Installing Web Access Guide

Maximizer CRM 12 is specifically designed for small and medium-sized businesses and corporate divisions of large companies. By integrating sales, marketing, and customer service tools into one adaptable and affordable solution, Maximizer CRM 12 helps organizations realize their primary customer management goal of having many profitable and satisfied customers.

Maximizer Web Access is a secure, web-browser interface to a central Maximizer CRM database. You can work with Address Book entry information, notes, calendar appointments, Hotlist tasks, user-defined fields, customer service cases, campaigns, and opportunities. The customizable Maximizer Web Access site also enables you to build a corporate intranet to provide all employees, even those without Maximizer installed, access to critical company information, such as the phone list, documents, and forms. Reports and Dashboard are also accessible through Maximizer Web Access.

During the installation of your trial Maximizer CRM Server software, you will have the option to install the "Maximizer Server" and or the "Maximizer Components for Microsoft IIS". The "Maximizer Components for Microsoft IIS" consists of programs (Maximizer Web Access, Mobile Access, Customer Access, and Partner Access) that allow your employees, customers, or your partners to access a Maximizer Address Book from the web. These components are hosted from a web server running Microsoft Internet Information Services (IIS). The web server must have SQL connectivity with the SQL Server machine that contains the Maximizer CRM database. Typically, the web server is separated from the rest of the network by a firewall. Even if a firewall exists between the web server and SQL Server, SQL connectivity must exist in order to run any of the Maximizer Components for Microsoft IIS.

The following instructions are appropriate when you wish to only install the "Maximizer Components for Microsoft IIS" option on a web server. These instructions are for Maximizer CRM 12 Group and Enterprise Editions.

NOTE: Do not use the following instructions if your Maximizer Server and Microsoft IIS Server are going to be installed on the same computer. Instead, refer to "Installing Maximizer CRM Server" on page 51 of the Maximizer CRM 12 Administrator's Guide for installation instructions (http://www.maximizer.com/support/maxcrm120.html?panel=1#support).

The following instructions are divided into the following steps:

- Installing Maximizer Components for Microsoft IIS

- Accessing Maximizer Web Access

Installing Maximizer Components for Microsoft IIS

Please ensure the computer (web server) that you are going to install Web Access on meet the following system requirements:

http://maximizer.com/pdf/crm12datasheets/SystemRequirements_MedRes.pdf

Note: The Maximizer Server must be installed (in this case on a separate computer) before installing the Maximizer Components for Microsoft IIS.
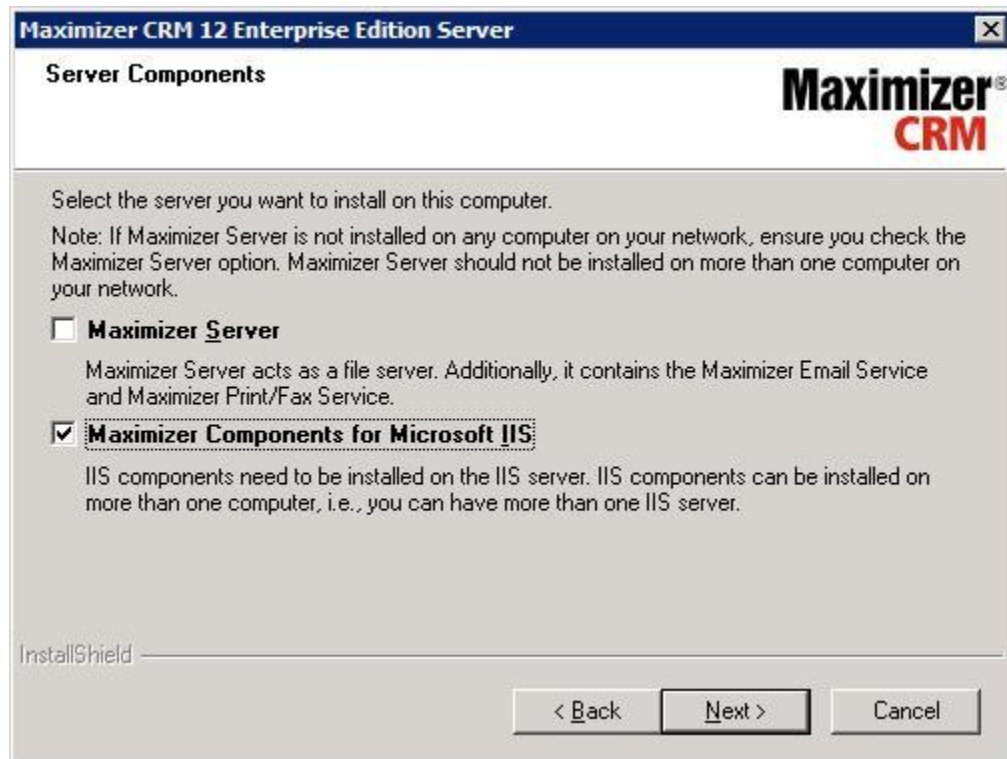
To install Web Access

1. Close all programs running on the server.

2. After download is complete, double-click "MaximizerCRM_12.exe" from the saved location.

   Alternatively, if you have the Maximizer CRM Server DVD then insert the Maximizer CRM Server DVD in the server's DVD drive. (The server and workstation versions are on separate DVDs.)

   The setup starts automatically.

3. Select "Install Maximizer CRM Server". The InstallShield Wizard starts.

4. The Welcome screen appears. Click **Next** to continue.

5. Read the license agreement, and click **Yes** to continue.

6. Enter your Product Serial Number, First name, and Last name into the required fields, and click **Next**.

7. Read the Maximizer CRM Release Notes, and click **Next**.

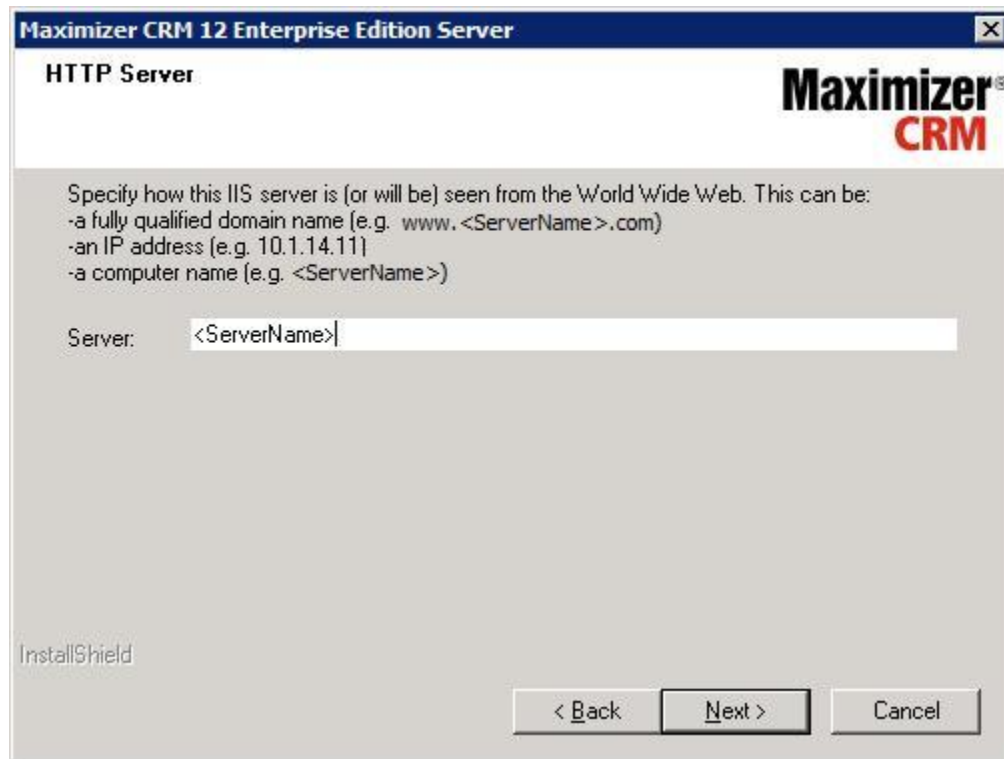8. Select Maximizer Components for Microsoft IIS, and click **Next**.

Maximizer Components for Microsoft IIS must be installed on one of your network servers. Select only this option if you are installing on the IIS Server and the Maximizer Server is on a different computer.

9. Click **Next** to install to the default location.

    – OR –

    Click **Browse**, select a destination folder to install Maximizer CRM, and click **Next**.

10. Click **Browse**, and select the same SQL Server that you selected for the Maximizer Server installation.

11. Enter the SQL administrator User name and Password, and click **Next**.

12. Enter the name of the HTTP Server, and click **Next**.

The IIS Server can be identified to the web by a fully qualified domain name (e.g., "www.<ServerName>.com"), by its IP address, or by its computer name. The most common choice is to use a fully qualified domain name. The other choices are provided for flexibility in the event that a fully qualified domain name is not available at the time of installation.

13. Enable Access sites by checking the 'Enabled' option to the right of the desired site.

The default virtual names for Access sites can be changed. This document assumes the default virtual names are used.

14. Review the installation settings, and click **Next** to begin installing.

The wizard displays an installation progress indicator. When the installation is complete, the final step of the wizard appears.

15. Click **Finish** to close the wizard.

16. After the computer restarts, log into Windows using an administrator account. This step is required to complete the installation.

Maximizer Components for Microsoft IIS are now installed.

Accessing Maximizer Web Access

To access a Maximizer Address Book from the web, open Microsoft Internet Explorer or Mozilla Firefox and type the URL set by your system administrator into the browser's Address field.

Typically, the URL would look like the following:

- **http://<ServerName>/MaximizerWebAccess/Default.aspx**

– OR –

- Alternatively, for computers that have had Maximizer CRM installed, Web Access can be accessed by selecting **Start** > **All Programs** > **Maximizer CRM** > **Web Access** > **Maximizer Web Access**

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