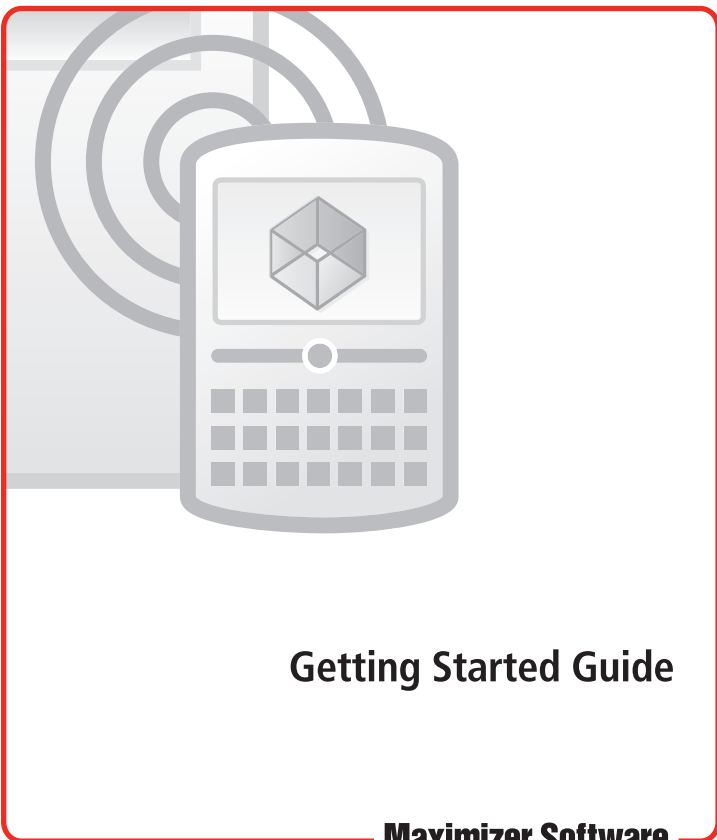




Maximizer[™] CRM 11

MaxMobile *Wireless Server*



Getting Started Guide

Maximizer Software
Simply Successful CRM

Welcome to MaxMobile Wireless Server

Introduction

MaxMobile Wireless Server is a MaxMobile add-on that supports the wireless connectivity of Address Book information.

MaxMobile Wireless Server is installed and configured on a Microsoft Internet Information Services (IIS) computer.

System Requirements

- Maximizer CRM 11 Entrepreneur or Team edition
- Processor Speed - 1.6 GHz (minimum) and 3 GHz (recommended)
- Available RAM - 1 GB (minimum) and 2 GB (recommended)
- Operating system - Microsoft Windows XP, Vista, Windows 7, 2003, 2003 R2, 2008, 2008 R2 (updated to their latest service packs) with Microsoft Internet Information Services (IIS).

Installing Microsoft Internet Information Services

Before you install MaxMobile Wireless Server, you need to install Microsoft Internet Information Services (IIS) and Maximizer CRM.

Note that during the following procedures, you may be prompted for your Windows CD.

➤ To install IIS on Windows XP

1. Select **Start > Control Panel > Add/Remove Programs**.
2. Select **Add/Remove Windows Components**, and select **Internet Information Services (IIS)**.

➤ To install IIS on Windows Vista or Windows 7

1. Select **Start > Control Panel > Programs and Features**.
2. Select **Turn Windows features on or off**, and select **Internet Information Services** and its sub-items, excluding FTP Publishing Services.

➤ To install IIS on Windows 2003

1. Select **Start > Control Panel > Add/Remove Programs**.
2. Select **Add/Remove Windows Components**.
3. Select **Application Server**, and click **Details**.
4. Select **Internet Information Services (IIS)**.

Installing MaxMobile Wireless Server

As previously noted, before installing MaxMobile Wireless Server, you must install Microsoft Internet Information Services and Maximizer. Refer to the *Maximizer CRM Administrator's Guide* for information on installing Maximizer CRM.

➤ To install MaxMobile Wireless Server

1. Close any Maximizer applications running on the computer.
2. If you have a previous version of MaxMobile Wireless Server installed, it is important to uninstall it before proceeding with the installation.
3. Insert the MaxMobile Wireless Server installation CD into the computer's CD drive.

The setup starts automatically. If it doesn't start, browse to your CD drive and double-click the **Autorun.exe** file.

4. Click **Install MaxMobile Wireless Server**.
5. Follow the installation wizard on-screen instructions.

During the installation, you are prompted to specify the website for the MaxMobile Wireless Server. You can click **Next** to accept the default configuration.

If you choose to use an existing website, select the website from the drop-down list.

If you choose to create a new website, enter the description, TCP port, IP address, and Host Header value.

Applying Licensing

- In Administrator, choose **Utilities > Install Multi-User License**, enter the Product License number, and click the **Install License** button. Open the Address Books to which you are applying licensing.

This applies your licensing for MaxMobile Wireless Server. By default, a single license is available for use with MaxMobile Wireless Server, so this step is necessary only if you are enabling the software for more than one user.

MaxMobile Interface Customizations

You can customize components of MaxMobile such as menu item names and field labels through a utility in the Maximizer CRM Customization Suite. Interface customizations can then be synchronized to the device.

For more information on how to set up customizations for MaxMobile, refer to the Maximizer CRM Customization Suite documentation. If you do not have the product, you can find out more by clicking the Maximizer button and selecting Help > Other Maximizer Products in Maximizer or by visiting the Maximizer web site at www.maximizer.com.

Configuring MaxMobile Wireless Server

Once you have installed the software, you must configure your wireless server.

Note that when specifying the server name in the following steps, you can alternatively use a local computer name (if you are using BES or Wi-Fi in an internal domain), a qualified domain name, or an IP address (e.g., an external static IP). Contact your Internet Service Provider for more information.

The **port number** is necessary in the following steps only if you are using a port other than the default ports of **80 for http** or **443 for https**. You can also use the **IP address** in place of the **server name**.

➤ To configure the wireless server

1. After installing MaxMobile Wireless Server, if you have not yet opened the Address Book you will be accessing, do so in Maximizer or Administrator. Opening the Address Book creates the Data Source Name (DSN) for accessing the database on the SQL server by IIS.
2. If the MaxMobile Wireless Server or the Maximizer database server is behind a firewall, allow access through the firewall.

On the MaxMobile Wireless Server computer, add an exception for the MaxMobile Wireless Server port (port 80 for http and 443 for https by default).

If MaxMobile Wireless Server and the Maximizer database are on different computers, create an exception on the Maximizer database computer to give the computer running MaxMobile Wireless Server access to the database computer through port 1433. Depending on its configuration, you may need to perform additional steps to configure the firewall:

- Open port 1434 to expose the SQL Server Browser service.
 - Create an exception for sqlservr.exe and sqlbrowser.exe to allow the MAXIMIZER instance of SQL Server access through the firewall.
3. If the MaxMobile Wireless Server is behind a router, configure the router to direct to the MaxMobile Wireless Server computer.
 4. If the server is a Windows 2003/2003 R2 server, ensure **.NET v2.0.xxx** is allowed in IIS **Web Service Extensions**.
 5. Enable the **.NET Framework** and activate the **WCF** (Windows Communication Foundation) component by doing the following:
 - In the **Control Panel**, open **Programs and Features** and click on the **Turn Windows features on or off** option.

- If the server is a Windows 2008/2008 R2 server, click on **Features**, click **Add Features**, select the **Microsoft .NET Framework** feature, and select the **WCF Activation** and **HTTP Activation** options.

If the server is running Windows Vista, expand **Microsoft .NET Framework 3.0**, and select the **Windows Communication Foundation HTTP Activation** option.

If the server is running Windows 7, expand **Microsoft .NET Framework 3.5.1**, and select the **Windows Communication Foundation HTTP Activation** option.

If the server is running Windows XP or 2003, this step is done automatically by the installation and you can move to step 6.

- Click **OK**.
6. If you are installing MaxMobile on a 64-bit operating system, you must perform some additional steps. Refer to **Enabling the Server on a 64-Bit Operating System** section in this guide for more information.
 7. Ensure MaxMobile Wireless Server is configured properly by going to one of the following URLs depending on if you are using a secure connection (https) or not:

http://[server_name]/MaxMobileService/mobile.svc

https://[server_name]/MaxMobileService/mobile.svc

Note that the following message appears at the top of the web page:

Metadata publishing for this service is disabled.

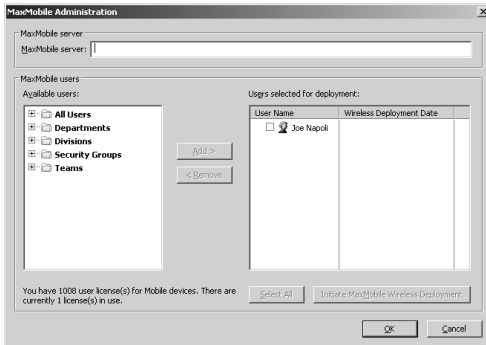
This message can be ignored—it does not indicate a configuration error.

If you are running Windows XP and retrieving this URL fails, it could be because ASP .NET is not registered. To register ASP .NET, open the command prompt and enter the following command:

```
[system drive]:\WINDOWS\Microsoft.NET\Framework\  
v2.0.50727\aspnet_regiis -i
```

For example, if your system drive is drive C, you would enter:
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis -i

8. In Administrator open the Address Book to use with MaxMobile, and select **File > MaxMobile Administration**. Note that you can also access this dialog box from Maximizer if you have administrative privileges as a Maximizer user.



9. Enter the URL of MaxMobile Wireless Server. The URL should be in the following format:

http://[server_name]:[port_number]/maxmobileservice

https://[server_name]:[port_number]/maxmobileservice

If you are deploying MaxMobile by email, the maximum length of the URL is 64 characters.

If you are using a secure connection, you must also uncomment the security mode setting in the MaxMobile Wireless Server's web.config file as follows:

```
<security mode="Transport"/>
```

Note that the web.config file is stored in the following folder:

...\\Maximizer\\WebServices\\MaxMobileServer

10. For each **user, department, division, and security group** who will use MaxMobile, select the name from the **MaxMobile users** list and click **Add** to move the item to the **Users selected for deployment** list. This enables MaxMobile for these users. Use the **Remove** button to remove an item from this list.

Note that you can also enable MaxMobile for users in the **General** tab of the **Properties** dialog box for a user.

The screenshot shows the 'Properties for Joe Napoli' dialog box with the 'General' tab selected. The dialog is divided into several sections:

- Name and position:** Includes fields for User ID (jnapoli), Mr/Ms (Mr), First name (Joe), Initials, Last name (Napoli), Salutation (Dear < >), Display name (Joe Napoli), Position (President), and Reports to (a dropdown menu).
- Company and main address:** Includes fields for Company (Escena Estate Wines), Dept (Executive), Division (CAN - East), Address 1 (1344 Eastside Road), Address 2, City/Town (Petaluma), St/Ct/Prvg (CA), Zip/Postcode (94954), and Country (USA).
- Phone numbers and phone extensions:** Includes four rows for phone numbers and extensions, with the first two filled: 1: (555) 775-0982 and 2: (555) 775-0900.
- Security:** Includes radio buttons for Public (selected) and Private.
- Module Login:** A table showing the status of various modules:

Module	Login
Windows Access	Enabled
Web Access	Disabled
Mobile	Enabled
- Internet information:** Includes fields for Email (jnapoli@maximizer.com) and Website (http://www.escena.com).

At the bottom of the dialog are buttons for OK, Cancel, and Apply.

Configuring MaxMobile for Deployment

Before you deploy MaxMobile, Internet Information Services (IIS) must be configured properly. **Although the MaxMobile Wireless Server installation should do this automatically,** these settings may be verified for installing/downloading MaxMobile.

> To configure Internet Information Services (IIS)

1. Open IIS.
2. If you are using Windows Server 2003/2003 R2 or Windows XP, open the properties for the MaxMobile Wireless Server website (**Default Web Site**, by default) and on the **HTTP Headers** tab, click on the **File/MIME Types** button.

If you are using Windows Server 2008/2008 R2, Windows Vista, or Windows 7, open the MaxMobile Wireless Server website (**Default Web Site**, by default), double-click on **MIME Types**, and click **Add**.

3. Add the following registered file extension types:

Extension: **cod**

MIME type: **application/vnd.rim.cod**

Note that if the cod extension already exists, you must change the MIME type to the value shown above.

Extension: **jad**

MIME type: **text/vnd.sun.j2me.app-descriptor**

Deploying the MaxMobile Installation

You can deploy MaxMobile by email or through the web.

It is important to note that if a previous version of MaxMobile was installed on the BlackBerry through a USB connection, you must uninstall it before installing this version of the software. Refer to the Uninstalling MaxMobile section in the MaxMobile Getting Started Guide.

Deploying MaxMobile Through a Web Browser

If you are not deploying MaxMobile through email, users can install MaxMobile through a web browser. After installing MaxMobile, MaxMobile users must enter the URL of the MaxMobile Wireless Server, as specified in the MaxMobile Administration dialog box, to launch MaxMobile.

The **port number** is necessary in the following steps only if you are using a port other than the default ports of **80 for http** or **443 for https**.

➤ To deploy MaxMobile through a web browser

1. On the device web browser, browse to one of the following URLs depending on if you are using a secure connection (https) or not:

**http://[server_name]:[port_number]/
MaxMobileService/bb.aspx**

**https://[server_name]:[port_number]/
MaxMobileService/bb.aspx**

2. Select **Download** and click the **trackball**.
3. Launch MaxMobile.

You are prompted for the URL of the MaxMobile Wireless Server.

4. Enter the URL of the MaxMobile Wireless Server. The URL should be in the following format:

http://[server_name]:[port_number]/maxmobileservice

https://[server_name]:[port_number]/maxmobileservice

5. Grant the necessary permissions for MaxMobile. See the **Granting Permissions for MaxMobile** section of this manual for more information.

Deploying MaxMobile by Email

In order to deploy MaxMobile by email, an email client (for example, Microsoft Outlook, Microsoft Outlook Express, Microsoft Windows Mail, or Microsoft Live Mail) must be set up and running on the computer sending the email message.

➤ To deploy the MaxMobile installation by email

1. For each MaxMobile user, select the user in the **MaxMobile Administration** dialog box in Administrator, enable the checkbox beside the user's name, and click the **Initiate MaxMobile Wireless Deployment** button.

This sends out an email to each of the selected users that includes instructions on how to install MaxMobile. You can send an email to more than one user at a time.

Note that if you use Microsoft Outlook, Outlook should be running when you send the email message.

To customize the email, you must modify the **MaxMobileOTADeploymentTemplate.txt** file found in the MaData6 folder where you installed Maximizer.

2. Ensure users install MaxMobile by following the instructions sent in the email. After receiving the email, users must click on the link to the MaxMobile installation, download the software, and grant the necessary permissions for MaxMobile. See the Granting Permissions for MaxMobile section for more information.

Granting Permissions for MaxMobile

After downloading and installing MaxMobile, users must grant the necessary permissions for MaxMobile as follows:

- If users are prompted with a Yes/No message when granting permissions, they should choose **Yes**. If they receive a message asking them to view the permission details, they should click the **View** button, select the **Menu** key, and click **Save**.

Connecting to the MaxMobile Wireless Server

Depending on the connection methods enabled on the device, MaxMobile uses Wi-Fi or the Mobile Network to connect to the MaxMobile Wireless Server. If both connection methods are enabled and available, MaxMobile uses Wi-Fi.

For Mobile Network connections, MaxMobile first attempts to connect to BES (BlackBerry Enterprise Server), followed by BIS-B (BlackBerry Internet Service Browsing), then Direct TCP, and lastly, WAP2. MaxMobile users may need to specify additional settings on their devices for Direct TCP. These settings are specified in Options > Advanced Options > TCP (or TCP/IP). Contact your BlackBerry service provider for information on the required settings. Users can also specify a custom order of the connection type to be used in the Server dialog box in MaxMobile. See the *MaxMobile Getting Started Guide* for more information.

Enabling the Server on a 64-Bit Operating System

MaxMobile Wireless Server requires the 32-bit version of ASP.NET 2.0 in order to run on a 64-bit operating system so you must enable the application in IIS. The following procedures vary depending on the operating system running IIS.

For Windows Server 2008, Windows 7, and Windows Vista

MaxMobile Wireless Server should run under an application pool in Classic Pipeline mode that has 32-bit applications enabled. If you do not need to run other applications on a 64-bit web

server, you can specify these settings for the default application pool (DefaultAppPool). If you need to use a 64-bit web server, you can add a new application pool with these settings and run MaxMobile Wireless Server under this application pool. You can also run the application under the “Classic .NET AppPool” application pool.

➤ To run applications in Classic .NET AppPool

1. In IIS Manager, select the virtual directory for MaxMobile Wireless Server.
2. Select **Advanced Settings**.
3. In the **Application Pool** field, select **DefaultAppPool**, **Classic .NET AppPool**, or the application pool you created, and click **OK**.

For Windows Server 2003 and Windows XP

You must enable the 32-bit version of ASP.NET 2.0 using the command prompt.

➤ To enable the 32-bit version of ASP.NET 2.0

1. Open the Command Prompt (Start > Accessories > Command Prompt).
2. Type the following command to enable the 32-bit mode:

```
cscript %SYSTEMDRIVE%\inetpub\adminscripts\adsutil.vbs  
SET W3SVC/AppPools/Enable32bitAppOnWin64 1
```

3. Type the following command to install the 32-bit version of ASP.NET 2.0, and the script maps at the IIS root:

```
%SYSTEMROOT%\Microsoft.NET\Framework\v2.0.50727\  
aspnet_regiis.exe -i
```

On Windows Server 2003, make sure that the status of ASP.NET version 2.0.50727 (32-bit) is set to Allowed in the Web service extension list in Internet Information Services Manager.

Application Settings for MaxMobile

After you have deployed MaxMobile Wireless Server, you can customize your application settings in the web.config file. The web.config file is stored in the following folder:

...\Maximizer\WebServices\MaxMobileServer

Following is a list of the application settings and their descriptions:

<add key="SessionTimeoutMinutes" value="125" /> determines the length of time each session is available while activity is idle.

<add key="MaximumRecords" value="2000" /> determines the maximum number of records a search returns.

<add key="LogFile" value="" /> determines the location and file name for the log information - i.e., **<add key="LogFile" value="c:\temp\MaxMobile.log" />**.

<add key="LogLevel" value="0" /> determines the level of logging—the value of **0** sets it to no logging and the value of **5** sets it to full logging.

<add key="culture" value="fr-BE" /> determines the display settings for a culture other than English. The example shown above is for Belgium - French. To use a different cultural setting, replace the value of the culture.

<webHttpBinding> determines the size of documents that you can download and upload. The default value is just under 4 MB (4096000 bytes). To change this value you must modify the following attributes:

**maxBufferSize, maxReceivedMessageSize,
MaxStringContentLength**

Additionally, note that in order to use HTTPS, you must uncomment the following line in this section:

<security mode="Transport"/>

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