



# What's New Feature Guide

## Maximizer® CRM 2015 R2

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# Security Enhancement

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## Disallow login after several failed attempts

Brute force password attacks can be automated to try thousands of password combinations for user accounts. Limiting the number of failed login attempts can eliminate the effectiveness of such attacks. This feature is to lock the user's account after several failed login attempts.

### Security settings in Administrator


A new Security Settings module is added into Web Access Administrator. The administrator can specify how many failed login attempts that are allowed and how long the lockout period is.



## Preferences

### for Security Settings

**Security Settings**

 **Modify Settings**

**Account lockout**

Number of invalid login attempts that are allowed before the account is locked:

Lockout duration:  minutes

Locked user account(s):  
No account is currently locked.

**Mobile Access**

☒ Hide "Keep me logged in" option in the login page

The default number of failed login attempts is 5 times. The default lockout duration is 30 minutes.



Log in to:

Escona Tutorial

JNAPOLI

Password

Log In

☐ Remember me

Your Maximizer account has been locked. Try login again later or contact your Administrator to unlock your account.

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## Login screen

If the number of failed login attempts reaches the threshold, the user's account will be locked. During the lockout period, the user cannot login even the correct login credential are entered. The user can try to login again after the lockout period ends. Or, ask the administrator to unlock the account.

The account lockout settings will be applied to Web Access, Administrator and Mobile Access, as well as in API.

## Monitor locked user accounts and unlock

The administrator is able to monitor which user accounts are locked. The administrator can unlock a user account which will allow the user to login again before the lockout period ends.



## Preferences

### for Security Settings

Security Settings

Modify Settings

Account lockout

Number of invalid login attempts that are allowed before the account is locked: 5

Lockout duration: 30 minutes

Locked user account(s):

Joe Napoli	<input checked="" type="checkbox"/> Locked
------------	--

Mobile Access
   
☒ Hide "Keep me logged in" option in the login page

The locked user accounts are display in Security Settings screen. The administrator can unlock the user account by unchecking the checkbox.

### Email notification for changing password

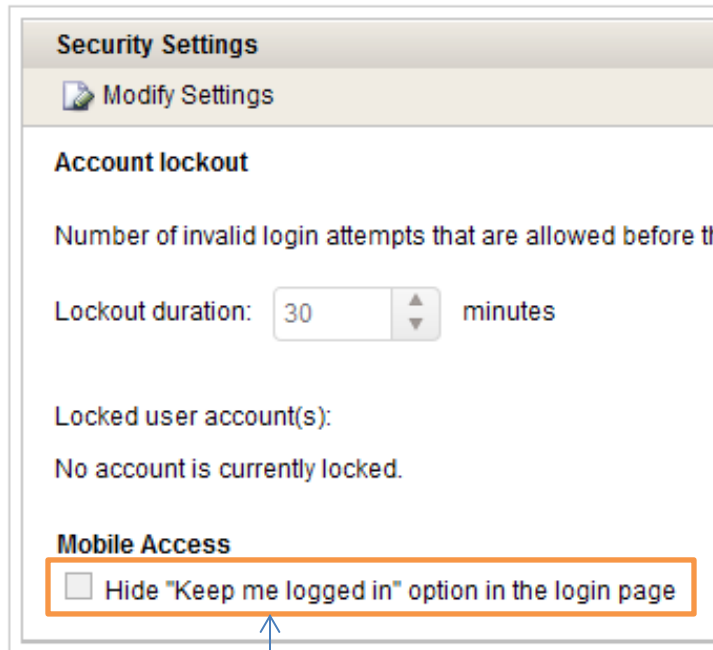
You will receive an email informing you that your Maximizer user password has been changed. If you receive such email without changing your password, you should contact your Maximizer administrator.

The notification will be sent if the password is changed in Web Access > Preferences > Password dialog. If the password is changed in Administrator, there is no notification.


### Force login in Mobile Access

You can now prevent users from staying logged in to Mobile Access by hiding the “Keep me logged in” checkbox in the Login screen in Mobile Access. You can turn off the checkbox in Administrator > Security Settings screen.

#### Preferences for Security Settings



**Security Settings**

 Modify Settings

**Account lockout**

Number of invalid login attempts that are allowed before the account is locked:

Lockout duration: 30 minutes

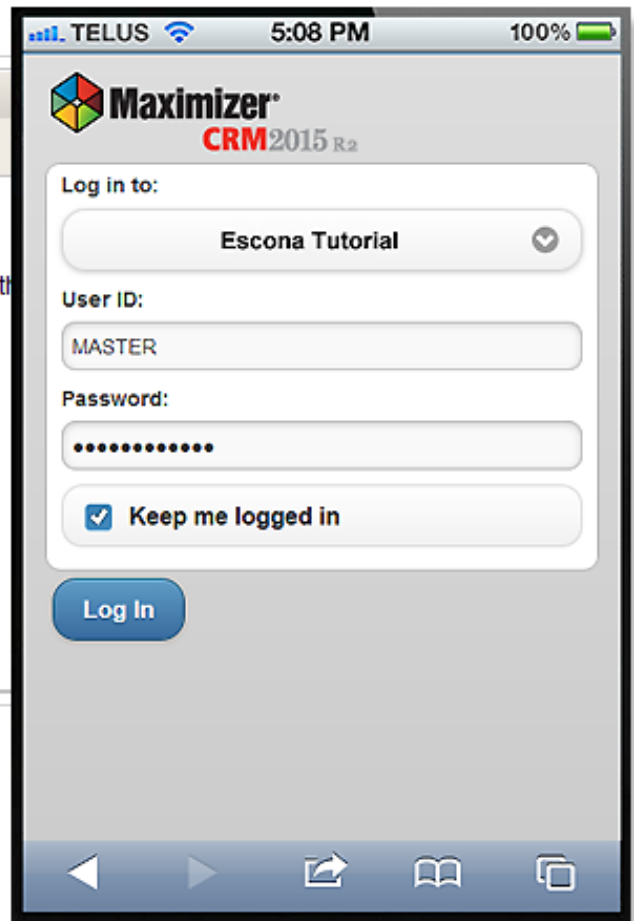
Locked user account(s):

No account is currently locked.

**Mobile Access**

☐ Hide "Keep me logged in" option in the login page

When this checkbox is checked, “Keep me logged in” option in the Login screen of Mobile Access will be hidden.



Maximizer CRM 2015 R2

Log in to:

Escona Tutorial

User ID:

MASTER

Password:

.....

☒ Keep me logged in

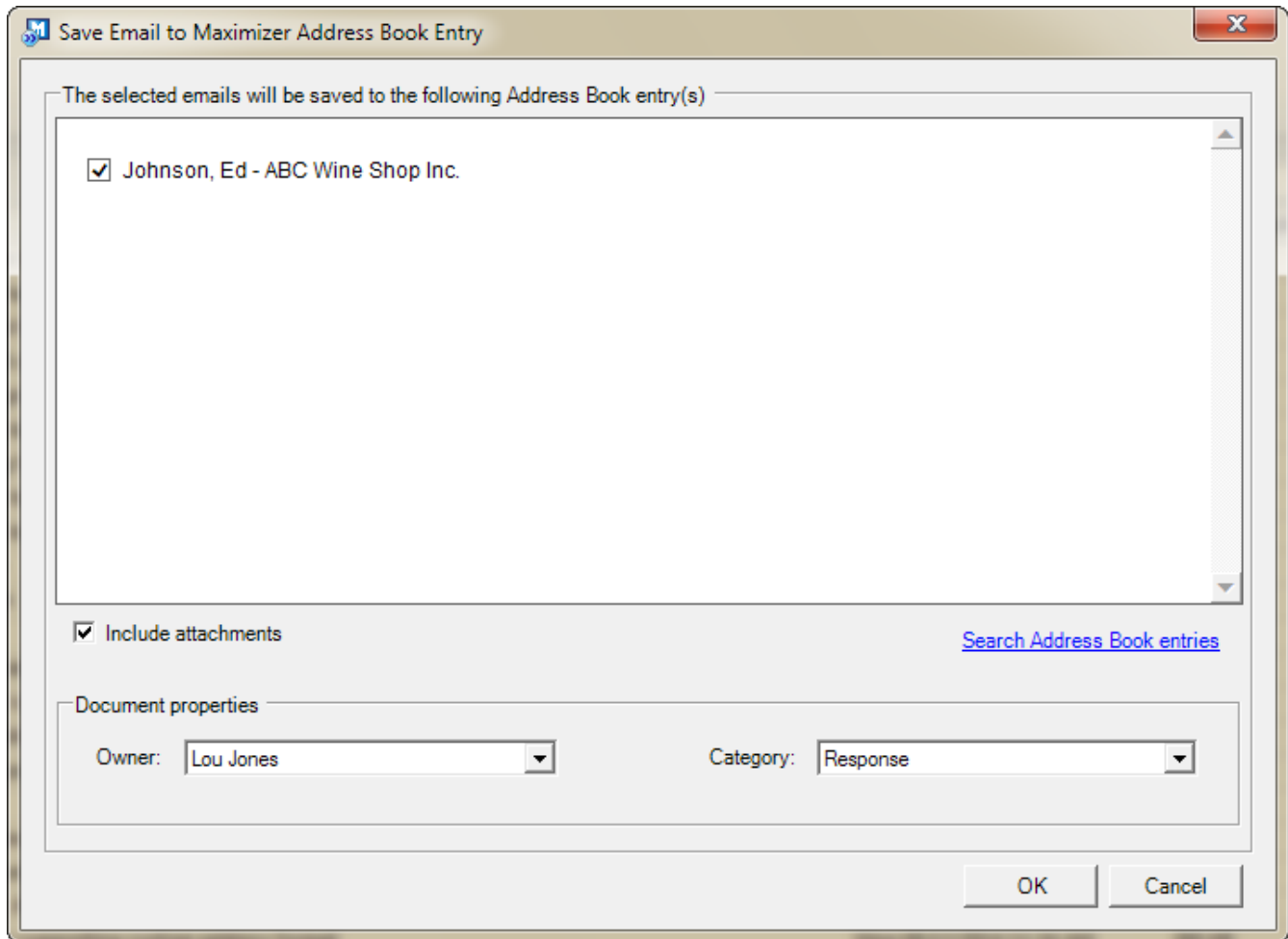
Log In

# Integration Enhancement

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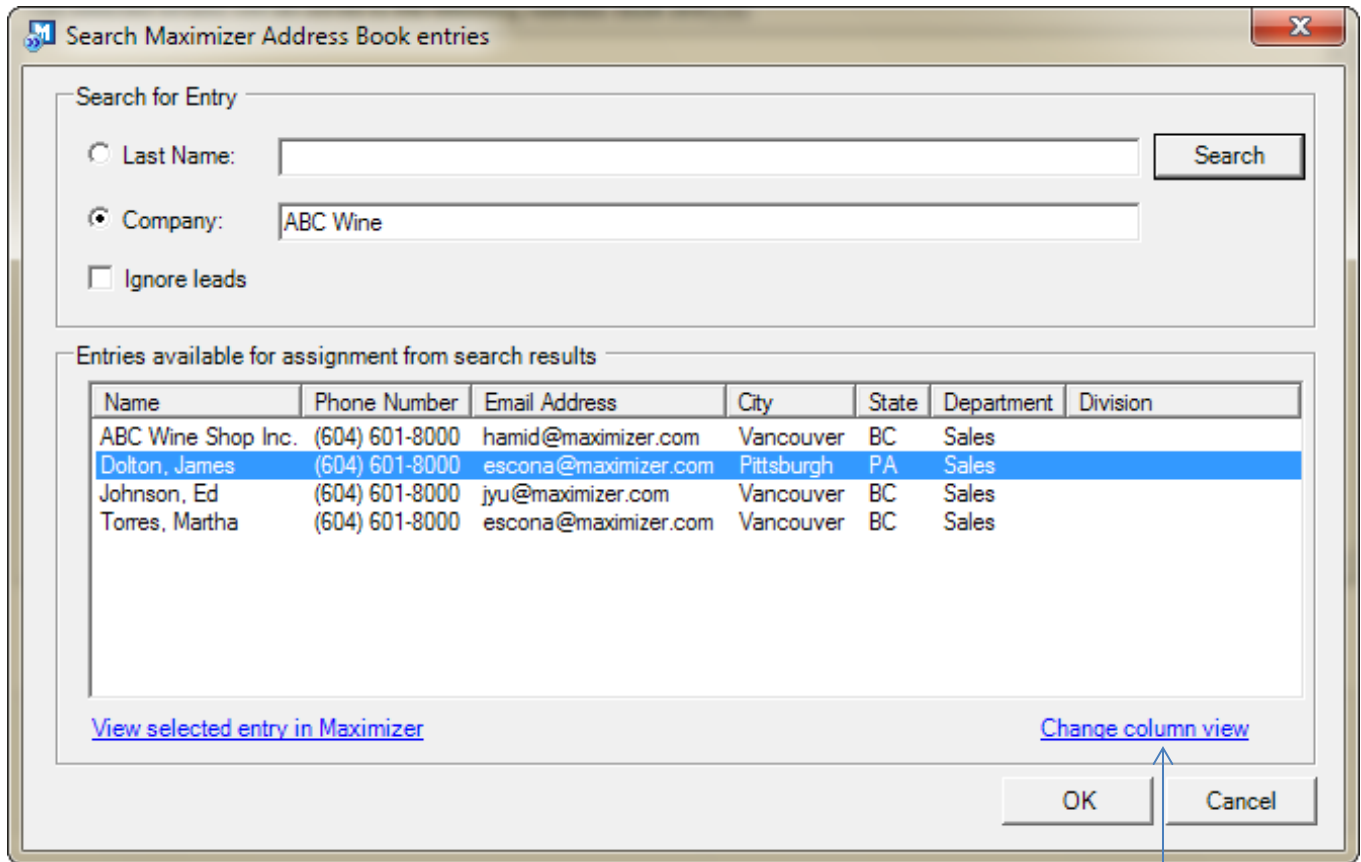
## Outlook Add-on - Allow saving attachment at per email base and specifying security group and category for the saved document

When you are saving an email from Outlook to a Maximizer entry, you can specify whether you want to include the attachments or not. You can also specify the properties of the saved document by setting Owner and Category fields.



## Outlook Add-on – Support column view in the dialog for searching Maximizer entries

If you need more fields to identify which entry is the right one for saving the email, you can now select a column setup view that has been created in Maximizer. This can be very useful if you want to use a specific field to identify the right entry. For example, you can include case number in the column view. This will help you to make sure the email will be saved to the right case.



Search for Entry

☐ Last Name:

☒ Company:

☐ Ignore leads

Entries available for assignment from search results

Name	Phone Number	Email Address	City	State	Department	Division
ABC Wine Shop Inc.	(604) 601-8000	hamid@maximizer.com	Vancouver	BC	Sales	
Dolton, James	(604) 601-8000	escona@maximizer.com	Pittsburgh	PA	Sales	
Johnson, Ed	(604) 601-8000	jyu@maximizer.com	Vancouver	BC	Sales	
Torres, Martha	(604) 601-8000	escona@maximizer.com	Vancouver	BC	Sales	

[View selected entry in Maximizer](#)

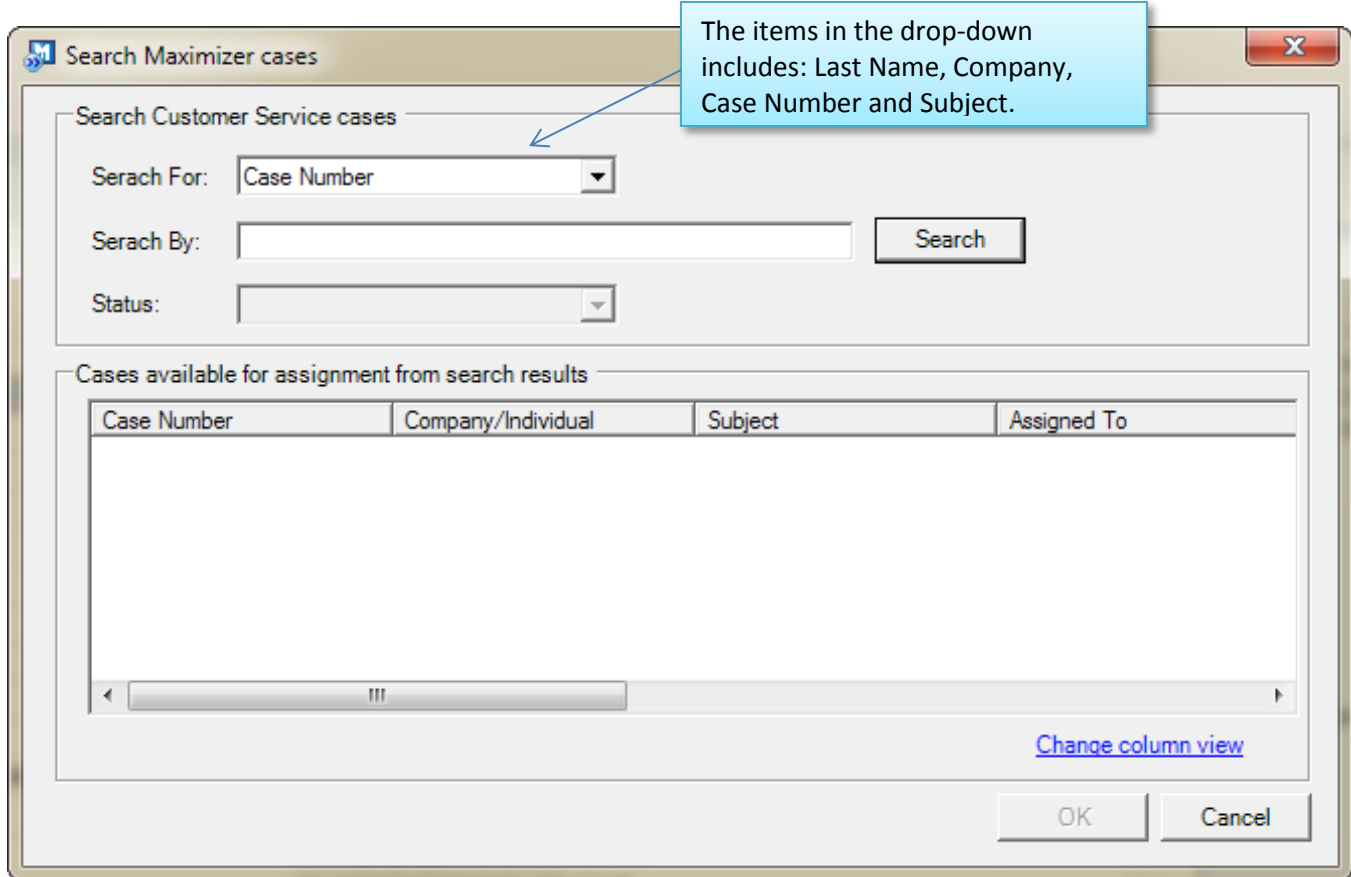
[Change column view](#)

Press the button will open a dialog where you can select a column setup that has been created in Maximizer.



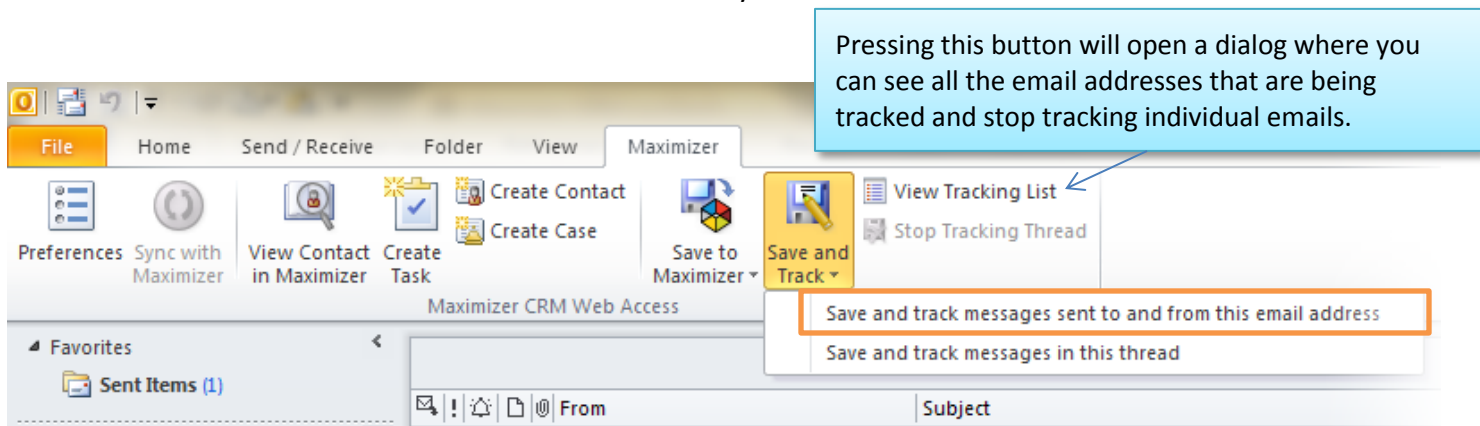
### Outlook Add-on – Support search by case fields when saving an email to a Maximizer case

When you are saving an email to a case in Maximizer, you can search the cases by case number or subject.



### Outlook Add-on – Automatically track and save emails

If you need to save all the emails sent to or from your customers, you can do so by turning on the automatic tracking function in Outlook Add-on. The Save and Track button now includes two options. You can track and save by email thread. The new feature added in R2 release allows you to save all emails sent to and from one email address to the Address Book entry in Maximizer.



## Word Add-on - Remove blank space when a merge field has no value

In previous release, if a merge field has no value, it will leave a blank space. This problem has been solved in the 2015 R2 release. The blank line will be removed if the field has no value. The table below illustrates the changes. In this example, Position and Address Line 2 fields have no value.

Merge fields inserted in a Word document	After merging (previous release)	After merging (R2 release)
<First Name> <Last Name>	Ed Johnson	Ed Johnson
<Position>		208 W. 1st Avenue
<Address Line 1>	208 W. 1st Avenue	Vancouver BC V5Y 3T
<Address Line 2>		
<City / Town> <State/Province> <Zip/Postal >	Vancouver BC V5Y 3T	

## Word Add-on - New way to preview the merged document

You will see a different way of merging documents. After you insert some merge fields into a Word document and press the Preview button, a new instance of Word will open with the merged values displayed in it.

The image shows two Microsoft Word windows. The top window, titled 'Maximizer Document Template [Confirmation Letter].docx', contains a document with several merge fields: **Mr/Ms First Name Last Name**, **Position**, **Company**, **Address Line 1**, **Address Line 2**, **City / Town State / County / Province Zip / Postal Code**, **Country**, **Phone: Phone 1**, **Email: Email Address**, **Website**, **Dear First Name:**, and **I am writing to you regarding**. A blue arrow points from this window to a second window below it. The second window, titled 'tmp4EB.tmp.maximizer\_temp\_preview.docx', shows the same document but with the merged data for 'Ms. Jane Doe'. The merged text includes: **Ms. Jane Doe**, **Administrator**, **Aggassi Cold Beer & Wine Store**, **1234 Spring Drive**, **Alice Spring BC V8L 3H8**, **Canada**, **Phone: (604) 601-8000**, **Email: escona@maximizer.com**, **www.maximizer.com**, **Dear Jane:**, and **I am writing to you regarding to your inquiry about our product.**

Document with merge fields

Pressing the Preview button will open a new Word document and show the merged values. You can use the up and down arrow to navigate through the entries in Maximizer and see the merged values of each entry. Print and save to Maximizer functions are available.

## Custom address format

People from different regions of the world would like to use different formats for address. You can now create your customized address format. It will be displayed in Address Book entry Details tab, used in Name and Address merge field, and applied to the printed labels and envelopes.

### Set up custom address format in Web Access

A new Format tab is added into Web Access Preferences. It includes a default address block. You can change the address block by changing the layout of the fields, adding fields into the block or removing fields from it. Only the basic fields related to address are available.

**Format**

**Address format**

Insert the merge fields that will be used to create an address block. This address block is used in the Name and Address merge field and for printing labels and envelopes in Microsoft Word.

Available fields:

- 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
- Zip / Postal Code

>>

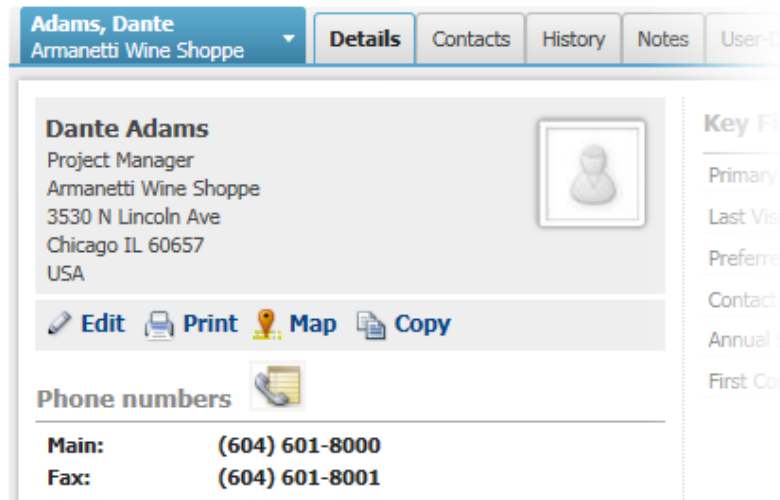
Address block: [Restore to default](#)

[First Name] [Last Name]  
 [Position]  
 [Company]  
 [Individual Name for Contact]  
 [Address Line 1]  
 [Address Line 2]  
 [City / Town] [State / County / Province] [Zip / Postal Code]  
 [Country]

OK Cancel

## Display custom address format

The name and address section displayed in Address Book entry Details tab follows the address format defined in Preferences. A new Map button is added for showing the address in Google Maps. The address format is also applied to Copy and Print functions.



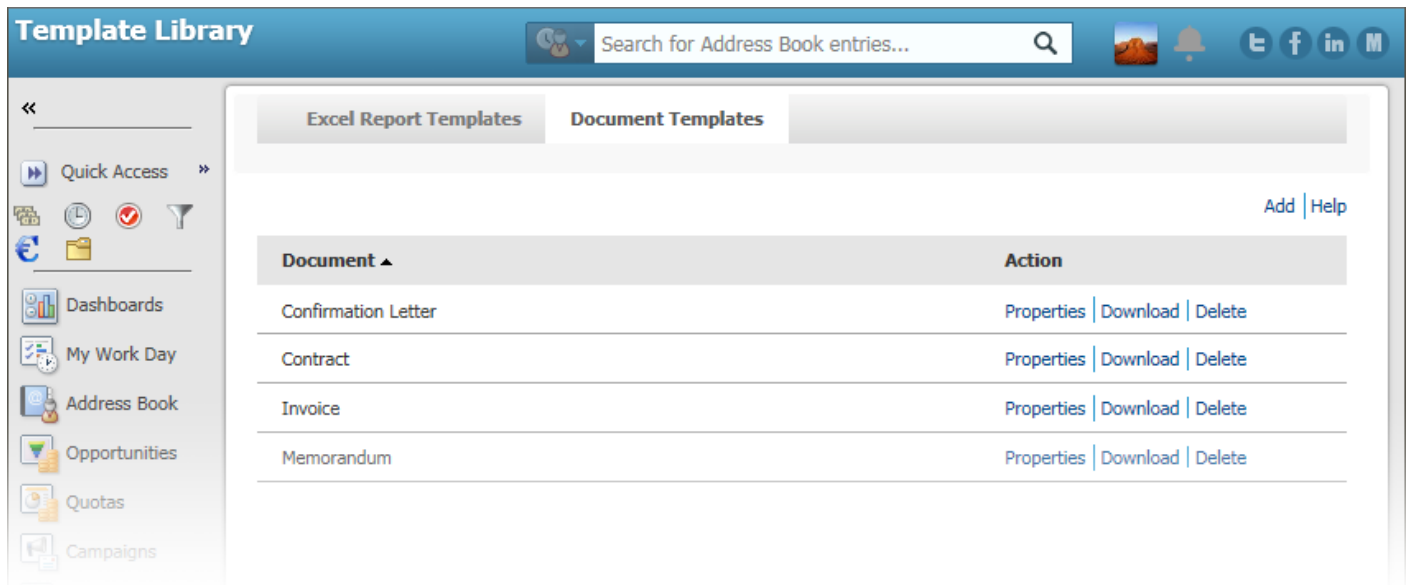
Other places that follow the address format include Name and Address merge field, labels and envelopes printed in Word Add-on.

## Centralized document template management

In 2015 R2 release, there is a centralized Document Template Library where you can store and manage different types of document templates. For example, you can create templates for letter, memo, contract and invoice. The templates have access rights. Only people with the right can use the templates.

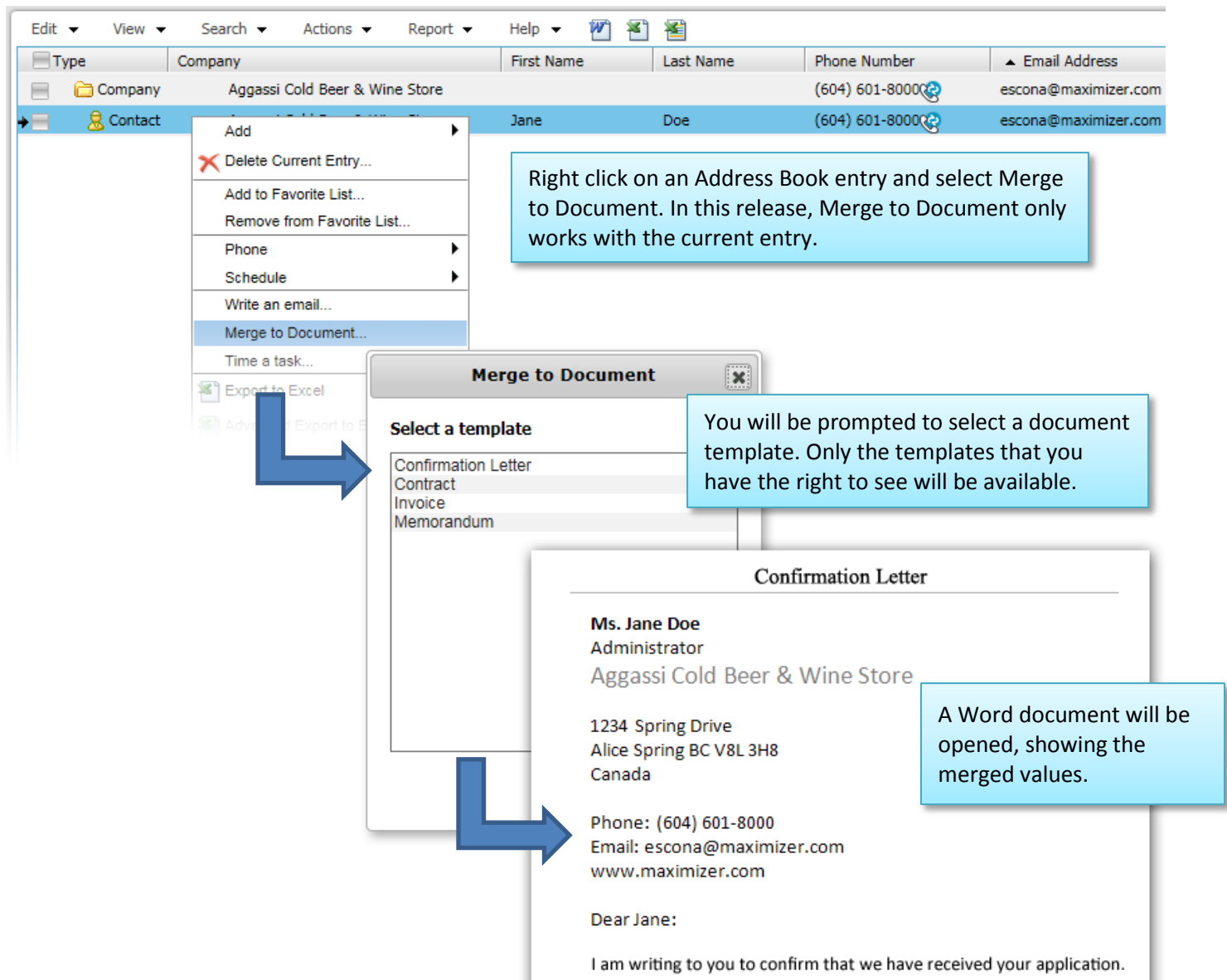
### New document template library

The new Document Templates can be accessed by going to Web Access Icon Bar > Administration > Template Library. This module includes two tabs for Excel Report Templates and Document Templates. In Document Template tab, you can create or delete templates, modify the properties of templates or download a template to your local machine.



### Merge to document from Web Access

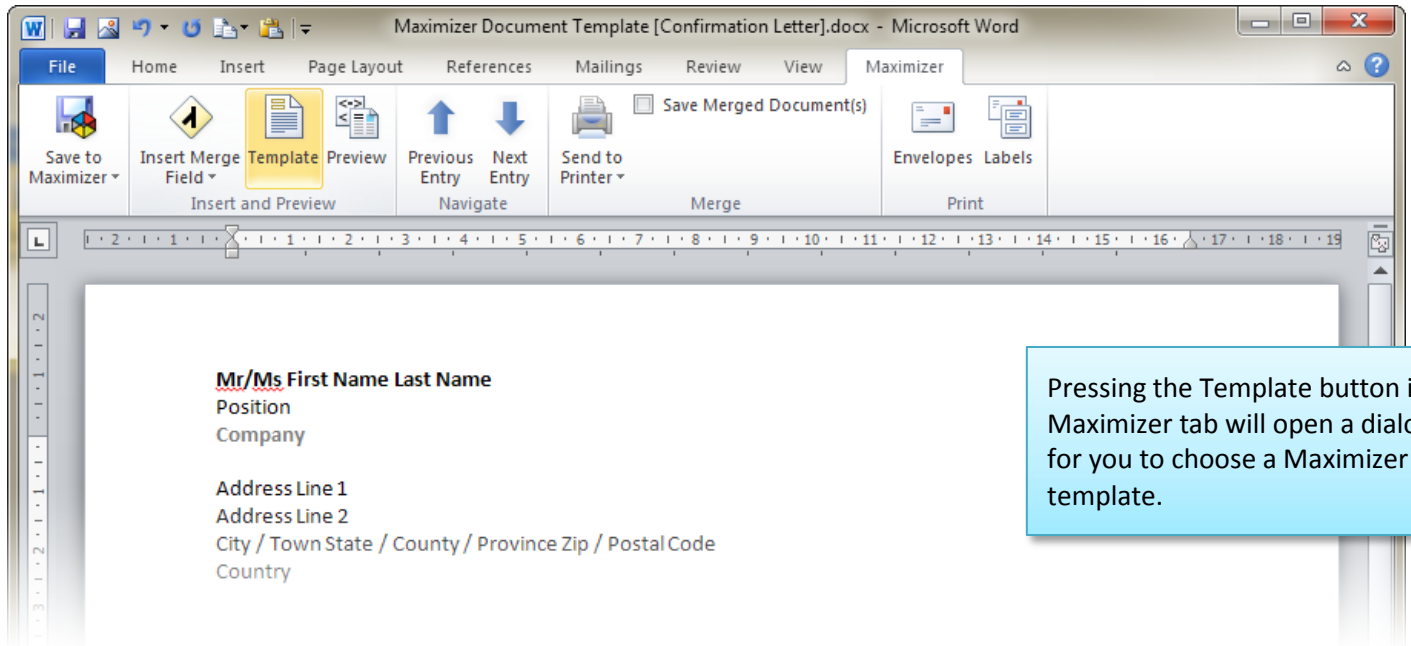
After you create the document templates, you can create merged document from Web Access. The diagram below illustrates the process of merging a document from Web Access.



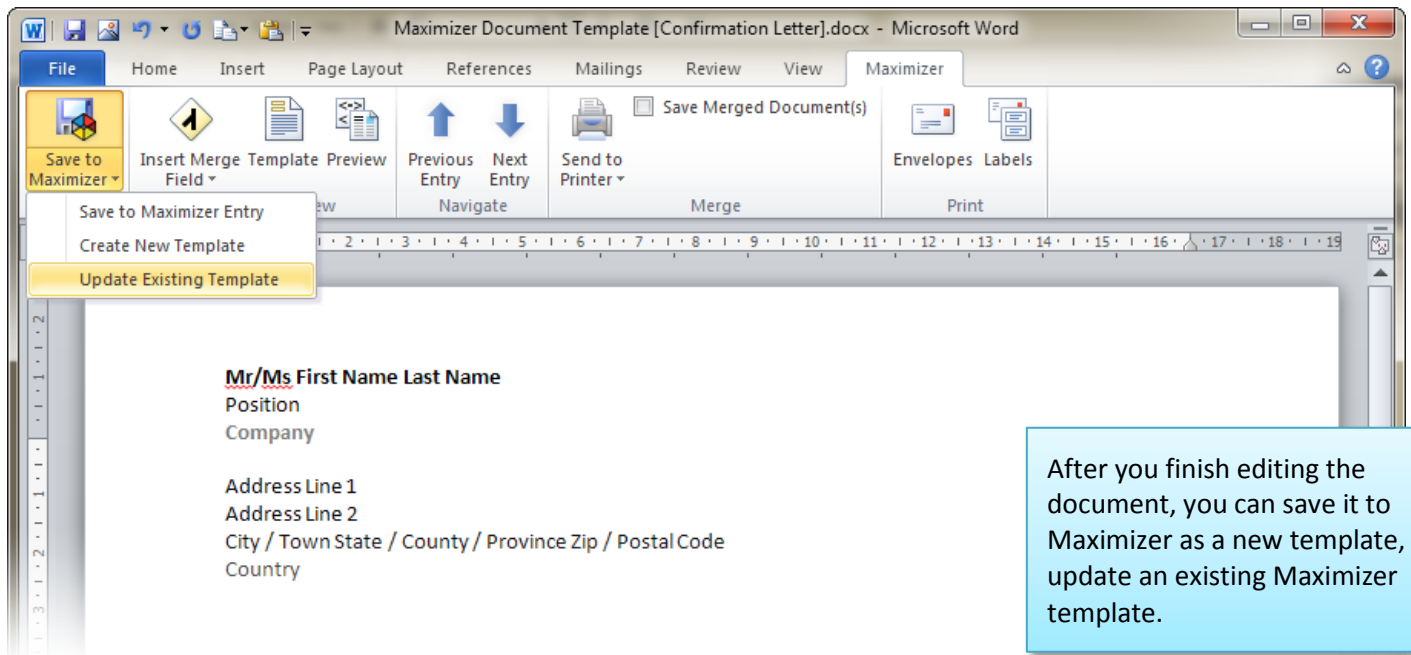
Merge to Document function is available in Address Book, Opportunities and Customer Service modules. It can be accessed from the Actions menu or right-click menu.

### Work with Maximizer document template in Word Add-on

In Word Add-on, you can retrieve a Maximizer document template that you have created in Document Template Library.



You can create a new template and save it to Maximizer, or make changes in an existing template and save the changes back to Maximizer.



# General Usability Enhancement

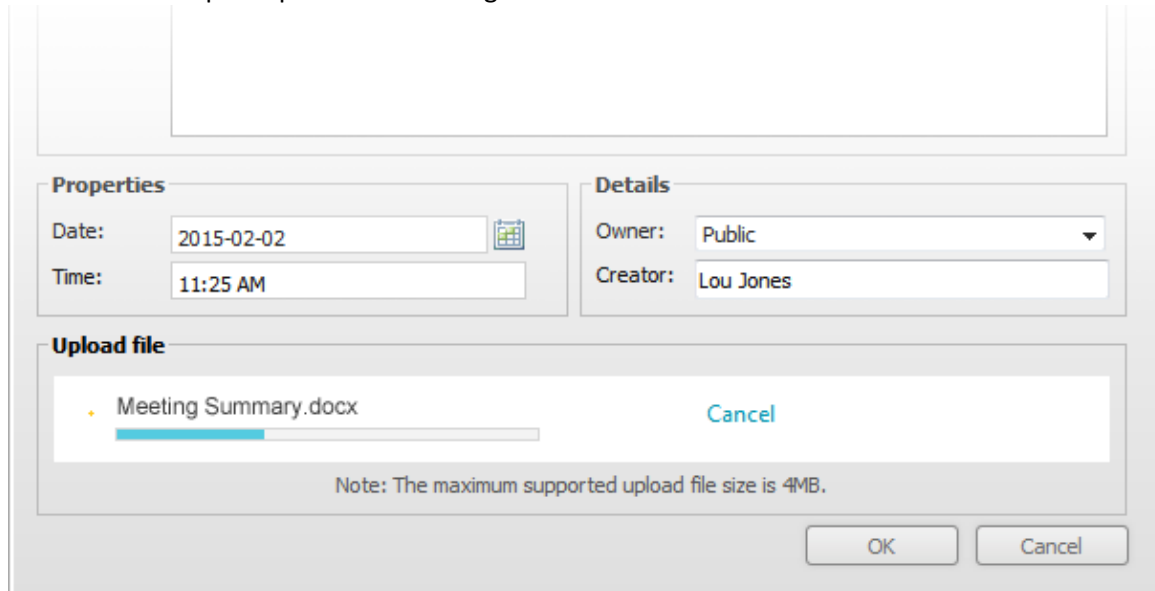
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## Performance improvement

The significant changes have been made to improve the performance of Add to List, Narrow List, Retrieve Contacts, Coloring Rules, and Export to Excel when working with a large list of entries.

## Allow uploading large document to Documents tab

A new upload control has been introduced in this release. It supports uploading a large file. Progress indicator will be available if the upload process takes long time.



The screenshot shows a software interface for uploading files. It features a 'Properties' section with date and time fields, and a 'Details' section with owner and creator dropdowns. The main area is for file upload, showing a file named 'Meeting Summary.docx' with a progress bar and a 'Cancel' button. A note at the bottom states the maximum supported upload file size is 4MB. At the very bottom are 'OK' and 'Cancel' buttons.

## Retrieve companies/individuals of the selected contacts

You can now retrieve the parent companies/individuals of the selected contacts in Address Book. You can find the command under the Search menu in Address Book module.

## Notify the sender of an email when there is a problem sending it

If there is a problem in email service that prevents emails going out, you will receive email notifications about which email cannot be sent.

### Test SMTP connection in CRM Live

If the CRM Live customers don't want to use the hosted email server and make mistake when setting up their own SMTP server, they won't be able to receive any emails. Currently, there is no notification to inform them about the problem. In this release, testing SMTP connection has been added into Administrator > Email Server Settings module in CRM Live. The user can test the connection when setting up the SMTP server. A test email will be sent to the user to confirm that the SMTP server is working correctly.



#### Preferences

for Email Server Settings

Save
 Cancel

**Automated Services**

☒ Override the hosted email server settings
 

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:

If there is a problem, the response from SMTP server will be displayed.

A test email has ben sent to the specified email address. The test is completed without any error.

### Easier to modify a Key Field list

In previous release, you need to go through multiple steps to modify a Key Field list. Now you can access the dialog for changing a Key Field list directly.

### Notes report for opportunities include information about Address Book entries

The Notes report in Opportunities module now includes details about the associated company/individual, contact and information about the opportunities.

### Support dependency between products and categories in Opportunity details tab

When you are editing Category field in an opportunity, you will only see the categories that are assigned to the selected products.

### Allow downloading the guides from the Help menu

You can now download the User's Guide and Administrator's Guide from the Help menu.





### New interface for Web Access login page

Web Access and CRM Live now have a new Login screen. The new layout uses a responsive design framework which will adjust the display based on screen size. The page is displayed properly in the web browser for desktop and mobile device.

Log in to:

EsconaTutorial

User ID

Password

Log In

☐ Remember me

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## Mobile Access Enhancement

Cancel Add Document Save

Date and time: Feb 2, 2015 12:31 PM  
Creator: Mark O'Brien

Name:  
Description:

Owner:  
Public

Category:

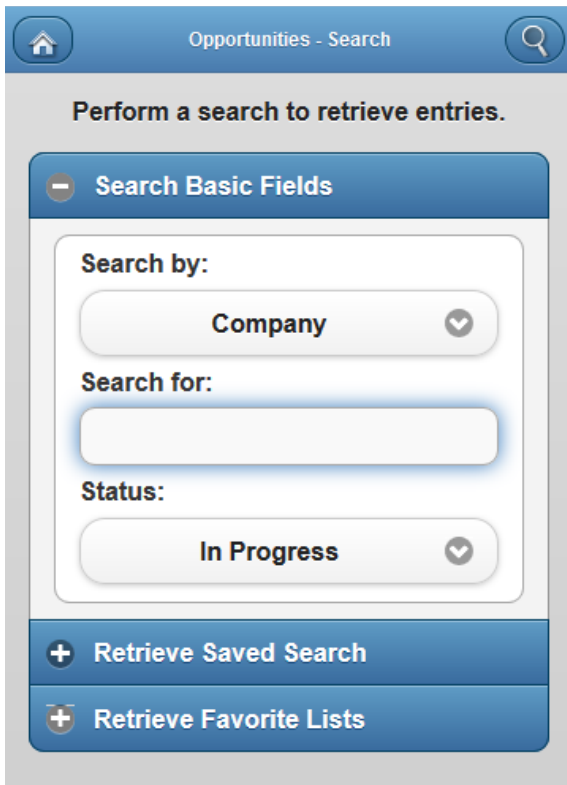
Select a file:  
Browse... No file selected.

The maximum supported file size is 4MB

### Save files from mobile device to Maximizer entry

You can now create a new document in Mobile Access by uploading a document from your mobile device.

You can also create a hyperlink document in Mobile Access.



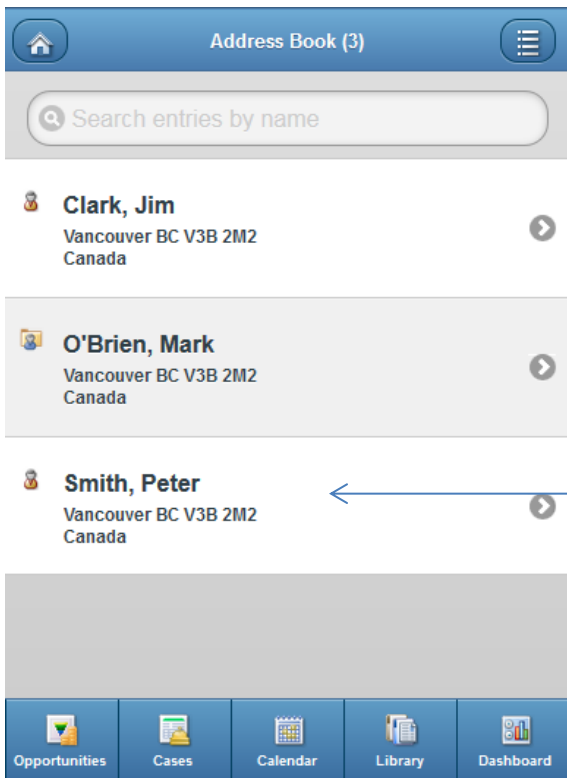
### Support more basic fields in search screen

More fields are now supported in the screen screens for Address Book, Opportunities and Customer Service.

In Address Book module, Address Lin 1 is added into the search screen.

In Opportunities module, search by Company, Stage, Team and Leader are added.

In Customer Service, search by Company, Case Type and Priority are added.

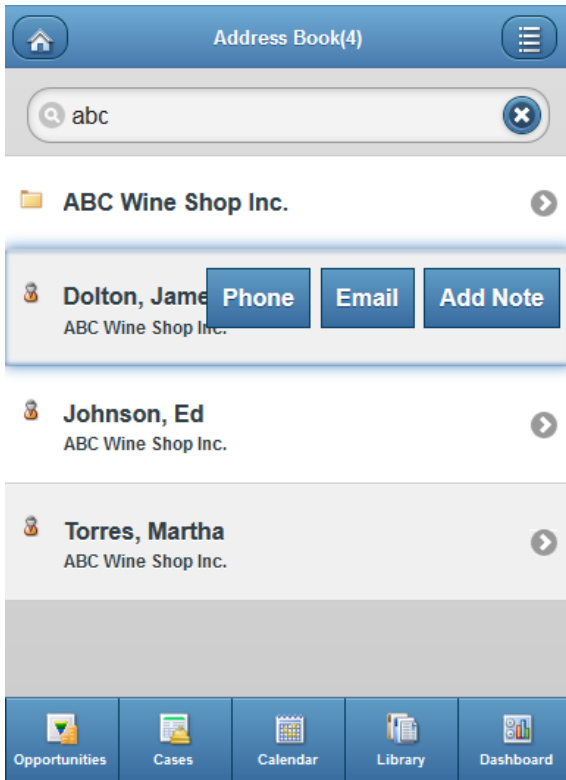


### Support column view for mobile phone

Now you can change the built-in column view in Mobile Access to include more fields. In Web Config file for Mobile Access, you can specify a column setup view that has been created in Web Access. The fields in the first two columns of the column setup view will be displayed in Mobile Access.

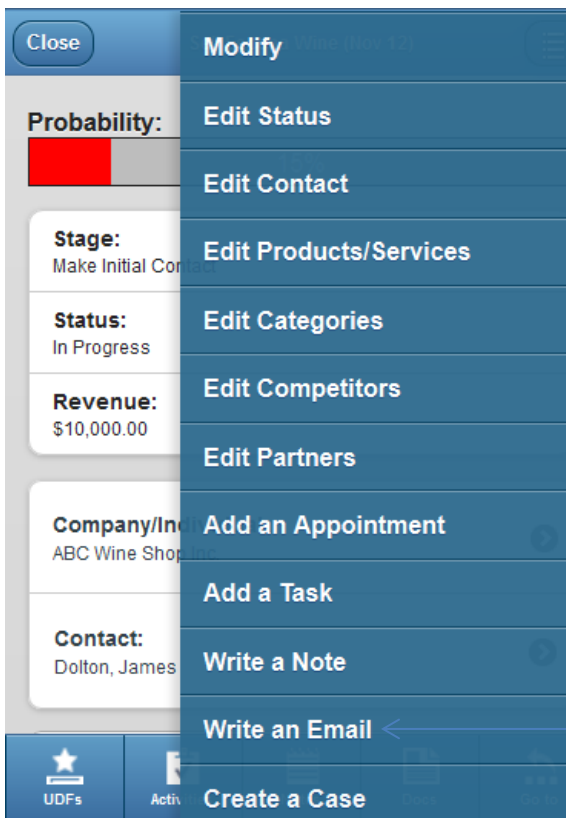
The built-in column view has been replaced by a column setup view from Web Access. City, Province/State, Zip/Postal Code and Country fields are displayed in the Address Book Entry list.

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### Add a note from Address Book entry list

Now you can add a note from Address Book entry list. Swiping a row will reveal the action buttons. Add Note button is available besides Phone and Email buttons. This allows you to create a note against the entry without opening it. After the note is created, you will go back to the list.



### Send email from an opportunity or a case

Now you can send an email from an opportunity or a case. The email can be saved against the opportunity or the case.

Press the command will open the email compose dialog.

# Fixed since Maximizer CRM 2015

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## **Better format for replying or forwarding email from Documents tab**

Category: Web Access - Email

If you open a saved email from the Documents tab and reply or forward the email, the formatting of the email is not the same as the original email; for example, extra space is added between the lines.

## **Word Add-In changes formatting incorrectly when merging a blank field**

Category: Word Add-In

When merging documents using the Microsoft Word Add-in, if any of the merged fields do not have a value, the formatting of the document is modified incorrectly.

## **Similar emails may not be saved through Outlook Add-in**

Category: Outlook Add-In

If you have two emails in Outlook that are similar but you want to save both to the same entry, the second email may be treated as a duplicate of the first and may not be saved.

## **An error occurs when editing the value of a multi-select field when one of the entries in the right column is selected**

Category: Web Access

When editing the value of a multi-select field, such as a table user-defined field or the Products/Services or Categories fields, if one of the items in the right "Selected values" panel is highlighted by selecting it with the mouse, an "Invalid Postback error..." error message is displayed when the OK button is clicked.

## **Zip / postal code is not saved as uppercase**

Category: Web Access - Address Book / Clients

When entering a Zip / Postal code for an Address Book entry, if the Shift or Caps Lock key is not used, the value is saved to the database in lowercase. Even though the value will appear in uppercase in the Web Access user-interface, reports and other access methods will show the value in lowercase.

## **Convert Individual to Contact of another company loses appointments and tasks (Action Plan only)**

Category: Web Access - Address Book

If an Individual having appointments and tasks assigned to it from an Action Plan is converted to a Contact of another Company, the appointments and tasks from the action plan are deleted.

## **User with correct privileges may not be able to modify the date and time of notes**

Category: Web Access - Notes

If a user with the "Modify note properties" but without the "Modify/delete other owners' notes" privileges tries to modify the properties of a note for which the user has Full access, the changes will not be saved.

## **Column setups containing a column name enclosed in square brackets will not load**

Category: Web Access - Column Setup

If the name of a column in a column setup is enclosed by square brackets, for example "[Name]", the main grid in Maximizer Web Access will fail to load when the column setup is selected.

## **Opportunities do not support dependencies between products and categories**

Category: Web Access - Opportunity

Dependencies between products and categories are not supported for Opportunities in Web Access.

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### **Grid sorting in the Territory Management dialog causes a server error**

Category: Web Access

A server error occurs when trying to sort the grid in the Territory Management dialog by clicking one of the column headers.

### **PDF documents attached to an email cannot be opened in Mobile Access on an Android device**

Category: Max Mobile - Documents

In Mobile Access if you have an email with a PDF attachment saved to an entry's Documents, the attachment is unreadable on Android devices.

### **Symbols like £ and & don't show properly when editing a Key Field**

Category: Web Access - Key Fields

When a value containing a symbol like £ or & is entered in a field in a Key Fields list, the symbol appears as HTML code after saving the entry.

### **The "Calculate" button in the Campaign Basic Information tab does not cause calculation**

Category: Web Access - Campaign Manager

Clicking the "Calculate" button in the Basic Information tab of the Campaign dialog does not update the values in the "Revenue from opportunities generated by this campaign" group box.

### **Extra spaces added when both a default email template and auto-signature are used**

Category: Email

When sending email and using both a default email template and an auto-signature, extra spaces are added at the top of the email.

### **Can't sync Contacts with Outlook Add-in with German Outlook or Outlook with German language pack**

Category: Outlook Add-In

If you are using the German version of Outlook or the German Language pack, the error message "Die Bendingung ist ungültig" ("The Condition is invalid") appears when trying to synchronize Address Book Entries using the Outlook Add-in.

### **Contacts merged to another company do not retain their alternate address**

Category: Web Access - Address Book / Clients

When combining two companies whose contacts have alternate addresses assigned to them, the alternate addresses are copied to the target entry but the target's Main address is assigned to merged contacts.

### **The sort order for entries in the Note Report is incorrect**

Category: Web Access - Notes, Reports

When printing a note report, the entries in the report are not sorted alphabetically.

### **Searching for opportunities when saving email in the Outlook Add-In doesn't return results in some cases**

Category: Outlook Add-In

When using the Outlook Add-In to save an email to an opportunity, searching for entries by Last Name does not return any results when there are more than 126 matching entries in the Address Book.

### **Users without "Modify" rights for notes cannot print notes**

Category: Web Access - Notes

Users without "Modify" access rights for notes cannot print notes, as the print icon in the Note dialog is disabled.

### **Checkboxes in "Send Email Logging Details" dialog do not retain state**

Category: Web Access - Address Book, Email

The "Log to Note" and "Save Document" checkboxes in the "Send Email Logging Details" dialog in Maximizer Web Access or Maximizer CRM Live do not save their state when the dialog is closed.

### **Coloring rules very slow with large list of Address Book Entries**

Category: Web Access

In Maximizer Web Access or Maximizer CRM Live, if you retrieve a list that is particularly large and if you have a Coloring Rule applied, it will take a long time for it to complete and will cause the application to stop responding which can either lead to an ajax error or to the menu bar not working.

### **Some saved emails do not show all attachments**

Category: Web Access - Documents, Email

Some attachments do not appear in saved emails in the Documents tab in Maximizer Web Access or Maximizer CRM Live.

### **The performance of the "Narrow list" option for searches is not as good in Web Access as it is in Windows Access**

Category: Web Access - searching

Performing certain searches with the "Narrow list" option selected in Maximizer Web Access does not perform as well as the same search does in Windows Access.

### **Column reports and exporting to Excel may run slowly if using security groups**

Category: Web Access

In Maximizer Web Access or Maximizer CRM Live, if you are using security groups and do not have the "Modify other users' private entries" privilege and you try to print a column report or export entries to Excel, the operation may time out with an ajax error before completing.

### **In Maximizer CRM Live an "Undefined" message appears when creating a follow up appointment from the Alarm panel when using Internet Explorer**

Category: CRM Live - Alarms

When choosing to schedule a follow-up appointment after completing a task or appointment in the Alarm panel in Maximizer CRM Live, an "Undefined" error message is displayed when the appointment dialog is closed when using Internet Explorer.

### **Excel reports fail to run in Excel on some non-English operating systems**

Category: Web Access - Export to Excel, Reports

When running an Excel report on some non-English operating systems, clicking Generate Report causes an error in Excel.

### **Clicking Add Contact opens the Details tab for the parent company in certain cases**

Category: Web Access - Contacts

In Maximizer Web Access or Maximizer CRM Live, if the Contacts following tab is selected and then the following pane is collapsed, after logging out and back in to Maximizer, the Contacts tab will remain selected; in this case, selecting the Add Contact menu item will open the Details tab for the parent company or individual rather than the Add Contact tab.

### **Spell check causes a server error in Maximizer CRM Live**

Category: CRM Live - Spell Checking

In Maximizer CRM Live, a server error occurs when trying to spell check the contents of a note.

### **Some Maximizer Editor documents have images that do not display**

Category: Web Access

When opening Maximizer Editor documents in Maximizer Web Access or Maximizer CRM Live, the documents are converted to RTF format for display. However, certain types of images in Maximizer Editor documents do not convert properly and are not shown.

## **What's New Feature Guide - Maximizer CRM 2015 R2**

### **Email addresses with more than three characters in the top level domain suffix are rejected as invalid**

Category: Email

When sending an email in Maximizer Web Access or Maximizer CRM Live, any sender or recipient email address with more than three characters in the top-level domain suffix, for example "test@example.info", is considered invalid.

### **The City/Town, St/Prov, and Country drop downs do not appear when adding multiple alternate addresses**

Category: Web Access - Address Book

When editing an Address Book entry in Maximizer Web Access or Maximizer CRM Live, after adding an alternate address the City/Town, St/Prov, and Country drop down buttons do not appear for any subsequent addresses added to the entry until it is saved and re-opened.

### **The drop down menu for the Activity field does not appear when creating a Hotlist task as a follow-up activity**

Category: Web Access - Hotlist

In Maximizer Web Access, when creating a Hotlist task as a follow-up activity after completing a task or appointment, the drop down button for the Activity field is not shown.

### **Cannot edit the address of an entry if Full Access for the entry is set to multiple security groups**

Category: Web Access

In Maximizer Web Access or Maximizer CRM Live, if the current user does not have the "Edit other users' private entries" privilege, when editing an Address Book entry for which the Full Access field is set to multiple security groups, the entry's addresses are not shown even if the user is a member of one of the security groups with Full Access to the entry.

### **Some email documents with attachments do not open and give a session expired message**

Category: Web Access - Documents

In some cases, email documents with attachments that were saved in an earlier version of Maximizer Windows Access do not open in Maximizer Web Access and instead display a session expired message.