons for "My activities", "Activities of all users", and "Activities of the selected users". The "Activities of the selected users" option is selected, and a dropdown menu shows "Celine Dancer, Joe Napoli, Lou Jones". The "Options" section has a checked checkbox for "Only show tasks that I created" and several unchecked checkboxes for "Show completed tasks", "Show carried forward unfinished tasks", "Show appointments", "Show completed appointments", and "Show carried forward unfinished appointments".

Date	Time	Pr.	Task	Name	Company	Phone	Assigned to	Completed
August-11-15	10:30 AM	HI	Call customer to discuss next step	Adams, Dante	ABC Wine Shop Inc.	(604) 601-8000	Joe Napoli	✓
August-12-15		MED	Confirm deadline	Richard, Elisabet	Capitol Vineyards	(604) 601-8000	Joe Napoli	✓
August-13-15		HI	Prepare PowerPoint demo	Dolton, James L	ABC Wine Shop Inc.	(604) 601-8000	Lou Jones	✓
August-13-15	3:00 PM	MED	Send document to James	Dolton, James L	ABC Wine Shop Inc.	(604) 601-8000	Joe Napoli	✓
August-14-15		LOW	Confirm meeting schedule	Horton, Chrystal	Ingersoll Wines & Spirits	(604) 601-8000	Celine Dancer	✓

**Hotlist filter**  
The options allow you to view your activities, activities of any user that you have right to view or activities of the selected users.

Turn on this option will filter the Hotlist to only show the tasks created by you.

3530 N Lincoln Ave  
Room 2000  
Chicago IL 60657  
USA

Date: February 01  
Primary Interest: To sell in a  
Annual Sales: 500000.00  
Retail Wine Cost: \$41 - 50  
Promo level: Frequently  
Region: US - Midwe  
Industry: Wine-Retail

Phone numbers  
Main: (604) 601-8000  
Fax: (604) 601-8001

Email addresses and website

Filter the activities you would like to be displayed

Show

My activities  
 Activities of all users  
 Activities of the selected users  
Celine Dancer, Joe Napoli, Lou Jones

Options

Only show tasks that I created

Show completed tasks  
 Show carried forward unfinished tasks  
 Show appointments  
 Show completed appointments  
 Show carried forward unfinished appointments

OK Cancel

Sales Lead: Yes  
Lead status: Hot



## Excel report for Hotlist

Excel report has been added into Hotlist page. The report provides an overview of the activities grouped by dates, priorities, companies and creators. The report can be accessed from the Report menu in Hotlist page. To support the Excel report, Default Report View column setup has been created for Hotlist.

### Hotlist Tasks Reports

[Click to Generate Reports](#)

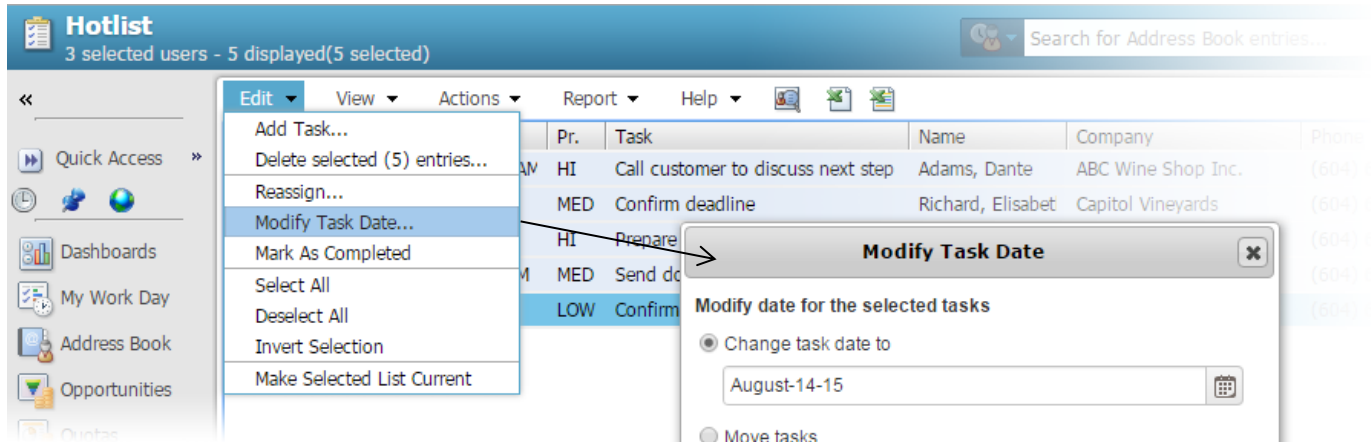
#### Table of Contents

Report name	Description	Details
<a href="#">Tasks assigned to by time</a>	Total number of all tasks by user they are assigned to, grouped by time.	Filter by month/year and by users tasks are assigned to
<a href="#">Completed vs. not completed tasks</a>	Total number of all completed tasks vs. not completed grouped by users they are assigned to.	Filter by month/year and by users tasks are assigned to
<a href="#">Tasks by priority</a>	Total number of all tasks grouped by priority.	Filter by month/year/priority and by users tasks are assigned to
<a href="#">Tasks by company</a>	Total number of tasks grouped by company.	Filter by month/year and company
<a href="#">Tasks by creator</a>	Total number of tasks grouped by creator.	Filter by month/year and by users tasks are assigned to

## Allow batch editing task dates

You may have experienced having too many tasks that you cannot complete in current week. You would like to move some of them to future so you can focus on the one that you are able to finish. Now you can modify the dates for multiple tasks at the same time. There are two options for moving tasks. You can move all the selected tasks to one specified date. Or, you can move tasks by offset days. You have the option to skip non-working days when moving the tasks.

This function can be accessed from the Edit menu in Hotlist page. Note that you can only change dates for none Action Plans tasks or tasks that are scheduled from Action Plans in which activities are not set as dependent. Dates for appointments or dates for tasks from Action Plans with dependent activities cannot be changed using Modify Task Date dialog.



Selecting the first option will move all the selected tasks to a specific date (e.g. August 14).

Selecting the second option will move the tasks by offset days. For example:  
There are three tasks selected:  
Task 1 (Date: June 15)  
Task 2 (Date: June 16)  
Task 3 (Date: June 17)

They will be moved 1 day forwards. The three tasks will be moved into three days:  
Task 1 (Date: June 16)  
Task 2 (Date: June 17)  
Task 3 (Date: June 18)

# Interface and User Experience Improvements

## Details tab for Customer Service cases

The Details following tab has been implemented for Customer Service cases. In the Details tab, you can see the basic fields, Key Fields, billing and solution information. You can edit the case; print the detail information about the case; setup case monitoring and assign/escalate/resolve the case.

Checking conditional mandatory fields is now supported when creating or editing a case.

The screenshot displays the CRM interface. At the top, there is a menu bar with options: Edit, View, Search, Actions, Report, and Help. Below the menu is a table listing cases:

Case Number	Company/Individual	Subject	Assigned To	Follow-up Deadline	Status	Priority	Elapsed Time
HQ-00091	Ansley Wine Merchants	Faulty Product	Joe Napoli	September-18-15 5:25 PM	Escalated	High	3.1 years
HQ-00089	Atlas Food Inc	Faulty Product	Joe Napoli	October-01-15 6:30 PM	Escalated	High	3.2 years
HQ-00088	ABC Wine Shop Inc.	Ship error, refund req	Celine Dancer	August-20-15 6:16 PM	Wait for Custc	Medium	3.0 years

Below the table is a tabbed interface with 'Details' selected. The 'Details' tab shows the following information for case HQ-00091:

- Faulty Product**  
Case number: HQ-00091  
Elapsed time: 3.1 years  
Status: Escalated
- Basic information**  
Company / Individual: Ansley Wine Merchants  
Contact: Wiley, Kendall Val  
Products / Services: Accessories
- Description:**  
The shipment of stainless steel corkscrews has many defective units. Wants to return the entire shipment for a full refund.
- Billing information**  
Billing type: Chargeable  
Billing rate: 50  
Billable time(hrs): 5  
Case fee: 250.00
- Solution information** (+)
- System information** (+)

Key Fields for: <Default Key Fields>

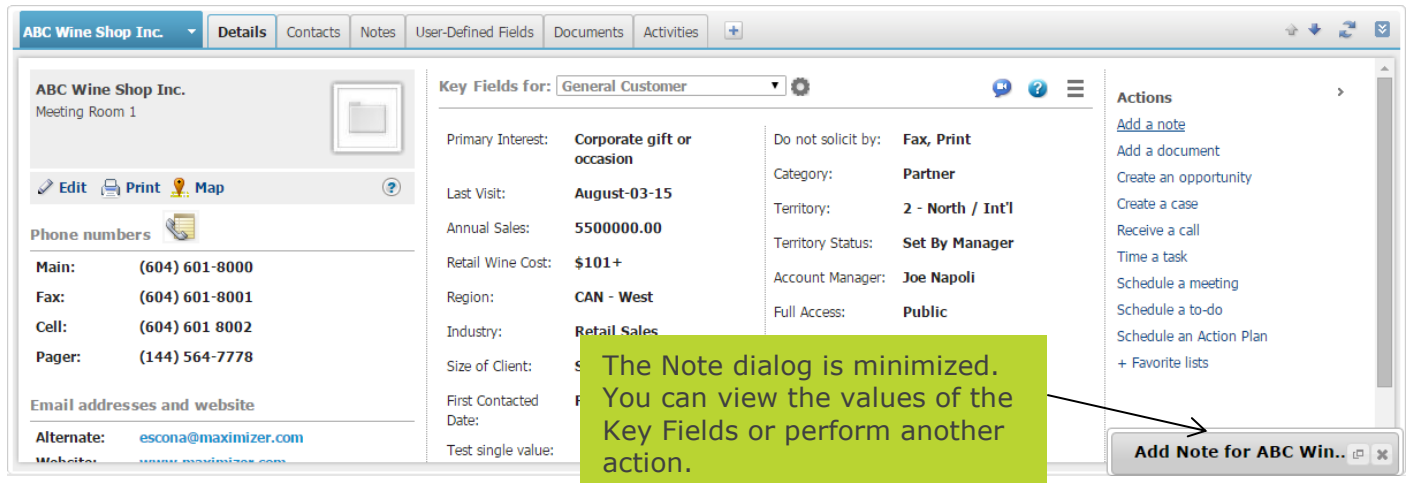
Case queue:	Priority	Status:	Escalated
Case type:	Product Return	Case owner:	Lou Jones
Case reason:	Other	Assigned to:	Joe Napoli
Case origin:	Phone	Priority:	High
Follow-up deadline:	September-18-15 5:25 PM	Severity:	Medium
SLA:	Silver	Contract Number:	#058974

A callout box with a green background and an arrow pointing to a collapse icon in the Key Fields section contains the text: "Actions panel can be collapsed. Pressing the icon will expand the panel."

The Details tab for Address Book entry, opportunity and case has been changed to use the responsive user interface framework. The framework will automatically adjust the width of the three panels in the Details tab (basic field, Key Fields and actions) based on the screen width. The framework optimizes the look of the Details tab for different screen sizes, including the screens of mobile devices. For example, in a small screen that doesn't have enough space to display the two columns for Key Fields, the fields in the right-hand side column will be automatically moved into the left-hand side column. Only single column of Key Fields will be displayed. The actions panel can be collapsed to provide more space for showing the Key Fields.

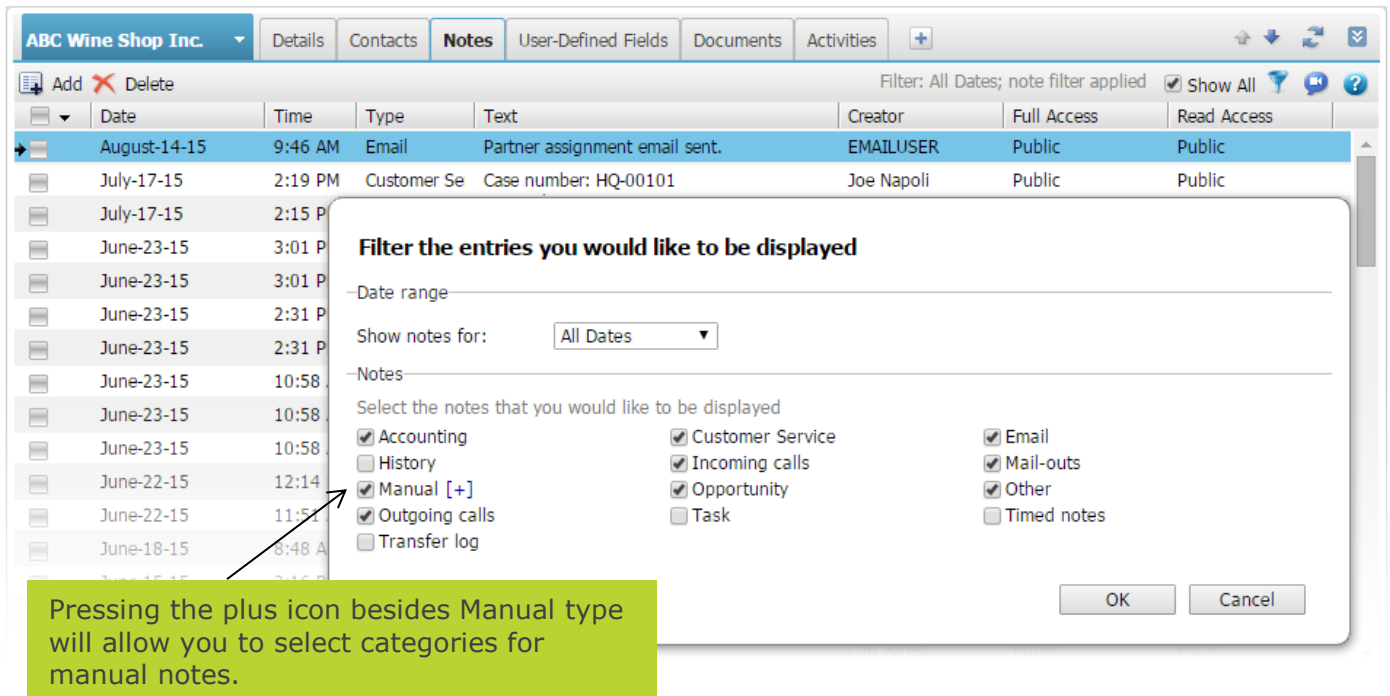
## Allow performing other actions while editing a note

When you are talking with a client and writing a note at the same time, you may want to check some user-define fields or schedule an appointment. In 2016 release, you can perform other actions or view other entries with the note dialog open. The note dialog can also be minimized.



## Allow selecting multiple types in the filter for Notes or Documents following tab

Now you can select multiple note types in Note filter. This will help you to view all the notes that are relevant to you, instead of viewing each type of note one by one. The drop-down for selecting a note type has been replaced with a filter dialog. In the dialog, you can specify multiple types of note that you want to see. The same change has been made in Document filter as well.



## Automatically adjust the row height to fit the stacked fields in a column setup view

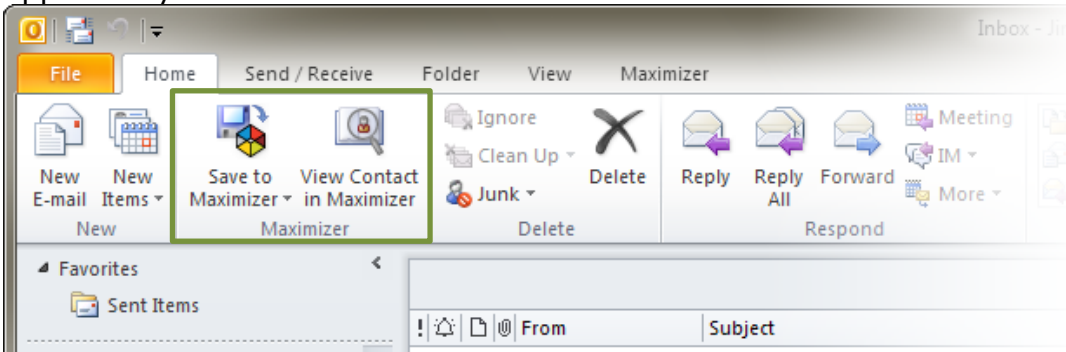
You may stack multiple fields into a column setup view. In 2016 release, the row height will be automatically adjusted to fit all fields.

Type	Company	Name	Phone Number	Email Address	Email opt-in type	City
Company	ABC Wine Shop Inc.		(604) 601-8000	escona@maximizer.com	Newsletter, Promotion	
Contact	ABC Wine Shop Inc.	Dante Adams Project Manager Business Development	(604) 601-8000	escona@maximizer.com	Newsletter, Promotion	
Contact	ABC Wine Shop Inc.	Dante Adams Project Manager Business Development	(604) 601-8000	escona@maximizer.com	Newsletter, Promotion	
Contact	ABC Wine Shop Inc.	Ed Johnson Sales	(604) 601-8000	escona@maximizer.com	Newsletter, Promotion	

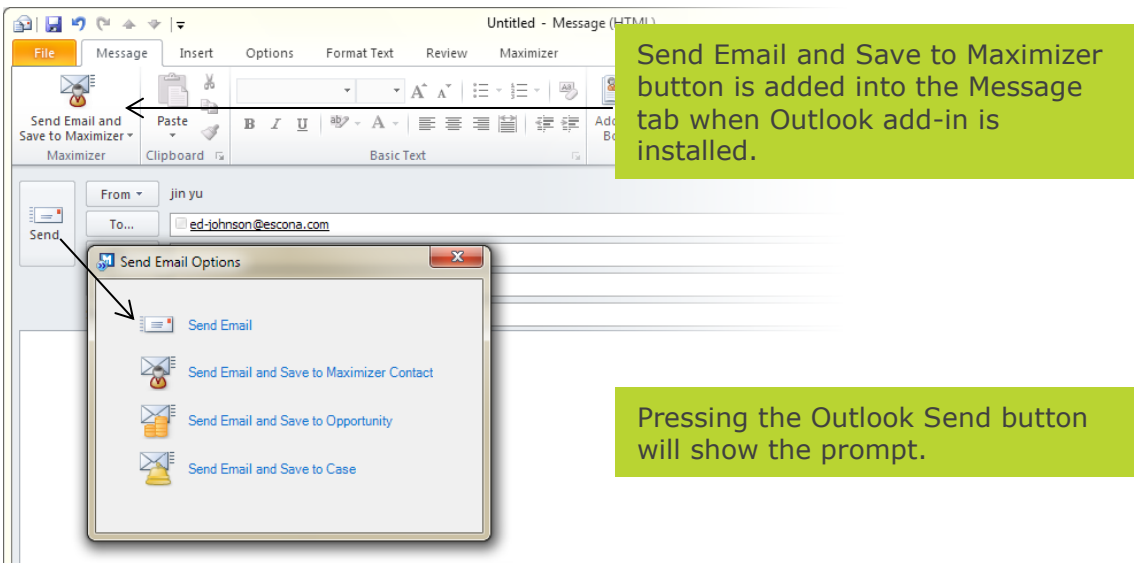
If you assigned three fields in to the column view, the row height will be adjusted automatically to show all the fields.

### Place Maximizer Outlook integration buttons into Outlook Home tab

When you install Maximizer Outlook integration for 2016 release, some of the most commonly used Maximizer buttons will be added into the Outlook Home tab. You will find buttons for Save to Maximizer and View Contact in Maximizer. Pressing Save to Maximizer button will show a drop-down that allows you to saving the email to an Address Book entry, an opportunity or a Customer Service case.



In email compose dialog, you will find Send Email and Save to Maximizer button. If you would like to avoid accidentally pressing the Outlook Send button which will send the email without saving it to a Maximizer entry, you can turn on the new "Confirm when sending email" option in Outlook add-in preference. When you press Outlook Send button, you will be prompted to send the email directly or send the email and save it to a Maximizer entry.

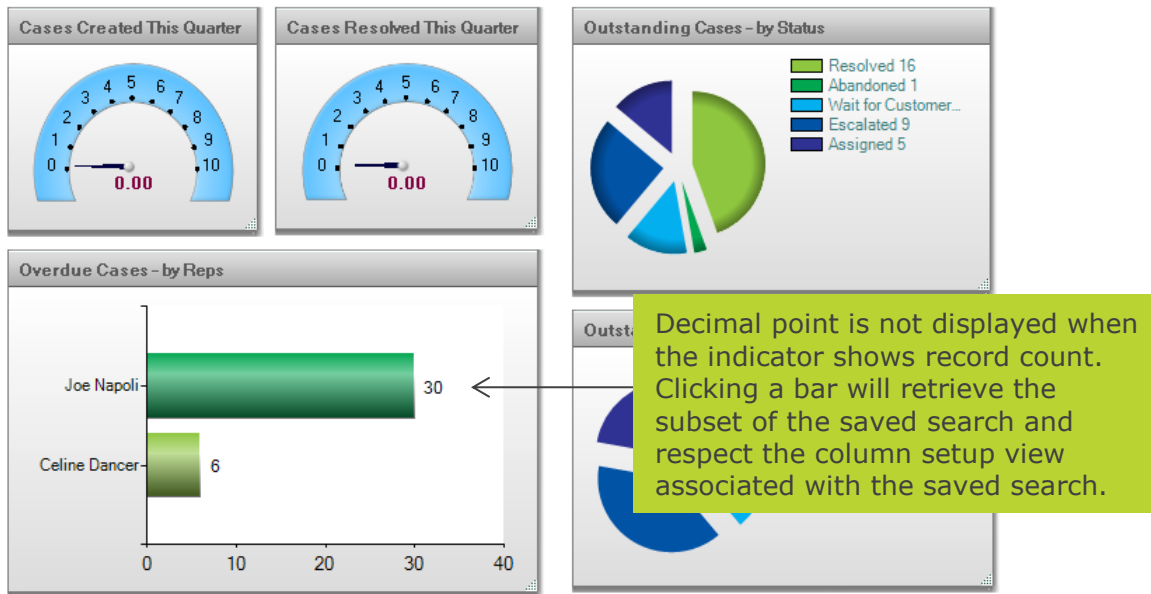


Send Email and Save to Maximizer button is added into the Message tab when Outlook add-in is installed.

Pressing the Outlook Send button will show the prompt.

## Dashboard improvements

Decimal point is not displayed in the indicator that displays record count. When retrieving entries by clicking a bar in a bar chart or a piece in a pie chart, the associated column view for the saved search will be applied.



## Notification for maintenance contract expiry



The users will be notified before their maintenance contracts expire. The will ensure the users to renew their contract and receive continue support and product upgrade from Maximizer.

Log in to:

Escona Tutorial ▼

MASTER

.....

Log In

Remember me

Your maintenance contract will expire in

**43 days**

To renew your contract, call 1-800-624-4153  
or email [Maximizer Renewals Team](#).

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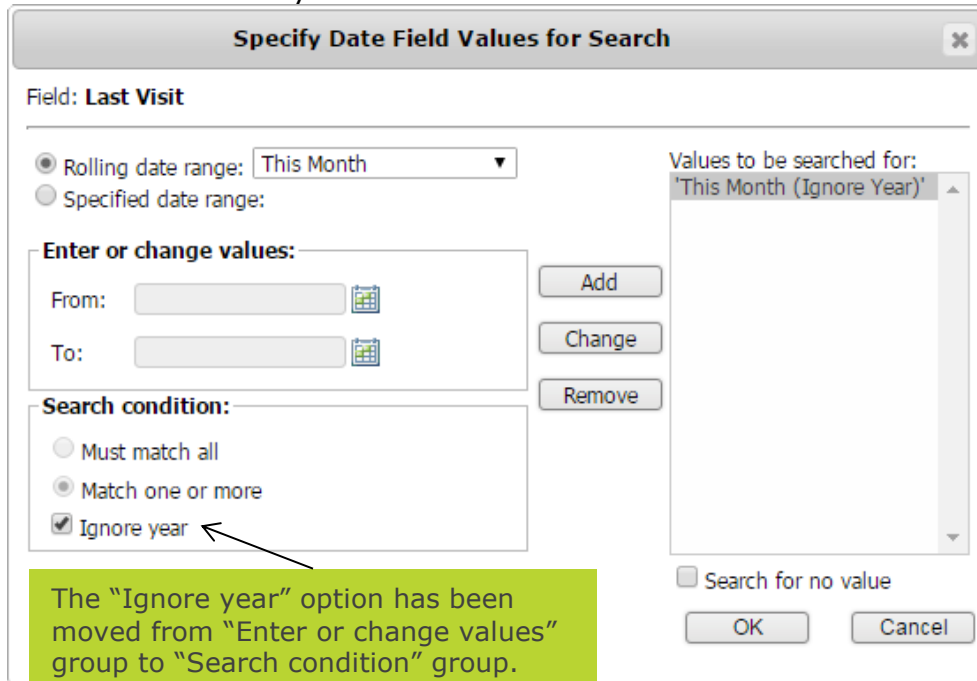
## New look of the notes and column report

The look of the notes report and column report, calendar summary report as well as phone lists have been improved.

# Other Improvements

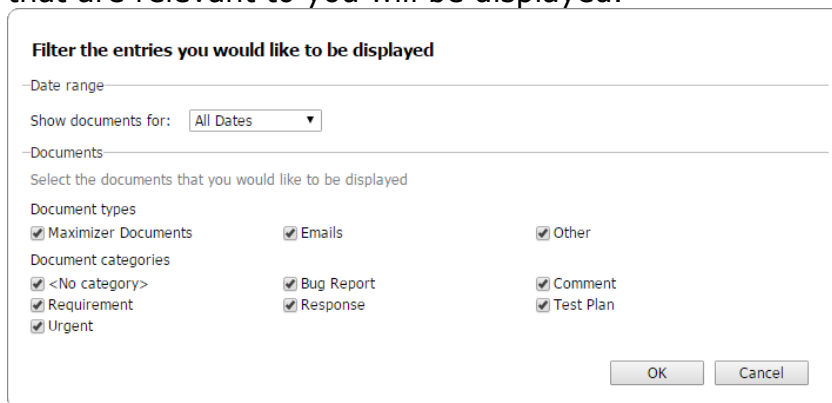
## Allow ignore year for rolling date range searches

The Ignore year option for date range searches can now be applied to rolling date ranges. This allows you to create a saved search that would, for example, retrieve all of your clients who have a birthday in the current month.



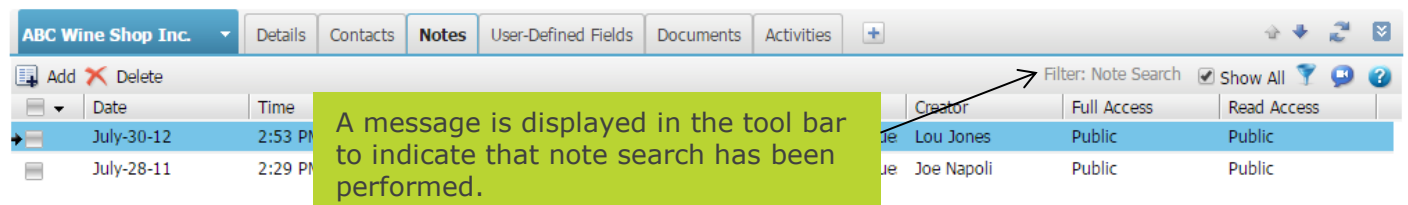
## Support document categories in the filter for Documents following tab

Document categories are available in Document Filter. If you have created many categories for managing documents, you can filter the documents by categories. Only the documents that are relevant to you will be displayed.



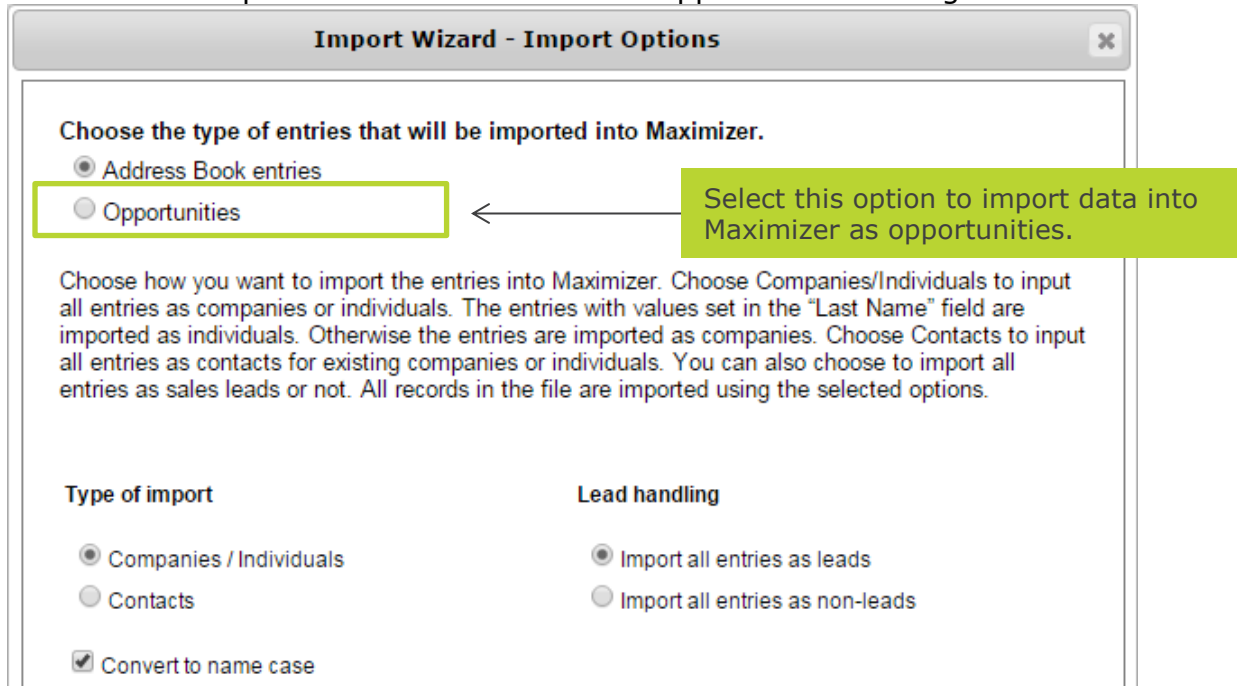
## Note and document search returns notes/documents that match the search criteria

In previous releases, if you search entries by notes or documents, all the notes/documents will be retrieved in the following tab. Now, only the notes/documents that match the search criteria will be retrieved.



## Allow import opportunities

You can now import data into Maximizer as opportunities through CSV or tab-delimited import.



## Allow default document

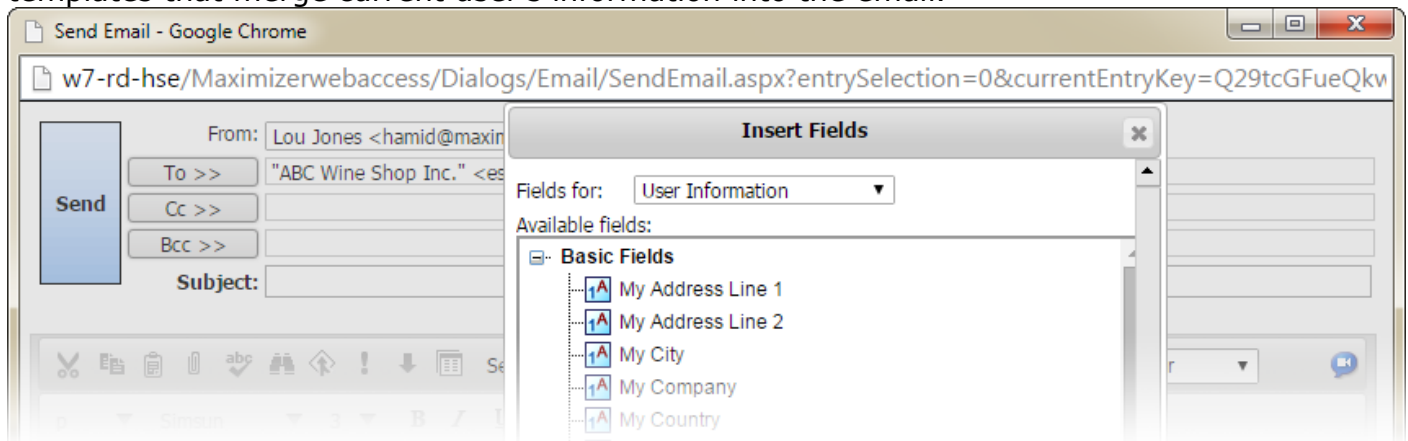
You can create default documents in Address Book, Opportunities, Campaigns and Customer Service pages. When you add a new document, the Full access, Read access, and Category fields are automatically set to the values in your default document. The default document settings will be respected in Web Access, Mobile Access, Outlook and Word add-in.

## Allow creating a note against Maximizer entry when saving an email in Outlook add-in

In Outlook add-in, you can save an email as a note to Maximizer entries if you turn on logging email as notes in Web Access preferences.

## Allow merge fields for user information in email

You can now insert user-defined fields for users into an email. This allows you to create email templates that merge current user's information into the email.





## Retrieving partners in Address Book page

Two search functions related to partner have been added into Address Book > Search menu. Search by partner – This function allows you to retrieve Address Book entries by a specific partner. For example, retrieve all entries that Samson Consulting has been assigned as partner.

Retrieve partner – This function retrieves the partner of the selected Address Book entries.

## Shows more information about cases in Notes report for cases

The Note Report for Customer Service cases now shows more information about cases. The fields added into the report include: Company/Individual, Contact, Subject, Products/Services, Status, Assigned To, Priority, and Severity.

## Remove the message after an email message is sent in Web Access

In previous release, you will be prompted with a message after the Send button in email compose dialog is pressed. The message states that the email has been sent, but it is actually queued in email service. The message has caused some confusion to some people. This message has been removed in 2016 release.

## Improve performance for adding campaign subscribers

The performance for adding campaign subscribers has been improved. You can now add a large number of Address Book entries into campaign activities.

## More columns may be added when searching for Address Book entries

In the dialogs where you search for Address Book entries, you can now specify a column setup view to display additional information about the entries and help you to identify the entry you're looking for. You can also select a column setup in Appointment dialog > Address Book Entries tab.

Selecting a column setup has been added into the dialogs for searching for a partner/competitor, assigning a company/contact to an opportunity or a case, assigning a contact to a strategy role.

Name	Phone	Email	City	State	Department
Samson, Paul	(604) 601-8000	escona@maximizer.com	San Jose	CA	

## Opportunities forecast report

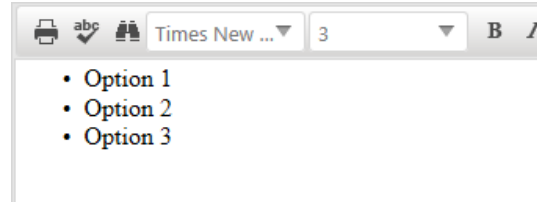
The opportunities forecast Excel report has been split out from the Opportunity Reports and has been added as a separate report available in the Report menu in the Opportunities page.

## Better formatting in text editor

The text editor has been improved for better handling bullet points and spacing between paragraphs.



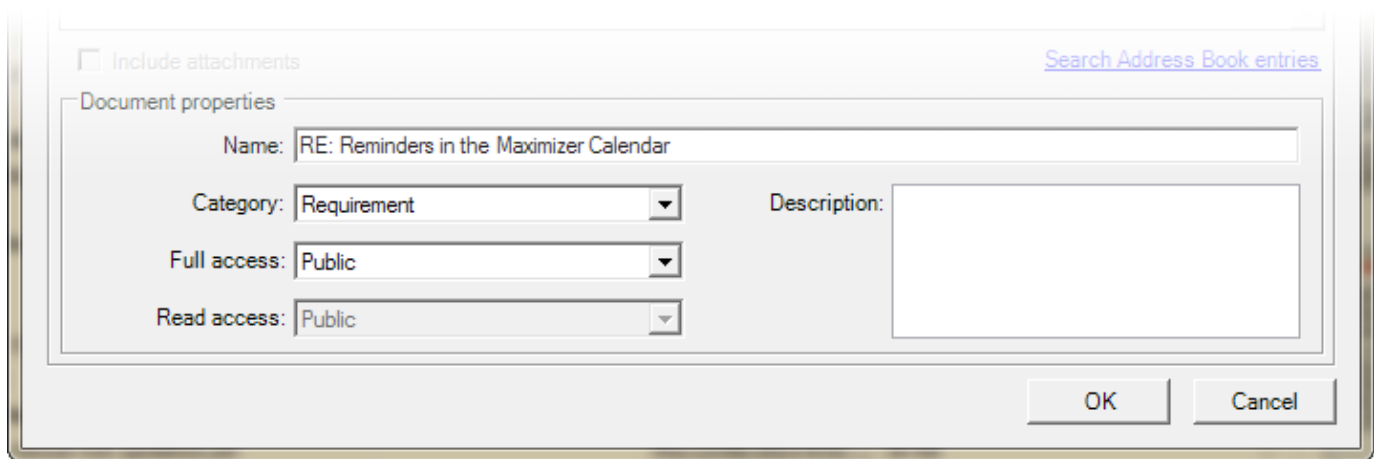
In previous release, if you type in multiple lines of text and turn on bullets, the bullets are not displayed for each line.



In 2016 release, the bullet will be displayed for each line.

## Allow specifying name and description when saving an email from Outlook add-in

When you save an email as a document to a Maximizer entry, you can now enter the name and description for the document. By default, the email subject will be added into the Name field.



# Technical Changes and Improvements

## Discontinue MaxExchange

MaxExchange has been discontinued in 2016 release. MaxExchange Remove Workstation component has been removed from installation. We no longer provide workstation installation. If you need a workstation installation, you can generate one from the server image.

The user interface related to MaxExchange in Administrator has also been removed (Administrator > System Options tab > MaxExchange).

## Upgrade SQL engine for Group edition

The database engine for Maximizer CRM 2016 Group edition has been upgraded to use SQL Server 2014 SP1 Express.

## Dedicated service user

Service Access has been created for accessing Maximizer API. Users that are enabled for "Service access" cannot log in to Maximizer, but may access the Maximizer database using Maximizer APIs. These users do not consume a Maximizer license. Users enabled only for "Service access" may be created for use with Maximizer add-in products such as the Maximizer HubSpot Connector or Maximizer MailChimp Connector.

**Users**  
Users > Modify User > General Information

General | Access Rights | Groups/Teams

Save | Cancel

**Name and position**  
User ID: MASTER | Mr/Ms: Mr. | First name: Lou | Initial: | Last name: Jones | Salutation: Dear < >:  
Display name: Lou Jones | Position: System Administrator | Reports to: Joe Napoli

**Company and main address**  
Company: Escona Estate Wines | Dept: IT | Division: US - East | Address 1: 1344 Eastside Road | Address 2: | City/Town: Petaluma | St/Co/Prov: CA | Zip/Postcode: 94954 | Country: USA

**Internet information**  
Email 1: hamid@maximizer.com | Display name: Lou Jones | Email 2: | Display name: | Email 3: | Display name: | Website: http://www.escona.com

**Time Zone**  
Region: (UTC-08:00) Pacific Time (US & Canada) |  Automatically adjust for Daylight Saving

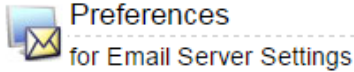
**Phone numbers and extensions:**  
1: (555) 775-0987 | 2: (555) 775-0900 | fax | 3: | 4: |



**Security**  
 Public  Private

**Module login**  
Windows access: Enabled | Web access: Enabled | **Service access: Disabled**

## New email server settings page in Administrator

You can now control the email server settings that are used for email functions in Maximizer. The settings can be found in Administrator > Email Server Settings page.



 Save  Cancel

**Preferences that apply to all Address Books**

Service cycle time check:

Enable sending in batch mode

Character set used by email service:

URL of Campaign Manager statistics:

**Preferences that apply to only the current Address Book**

Activate services for the currently open Address Book

Service Computer:

SMTP Server:

SMTP Port:

SMTP server requires authentication:

Account Name:

Password:

Confirm Password:

SMTP server has SSL/TLS enabled:

Static Sender:

Static Footer:

**Test SMTP Connection**

Enter the From and To email addresses in the fields below. The domain of the From address should match the domain of the SMTP server.

From:

To:

## Support Google Chrome browser

Google Chrome for Windows is now supported for accessing 2016 Web Access.

## Support Windows 10

Windows 10 is now supported for 2016 release. The Edge browser which is the default web browser in Windows 10 is supported to work with Web Access, but Microsoft Word Integration is not support for Edge browser.

# Issues fixed since Maximizer CRM 2015 R2

## **MSG file locked if Outlook Add-in enabled and opened twice**

Category: Outlook Add-in

If the Maximizer Outlook Add-in is installed and you open Outlook then after open a .MSG file off the hard drive then close it and then try and open it again it will be locked and you can't open it until you shut down Outlook completely.

## **Can't import Turkish Characters properly through Web Access**

Category: Import / Export

In Web Access if you have a CSV File with Turkish Characters in it, it doesn't matter if it is in ANSI or UTF-8, it won't import properly and translate some characters.

## **Follow-Up Deadline Pop-up Calendar won't allow moving more than 2 months ahead if date already present**

Category: Customer Service

In Maximizer CRM Live or Maximizer CRM in Web Access, if you open a CS Case that already has a Follow-Up Deadline set to some date, and then you click on the Pop-Up Calendar to pick another date and you try and move over 2 months ahead it will either just stop right there or cycle through the next two months.

## **Trouble updating Contact if points to invalid Alternate Address in back end**

Category: Address Book

If you set a Contact to use an Alternate Address as their Default Address and then later that Alternate Address is deleted, the Contact will still point to that Deleted Address. When opening that Contact in Web Access it will correctly show the Main Address as being used, but if you make a change and try and save it, you will get an error message about the Length of a Data field being wrong.

## **Can't Save AB entries to new Favorite list when Identity field has reached Signed INT limit**

Category: Favorite List

If you have used a Maximizer Database for a long time it is possible if you are constantly updating and adding new Favorite Lists to have the Identity field in the Favorite records table to become bigger than a Signed INT which causes a problem when trying to add new ones. The AB Entries won't save into the list.

## **Advanced Search Picking fields to search from and Items for Table Udf's picked really slow in DB with many UDFs**

Category: Searching

In Web Access when performing an Advanced Search if you are in a Maximizer database that has a lot of UDF Definitions and a lot of Table UDF Items as well, when you first go to choose fields for the search it takes a very long time for that list to be generated and if you have chosen any Table UDFs to search by it takes a very long time for those items to be loaded to be chosen from.

## **Duplicate Checking causing adding new Companies to be very slow in Web Access when lots of entries in the Address Book**

Category: Web Access - Duplicate Checking

If you have enabled duplicate checking in your Address Book and it has a lot of Address Book Entries in it, (200K plus) when adding a new Company it takes an extremely long time for the insert to complete.

## **Error trying to add new Company in Web Access If Territory set in Default Entry and User is not Sales Manager**

Category: Web Access - Territory Management

In Maximizer CRM, if you are a Sales Representative but not a Sales Manager and you set a Territory in your Default Entry, then after try and add a new Company in Web Access, when you click Save you will get an error about the length of a field and the entry won't save.

## **Web Access Pipeline Report Printer button not working in IE11**

Category: Reports

If you are using IE11 as your browser and you run a report that uses the Microsoft Report Viewer like the Opportunity Pipeline Report or Consolidated Activity Report after the Report generates, if you click on the Printer Icon nothing happens.

## **MaxMobile Enabled / Disabled shouldn't show in CRM Live Administrator**

Category: Web Access - Administrator

In CRM Live Administrator the ability to enable and disable Users for Max Mobile still shows but shouldn't because there is no Max Mobile in CRM Live.

## **Copying and pasting Html into the new Web Access Email control strips out images**

Category: Email

If you either copy and paste html with images in it or copy the html code into the insert Html dialog and save it in both cases the images won't show.

## **Drop down of team names not in alphabetical order in Search dialog by Team in Web Access**

Category: Web Access - Searching

In Web Access, if you are in the Opportunity window and you choose to search by Team, the drop down in the dialog that comes up shows the Teams in the order they were entered in the database not in alphabetical order like it is in the Windows client.

## **Notes created from Opp change Creator when AB entry duplicated while logged in as different User in Web Access**

Category: Web Access - Address Book

If you have an Address Book Entry that has an Opportunity assigned to it that has been won and all the notes are with the User that did those actions, and you login as another User then create a Duplicate of the Address Book Entry, the notes on the Duplicate will now appear to have been created by the currently logged in User.

## **Email validation adding new AB entry doesn't allow for a number after the @ sign in Web Access**

Category: Web Access - Email

In Web Access when adding or modifying an Address Book entry, if an email address contains a number after the @ sign you will get an error "Invalid email format". (Like ab@49ab.com). This should be valid.

## **"The resource cannot be found." error picking User for followup activity after a phone call in Web Access**

Category: Web Access - Hotlist

In Web Access if you have clicked on the phone icon in the details tab of an Address Book Entry, go through the phone call then when done say yes to creating a follow-up activity and when the add Task window comes up click to pick the User and you will get the following error instead: "Server Error in '/MaximizerWebAccess' Application. The resource cannot be found"

## **Can set Date UDF for an Opportunity to Include in Hotlist due to bug in Web Admin**

Category: Web Access - Administrator

In the Web Administrator, if you make a new Date UDF for an Opportunity the "Include in Hotlist" checkbox is disabled, however if you click the "Set to Hidden" Checkbox it becomes enabled and you can turn it on.

## **Activities Tab rebuilds recurring date UDF as Hotlist Task 1 year back repeatedly when set to All Dates in Web Access**

Category: Web Access - Activities

In Web Access, if you have configured your Activities Tab to show all Dates, And you have any Date UDFS set to build in the Hotlist as a recurring event, any records this field is filled in for the current date the year prior will build into the Hotlist and each time you refresh the Activities tab it will build another one.

## **Note does not display currency symbol for the revenue/Cost for multi-currency**

Category: Web Access

Note does not display currency symbol for the revenue/Cost for multi-currency.

## **"Include Article Body Contents Also..." checkbox disabled KB Search by Phrase**

Category: Customer Portal, Partner Portal

Description of defect: Currently in both the Customer and Partner Portals when Searching by Phrase in the Knowledge Base the checkbox "Include Article Body Contents Also when executing search" is present even though the feature doesn't exist. It should be removed to avoid confusion.

## **MXI Import: Missing or blank <Assigned To> element in MXI file will delete Account Manager in Target AB**

Category: Import / Export

If you are importing an MXI file to update entries in a Maximizer CRM Address Book if you don't include the <Assigned To> element or include it but it contains no data, the Account Manager field for entries will be wiped out.

## **MXI Import: 'Creator' Field Updated incorrectly in Windows Access and 'Updated by' not importing**

Category: Import / Export

When importing an XML/MXI file that updates address book records, if done via Windows Access, the Creator Field will be updated to the current logged in User which is wrong, and if done via Web Access the Updated By field is not updated but should be.

## **MXI Import (Windows Access) Insert instead of update if Company Name longer than 39 characters Windows Access**

Category: Import / Export

If doing an import in Windows Access of an MXI file, if a matching Company has a Company Name over 39 characters instead of merging to the matching entry a new Record is created.

## **MXI Import: MaxWin.exe: MatchMode = AlwaysInsert is ignored when importing via command-line**

Category: Import / Export

When importing an MXI file via the command line, when the "MatchMode" option in the "ImportOptions" element of the import file is set to "AlwaysInsert", the setting is ignored and matching entries that already exist in the Address Book are updated instead of creating new entries.

## **Windows Access: Second pass contact import of tab delimited file truncates URL**

Category: Import / Export

If you are using Windows Access to import a tab delimited file and you are doing a two pass import on the contact pass if one of the fields is an alphanumeric displayed as HTML, it will be truncated to 29 characters.

## **Last modify date not updated on Address Book entry when email saved via Outlook add-in**

Category: Import / Export

If you are using the Outlook add-in to add new emails to Address Book entries in Maximizer, after it is saved the Address Book entries last modify date is not updated but should be.

## **Bullet List and numbered list issue with selected text with multiple rows**

Category: Email, Notes

If a user types multiple rows in an email or note and then selects it, the selected bullet list or numbered list will not add bullets or numbers to each row, but at the beginning and end of selected text.

## **MxExchange Distribution Field on Default record not observed if User has Modify distribution field privilege Web Access**

Category: Address Book / Clients

If the MaxExchange Distribution field has been set to some value or values on the default entry of a user, if that user also has the Modify distribution field privilege it will not apply it to new Address Book entries that user creates in Web Access.

## **CRM Live: Note Report not rendering some HTML notes correctly but others are**

Category: Reports, Web Access

In Web Access when printing a Note Report and retaining HTML some notes which show correctly when opened in the Note tab will show with HTML tags showing in the note report. The report is not rendering them properly.

## **Team member with opportunity edit rights can't delete opportunity in Web Access**

Category: Web Access

If you are logged in as a user that is part of a sales team and that user has opportunity edit rights, any opportunities that the sales team is assigned to should be able to be deleted by that user. But when you do, there is no error but it doesn't delete.

## **"Please specify at least one recipient" message if click to save and send new email and Outlook hasn't resolved yet**

Category: Outlook Add-In

If you are using the Maximizer Outlook add-in and you are composing a new email, if the email address you put in hasn't been resolved yet by Outlook and you click any of the "Send Email and save to..." buttons you will get an error message "Please Specify at least one recipient" and the email address will be deleted from the To field.



## **When saving email to an opportunity via Outlook add-in, search by company looks at contact's company only**

Category: Outlook Add-In

If you are using the Web Access Outlook add-in to save an email to an opportunity and you use the search to find it by company, if the contact assigned to the opportunity is actually with a different company, the opportunity will not be found by the search.

## **Domain .international not allowed in Maximizer for emails**

Category: Email

In Maximizer Web Access if you have an entry with an email address that uses the domain .international (like bob@free.international), you can't enter it for an Address Book entry, or email it via the GUI or a Campaign. it is valid and should be allowed.

## **Apostrophe in file name of attachment when sending email from Web Access won't allow it to be attached**

Category: Email

If you are in Web Access trying to send an email and you try to attach a file with a name that contains an apostrophe, the attachment won't show in the main Send email dialog.

## **Appointment completed on My Work Day doesn't log note to Address Book entry when it should**

Category: My Work Day

If you have tasks set to log to notes and you are in My Work Day and see an appointment assigned to an Address Book entry and you click the checkmark in My Workday to complete it, it will not log to that Address Book entry notes it has been completed.

## **MXI Import: Importing in Web Access won't match by ID even if that import option is provided**

Category: Import / Export

If you are importing an MXI file via Web Access and you have specified the import option to match by Id, it will still match by name.

## **Dashboard indicator can't be updated if set Full Access to security group by members**

Category: Dashboard

If you have set a dashboard indicator with Full Access to a security group, members of that security group will be unable to update that indicator.

## **Consolidated Activity Report sub report strange sort order**

Category: Reports

If you run the Consolidated Activity Report and you have appointments both assigned directly to you and appointments assigned to you and another user, the report will first show appointments assigned directly to you in chronological order then it will show the ones with other users in a different order.

## **Blank List of Column Setups shown in Web Access Outlook add-in**

Category: Outlook Add-In

In Outlook add-in for Web Access in some databases, you choose to change your Column when saving an email. When you try to bring up the list of Column Setups, it will come up blank even though the Column Setups do exist.

## **ADMN Log shows MASTER Password in plain text when doing an upgrade**

Category: Upgrade

When you are upgrading a database in the Administrator module, the ADMN Log will log in a certain section the MASTER Password or password of whatever user you used to login for the Upgrade.

## **Session expired message opening some emails saved through Outlook add-in**

Category: Email

In some cases, customers save emails to Address Book entries via the Outlook add-in. When they try to open the emails later to view them, Session expired message will be displayed, instead of the view email dialog.