

# Feature Review Guide

## June 2019



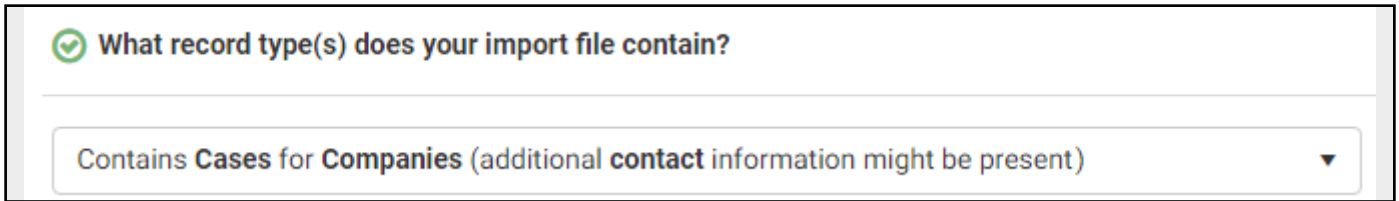
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# LATEST FEATURE UPDATES IN MAXIMIZER CRM LIVE

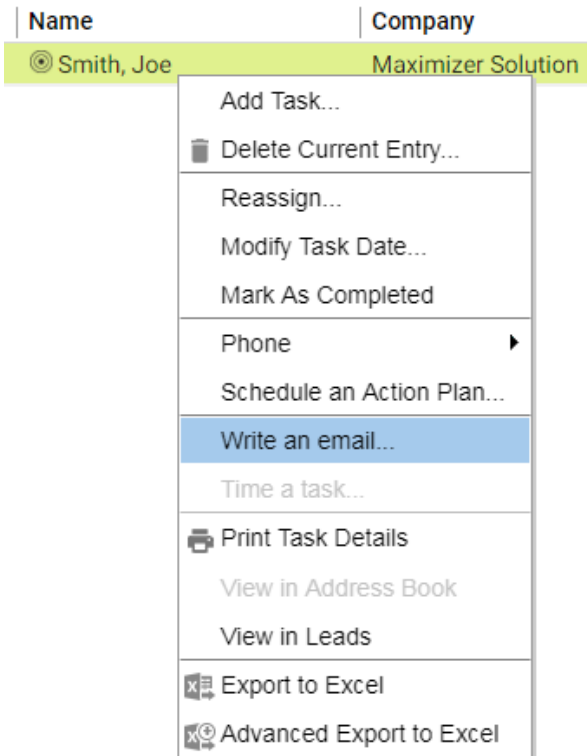
## IMPORT CUSTOMER SERVICE CASES

Import Manager now supports importing cases. In Import Manager > Source screen, new options for importing cases have been added into the drop-down of “What record type(s) does your import file contain?”.



Same as importing Address Book entries or opportunities, you can retrieve the cases after import has completed. You can also save the settings of the import as a template for the repeated import in the future.

## WORKING WITH LEADS IN HOTLIST SCREEN



If you select a task with a lead in Hotlist screen, you can now write an email to the lead or view the details about the lead using the right-click menu.

Select a task for a lead and right-click. From the contextual menu, select Write an Email. The email compose dialog will open. The email address of the lead associated with the task will be added into the To field. You can send the email and save it to the lead.

Note that if you select multiple tasks, the email will only be sent to the lead associated with the current selected task.

In the right-click menu, you can perform View in Leads. Selecting this menu item will switch you to the Leads screen and highlight the lead associated with the task.

## RESOLVED CASES

### **Emails sent multiple times if the email to one of the recipients has failed**

You send an email to a group of users or Address Book entries. If the email to one of the recipients has failed, the other recipients will receive multiple emails. Now they only receive one email.

### **Email reminder setting in appointment dialog is not sticky in some databases**

You have a database that has been used for a while and the logged in user has existed for some time. If you add a new appointment and turn off the email reminder, next time you create an appointment, the reminder is set to on again. Now it remembers the previous setting and follows that.

### **Exception occurs when performing Save and Send in Outlook add-in with POPs and IMAP**

Setup Outlook with SMTP and POP3 or IMAP. When you send an email and try to save it to an opportunity, a case or a lead by choosing "Save and Send" in Outlook add-in, you will get an error message. This issue has been fixed.

### **In Outlook add-in, View Contact in Maximizer doesn't work if an email address has an apostrophe in it**

If the email address of a Maximizer contact includes an apostrophe, e.g. john.d'antonio@maximizer.com, View Contact in Maximizer in Outlook add-in doesn't work. You can now find the entry.

### **Some audit log entries are recorded in database but not displayed in the audit report**

The changes made in some entries are recorded in database, but the entries are not displayed in the audit report. Now these entries are displayed in the report.

### **Editing one instance of recurring all day appointments changes the duration of the appointments**

You have recurring all day appointments (e.g. daily all day appointments for a week). If you open the first instance and make some changes (e.g. change the subject), after you save the changes, all the instances after the first one become two-day appointments. This has been fixed.

### **Send and Save to Contact fails in Outlook 2010**

You turn on "Confirm when saving email" option in add-in preferences. You try to send an email to someone who is not a contact in Maximizer. From the pop-up dialog, select Send Email and Save to Maximizer Contact. You don't get the prompt for creating a new contact in Outlook 2010. Now you will see the pop-up for searching for an existing contact or create a new one.



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