

# **Maximizer<sup>®</sup>** **CRM12**



## **Administrator's Guide** **for Group Edition**

**Maximizer Software**  
Simply Successful **CRM**



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## Applicability

This document applies to Maximizer CRM 12 Winter 2012 software.

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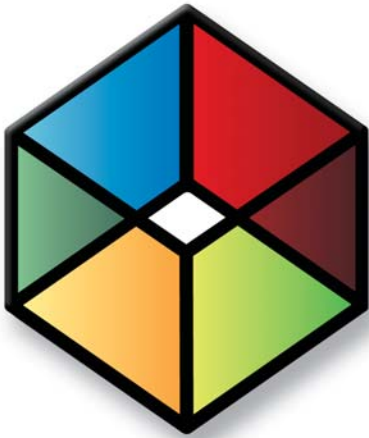
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# CHAPTER 1 **Introduction**

## In this chapter...

- "Maximizer System Requirements" on page 2
- "Maximizer CRM Modules and Components" on page 5
- "Sample Address Books" on page 7
- "Network Configuration" on page 8
- "Related Documentation" on page 9

## Maximizer System Requirements

The hardware and software requirements for each type of Maximizer installation are listed in the following tables. Please refer to the Maximizer website at [www.maximizer.com](http://www.maximizer.com) for updated information.

These are the minimum system requirements for Maximizer, and your operating system may have higher requirements for some components, such as processor speed and RAM.

Because Web Access (part of the Maximizer components for Microsoft IIS) may have to handle larger amounts of processing (as the number of concurrent Web Access clients increase), we recommend that you install Web Access on a server with dual or quad processors and more RAM than the minimum requirements. In addition, it is recommend that customers that are planning a deployment of Web Access on a server machine that potentially will have physical memory demands in excess of four gigabytes of physical RAM deploy on a 64-bit operating system.

The following sections contain detailed system requirements for running Maximizer:

- “Maximizer Group Edition System Requirements” on page 2
- “MaxSync for Microsoft Exchange System Requirements” on page 4
- “Workflow Automation Powered by KnowledgeSync System Requirements” on page 4

## Maximizer Group Edition System Requirements

The following table lists the system requirements for Maximizer CRM Group Edition server and workstation. For the latest list of supported software, go to [www.maximizer.com](http://www.maximizer.com).

|                                      | <b>CRM Server</b>  | <b>CRM Workstation</b>   |
|--------------------------------------|--|--|
| Minimum Processor Speed <sup>b</sup> | 1.6 GHz (minimum)<br>3 GHz or faster processor (recommended) | 1 GHz (minimum)<br>2 GHz or faster processor (recommended)   |
| Available RAM <sup>a</sup>           | 1 GB (minimum)<br>2 GB (recommended)                         | 512 MB (minimum);<br>1 GB (minimum for Windows Vista, Windows 7, or Windows 8)<br>2 GB or more (recommended) |
| Available hard disk space            | 2 GB (minimum)<br>5 GB or more (recommended)                 | 2 GB (minimum)<br>5 GB or more (recommended)   |
| Hard disk format                     | NTFS-formatted file system <sup>b</sup>                      | NTFS-formatted file system <sup>b</sup>  |

|  | CRM Server   | CRM Workstation  |
|--|--|--|
| Minimum video resolution   | SVGA (1024x768) or higher-resolution video adapter and monitor   | SVGA (1024x768) or higher-resolution video adapter and monitor   |
| Operating system   | Microsoft Windows XP <sup>c</sup><br>Microsoft Windows Vista <sup>c</sup><br>Microsoft Windows 7<br>Microsoft Windows 8<br>Microsoft Windows Server 2003/2003 R2<br>Microsoft Windows Server 2008/2008 R2<br>Microsoft Windows Server 2012<br>(320bit and 64-bit editions updated to their latest service packs) | Microsoft Windows XP <sup>c</sup><br>Microsoft Windows Vista <sup>c</sup><br>Microsoft Windows 7<br>Microsoft Windows 8<br>Microsoft Windows Server 2003/2003 R2<br>Microsoft Windows Server 2008/2008 R2<br>Microsoft Windows Server 2012<br>(32-bit and 64-bit editions updated to their latest service packs) |
| Email system   | 32-bit MAPI- or VIM-compliant SMTP (for Maximizer Email Service)<br>SMTP and IMAP (for Maximizer Web Access)   | 32-bit MAPI- or VIM-compliant  |
| Internet browser   | Microsoft Internet Explorer 8.0<br>Microsoft Internet Explorer 9.0<br>Microsoft Internet Explorer 10.0<br>Mozilla Firefox 9, 10, 11, 12, or 13   | Microsoft Internet Explorer 8.0<br>Microsoft Internet Explorer 9.0<br>Microsoft Internet Explorer 10.0<br>Mozilla Firefox 9, 10, 11, 12, or 13   |
| Software on the server where Maximizer components for Microsoft IIS are installed <sup>d</sup> | Microsoft Internet Information Server 6.0 (Microsoft Windows Server 2003/2003 R2)<br>Microsoft Internet Information Server 7.0 (Microsoft Windows Server 2008)<br>Microsoft Internet Information Server 7.5 (Microsoft Windows Server 2008 R2)<br>8.0 (Microsoft Windows Server 2012)                            | n/a  |

- a. Because Web Access (Maximizer components for Microsoft IIS) may have to handle larger amounts of processing (as the number of concurrent Web Access clients increase), we recommend that you install Web Access on a server with dual or quad processors and more RAM than the minimum requirements. In addition, it is recommend that customers that are planning a deployment of Web Access on a server machine that potentially will have physical memory demands in excess of four gigabytes of physical RAM deploy on a 64-bit operating system.
- b. If you want to install Maximizer on a FAT32 file system, you should first convert the drive to an NTFS file system. For information on installing Maximizer on a FAT32 file system, visit the Maximizer Knowledge Base at [www.maximizer.com/knowledgebase](http://www.maximizer.com/knowledgebase).
- c. Microsoft Windows XP Home, Microsoft Windows XP Media Center, Microsoft Windows Vista Home or Microsoft Windows Vista Home Premium are not supported in a network environment when logging into a domain is required. Refer to your Microsoft documentation for details on how to set up networking in a workgroup environment.
- d. Maximizer components for Microsoft Internet Information Services are not supported on any Windows XP-based, Windows Vista-based, Windows 7-based, or Windows 8-based computers.

## MaxSync for Microsoft Exchange System Requirements

The following table lists the system requirements for MaxSync for Microsoft Exchange.

|                               | <b>Server</b>   |
|-------------------------------|---|
| Minimum Processor Speed       | 1.0 GHz (minimum)<br>1.6 GHz (recommended)  |
| Available RAM                 | 1 GB (minimum)<br>2 GB (recommended)  |
| Available hard disk space     | 2 GB (minimum)<br>5 GB (recommended)  |
| Operating system <sup>a</sup> | Microsoft Windows XP <sup>b</sup><br>Microsoft Windows Server 2003/2003 R2<br>Microsoft Windows Server 2008/2008 R2<br>Microsoft Windows Server 2012<br>(updated to their latest service packs) |
| Email system                  | Microsoft Outlook 2003, 2007, 2010, or 2013   |

- a. MaxSync for Microsoft Exchange is not supported in a multi-server Microsoft Exchange environment.
- b. Microsoft Windows XP Home is not supported in a network environment.

## Workflow Automation Powered by KnowledgeSync System Requirements

The following table lists the system requirements for Workflow Automation Powered by KnowledgeSync.

|                           | <b>Server</b>  |
|---------------------------|--|
| Minimum Processor Speed   | 1.6 GHz or faster processor  |
| Available RAM             | 1 GB   |
| Available hard disk space | 140 MB for installation,<br>70 MB for application,<br>5 KB max per event   |
| Operating system          | Microsoft Windows Server 2000<br>Microsoft Windows Server 2003<br>Microsoft Windows XP<br>Microsoft Windows Vista<br>(updated to their latest service packs) |



# Maximizer CRM Modules and Components

- **Maximizer CRM** is a robust contact, campaign, opportunity, and order management tool. It provides invaluable assistance in tracking customer interaction and purchase history, planning and management of sales opportunities using customizable sales strategies and automatically calculating the probability of close at every stage. With the creation of meaningful graphs and charts, companies benefit from complete, detailed intelligence to fully understand their audience and evaluate the performance of their business.
- **Administrator** is used by a system administrator or IT staff to configure the entire Maximizer system and manage users and security. From Administrator, you can create and manage Maximizer databases (called “Address Books”), back up your data, import and export Address Book information, produce system reports, and perform other administrative tasks.

## Modules and Components

- **Customer Access** is a browser-based application providing a two-way flow of information between your organization and its customers.
- **Dashboards** are a component of Maximizer and Maximizer Web Access that can be used for monitoring activities in your company. The information you see in dashboards is generated in real-time, so you have an up-to-date view of the activities taking place in Sales and Marketing. Information, such as how many opportunities are in the funnel and your daily revenue from online purchases, are accessible instantaneously.
- **Maximizer Web Access** is a browser-based application providing your organization's employees with the functionality of Maximizer from anywhere in the world.
- **Mobile Access** provides access to Maximizer through mobile web browsers. When users go to Start > Programs > Maximizer CRM > Web Access > Mobile Access, a URL displays. They can enter this URL into a mobile device to access Mobile Access.
- **Partner Access** is a browser-based application providing two-way flow of information between your organization and its business partners. A multi-tier distribution group can effectively distribute sales opportunities and keep all involved parties informed about the latest discussion topics and customer service cases.

## Maximizer Companion Applications

- **MaxAlarm** automatically monitors appointments for one or more people in any number of Address Books. MaxAlarm automatically starts when you start the computer and appears as an icon in the Windows system tray. You can leave it running when Maximizer is closed and still receive notification of appointments.
- **MaxExchange** is a separate application. When installed, it enables you to synchronize Maximizer data between a server and remote computers.
- **MaxMobile** combines with Maximizer to offer you all of the contact management features of Maximizer with the portability and convenience of a handheld device. Whether at work or on the road, you always have access to current information about your clients or customers—names, addresses, appointments, tasks, and notes. Simply use MaxMobile to view and modify your data, on your mobile device, in real time.

## Sample Address Books

Maximizer includes sample Address Books to help you learn the program. A typical server installation of Maximizer installs a complete sample Address Book called "Escona Tutorial", which is used throughout the Maximizer documentation. You can use the Escona Tutorial Address Book while you are learning to use Maximizer.

Maximizer also installs several other sample Address Books for a variety of industries. You can use a sample Address Book appropriate to your industry as a starter Address Book.

With the exception of Maximizer Web Access, you can access the sample Address Book for all components of Maximizer with the following user ID:

User ID: ***MASTER***

Password: ***control***

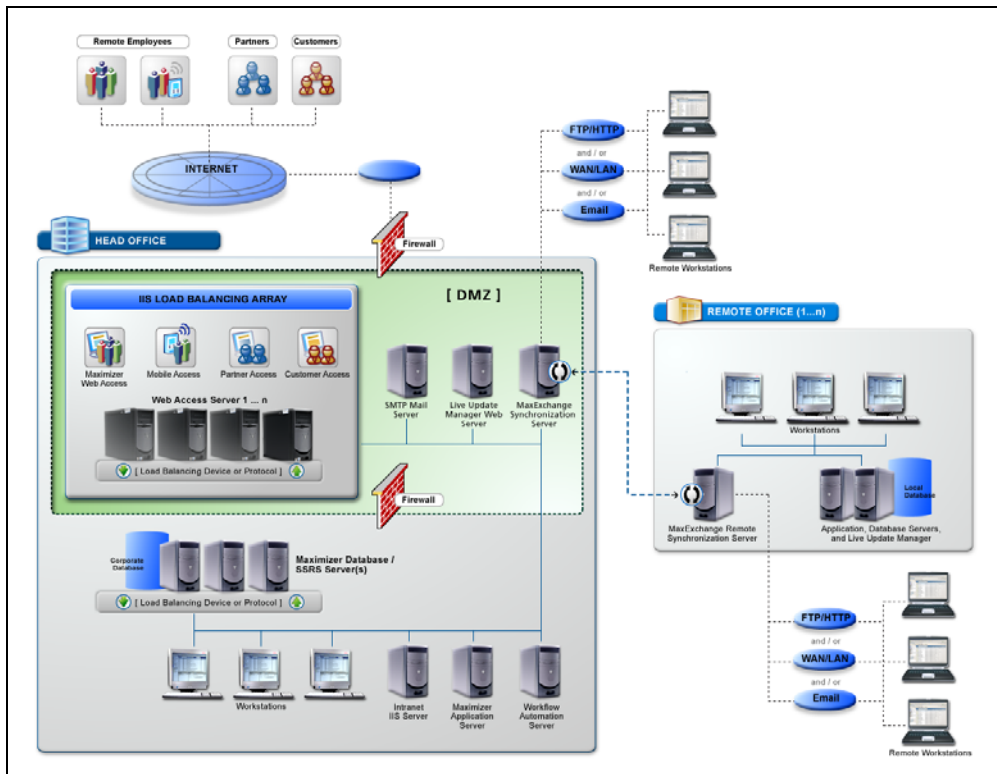
Use the sample Address Books for learning and testing purposes only, and create a new Address Book for your organization's data. The sample Address Books are overwritten if you re-install, so you don't want to store your organization's data in those Address Books.

## Network Configuration

The following diagram is an example of how Maximizer CRM can be deployed. This example demonstrates the use of multiple servers, workstations, firewalls, intranet, and Internet connections.

In this example, remote employees, partners, and customers can connect through the Internet using Maximizer Web Access or a mobile device with Mobile Access or MaxMobile. Employees can also connect through your intranet. Workstations at the head office access the Maximizer database over the network, while workstations in remote offices can use MaxExchange to access corporate information. The Maximizer database and Microsoft SQL Server Reporting Services (SSRS) can reside on a single server or on different servers.

Your network setup will depend on the configuration and the components you choose to install.

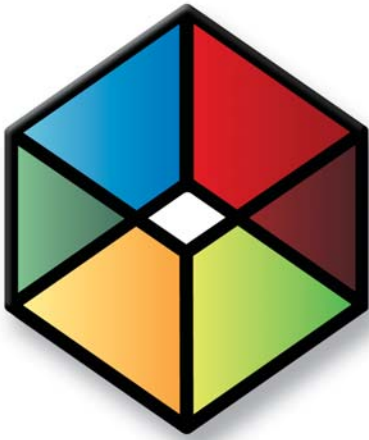


## Related Documentation

This guide is one source of documentation included with Maximizer, and the following additional resources are available:

- **Online Help** (Help > Online Help) provides additional information about using Maximizer and Administrator.
- **Context-sensitive help** (F1) provides details specific to the screen currently active in Maximizer. Press the F1 key to activate context-sensitive help for the current screen.
- The **Maximizer CRM User's Guide** is your reference guide to using Maximizer. This guide is available in PDF format from the Help menu in Maximizer and Administrator.
- The **MaxExchange Administrator's Guide** is your reference guide to configuring and using MaxExchange. This guide is available in PDF format from the Maximizer CRM folder in the Windows Start menu when MaxExchange Synchronization Server is installed.
- The **Maximizer CRM Customization Suite** includes additional guides for integrators. When the Customization Suite is installed, these guides are available in PDF format from the Maximizer Customization Suite folder in the Windows Start menu. The Customization Suite enables customers and business partners to customize the Maximizer interface and to integrate with other front-office and back-office solutions.
- The Maximizer website ([www.maximizer.com](http://www.maximizer.com)) provides the latest product information. It also includes a searchable Knowledge Base at [www.maximizer.com/knowledgebase](http://www.maximizer.com/knowledgebase).






# CHAPTER 2

## Configuring Microsoft Internet Information Server (IIS)

### In this chapter...

- "Maximizer Components Requiring Microsoft IIS" on page 12
- "Virtual Directories" on page 12
- "Web Server Permissions" on page 13
- "Changing the Anonymous Web Access Account" on page 13
- "Setting Up the Maximizer IIS Production Environment" on page 15
- "Microsoft IIS Account Configuration" on page 18
- "Microsoft IIS on Windows Server 2008" on page 19
- "Microsoft IIS on Windows Server 2003" on page 20
- "Microsoft IIS on 64-Bit Operating Systems" on page 21
- "Microsoft IIS for Windows Authentication" on page 23
- "Setting File and Directory Permissions" on page 26
- "Adding Support for File Types" on page 27

# Maximizer Components Requiring Microsoft IIS

 To support downloading emails that were saved to Documents from Maximizer Web Access, Extended MAPI must be installed on the IIS server. Installing Microsoft Outlook on the IIS server in Corporate or Workgroup mode satisfies this requirement.

Microsoft Internet Information Services (IIS) is required for the following Maximizer components:

- Maximizer web access, sites
- Dashboards
- Automated campaigns, for statistics in email activities
- MaxExchange Server, when using the HTTP transport method
- MaxMobile Wireless Server

IIS is included with most versions of Windows supported by Maximizer CRM.

## Virtual Directories

The content and script/executable directories that IIS makes available to web clients are known as virtual directories.

When you create a new Address Book, virtual directories are created automatically for the various Maximizer components.

| Maximizer Components                                  | Virtual Directory Name |
|---|------------------------|
| Maximizer Web Access                                  | MaximizerWebAccess     |
| Maximizer Web Access Administrator                    | MaximizerAdmin         |
| Mobile Access   | MaximizerMobileAccess  |
| Partner Access  | MaximizerPartner       |
| Customer Access                                       | MaximizerCustomer      |
| Dashboards  | Dashboard              |
| Automated campaigns                                   | Campaigns              |
| MaxExchange web service for the HTTP transport method | MaxExchangeTransport   |
| MaxMobile Wireless Server                             | MaxMobileService       |



## Web Server Permissions

**i** If both Web server and NTFS permissions are set, permissions that deny access take precedence over those that grant access.

Web server permissions affect all users accessing the site, ranging from the Anonymous user account to a user who is a member of the Administrators or Domain Admins group. Regardless of an account's group membership, all accounts will be denied access equally. Therefore, when access to virtual directories is created for IUSR\_ServerName, the exact same virtual directory restrictions will be placed on the IWAM\_ServerName account.

## Changing the Anonymous Web Access Account

**i** If you change the anonymous web access account on a computer running MaxExchange Synchronization Server or MaxExchange Remote Synchronization Server, you must update permissions on the MaxExchange folders. See the MaxExchange Administrator's Guide for details.

Changing the anonymous web access account involves first creating an account, then configuring the account.

### ➤ *To create an anonymous web access account*

- 1** Start Windows User Manager.
- 2** Select the local domain by selecting **Users > Select Domain**.
- 3** Create a new user account.
- 4** Make the account a member of the **Guests** group.
- 5** Confirm that the Guests group only has the right to **log on locally** by performing the procedure outlined in "Standalone Servers" on page 18.

### ➤ *To configure the anonymous web access account in Windows Server 2008*

- 1** Start **Internet Services Manager** (available through Windows Administrative Tools).
- 2** Select the default website or another website if more than one is available.
- 3** Double-click **Authentication**.
- 4** Select **Anonymous Access** and click **enable**.
- 5** Click **edit**.

The Edit Anonymous Authentication Credentials dialog box opens.

- 6** Click **Set** and type the **Username** and **Password** for the account you created above. Click **OK** when you are finished.

**7** Select the **Basic Authentication** option and click **Enable**.

► **To configure the anonymous web access account in Windows Server 2003**

**1** Start **Internet Services Manager** (available through Windows Administrative Tools).

**2** Select the default website or another website if more than one is available, and open its property sheets by right-clicking and selecting **Properties**.

**3** Click the **Directory Security** tab.

**4** Click the **Edit** button in the **Anonymous Access and Authentication Control** section.

The Authentication Methods dialog box opens.


**5** Select the **Enable Anonymous access** checkbox.

**6** Type the **Username** and **Password** for the account you created above or click the **Browse** button to select a user from the list.


**7** Enable the **Basic Authentication** option.

**8** Click **OK** to close the Anonymous User Account dialog box.

**9** Click **OK** to close the remaining dialog boxes.

 Web browsers enable the anonymous access option by default. It is recommended that you manually enter the Anonymous user account password, and that you disable the "Enable Automatic Password Synchronization" checkbox. Be sure that the password that you enter is identical to the existing password for the local Anonymous user account.

# Setting Up the Maximizer IIS Production Environment

 Maximizer uses the IIS Default Web Site on port 80. Other web sites running on the server must use different ports.

Maximizer is designed to meet the real-world infrastructure requirements of IT departments, including support for load balancing and demilitarized zones.

Maximizer Web Access makes use of Microsoft's ASP.NET technology. If your company has implemented other web pages or solutions, it is strongly recommended that these pages are hosted on a separate IIS Server from the Maximizer Web Access sites.

The following sections contain information on IIS production environments:

- "Load Balancing" on page 15
- "Demilitarized Zone (DMZ)" on page 17

## Load Balancing

In some deployments of Maximizer Web Access with a large number of users, more than one IIS server may be needed to handle the load. Network load balancing works with Maximizer Web Access to achieve this.

It may be advantageous to deploy network load balancing in a situation that includes the following:

- A single IIS server is running at high CPU usage levels and performance of Maximizer Web Access is poor only when many users are using the system.
- The SQL server serving the Maximizer Address Books is not running at high CPU usage levels.
- A set of servers of similar capacity are available to deploy Maximizer Web Access.
- The available IIS servers are all running Windows Server 2003 or later or a hardware load balancer is available.

## Configuring Load Balancing

For Maximizer Web Access, network load balancing is configured in one of the following ways:

- Install multiple servers with the Maximizer IIS components and install the Network Load Balancing service in Windows on each server. See the Network Load Balancing documentation for information.
- Install and configure a hardware network load balancer in the network.

Network load balancing must be configured with client affinity enabled meaning that each client has all IIS requests served by the same server and that the client's IP address is used to determine which server will serve the requests.

Each Maximizer IIS server must be configured identically and must have the same version of the Maximizer IIS components installed. When upgrading to a new version of Maximizer Web Access, upgrade each server to the new version before the new version goes online, and apply any customizations to all servers.

## Benefits of Load Balancing

The main benefit of load balancing is that multiple IIS servers can be used to divide the IIS load transparently to users with very low performance overhead. It may be more economical to install many IIS servers of lower capacity than one high-capacity IIS server. If one IIS server loses connectivity or is taken offline for maintenance, users may experience a session timeout as the load is rebalanced. But users will be able to log in again immediately and continue to use the system.

## Drawbacks of Load Balancing

Network load balancing has the following drawbacks:

- The system is scaled to a larger number of users only if the SQL server can handle the load.
- Multiple IIS servers must be maintained with the same settings and version of the software. Otherwise, some users may be able to use the system while other users are not able to use the system.

In some cases, users may access the system from an Internet service provider that frequently changes the client IP address as it appears to the server. This may cause frequent session timeouts when logged in to Maximizer Web Access.

## Demilitarized Zone (DMZ)

Security is the biggest priority for IT departments in most corporations. Demilitarized zone (DMZ) is the term used to describe the network area between the external router, which talks to the Internet, and the corporate firewall, which protects internal computers from Internet security breaches.

Maximizer has been designed to support network DMZs by enabling corporations to separate their database servers (usually located inside the firewall) from the IIS web machine (located in the DMZ). Communication between the database servers and the web server is handled by private ports configured by IT administrators.

## Microsoft IIS Account Configuration

Most Windows servers are installed in network environments in which they provide services to client workstations. In such a configuration, the security considerations are often built around physical access issues. When Microsoft IIS's World Wide Web Publishing Service is enabled, the server is suddenly placed in an environment that is accessible by external users who can be located virtually anywhere in the world. This situation requires that you exercise much more care in ensuring that the server is secure from unauthorized access.

The following section contains information on one type of IIS configuration:

- “Standalone Servers” on page 18

### Standalone Servers

When IIS is installed on a standalone server (a server without membership in a Windows domain) the IUSR\_ServerName account is made a member of the “Guests” local group. In most server environments, this configuration works well.

➤ ***To configure the Guest local group in Windows Server 2003 or Windows Server 2008***

- 1** Open **Local Security Policy** (available through Windows Administrative Tools).
- 2** Expand the **Local Policies** branch, and select **User Rights Assignment**.
- 3** Right-click **Allow log on locally**, and select **Properties** from the shortcut menu.
- 4** Add the **<server\_name>\Guest** account to the list of allowed users. Click **OK**.
- 5** Right-click **Deny log on locally**, and select **Properties** from the shortcut menu.
- 6** Add the **<server\_name>\Guest** account to the list of denied users. Click **OK**.

 For further information, refer to your Windows operating system documentation.

# Microsoft IIS on Windows Server 2008

If your Microsoft IIS server is a Windows Server 2008 computer, you may need to perform the following steps before installing the Maximizer components for IIS:

- Enable the .NET framework.
- Install the IIS 6 Management Compatibility role services.

## ➤ *To enable the .NET framework*

- 1** From the Control Panel, open *Programs and Features*.
- 2** Click *Turn Windows features on or off*.
- 3** Select *Features*, and select *Add Features*.
- 4** Select *Microsoft .NET Framework*.
- 5** Click *OK*.

## ➤ *To install the IIS 6 Management Compatibility role services*

- 1** Click *Start > All Programs > Administrative Tools > Server Manager*.
- 2** Click *Roles*.
- 3** Under *Web Server (IIS)*, select *Add Role Services*.

The Add Role Services dialog box opens.

- 4** Expand *Management Tools*, and select *IIS 6 Management Compatibility* and all of its sub-items.
- 5** Click *Next*.
- 6** If you are prompted, include additional components.
- 7** Click *Install*.
- 8** When the installation is finished, click *Close* to close Server Manager.

## Microsoft IIS on Windows Server 2003

If your Microsoft IIS server is a Windows Server 2003 computer and the Details tab in the Address Book page following pane does not display, you may need to perform the following steps after installing the Maximizer components for IIS:

- Create a wildcard application map for ASP.NET 4.0.

### ➤ *To create a wildcard application map*

- 1** Click **Start > All Programs > Administrative Tools > Internet Information Services (IIS) Manager**.
- 2** Select the MaximizerWebAccess site in the Web Sites list and click **Action > Properties**.
- 3** In the **Virtual Directory** tab, under the **Application settings** group, click **Configuration**.
- 4** In the **Wildcard application maps** group, click **Insert**.
- 5** In the **Executable** field, enter the path to the ASP.NET 4.0 **aspnet\_isapi.dll** on your system. The default path is **C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\aspnet\_isapi.dll**
- 6** Uncheck the **Verify that file exists** option and click **OK**.
- 7** Click **OK** again to save the Application Configuration settings and click **OK** once more to save the web site properties.



## Microsoft IIS on 64-Bit Operating Systems

Maximizer requires the 32-bit version of ASP.NET 4.0 in order to run on a 64-bit operating system. To run the Maximizer components that require Microsoft Internet Information Services (IIS), you must enable 32-bit applications in IIS. The procedures vary depending on the operating system running IIS.

- “Enabling 32-Bit Applications in Windows Server 2008” on page 21
- “Enabling 32-Bit Applications in Windows Server 2003” on page 22

### Enabling 32-Bit Applications in Windows Server 2008

In Windows Server 2008, the Maximizer web applications should run under an application pool that has 32-bit applications enabled and that uses ASP.NET v4.0. 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.

If you need to use a 64-bit web server, you can add a new application pool with these settings and run the Maximizer applications under this application pool.

#### ➤ *To enable 32-bit applications for the ASP.NET v4.0 application pool*

- 1** In IIS Manager, select ***Application Pools***.
- 2** Select the ***ASP .NET v4.0*** application pool.
- 3** Click ***Advanced Settings***.
- 4** Next to ***Enable 32-bit Applications***, select ***True***.
- 5** Click ***OK***.

## Enabling 32-Bit Applications in Windows Server 2003

In Windows Server 2003, you must enable the 32-bit version of ASP.NET 4.0 using the command prompt.

➤ ***To enable the 32-bit version of ASP.NET 4.0 in Windows Server 2003***

- 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 4.0, and the script maps at the IIS root:

```
%SYSTEMROOT%\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis.exe -i
```

- 4** Make sure that the status of ASP.NET version 4.0.30319 (32-bit) is set to Allowed in the Web service extension list in Internet Information Services Manager.

# Microsoft IIS for Windows Authentication

If you want to use Windows Authentication in the components that require Microsoft IIS, you must configure IIS for Windows Authentication. The procedure for configuring IIS for Windows Authentication varies depending on the version of Windows you are using. The following sections contain detailed information on configuring IIS for Windows Authentication:

- “IIS for Windows Authentication in Windows Server 2008” on page 23
- “IIS for Windows Authentication in Windows Server 2003” on page 24

## IIS for Windows Authentication in Windows Server 2008

In Windows Server 2008, you must set the authentication method for the Maximizer Web Access, Maximizer Web Access Administrator, Mobile Access, or Dashboard virtual directory or for the Admin subfolder of the Customer Access or Partner Access virtual directory.

### ➤ *To set the authentication method for a virtual directory in Windows Server 2008*

- 1** In IIS Manager, select the virtual directory for the web access site.  
– or –

To set up Windows Authentication for Customer Access or Partner Access, select the Admin subfolder of the virtual directory.

- 2** Double-click **Authentication**.

- 3** Set the authentication settings depending on the following scenarios:

**Scenario 1:** SQL server is on the same machine as IIS, or Delegation is set up between IIS and SQL.

- Enable **Windows Authentication** and **ASP.NET Impersonation**. All other options must be disabled.

**Scenario 2:** All other configurations.

- Enable **Basic Authentication** and **ASP.NET Impersonation**. In this situation, SSL should always be set up in a production environment to protect the users' passwords since Basic Authentication is not encrypted.
- Right-click on **Basic Authentication** and select **Edit** to change the basic authentication settings.

- Set the **Default domain** so that users can type username instead of domain\username when logging in.
- Set the **Realm** to describe the location of the server.

If the necessary options are not available, you can turn them on. Go to Control Panel > Programs and Features. Select Turn Windows features on or off. Expand Roles and select Web Server (IIS). Click Add Role Services and enable Windows Authentication or Basic Authentication. When you go back into IIS Manager, the required features should be available.

## IIS for Windows Authentication in Windows Server 2003

In Windows Server 2003, you must specify the authentication methods for the Maximizer Web Access, Maximizer Web Access Administrator, Mobile Access, or Dashboard virtual directories or the Admin subfolders of the Customer Access or Partner Access virtual directory. The settings differ depending on the type of configuration.

### ► *To set the authentication method for a virtual directory in Windows Server 2003*

- 1** In IIS Manager, select the virtual directory that you want to modify.  
– or –

To set up Windows Authentication for Customer Access or Partner Access, select the Admin subfolder of the virtual directory.

- 2** Right-click, and select **Properties**.
- 3** Select the **Directory Security** tab.
- 4** In the **Authentication and access control** area, click **Edit**.
- 5** Set the field values based on the following scenarios:

**Scenario 1:** SQL server is on the same machine as IIS, or Delegation is set up between IIS and SQL.

- Enable only **Integrated Windows authentication**.  
Internet browser settings on user's computers control whether or not users are prompted for a password. In Internet Explorer, select Tools > Internet Options. Select the Security tab. Click Custom. The User Authentication setting is at the bottom of the list. The setting cannot be set to Anonymous access.

**Scenario 2:** All other configurations.

- Enable only **Basic Authentication**. In this situation, SSL should always be set up in a production environment to protect the users' passwords since Basic Authentication is not encrypted.
- Set the Realm to describe the location of the server.
- Set the default domain so that users can type username instead of domain\username when logging in.

## Setting File and Directory Permissions

The virtual directory system for IIS comprises only half of the directory security system. To complement the virtual directory security, file and directory permissions for all of the physical directories that virtual directories reference must also be made more secure. In a default Windows Server 2003 or Windows Server 2008 installation, the “Everyone” group is given full Directory and File permissions for almost all directories on the server. Although this is a convenient feature for a newly installed server, it provides very poor security.

During the installation, the Maximizer setup creates the following folders on the server:

- ...\\All Users\\Application Data\\Maximizer\\AddrBks
- ...\\All Users\\Application Data\\Maximizer\\SvrShare

By default, these folders have full access rights. You may change the security rights to provide access to only specific users and/or groups.

### ➤ *To remove the “Everyone” group*

- 1** Start Windows Explorer and browse to the ...\\inetpub\\scripts directory (typically, C:\\inetpub\\scripts).
- 2** Select the *scripts* directory, and select **File > Properties**.
- 3** Select the **Security** tab.
- 4** Highlight the **Everyone** group in the **Name** list box, and click **Remove**.

The Everyone group is removed from the list.

- 5** Click **Add**.

The Select Users, Computers, or Groups dialog box opens.

- 6** Select the **Guest** or **Domain Guest** group, and click **Add**.
- 7** Click **OK**.
- 8** In the Permissions list box, select the **Read** checkbox from the **Allow** column.
- 9** Click **OK**.

## Adding Support for File Types

Some Maximizer features may require you to add support for different file types to the Default Web Site on your IIS server. You can use IIS Manager to register additional Multipurpose Internet Mail Extensions (MIME) types for your server.

You may be required to register MIME types in the following situations:

- To add to the list of supported document types in Maximizer Web Access.
- To deploy MaxMobile.

The procedure for registering MIME types varies depending on the version of Windows you are using.

### ➤ *To register MIME types in Windows Server 2008*

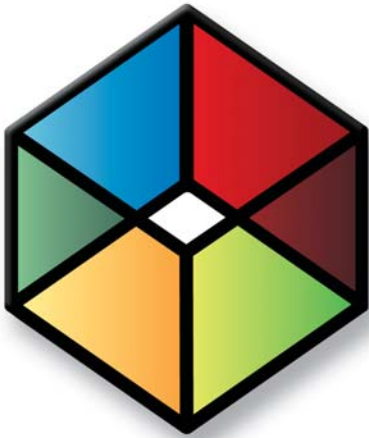
- 1** On the Maximizer IIS server machine, open the *IIS Manager*.
- 2** Open the *Default Web Site*.
- 3** Double-click the *MIME Types* icon.
- 4** Click *Add*.
- 5** Enter the file extension and MIME type to be supported.
- 6** Click *OK* to add the specified MIME type.

### ➤ *To register MIME types in Windows Server 2003*

- 1** On the Maximizer IIS server machine, open the *IIS Manager*.
- 2** Open the *Properties* dialog box for *Default Web Site*.
- 3** Click on the *HTTP Headers* tab.
- 4** Click the *MIME Types* button.
- 5** Click the *New* button.
- 6** Enter the file extension and MIME type to be supported.
- 7** Click *OK* to close the Default Web Site Properties dialog box.
- 8** Restart the IIS server.








# CHAPTER 3 **Installing Maximizer**

## In this chapter...

- "Installation Checklist" on page 30
- "Third-Party Components Installed with Maximizer" on page 34
- "Windows Login Account Rights Required for Installation" on page 36
- "Shared Folders and Permissions" on page 37
- "Upgrading from a Previous Version of Maximizer" on page 38
- "Installation Order of Maximizer Components" on page 41
- "Installing Maximizer CRM Server" on page 42
- "Installing Maximizer CRM Workstation" on page 54
- "Installing Maximizer Companion Applications" on page 61
- "Adding and Removing Maximizer CRM Components" on page 63
- "Installing Licenses" on page 64
- "Where to Go from Here..." on page 67

# Installation Checklist

Although the process of installing Maximizer CRM is straightforward, a successful installation requires planning and attention to detail. In its simplest arrangement, all Maximizer CRM components may be installed on a single Windows machine to which one or more Maximizer Workstations may connect. However, for large installations, it is optimal to designate a single machine for each component.

 Depending on the network configuration, you may have more than one of each component machine. However, there is only one Maximizer Application Server.

- “Step 1: Identify the Key Server(s)” on page 30
- “Step 2: Ensure the Servers Meet System Requirements” on page 30
- Step 3: Verify Network Connectivity
- Step 4: Install Maximizer
- Step 5: Install Additional User Licenses
- Step 6: Activate the Software

The following sections outline the steps for a large installation in which each Maximizer component—such as IIS Server, Maximizer Server, Maximizer Workstation, and MaxExchange Synchronization Server—is isolated on a separate machine.

## Step 1: Identify the Key Server(s)

Identify the Maximizer Application Server, IIS Server MaxExchange Synchronization Server and Email Server. For information on the role of each server, see “Servers Required for Maximizer Installations” on page 31.

## Step 2: Ensure the Servers Meet System Requirements

After identifying the key servers, you should ensure that they meet the minimum system requirements. Also verify that all workstations meet minimum system requirements. See “Maximizer System Requirements” on page 2.

## Step 3: Verify Network Connectivity

All workstation computers access information on the Maximizer server using a network connection. Check for network connectivity between the Maximizer Server computer and all Maximizer Workstation computers. For more information, see “Verifying Network Connectivity” on page 33.

## Step 4: Install Maximizer

Install Maximizer components on all applicable computers.

For more information see the following sections:

- “Installation Order of Maximizer Components” on page 41
- “Installing Maximizer CRM Server” on page 42
- “Installing Maximizer CRM Workstation” on page 54
- “Installing Maximizer Companion Applications” on page 61

## Step 5: Install Additional User Licenses

Install licenses for any additional Maximizer users. This step is required only if you are installing Maximizer in a multiple-user environment. For more information, see “Installing Licenses” on page 64.

## Step 6: Activate the Software

Activate your Maximizer licenses. You can use Maximizer for a limited period of time before activating the software. Once this grace period is over, you will be unable to log in to Maximizer or administrator until you activate the software.

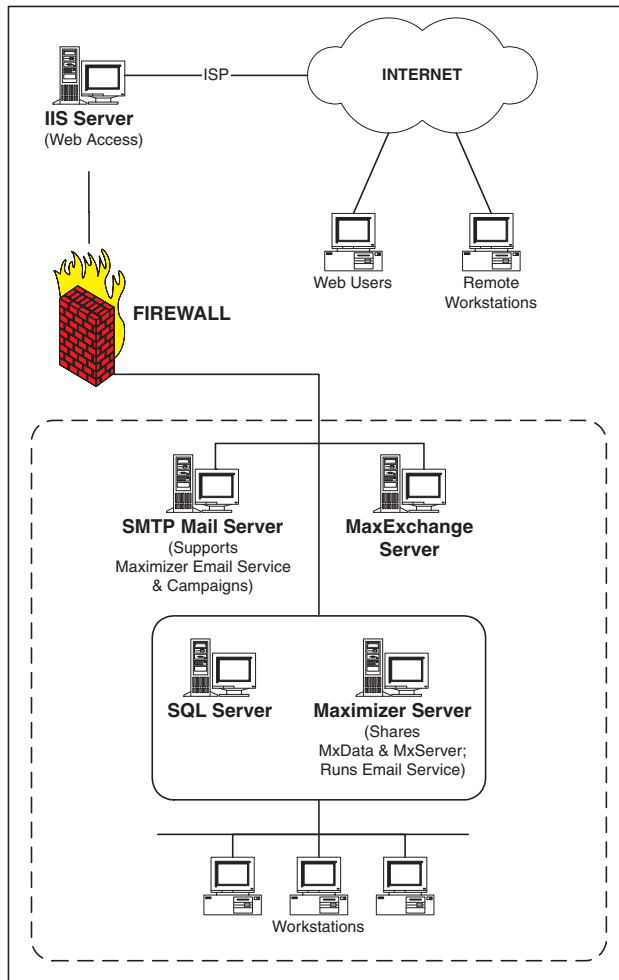
You are prompted to activate the software when you first log in. You can also activate the software from the Install Multi-user Licenses dialog box.

If you install additional licenses after activating Maximizer, you must activate the multi-user licenses in order to use them.

## Servers Required for Maximizer Installations

- **Maximizer Application Server:** The Maximizer Application Server is the machine where the Maximizer CRM Server application is installed, and it acts as a file server. Additionally, the Maximizer Server machine contains the Maximizer Email Service. The Maximizer Server machine must be capable of sharing folders. These folders store template and configuration information specific for each Address Book. It is advisable to back up the Maximizer Server on a consistent basis.
- **IIS Server:** The IIS Server hosts the web server components, including web access sites. To run these components, the IIS Server must have SQL connectivity with the SQL Server machine. Typically, the web server is separated from the rest of the network by a firewall. Even if a firewall exists between the IIS Server and SQL Server, SQL connectivity must exist to run Maximizer Web Access.

- **MaxExchange Synchronization Server:** The MaxExchange Synchronization Server communicates with Maximizer Remote Workstations, keeping their data up to date with the main Address Book. If the MaxExchange transfer protocol is FTP, ensure this machine is capable of communicating with MaxExchange Remotes through the designated port. If the transfer protocol is Email, make sure a compatible Email Server is available.
- **Email Server:** The Email Server supports marketing campaigns, appointment reminders, and customer service case notifications. It must be capable of sending SMTP.



## Verifying Network Connectivity

### ➤ *To verify network connectivity using the ping command*

**1** At the designated Maximizer Server computer, click **Start > Run**.

**2** Type **command**, and press **Enter**.

A Windows command prompt window opens.

**3** At the command prompt, type **ping <IP address>**, and press **Enter**.

<IP address> is the IP address of the computer you are trying to connect to over the network.

**4** Read the messages returned by the ping command and note whether the ping was successful.

- “Reply from ...” = success
- “Request timed out” = failure

**5** View the ping statistics to determine the quality of the network connection.

**6** If the ping command failed, or if the ping statistics reveal a poor quality connection, then troubleshoot the network connection to correct the problem.

**7** Repeat these steps to ping the rest of the computers in the network.

### ➤ *To determine a computer's IP address*

**1** At the computer whose IP address you want to determine, click **Start > Run**.

**2** Type **command**, and press **Enter**.

A Windows command prompt window opens.

**3** At the command prompt type **ipconfig**.

The window displays the computer's IP address, subnet mask, and default gateway, as well as additional network information.

**4** Write down the computer's name and IP address for reference.

## Third-Party Components Installed with Maximizer

The Maximizer CRM installation includes the following third-party products:


- Microsoft SQL Server Express Database Engine
- Microsoft .NET Framework
- Crystal Reports Viewer

The type of Maximizer installation determines which of these components are installed.

### Microsoft SQL Server Express Database Engine

Microsoft SQL Server Express is the database engine Maximizer uses to read and write data from the Address Book.

If you are running Maximizer in a multiple-user environment, you can designate one computer as the Maximizer Application Server, which is the computer where the Maximizer Address Book(s) are stored. SQL Server Express installs automatically as part of the Maximizer CRM installation.

 If you are upgrading the Maximizer instance of SQL Server 2005 Express 32-bit edition to SQL Server 2008 Express 64-bit edition, you must uninstall the Maximizer instance of SQL Server 2005 Express 32-bit edition before installing the Maximizer instance of SQL Server 2008 Express 64-bit edition. Refer to the Maximizer knowledge base for detailed information.

If you are upgrading from Maximizer CRM 10.x, the Maximizer instance of SQL Server 2005 Express will be upgraded to SQL Server 2008 Express.

The following Maximizer operations require the SQL Server Express database engine:

- installing MaxExchange Remote
- email transfer

The following Maximizer operations require the Pervasive.SQL database engine, which must be installed from the disc of a previous version of Maximizer or downloaded from the Pervasive website:

- upgrading an existing Pervasive or Btrieve Address Book

### Microsoft SQL Server Management Studio Express

Microsoft SQL Server Management Studio is a tool you use to manage your database. It is not included in the typical installation of Maximizer. But you can run a custom installation to install it.

If you require SQL Server Management Studio Express to be installed on a drive other than the default Maximizer program folder drive, you can run the installation from the Maximizer CRM disc. The setup is found in the following location:

- MaxCRM\3RDPARTY\SQLExpr

## Microsoft SQL Server Reporting Services

Microsoft SQL Server Reporting Services is installed with Microsoft SQL Server Express. It's used in the SQL Server Reporting Services integration with Maximizer Web Access. The integration is installed automatically when you install Maximizer CRM Server. You can enable SQL Server Reporting Services Integration in the System Options preferences in Maximizer Web Access Administrator.

## Microsoft .NET Framework

The Microsoft .NET Framework installs automatically with the "Install Maximizer Components for Microsoft IIS" option.

If you install MaxExchange Synchronization Server, you must install the Microsoft .NET Framework before installing MaxExchange Synchronization Server. For more information, refer to the *MaxExchange Administrator's Guide*.

## Crystal Reports

Maximizer CRM includes a report reader for Crystal Reports. You must install the full version of Crystal Reports to create reports for Maximizer, but you can view Crystal Reports in Maximizer without installing the full version. These reports are accessible from the Reports tab in Maximizer.

The Maximizer Server installation creates the following folder for shared reports:

**...\\All Users\\Application Data\\Maximizer\\SvrShare\\Reports\\  
<Address Book name>**

All folders and reports within this folder are accessible from Maximizer on workstation computers. Maximizer installs a set of standard reports, but you can also create your own custom, shared reports and save them in this folder. To access a shared report in Maximizer, from the Reports tab, select Crystal Report, and select the folder that contains the report.

The Maximizer CRM installations also create the following local folder for personal reports:

**...\\My Documents\\MaximizerReports**


This local folder is the default location for personal reports. You can create reports directly from Maximizer if you have a version of Crystal Reports installed on your computer. Users must belong to the Crystal Reports Users security group to create personal reports from Maximizer. To create a personal report, from the Reports tab, select Crystal Report > Personal > Custom Report.

## Windows Login Account Rights Required for Installation

To install Maximizer CRM Server or Workstation, you must be logged in to Windows using an account with Windows Administrator privileges. During installation, you may be required to reboot the computer, and then you must log in to Windows using an account with Windows Administrator privileges again so the installation can continue.



## Shared Folders and Permissions

 For information about the virtual directories created during installation and their permissions, refer to “Virtual Directories” on page 406.

When installing Maximizer CRM Server, the following shared folders are created in the ...\\Documents and Settings\\All Users\\Application Data\\Maximizer\\ folder on the server:

| Folder name | Shared name | Description  |
|-------------|-------------|--|
| AddrBks     | MxData      | Contains Address Books and Sample Address Books.<br>Share Permissions of Everyone with Change and Read (not Full Control).   |
| SvrShare    | MxServer    | Contains Maximizer Workstation installation files, Crystal Reports templates, and Crystal Reports reports.<br>Share Permissions of Everyone with Change and Read (not Full Control). |

These folders must be shared on the server before installing Maximizer CRM workstation. If the Maximizer CRM Server installation did not share the folders, you must share them before proceeding with the workstation installations.

No shared folders are created by the Maximizer CRM Workstation installation.

## Upgrading from a Previous Version of Maximizer

**ⓘ** ALWAYS back up the Address Book before upgrading Maximizer. For instructions on backing up, refer to “Backing Up and Restoring Address Book Data” on page 316. If you have customized the dictionary and holidays, also back up those files separately before upgrading.

If you are currently running an earlier version of Maximizer and want to upgrade, it is strongly recommended that you uninstall the previous version before proceeding with the upgrade.

However, if you absolutely require your Maximizer settings, such as Window layout, colors, fonts, etc., to be carried over to the new version, you can install the new version without uninstalling the previous version. The setup then prompts you to uninstall the previous version automatically, but this method does not overwrite your Maximizer settings.

Note that the Wireless Access site from previous releases is now renamed Mobile Access. The name of the default virtual directory and URL have also changed. In previous releases the name of the virtual directory was “MaximizerWireless”. You can specify a different name for the virtual directory while installing Maximizer. If you keep the default virtual directory, you may need to update the Mobile Access URL specified in Administrator to maintain integration between Mobile Access and MaxMobile. Mobile Access users should also update bookmarks so they reflect the new URL.

### ➤ *To upgrade to the new version of Maximizer*

- 1** Back up your Maximizer Address Book. Refer to “Backing Up and Restoring Address Book Data” on page 316 for instructions.
- 2** If you have customized the dictionary and holidays, also back up those files separately before upgrading. For instructions, refer to “Backing Up the Dictionary and Holiday Files” on page 321.
- 3** If you have created custom dashboards in Maximizer CRM 10.5 or earlier, copy them to a safe location. The location of the dashboard (.KIN) files depends on your computer's operating system. You can search your hard drive for the .KIN file extension to locate and backup the files. After upgrading, you can import the .KIN files into Maximizer. See the *Maximizer CRM User's Guide* for more information on importing dashboards.
- 4** Uninstall Maximizer CRM, and any additional Maximizer components, such as MaxMobile or MaxExchange, on all computers.

For instructions on uninstalling Maximizer, see “Removing Maximizer” on page 39.

**5** Install the new version of Maximizer.

During the installation, specify the Maximizer license server. For more information, see “Choosing the License Server” on page 16.

For detailed instructions on installing Maximizer, see “Installing Maximizer (Details)” on page 21.

**6** If you use Maximizer in a multiple-user environment, install additional user licenses.

For more information, see “Installing Licenses” on page 64.

**7** Activate the software.


You can activate the software and all installed licenses when you open Maximizer or Administrator and when you install multi-user licenses.

**8** Upgrade your Maximizer Address Book database to the new version, as described in “Upgrading or Converting an Address Book” on page 79.

## Removing Maximizer

You can uninstall Maximizer to remove it from your computer. When you uninstall Maximizer CRM 12, you have the option of removing or keeping registry settings and program files. If you want to completely remove the program, you should select this option. If you want to reinstall Maximizer, you may want to keep these settings. Any settings stored in the database are not removed when you uninstall Maximizer.

➤ **To uninstall Maximizer**

 Uninstalling Maximizer does not uninstall your Address Book data. However, you should always back up your Address Book before uninstalling.

**1** Click **Start > Settings > Control Panel > Add/Remove Programs**. In Windows Vista, click **Start > Control Panel > Programs and Features**.**2** In the list of currently installed programs, select **Maximizer CRM**.**3** Click **Change/Remove**. In Windows Vista, select **Uninstall/Change**.

If you are uninstalling Maximizer CRM 12, you have the option to remove all related files and registry settings from the computer. If you plan on reinstalling Maximizer, it's recommended that you do not select this option to preserve Maximizer settings on the computer.

**4** To remove all Maximizer files and settings from the computer, select ***Remove all related files, folders, and registry settings***.

**5** Click ***Yes*** to confirm.

The Remove Programs From Your Computer dialog box displays the uninstall progress.

**6** If the Remove Shared File? dialog box opens, click ***No To All***.

**7** When the uninstall is complete, click ***OK*** to close the dialog box.

**8** Reboot the computer.

## Installation Order of Maximizer Components

Once the key servers are ready, you should install and configure the Maximizer components in the following order:

- 1** ***Maximizer Server*** – Refer to “Installing Maximizer CRM Server” on page 42. Regardless of whether you are installing a Workgroup or Client/Server configuration of Maximizer, it is essential that you install the Maximizer Server before installing the workstations. During the workstation installation, you are prompted to supply a server name. After installing Maximizer on the server, open the Escona Tutorial sample database to create a server-side DSN, which enables any workstation to connect to the databases on the server.
- 2** ***Maximizer Components for Microsoft IIS*** – Refer to “Installing Maximizer Components for Microsoft IIS” on page 50.
- 3** ***Maximizer Workstation*** – Refer to “Installing Maximizer CRM Workstation” on page 54.
- 4** ***MaxExchange Synchronization Server*** – Refer to the *MaxExchange Administrator's Guide*.

# Installing Maximizer CRM Server

**i** You must be logged in to Windows as an administrator to install Maximizer. After installation, you may be prompted to restart the computer, and then you must log in as an administrator again to complete the installation.

An installation wizard steps you through the process of installing the software on the server. The instructions in this section complement the wizard to provide additional information.

Note that Maximizer Web Access, Customer Access, Partner Access, and Mobile Access are installed automatically with Maximizer CRM Server when the Maximizer Components for Microsoft IIS option is selected. You can enable the sites while installing Maximizer CRM Server or later. For information on enabling sites, see “Enabling Web Access Sites” on page 211.

## **IMPORTANT NOTE FOR CONFIGURATIONS RUNNING THE MAXIMIZER APPLICATION SERVER AND MICROSOFT IIS SERVER ON THE SAME MACHINE:**

In a typical Maximizer CRM environment, the Maximizer application server and Microsoft IIS server are on two separate machines, and you must run the Maximizer CRM Server setup once on each machine:

- First install Maximizer Server on the Maximizer application server machine, using the Maximizer CRM Server disc.
- Then install Maximizer Components for Microsoft IIS on the Microsoft IIS server machine, using the Maximizer CRM Server disc.

However, if your Maximizer application server and Microsoft IIS server are running on the SAME machine, do not attempt to run the Maximizer CRM Server installation twice on the same machine. Instead, select both options in step 7 of the following procedure.

### ➤ **To install Maximizer**

- 1** Close all programs running on the computer.
- 2** Insert the Maximizer CRM Server disc. (The server and workstation versions are on separate discs.)

The setup starts automatically.

- 3** Select **Install Maximizer CRM Server**.

The InstallShield Wizard starts.

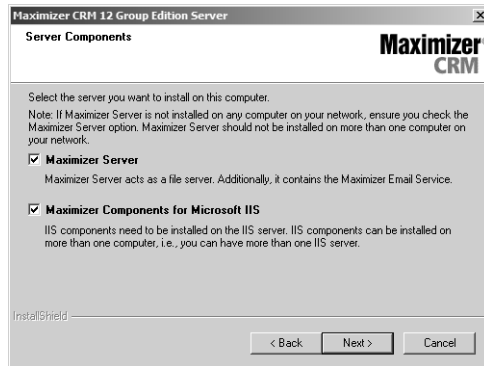
- 4** Click **Next** to begin the installation.
- 5** Read the license agreement, and click **Yes** to continue.
- 6** Enter your **Customer Number**, **Product Serial Number**, and your contact information, and click **Next**.

**i** If the setup doesn't start automatically, you can start it manually by running setup.exe from the MaxEnt folder of the disc (e.g., \MaxEnt\setup.exe).

- 7** Select **Maximizer Server**, and click **Next**.

**NOTE:** If you are installing Maximizer Server on the machine that is also your IIS Server, you must select both **Maximizer Server** and **Maximizer Components for Microsoft IIS** now to install them both on the machine.

To install Maximizer components for IIS, select **Maximizer Components for Microsoft IIS**.



- 8** Click **Next** to install Maximizer Server components to the default location.

– or –

Click **Browse**, select a destination folder, and click **Next**.

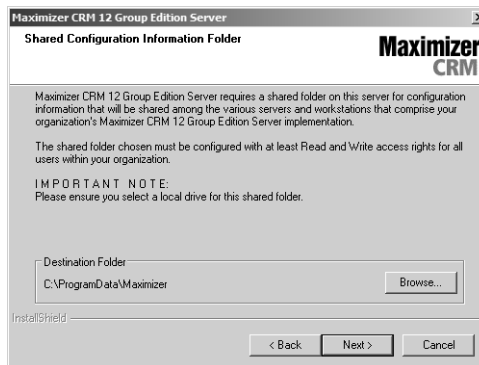


**i** Do not change any default share names, file names, file locations, folder names, or folder locations after installing Maximizer. If you want to use names and locations other than the defaults, change them during the installation.

- 9** Click **Next** to use the default folder for shared configuration information.

– or –

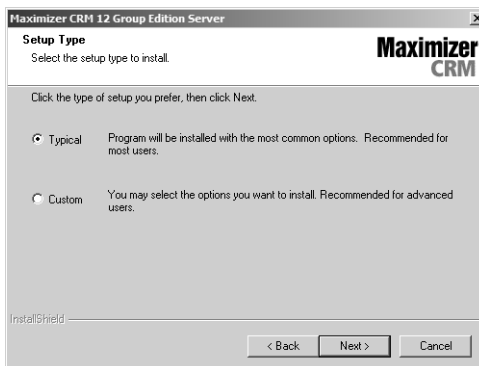
Click **Browse**, select a local shared folder, and click **Next**.



**i** Maximizer creates the "Maximizer" folder on the drive where the Windows operating system is installed. If your Windows operating system is not on the C drive, the path will have a different drive letter.

By default, Maximizer setup creates the folder **...|All Users|Application Data\Maximizer** on the server, and it creates two shared subfolders called **AddrBks** and **SvrShare**. These folders must be shared on the network so other PCs can access to resources installed to this location. The default Share name of AddrBks is "MxData", and the default Share name of SvrShare is "MxServer".

**10** Select a setup type, and click **Next**.



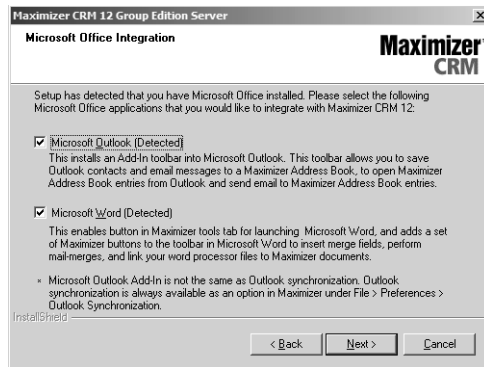
- **Typical** – installs a default set of server software, such as Windows services, server-side software, and drivers. It also installs a default set of Maximizer user applications on the server. Maximizer recommends that you select the Typical installation, unless you have a specific reason not to.
- **Custom** – enables you to select specific Maximizer modules to install. You can select virtually any combination of server software and user applications you want. Select this option only if you have a specific reason to alter the default



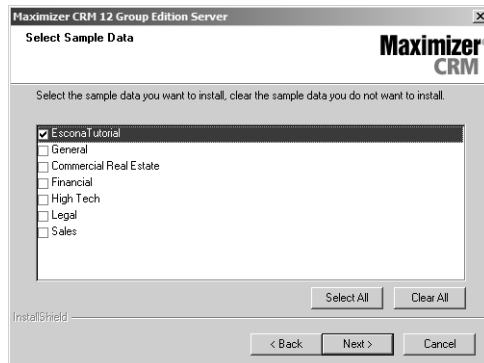
Maximizer installation provided by the Typical installation. Additional components available through the custom installation includes MaxExchange Remote.

To install Dashboard components for IIS, select **Custom**.

- 1 1** If you have Microsoft Outlook or Microsoft Word installed on this computer, the wizard prompts you to integrate either or both of those applications with Maximizer. Select which applications to integrate, and click **Next**.

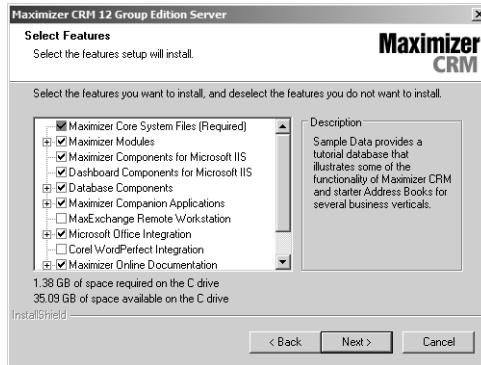


- 1 2** (This step applies only to Typical installations.) Select which sample Address Books to install.

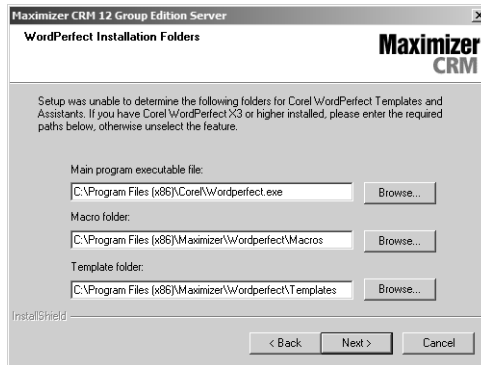


**1 3** (This step applies to Custom Installations only.) Select which features to install on the server, and click **Next**.

If you would like to select additional components, click the + to expand the selection.

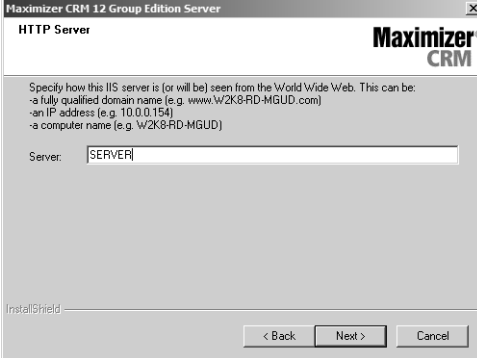


**1 4** (This step applies to the Core WordPerfect Integration option only.) If the setup cannot locate Core WordPerfect Office on the computer, it prompts you to provide the path to these files and folders. Click **Browse** to select the correct paths, and click **Next**.



**1 5** (The next 3 steps apply only if you selected **Maximizer Components for Microsoft IIS** in step 7.) The installation

prompts you to enter the name of your *HTTP Server*. Enter the name, and click *Next*.



The screenshot shows the 'HTTP Server' configuration window for 'Maximizer CRM 12 Group Edition Server'. The window title is 'Maximizer CRM 12 Group Edition Server' and the subtitle is 'HTTP Server'. It contains a text box for 'Server:' with the value 'SERVER'. Below the text box is a 'Next >' button. The window also includes a 'Back' button and a 'Cancel' button at the bottom right. The Maximizer CRM logo is in the top right corner.

Maximizer CRM 12 Group Edition Server

HTTP Server

Specify how this IIS server is (or will be) seen from the World Wide Web. This can be:

- a fully qualified domain name (e.g. www.W2K8-RD-MGUD.com)
- an IP address (e.g. 10.0.0.154)
- a computer name (e.g. W2K8-RD-MGUD)

Server: SERVER

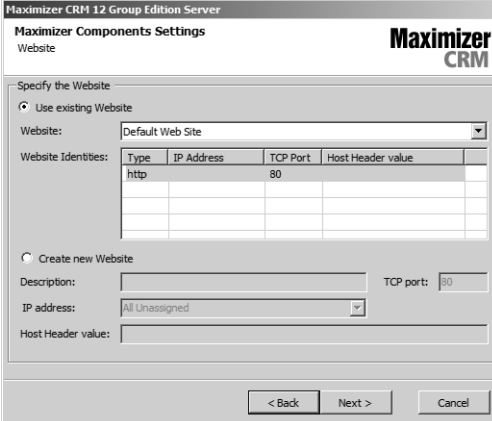
InstallShield

< Back Next > Cancel

### 16 Specify the Website for the Maximizer Components for Microsoft IIS settings, and click *Next*.

If you choose to use an existing website, select the website from the drop down. Its identities are displayed in the website identities area.

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



The screenshot shows the 'Maximizer Components Settings' window for 'Maximizer CRM 12 Group Edition Server'. The window title is 'Maximizer CRM 12 Group Edition Server' and the subtitle is 'Maximizer Components Settings Website'. It contains a 'Specify the Website' section with two radio buttons: 'Use existing Website' (selected) and 'Create new Website'. Under 'Use existing Website', there is a 'Website:' dropdown menu showing 'Default Web Site'. Below this is a 'Website Identities' table with columns: Type, IP Address, TCP Port, and Host Header value. The table has one row with 'http' in the Type column and '80' in the TCP Port column. Under 'Create new Website', there are text boxes for 'Description:', 'IP address:' (with a dropdown menu showing 'All Unassigned'), 'Host Header value:', and a 'TCP port:' spinner box set to '80'. The window also includes a 'Back' button and a 'Next >' button at the bottom right. The Maximizer CRM logo is in the top right corner.

Maximizer CRM 12 Group Edition Server

Maximizer Components Settings

Website

Specify the Website

☒ Use existing Website

Website: Default Web Site

Website Identities:

| Type | IP Address | TCP Port | Host Header value |
|------|------------|----------|-------------------|
| http |            | 80       |                   |
|      |            |          |                   |
|      |            |          |                   |
|      |            |          |                   |

☐ Create new Website

Description: TCP port: 80

IP address: All Unassigned

Host Header value:

< Back Next > Cancel

- 1 7** Specify the name of the virtual directory for each of the web access sites, select **Enabled** for each site you want to enable, and click **Next**.

- 1 8** Specify your SMTP Server settings, and click **Next**.

**i** The SMTP Server is used by the Maximizer Email Service.

If your ISP requires authentication, you must select the **Outgoing mail server requires authentication** checkbox and enter the **User name** and **Password** of a valid account.

**i** Not all of these checkboxes may be available, depending on which installation options you selected.

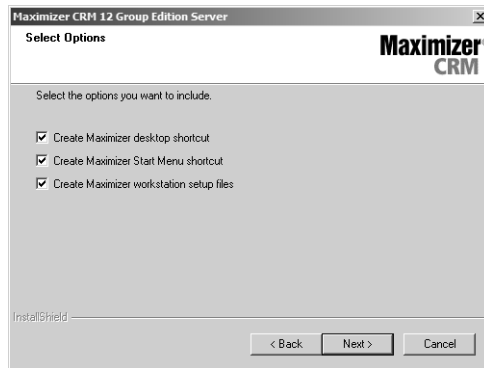
- 1 9** Select any of the following options, and then click **Next**:

- **Create Maximizer desktop shortcut** – This option creates an icon on the Windows desktop that runs Maximizer when you double-click it.
- **Create Maximizer Start Menu shortcut** – This option creates a shortcut to Maximizer on the Windows Start menu.
- **Create MaxExchange desktop shortcut** – This option is available only if you selected the Custom installation option

and then selected the MaxExchange Remote option. It creates a shortcut icon for MaxExchange on the Windows desktop.

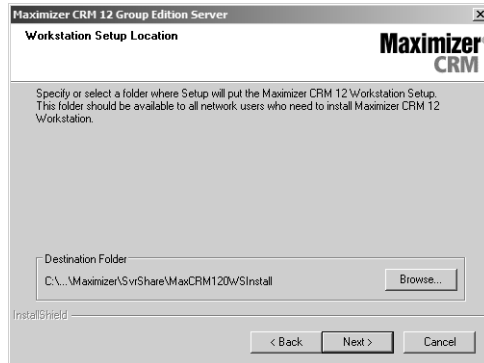
**i** Creating the Maximizer Workstation setup files causes the Maximizer Server installation to take much longer. Select this option only if necessary. For more information, see “Installing Maximizer CRM Workstation over the Network” on page 54.

- **Create Maximizer workstation setup files** – This option creates a set of setup files on the Maximizer Server. If you choose to create these setup files, you can install Maximizer Workstation on any computer by connecting to the Maximizer Server over the network and running this setup—no installation disc is required.

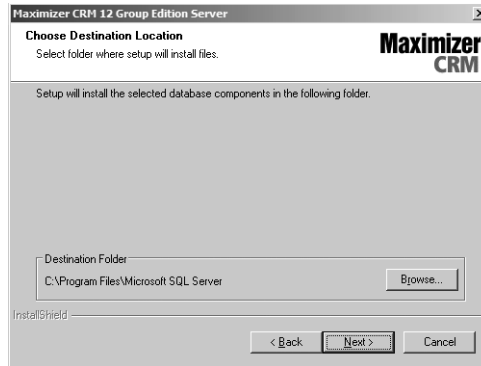


**i** This folder must be shared and available to all network users who need these files to install Maximizer CRM Workstation.

**20** (This step applies to the *Create Maximizer workstation setup files option only*.) Select a location to install the workstation setup files, or use the default location, and click **Next**.



- 2 1** Review the installation settings, and click **Next**.
- 2 2** Select a location to install the database components or use the default location, and click **Next**.



- 2 3** The wizard displays an installation progress indicator. After the installation is complete, click **OK** to close the message box.

The installation may prompt you to restart your computer.

- 2 4** Click **Finish** to close the wizard and restart the computer (if necessary).
- 2 5** If your computer needed to restart, log in to Windows using an administrator account. This step is required to complete the installation.

If you are installing Maximizer CRM Server, and your Microsoft IIS server is on a different machine, install **Maximizer Components for Microsoft IIS** on your Microsoft IIS machine, from the Maximizer CRM Server disc, as described in the following section.

## Installing Maximizer Components for Microsoft IIS

**i** You must be logged into Windows as an administrator to install Maximizer. After installation, it prompts you to restart the computer, and then you must log in as an administrator again to complete the installation.

The Maximizer Components for Microsoft IIS installation is required to install the web access sites. Microsoft IIS must already be installed. To install Dashboard components for IIS, you must complete a custom installation of the Maximizer server and select the Dashboard Components for IIS option in the Select Features screen. For information on installing Maximizer server, see "Installing Maximizer CRM Server" on page 42.

**NOTE:** The following procedure is to install Maximizer Components for Microsoft IIS only on a machine that is not the Maximizer application server. To add the Maximizer Components for Microsoft IIS to an existing Maximizer application server, ensure the installation

media is accessible from the application server. For example, if you installed the Maximizer application server from the disc, the disc must be in the drive. If you installed the Maximizer application server from another machine on the network, the other machine must be accessible. Then, modify the Maximizer installation via the Add/Remove Programs module in the Control Panel, and enable the Maximizer Components for Microsoft IIS option.

➤ **To install Maximizer Components for Microsoft IIS**

- 1** Close all programs running on the server.
- 2** Insert the Maximizer CRM Server disc. (The server and workstation versions are on separate discs.)

The setup starts automatically.

- 3** Select **Install Maximizer CRM Server**.

The InstallShield Wizard starts.

- 4** Click **Next** to begin the installation.
- 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** 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 machine.

- 8** Click **Next** to install to the default location.  
– or –  
Click **Browse**, select a destination folder to install Maximizer CRM, and click **Next**.
- 9** Click **Browse**, and select the same SQL Server that you selected for the Maximizer Server installation.
- 10** Enter the SQL administrator **User name** and **Password**, and click **Next**.
- 11** 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.yourcompany.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

**i** If the setup doesn't start automatically, you can start it manually by running setup.exe in the MaxEnt folder of the disc (e.g., D:\MaxEnt\setup.exe).

**i** If the setup is unable to stop the IIS Server, select Start > Settings > Control Panel > Administrative Tools > Services and stop the IIS Admin Service.

flexibility in the event that a fully qualified domain name is not available at the time of installation.

- 1 2** Specify the Website for the Maximizer Components for Microsoft IIS settings, and click **Next**.

If you choose to use an existing website, select the website from the drop-down list. Its identities are displayed in the website identities area.

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

- 1 3** Specify the name of the virtual directory for each of the web access sites, select **Enabled** for each site you want to enable, and click **Next**.

- 1 4** 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, as shown below.

- 1 5** Click **Finish** to close the wizard.

- 1 6** After the computer restarts, log in to Windows using an administrator account. This step is required to complete the installation.

Maximizer Components for Microsoft IIS are now installed.

## Setting Full Permissions to the Maximizer Web Access Temp Folder

In Windows Server 2003 or Windows Server 2008, after installing Maximizer and setting more secure permissions on the Maximizer directory (as described in "Setting File and Directory Permissions" on page 26), give the IIS/ASP.NET account full permissions to the following folder to allow documents to be downloaded from the Maximizer Web Access:

...|Program Files|Maximizer|Portals|Employee|Temp

- **To set full permissions to the Maximizer Web Access Temp folder**

- 1** On the IIS server, locate the following folder:

...|**Program Files** **Maximizer**|**Portal**|**Employee**|**Temp**



**2** In Windows Server 2003, right-click the *Temp* folder and select *Sharing and Security*. Click the *Security* tab.

In Windows Server 2008, right-click the *Temp* folder and select *Security*. Click *Properties*, then select the *Security* tab. Click *Edit*.

**3** Click *Add*.

**4** Click *Locations*

**5** Select the local machine.

**6** In Windows Server 2003, enter *IIS\_WPG* and click *OK*.

In Windows Server 2008, enter *IIS\_USRS* and click *OK*.

**7** Check *Full Control*.

**8** Click *OK*.

## Installing Maximizer CRM Workstation

After installing Maximizer on the server and performing the steps listed under “Installation Checklist” on page 30, follow the steps in this section to install Maximizer on the workstation computer.

You can install Maximizer Workstation from the Workstation Setup files on the server or from the disc.


The following sections explain the methods for installing Maximizer Workstation:

- “Installing Maximizer CRM Workstation over the Network” on page 54
- “Installing Maximizer CRM Workstation from the Disc” on page 55

### Installing Maximizer CRM Workstation over the Network

To install Maximizer Workstation over the network using the Workstation Setup files on the server, you must have selected the **Create Maximizer Workstation setup files** option during the Maximizer Server installation.

#### ► **To install Maximizer CRM Workstation from the Workstation Setup file on the server**

 You must be logged into Windows as an administrator to install Maximizer. After installation, it prompts you to restart the computer, and then you must log in as an administrator again to complete the installation.

- 1** On the workstation, open Windows Explorer and browse to the following shared directory on the Maximizer Server:

\\<server\_name>\MxServer\MaxCRMWSInstall\

- 2** Double-click **setup.exe** to run it.

The Installshield Wizard starts.

- 3** Complete the installation as described in the next procedure, beginning at step 4.

## Installing Maximizer CRM Workstation from the Disc

**i** You must be logged into Windows as an administrator to install Maximizer. After installation, it prompts you to restart the computer, and then you must log in as an administrator again to complete the installation.

**i** If the setup doesn't start automatically, you can start it manually by running setup.exe in the MaxEnt folder of the disc (e.g., D:\MaxEnt\setup.exe).

### ➤ *To install Maximizer CRM Workstation from the disc*

**1** Close all programs running on the computer.

**2** Insert the Maximizer CRM Workstation disc.

The setup starts automatically.

**3** Select **Install Maximizer CRM Workstation**.

The InstallShield Wizard starts.

**4** Click **Next** to begin the installation.

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

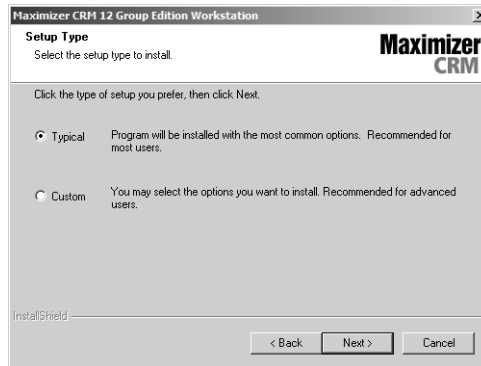
– or –

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

The Maximizer database files install to the ...\\Documents and Settings\\<localuser>\\Application Data\\Maximizer\\ folder. If other users should be able to access these database files, you must grant those users permissions to ...\\Documents and Settings\\<localuser>\\ folder.



**8** Select a setup type, and click **Next**.



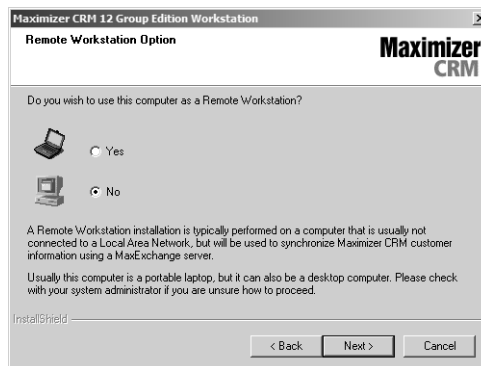
**Typical** installs the standard Maximizer CRM components. Administrator is not installed by default on workstation installations. To install Administrator on a workstation, select Custom.

**Custom** enables you to select additional, optional components to install, such as Administrator, and MaxAlarm.

**9** If this computer will operate as a Remote Workstation, select **Yes**, and click **Next**.

Otherwise, click **Next** to install the default, local setup.

**i** A Remote Workstation is for mobile users who are typically not connected to the network, but use MaxExchange to synchronize with a central database. Remote Workstations are frequently portable computers.

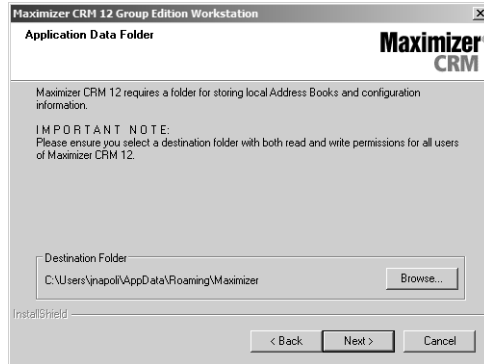


**1 0** (This step applies to Remote Workstation setups only.)

Click **Next** to use the default folder for storing local Address Book and configuration information.

– Or –

Click **Browse**, select a different folder, and click **Next**.

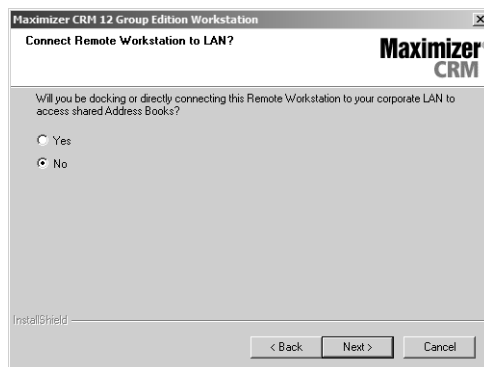


**1 1** (This step applies to Remote Workstation setups only.)

Select **Yes** if this Remote Workstation will also connect to the Maximizer Server through the LAN, and click **Next**.

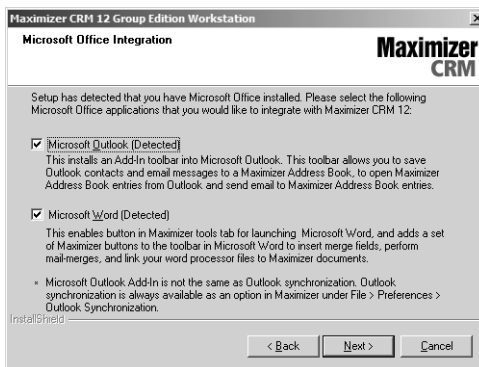
Otherwise, click **Next** to install the Remote Workstation setup without LAN support.

**i** This Remote Workstation synchronizes its local database with a MaxExchange Synchronization Server and occasionally connects directly to the Maximizer Server when docked back to the LAN.



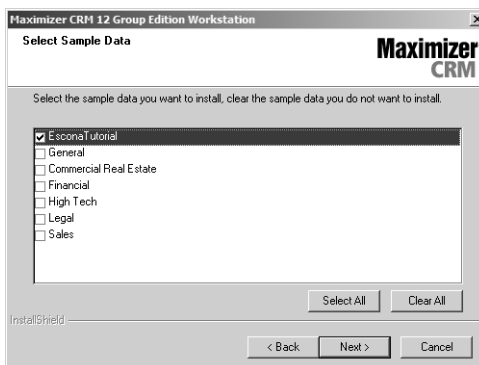
**1 2** If Microsoft Outlook or Microsoft Word is installed on this computer, the wizard prompts you to integrate either or both of

those applications with Maximizer. Select the applications to integrate, and click **Next**.

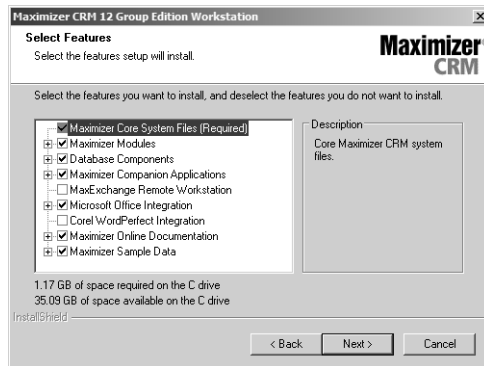


**i** The Maximizer documentation uses Escona Tutorial as its sample Address Book.

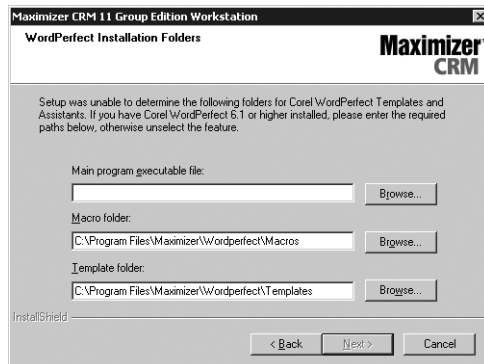
**1 3** (This step applies to Typical installations only.) Select any or all of the sample Address Books to install.



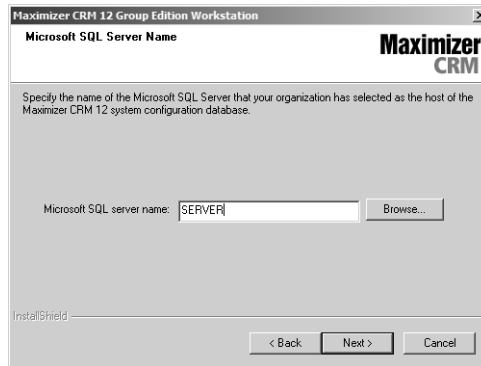
- 1 4** (This step applies to Custom installations only.) Select which features to install on the server, and click **Next**.



- 1 5** (This step applies to the Corel WordPerfect Integration option only.) If the setup cannot locate Corel WordPerfect on the computer, it prompts you to provide the path to these files and folders. Click **Browse** to select the correct paths, and click **Next**.



- 1 6** (This step does not apply to Remote Workstation installations without LAN connections.) Enter the name of the Maximizer Server, and click **Next**.



- 1 7** Select any of the following options you want for Maximizer and MaxExchange, and click **Next**.

**i** Not all of these checkboxes may be available, depending on which installation options you selected.

**Create Maximizer desktop shortcut** – This option creates an icon on the Windows desktop that runs Maximizer when you double-click it.

**Create Maximizer Start Menu shortcut** – Creates a shortcut to Maximizer on the Windows Start menu (Start > Programs > Maximizer CRM).

**Create MaxExchange desktop shortcut** – This option appears only if you selected the MaxExchange Remote installation option. It creates a shortcut icon for MaxExchange on the Windows desktop.

- 1 8** Review the installation settings, and click **Next** to begin installing.

The wizard displays an installation progress indicator.

- 1 9** Click **OK** to close the message box.

The installation wizard prompts you to restart the computer.

- 2 0** Click **Finish** to close the wizard and restart the computer.

- 2 1** After the computer restarts, log into Windows using an administrator account. This step is required to complete the installation.

Maximizer CRM Workstation is now installed.



## Installing Maximizer Companion Applications

The following table explains how to install each of the Maximizer companion applications. For information about each of these applications, refer to “Maximizer CRM Modules and Components” on page 5.

| Application                                  | Installation Instructions   |
|--|---|
| MaxExchange Synchronization Server           | Refer to the <i>MaxExchange Administrator's Guide</i> .   |
| MaxExchange Remote Synchronization Server    | Refer to “Installing Maximizer CRM Server” on page 42. During the Maximizer CRM Server installation, select Custom, and select the MaxExchange Remote option. |
| MaxExchange Remote Workstation               | Refer to “Installing Maximizer CRM Workstation” on page 54.   |
| Workflow Automation Powered by KnowledgeSync | On the Maximizer CRM Server Setup disc, select Install Workflow Automation Powered by KnowledgeSync and follow the on-screen instructions.                    |
| MaxAlarm                                     | MaxAlarm is available in the Custom Installation options of the Maximizer CRM Setup disc.   |
| MaxMobile                                    | Refer to the <i>MaxMobile Getting Started Guide</i> .   |
| MaxSync for Microsoft Exchange               | Refer to “Installing MaxSync for Microsoft Exchange” on page 183.   |
| MaxMobile Wireless Server                    | Refer to the <i>MaxMobile Getting Started Guide</i> .   |

## Installing Microsoft Office Integration for Maximizer Web Access

You can install Microsoft Word and Microsoft Outlook Integration for Maximizer Web Access on server and workstation computers. Each integration installs a Maximizer Web Access toolbar menu in Word or Outlook. These integrations are different from the Microsoft Office integrations that are available while installing Maximizer.

You can also install Word and Outlook integration directly in Maximizer Web Access. The procedure involves downloading ActiveX controls, which may be disallowed on some networks. For more information, see the *Maximizer CRM User's Guide*.

➤ ***To install Word or Outlook integration for Maximizer Web Access***

- 1** Insert the Maximizer CRM Server or Maximizer CRM Workstation disc.

The setup starts automatically.

- 2** Select ***Browse this Disc.***

- 3** Open the ***Office\_Integration*** folder.

- 4** Double-click one of the following files:

- ***MSWordInt.msi*** to install Word integration.
- ***OutlookInt.msi*** to install Outlook integration

The InstallShield Wizard starts.

- 5** Follow the steps outlined in the wizard to install the files.

## Adding and Removing Maximizer CRM Components

Maximizer enables you to add and remove specific components of the software without having to reinstall Maximizer itself.

### ➤ *To add or remove Maximizer CRM components*

- 1** Close all programs running on the computer
- 2** Insert the Maximizer disc.
- 3** On the Setup disc Autorun screen, select ***Install Maximizer CRM Server*** or ***Install Maximizer CRM Workstation***.

If the setup doesn't start automatically, you can start it manually by running setup.exe from the MaxEnt folder of the disc (e.g., \MaxEnt\setup.exe).

- 4** Select ***Modify***, and click ***Next***.

Checkboxes are automatically selected for any currently installed components.

 Expand the branches to add or remove sub-components.

- 5** Select the checkbox beside any components to add.
- 6** Clear the checkbox beside any components to remove.

If a component is already installed, and you want to keep it, do not clear the checkbox beside that component.

- 7** Click ***Next***.

Maximizer begins the update.

## Installing Licenses

You must have enough licenses for the total number of enabled users across all installed Maximizer products, including Maximizer and Maximizer Web Access. When you purchase licenses from Maximizer Software, you receive a Product License Number (PLN), which includes licenses for a specified number of users. Once installed, licenses must be activated before they can be used. In order to activate your licenses you must have a current maintenance account.

Maximizer licenses are stackable. For example, if you have 14 licenses and want to upgrade to 32, you just need a new PLN for 18 users, and you can apply it in addition to the original 14-user PLN.

In a MaxExchange environment, licenses are synchronized between sites. The total number of synchronized licenses applies to enabled and logged-in users at any site.

Note that the Maximizer system login accounts (EMAILUSER and WEBUSER) are always enabled and do not consume any Maximizer licenses. Also, the MASTER user account is always enabled, and it consumes a license only if you are logged in to Maximizer using the MASTER user account.

The following sections contain information on installing Maximizer licenses:

- “Installing a License” on page 64
- “Applying a License” on page 65
- “Viewing Applied and In-Use Licenses” on page 65

## Installing a License

After you install Maximizer or purchase additional licenses, you must install the Product License Numbers (PLN). The following procedure applies to all Maximizer CRM products.

If you install additional multi-user licenses after activating Maximizer, you must activate the licenses before using them. In order to activate your licenses you must have a current maintenance account.

### ➤ *To install a product license number (PLN)*

- 1** Run Administrator.
- 2** Select **Utilities > Install Multi-User License**.
- 3** Enter the PLN.
- 4** Click **Install License**.

- 5** Repeat steps 3 and 4 to install any additional licenses.
- 6** To activate the licenses, click **Activate**. And in the Activation dialog box, click **Activate** again.
- 7** Click **Close**.

Administrator closes automatically.

The next step is to apply the PLN(s) to the Address Books.

## Applying a License

After you have installed a PLN, you must apply it to the Maximizer Address Book(s).

### ➤ *To apply a product license number (PLN)*

- 1** After installing a PLN, start Administrator.
- 2** Open and close each Address Book that you are applying licenses to.

The license has now been applied to the Address Book(s).

## Viewing Applied and In-Use Licenses

### ➤ *To view the number of applied and in-use licenses*

- In Administrator, select **Reports > Current Users**.

## Activating Maximizer

In order to use your Maximizer software and licenses you must activate them. After installing Maximizer for the first time, you can use the software for a limited period of time before you are required to activate the software. Once this grace period is over, you will be unable to log in to any of your Maximizer products until you activate the software.

- You are prompted to activate the software when you first log in. You can also activate the software from the ***Install Multi-user Licenses*** dialog box in Administrator.
- If you install additional multi-user licenses after activating Maximizer, you must activate the licenses before you can use them or create new users.
- In order to activate your software and licenses, you must have a current maintenance account.
- If you upgrade from a version of Maximizer that has already been activated, there will be no grace period and you will need to activate the Maximizer software immediately before you can use it.

### ➤ ***To activate your software and licenses***

- 1** Run Administrator.
- 2** Select ***Utilities > Install Multi-User License***.
- 3** Click ***Activate***.
- 4** Click ***Install License***.
- 5** Verify that your ***Customer No.*** and ***Product serial number (PSN)*** are correct, and click ***Activate***.

The software will attempt to contact Maximizer servers to verify your Customer Number and Product Serial Number and maintenance status. Once your information has been verified, a confirmation dialog is displayed to let you know that activation was successful.

If the Internet activation is unsuccessful, you are given the option to contact a Maximizer customer support representative to obtain an Activation Code that you can use to activate the software.

- 6** Click ***OK*** to close the confirmation dialog. Your Maximizer software and all licenses are now activated.

## Where to Go from Here...

- Create a new Address Book or upgrade an existing Address Book to the latest version of Maximizer, as described in chapter 4 “Creating or Upgrading Address Books” on page 69.
- Create login accounts for Maximizer users and assign users to security groups and sales and marketing teams, as described in chapter 5 “Setting Up Users, Groups, and Teams” on page 83.
- Configure Address Book preferences, including duplicate Address Book entry handling, user-defined fields, key fields, customer service and opportunity email notification templates, and event notification, as described in chapter 6 “Configuring an Address Book” on page 117.
- Configure the Address Book for access through Maximizer Web Access

Maximizer Web Access permit users to access the Maximizer Address Book data from any Internet-connected computer using a browser such as Internet Explorer. You can enable Maximizer Web Access by making certain modifications to the Address Book. See “Configuring Web Access” on page 207.

- If you are using MaxExchange, configure the central Address Book for synchronization.

You can synchronize a Maximizer Address Book between a central location and one or more remote computers using MaxExchange. Using MaxExchange, a mobile sales force or a remote office can keep a local copy of the Maximizer Address Book current with the Maximizer Address Book in a central office. Updates are made via FTP, a direct network connection, or email.

For information on installing, configuring, and using MaxExchange Synchronization Server, refer to the *MaxExchange Administrator's Guide*.

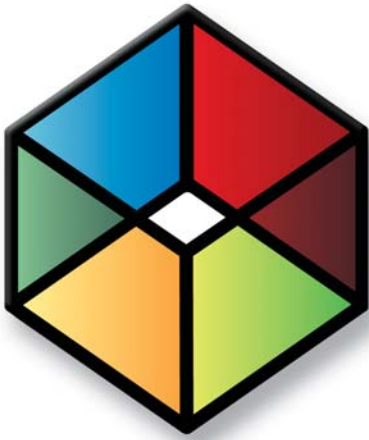
To install MaxExchange Remote on a Maximizer Workstation, refer to “Installing Maximizer CRM Workstation” on page 54.

To install MaxExchange Remote on a Maximizer Server, refer to “Installing Maximizer CRM Server” on page 42. During the Maximizer Server installation process, select Custom installation, and select the MaxExchange Remote as an installation option.

- For more information on converting a database, please refer to chapter 13 “Managing Address Book Data” on page 315.







# CHAPTER 4 **Creating or Upgrading Address Books**

## In this chapter...

- "What is Administrator?" on page 70
- "Creating Address Books" on page 72
- "Connecting to an Address Book" on page 75
- "Deleting Address Books" on page 76
- "Maximizer System Login Accounts" on page 77
- "Changing the MASTER User Password" on page 78
- "Upgrading or Converting an Address Book" on page 79
- "Time Zone Alignment" on page 80
- "Importing Vertical Templates" on page 81

## What is Administrator?

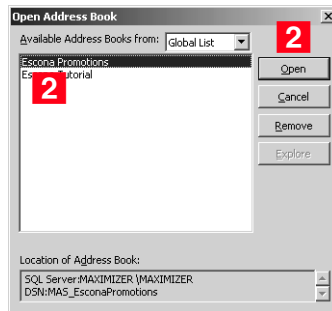
Administrator is the administrative center of Maximizer. Use it to complete the following tasks:

- Create and configure Address Books.
- Set up user-defined fields for different types of entries.
- Manage Maximizer application settings.
- Customize Maximizer fields and settings.
- Manage users, sales/marketing teams, and security groups.
- Set up synchronization with remote sites (applies to MaxExchange installations only).

Once Administrator is running, you can open any Address Book and perform administrative tasks. There will be no database conflicts if you open an Address Book while it is in use by another user. (However, you should ensure all users have logged out before backing up or restoring the Address Book.)

### ► *To log in to Administrator*

- 1** Click *Start > Programs > Maximizer CRM > Administrator*.
- 2** Select an Address Book, and click *Open*.



**i** The default MASTER user password is "control", unless it has already been changed to another password in any Maximizer Address Book on the server.

- 3** Enter the User ID and password of an administrator, and click **OK**.



The Address Book opens in Administrator.

➤ **To open an Address Book**

- 1** In Administrator, select **File > Open Address Book**.
- 2** Select an Address Book, and click **Open**.
- 3** Enter the User ID and password of an administrator, and click **OK**.

## Creating Address Books

**i** Sample Address Books are installed with Maximizer and demonstrate how a company would use Maximizer. Do not use the sample Address Book for your own data.

**i** For information about transferring Address Book information, refer to "Importing Address Book Data from MXI or XML Files" on page 336 and "Transferring Entries between Address Books" on page 359.

Once you have familiarized yourself with Maximizer by using a sample Address Book, such as Escona Tutorial, your first administrative task is to set up a new Address Book.

Administrator makes it easy to create your Address Book in a few steps, and even enables you to create it using some of the settings from an existing Address Book, such as preferences, templates, user-defined fields, and macros.

Once you've created the Address Book, set up user accounts and configure security and preferences. If you need to add entries from another Address Book, Maximizer can transfer those entries to the new Address Book. Any user can transfer Address Book information, provided that they have sufficient security privileges in their account.

When using MaxExchange Remote with a newly created Address Book, open the Address Book in Maximizer before attempting synchronization. Refer to the *MaxExchange Administrator's Guide* for more information.

The following sections contain information on creating Address Books in Maximizer:

- "Checklist: Setting Up an Address Book" on page 72
- "Global and Local Address Book Lists" on page 73
- "Creating an Address Book" on page 74

### Checklist: Setting Up an Address Book

Use this list to help you set up a new Maximizer Address Book. Perform these steps in the order shown here.

- 1** **Create the new Address Book.** Refer to "Creating an Address Book" on page 74.
- 2** **Change the MASTER user password.** Refer to "Changing the MASTER User Password" on page 78.
- 3** **Enable security for an Address Book.** This applies only if there are multiple users in your Address Book. To enable security, select the **Enable security** option on the **System Options** tab in Administrator preferences. Refer to "Address Book Preferences" on page 118.
- 4** **Add users to the Address Book.** When a new Address Book is created, it contains only the MASTER user accounts. Create an account for each Maximizer user. Refer to "Adding a User to an Address Book" on page 84.

- 5** *Set up security for users and security groups.* You may want some users to have more access to your Address Book data than other users. Administrator lets you restrict access to specific users and groups of users. Refer to “User and Group Security” on page 92.
- 6** *Test the Address Book.* In Maximizer, log in to the Address Book with one or more of the new user accounts.

## Global and Local Address Book Lists

When users open Address Books from Maximizer workstations, they have the option of choosing between a Local or Global Address Book list.

- **Local:** The Address Books in the Local Address Book list reside on the local workstation.
- **Global:** The Address Books in the Global Address Book list reside on the server. Use this list to access shared Address Books. When creating a global Address Book, it is recommended that you create the new Address Book on the Maximizer Server. If you create a new global Address Book from the workstation, you must have administrative rights to the server.

You cannot create automated campaigns in a local Address Book. Therefore, campaign users must create their Address Books in the Global List, so automated campaigns can be created on the Maximizer Server. You must also use the Global setting to access shared Address Books.

### ➤ *To change the Address Book list on a workstation*

- 1** In the top-left corner of the window, click the **Maximizer** button, and select **Open Address Book**.
- 2** Choose **Local** or **Global**. This setting affects the listed Address Books.

## Creating an Address Book

Use Administrator or Maximizer to create new Address Books.

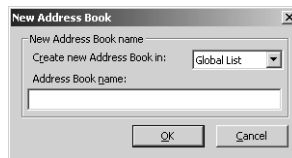
After the new Address Book is created and added to the list of Address Books in Maximizer, each workstation receives the updated Address Book list when logging in.

### ► *To create a new Address Book*

**1** In Administrator, select **File > New Address Book**.

– or –

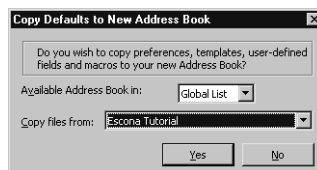
In Maximizer, in the top-left corner of the window, click the **Maximizer** button, and select **New Address Book**.



**2** Type the name of the new Address Book in the **Address Book name** field, and click **OK**.

**3** Click **OK**.

Maximizer prompts you to copy defaults from an existing Address Book to the new Address Book.



**4** Click **Yes** to copy the default settings, or click **No** to create a blank Address Book.

Maximizer creates the new Address Book.

## Connecting to an Address Book

Maximizer allows you to connect to any Address Book on a computer running SQL Server Express. The computer can be a Maximizer workstation or a server.

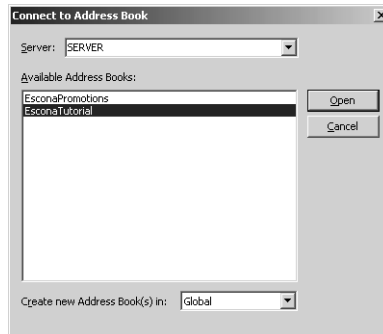
### ► *To connect to an Address Book*

- 1 From Administrator, select **File > Connect to Address Book**.

– or –

From Maximizer, in the top-left corner of the window, click the **Maximizer** button, and select **Connect to Address Book**.

- 2 In the **Connect to Address Book** dialog box, select the computer that hosts the Address Book to which you would like to connect.
- 3 Choose an Address Book from the **Available Address Books** list and click **Open**.



- 4 Choose Local or Global in the **Create new Address Book in** field.
- 5 When you are connected to the Address Book, you are prompted with a message saying the connection was successful. Click **OK** to close the message dialog box.

Once the connection to an Address Book is established, it appears in the Open Address Book window. You can use the Remove button in the Open Address Book dialog to remove it from the available Address Book list.

## Deleting Address Books

You can remove any existing Address Books from Address Book lists. When you remove the Address Book, the data remains in the database. You can later employ the database to log in to the Address Book again.

### ➤ *To remove an Address Book*

- 1** Select *File > Open Address Book*.
- 2** Select the Address Book, and click *Remove*.
- 3** At the prompt, click *OK*.
- 4** Enter the user ID and password of an administrator for the Address Book.
- 5** Click *OK*.



## Maximizer System Login Accounts

When a new Maximizer Address Book is created, the following login accounts are created automatically:

- **MASTER** is required to log into the Administrator module of Maximizer.
- **EMAILUSER** gives Maximizer access to Address Book data when it performs automated email activities such as automated campaigns. It is also used by MaxSync for Microsoft Exchange.
- **WEBUSER** is required for Customer Access and Partner Access.
- **COMPANY** is used for the company calendar, which displays company events in the Maximizer calendar. Company calendar events are created under the COMPANY user account. This user account provides read-only access of its calendar to all users.
- **maximizer\_default** is a system login created in the Maximizer instance of Microsoft SQL. It is only used by Maximizer and MaxExchange and cannot be used to login to Maximizer or Microsoft SQL. If this user is missing see “Recreating the Maximizer\_Default User” on page 370.

It is important to leave these user accounts enabled the default settings. Maximizer requires these accounts to function correctly. The Maximizer system login accounts (EMAILUSER and WEBUSER) do not consume any Maximizer licenses. The MASTER user account consumes a license only if you are logged into Maximizer with the MASTER user account.

It is important to change the password for the system login accounts from the default immediately after creating an Address Book. For instructions on changing the account passwords, refer to “Changing the MASTER User Password” on page 78.

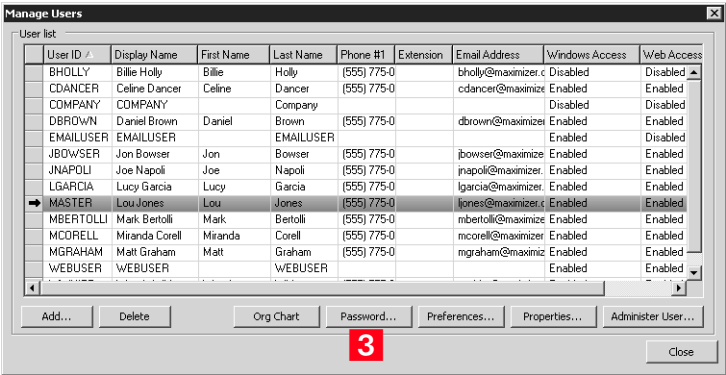
# Changing the MASTER User Password

**i** If the MASTER password for an existing Address Book has been changed, and then you create a new Address Book, the new Address Book will have the same password as the existing Address Book, and not "control".

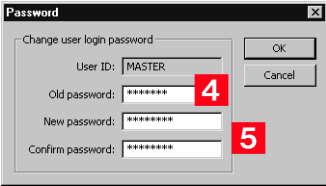
The default password for the MASTER user is *control*. For security reasons, you should change this password immediately after creating a new Address Book. Maximizer also creates the WEBUSER and EMAILUSER system user accounts, and it's important to change the passwords for these accounts as well.

➤ *To change the MASTER user password*

- 1** In Administrator, log in to the Address Book as MASTER.
- 2** Select *File > Manage Users*.
- 3** Select **MASTER** from the user list and click *Password*.



- 4** In the *Old password* field, type *control* (or the current password if you have changed the MASTER password before).
- 5** In the *New password* and *Confirm password* fields, type the new MASTER user password, and click *OK*.



The MASTER user password is updated.

- 6** Repeat this procedure to change the passwords for the WEBUSER and EMAILUSER accounts as well.

# Upgrading or Converting an Address Book

You can upgrade an Address Book by opening it in Administrator or Maximizer. Administrator also has a built-in utility to convert existing Maximizer databases from older versions to the current version, and to convert Maximizer Pervasive databases to Maximizer SQL databases.

You should always back up the Address Book before upgrading. For instructions on backing up, refer to “Backing Up and Restoring Address Book Data” on page 316. For older databases, refer to the User’s Guide for your previous version of the software. If you have customized the dictionary and holidays, also back up those files separately before upgrading.

If you are upgrading Maximizer from a previous version and you have old reports in the Crystal Reports file structure for Maximizer, the old reports are archived in a folder named after the Address Book with a .BAK file extension, where your other report files for Maximizer are stored (e.g., ...\\My Documents\\MaximizerReports folder). You can copy the reports to any of your working folders, such as the Sales folder, to access the reports from Maximizer.

After upgrading a database, you should always perform an Address Book validation and recovery. For further information, refer to “Verifying and Recovering Address Book Data” on page 324.

**i** If you are upgrading Maximizer Pervasive databases, do not uninstall Pervasive until you have successfully upgraded all of the Pervasive databases.

## ➤ *To upgrade a Maximizer Address Book*

- 1** Ensure Maximizer is closed on all machines before proceeding with the upgrade.
- 2** If you have an Address Book open in Administrator, select **File > Close Address Book**.
- 3** Select **Utilities > Upgrade Maximizer Address Book**.
- 4** Select **Yes** when prompted to continue.
- 5** If the Address Book does not appear in the list, click the **Browse** button to browse to the location of your Pervasive (Btrieve) Address Book files and click **OK**. Then, enter an Address Book name and click **OK**.
- 6** Select the Address Book from the available Address Book list, and click **Open**.

**i** Note that the Browse button is used to locate Maximizer files that are in a Pervasive (Btrieve) database format. It is not applicable to a SQL Server Address Book.

Log in with the MASTER password or as a user with a Maximizer Administrator role. The upgrade process begins.

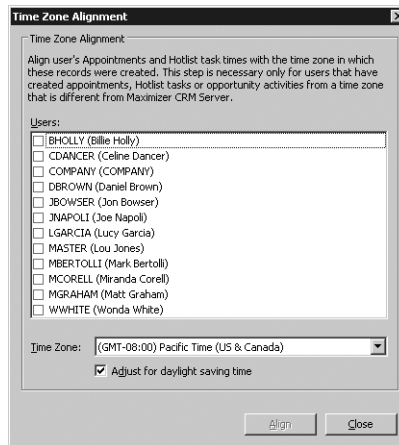
## Time Zone Alignment

After upgrading your database, use the Time Zone Alignment utility to align users' appointment, Hotlist task, and opportunity activity times with the time zone in which these records were created. This step is necessary only for users that have created appointments, Hotlist tasks, or opportunity activities from a time zone that is different than the Maximizer CRM Server.

**i** Users can only be aligned once.

### ► To align time zones

- 1** Select **Utilities > Time Zone Alignment**.
- 2** Select all users that belong to a specific time zone.
- 3** From the **Time Zone** drop-down list, select the time zone of the users.
- 4** Select the **Adjust for daylight saving time** option if the selected users are in a time zone or region that observes daylight saving time.
- 5** Click **Align**.
- 6** Repeat steps 2 to 5, as necessary, for all applicable users and time zones.



# Importing Vertical Templates

Maximizer provides vertical templates for several industries. You can import any of these vertical templates into your Address Book. A vertical template creates industry-specific user-defined fields, action plans, search catalogs, column setups, document templates, etc. in your Maximizer Address Book.

## ➤ *To import a vertical template*

- 1** Log in to the Address Book in Administrator or Maximizer.

You must be logged in as MASTER to import a vertical template.

- 2** In Administrator, select **File > Import > Vertical Templates > [industry]**.

– or –

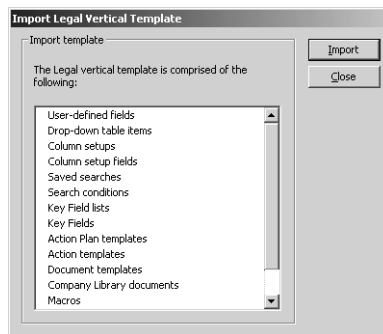
In Maximizer, in the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Vertical Templates.> [industry]**.

The Import [industry] Vertical Template dialog box opens, displaying the items included in the template.

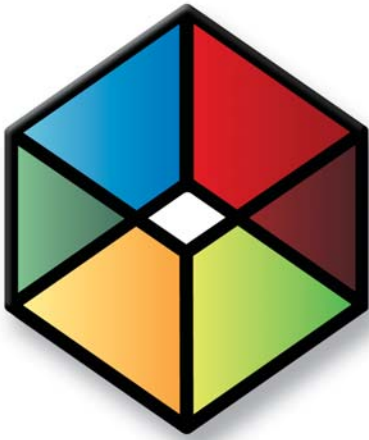
- 3** Click **Import**.

Items in the list are highlighted as the import process advances.

When the import process is complete, an Import Summary displays the number of items imported with the vertical template.







# CHAPTER 5 **Setting Up Users, Groups, and Teams**

## In this chapter...

- "Adding a User to an Address Book" on page 84
- "User Administration" on page 89
- "Changing a User's Password" on page 91
- "User and Group Security" on page 92
- "Security Groups" on page 100
- "Record Ownership" on page 106
- "Sales and Marketing Teams" on page 107
- "Setting Windows Authentication for Users" on page 110
- "User Preferences" on page 114
- "Access Rights Required to View or Generate Crystal Reports" on page 115

# Adding a User to an Address Book

As the Address Book administrator, you already have a user ID (MASTER) set up for you. Log in as an administrative user in Administrator to perform setup or administrative tasks. The default password for MASTER is “control”, but it may be different if it has already been changed in any Address Book. To use Maximizer, you should create a personal user ID for yourself.

Before a user can log in to Maximizer, you must assign that person a Maximizer user ID. All security in Maximizer is based on user IDs and the rights you assign to them. You should also assign a user Display Name, which easily identifies the user throughout Maximizer. When you fill in the First name and Last name fields in the Add User dialog box, the Display name field is completed automatically to include the user’s first and last name together. You can change this display name.

**i** The user’s name and contact information can be inserted as merge fields in the word processor.

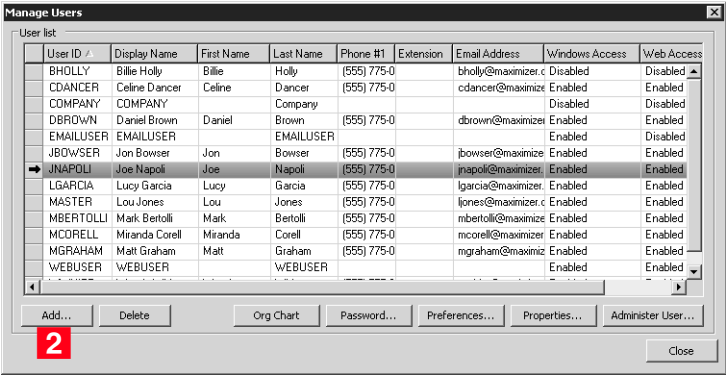
Use the User Properties dialog box to enter a user’s name and contact information, assign user-defined fields, specify access rights, and add a user to security groups and sales/marketing teams. Note that you can also add users to security groups and sales/marketing teams using the Groups/Teams module.

➤ *To add a new user to the Address Book*

- 1** Select *File > Manage Users*.

The Manage Users dialog box opens.

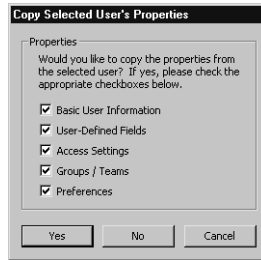
- 2** Click *Add*.



The Copy Selected User’s Settings dialog box opens.



- 3** Click **Yes** to copy the settings from the selected user, or **No** to start with the default settings.



The Add User dialog box opens.

- 4** In the **General** tab, fill in the basic information for this user.
- In the **User ID** field, enter unique identification for the user.  
The user must specify the User ID to log in to Maximizer.
  - The **Display name** field fills in automatically with the user's first and last names. You can change the display name.
  - The **Dept** and **Division** fields affect where the user is displayed in user-selection lists (for example, in the Add Appointment dialog box).
  - In the **Email** field, enter an email address for the user.  
The user must have an email address specified to send email from Maximizer.
  - Under **Module login**, ensure **Enabled** is selected next to **Windows Access** or **Web access**.

Users enabled for Windows Access can log in to Maximizer installed on the desktop. Users enabled for Web Access can log in to Maximizer Web Access and Mobile Access. You must have an available user license to enable the user.

**Add User**

General | **User-Defined Fields** | Access Rights | Groups / Teams | Windows Authentication

☐ Name and position

User ID:  Mr/Ms:  First name:  Initial:  Last name:  Salutation:  Dear < >:

Display name:  **4** Position:  Reports to:

☐ Company and main address

Company:  Escona Estate Wines

Dept.:  Executive Division:  CAN - East

Address 1:  1344 Eastside Road

Address 2:

City/Town:  Petaluma St/Co/Prov:  CA

Zip/Postcode:  94954 Country:  USA

☐ Phone numbers and phone extensions

1:  (555) 775-0902

2:  (555) 775-0900 Fax:

3:

4:

☐ Security

☒ Public ☐ Private

☐ Module Login

Windows Access ☐ Enabled

Web Access ☐ Enabled

☐ Internet information

Email:

Website:  http://www.escona.com

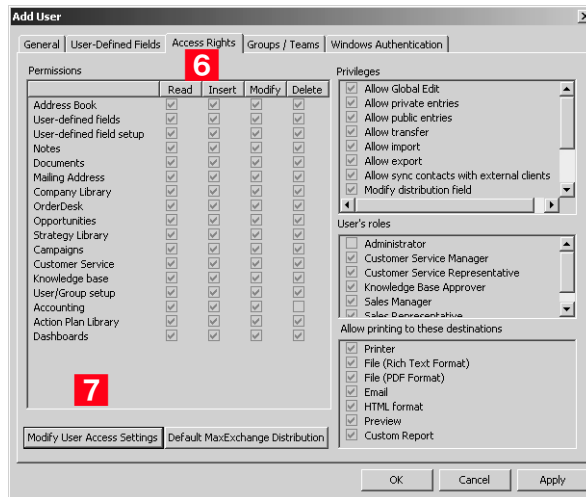
OK Cancel Apply

**5** In the **User-Defined Fields** tab, select the values of any user-defined fields, as appropriate.

You can set up these custom fields in the File > Set Up User-Defined Fields dialog box. Refer to “Setting Up User-Defined Fields for an Address Book” on page 129 for more information.

**6** Select the **Access Rights** tab.

- 7 Click **Modify User Access Settings**, and set up the access settings for the user.



For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 92.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 93.

- 8 Click **OK** to save the changes to the access settings.
- 9 In the **Groups/Teams** tab, select any security groups and sales/marketing teams to which the user should belong.  
(To add groups and teams, use the File > Security Groups and Teams dialog box.)

- 10 Click **OK**.

The default user password is **maximizer**. Ensure that you or the user create a new password from the Manage Users dialog box.

The new User ID and its associated information now appear in the User list.

## Enabled and Disabled Users

You can create any number of users in your Address Book. However, you must have licenses for all enabled users. The total number of users across all products cannot exceed the number of available licenses. Any additional users must be disabled. Disabled users cannot

log in to Maximizer. But other users can add disabled users to appointments and can specify disabled users as opportunity and customer service case monitors.

You cannot enable a user when you are at your limit of licensed users. You must first disable an existing enabled user, and then enable the user.

# User Administration

In Maximizer and Administrator, you can manage all settings for a user from a central location. In Administrator, select File > Manage Users, select a user, and click Administer User to open the Administer User dialog box. You can change properties, preferences, and other default settings for the user. Click the links in the navigation pane on the left to display information in the main content pane on the right. In the content pane, you can access links to a number of user settings.

| Navigation pane option    | Allows you to...  |
|---------------------------|---|
| User Properties           | View and edit general information, user-defined fields, access rights, groups/teams, or windows authentication for the selected user in the Properties dialog box.<br>For more information, see “User and Group Security” on page 92. |
| User Preferences          | View and edit preferences for the current user in the Preferences dialog box.<br>For more information, see the <i>Maximizer CRM User's Guide</i> .  |
| Password                  | Change the password for the selected user in the Password dialog box.<br>For more information, see “Changing a User's Password” on page 91.   |
| Default Entries           | Modify the Address Book, opportunity, and customer service default entries for the selected user.<br>For more information on default entries, see the <i>Maximizer CRM User's Guide</i> .   |
| Default Notes             | Change the Address Book, opportunity, customer service, and campaign default note for the selected user.<br>For more information on default notes, see the <i>Maximizer CRM User's Guide</i> .  |
| Security Groups and Teams | Configure security groups and sales and marketing teams in the Security Groups and Teams dialog box.<br>For more information see “Security Groups” on page 100 and “Sales and Marketing Teams” on page 107.                           |

| Navigation pane option         | Allows you to...  |
|--------------------------------|---|
| MaxMobile Administration       | Configure the MaxMobile Wireless Server and users for deployment in the MaxMobile Administration dialog box.<br>For more information, see "Configuring MaxMobile Wireless Server" on page 198.                                  |
| MaxExchange Site Manager       | Configure MaxExchange distribution sites in MaxExchange Site Manager.<br>For more information on MaxExchange Site Manager, see the <i>MaxExchange Administrator's Guide</i> .   |
| MaxSync for Microsoft Exchange | Configure synchronization between Maximizer and Microsoft Exchange in the MS Exchange Synchronization tab of the Preferences dialog box.<br>Fore more information, see "Setting Up MaxSync for Microsoft Exchange" on page 178. |

# Changing a User's Password

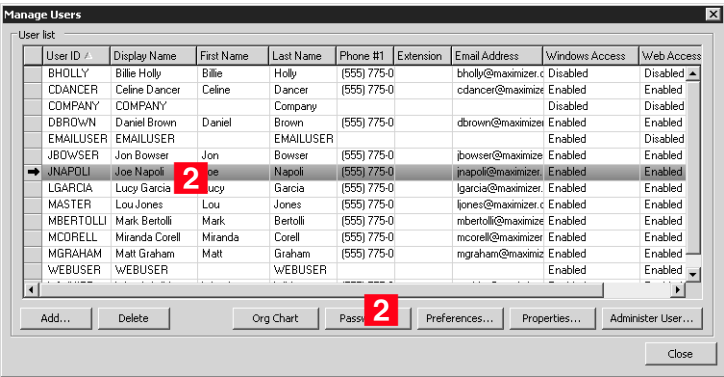
The following procedure explains how to change user passwords in Administrator. However, users can also change their own passwords in Maximizer by selecting Manage Users from the User Management group on the Setup tab.

➤ *To set and change a user's password in Administrator*

- 1
- In Administrator, select *File > Manage Users*.

The Manage Users dialog box opens.

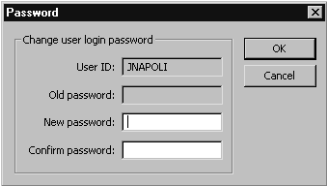
- 2
- Select the Maximizer user, and click *Password*.



**i** The default password for a new user is "maximizer".

The Password dialog box opens.

- 3
- Type the new password, then retype it on the next line to confirm it.
- 4
- Click *OK* to save the new password.



## User and Group Security

As the Administrator, you can restrict each user's access rights to types of entries, essentially providing per-module security. User access rights are accessible by going to the Access Rights tab of a user's properties (see "Modifying User Access Settings" on page 98). These user access rights consist of the access settings (security settings) of the user account as well as the access settings of any security groups the user is a member of. For example, if the Opportunity Delete permission is not set in the user's access settings, but is granted in the access settings of a group the user is a member of, then the user is granted Delete permissions to Opportunity entries.

Each checkbox contains one of the following potential values:

| Checkbox State                      | Access Setting | Access Right |
|-------------------------------------|----------------|--------------|
| <input checked="" type="checkbox"/> | Granted        | Granted      |
| <input checked="" type="checkbox"/> | Denied         | n/a          |
| <input type="checkbox"/>            | Not set        | Not granted  |

The following table illustrates user access rights derived from user and group access settings.

| User Access Setting                 | + Group Access Setting              | = User Access Right                 |
|-------------------------------------|-------------------------------------|-------------------------------------|
| <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

If the user belongs to more than one group, the conflict illustrated below results in the user not being granted the access right.

| User or Group Access Setting | + User or Group Access Setting      | + User or Group Access Setting      | = User Access Right      |
|------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| <input type="checkbox"/>     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |



## User Access Rights and User/Group Access Settings

The following tables describe each of the user access rights and user or group access settings.

**i** If a Read permission is denied (X), then the Insert, Modify, and Delete permissions are automatically disabled. A user cannot have Insert, Modify, or Delete permissions without having Read permission.

### Permissions

| Permissions              | Controls the selected user's or group's right to view, add, change, or remove . . .   |
|--------------------------|---|
| Address Book             | Entries in the Address Book window  |
| User-defined fields      | Values in user-defined fields   |
| User-defined field setup | User-defined field definitions  |
| Notes                    | Notes attached to entries<br>Users must have the Delete checkbox selected to be able to use the File > Purge > Notes function.  |
| Documents                | Documents attached to entries<br>Users must have the Delete checkbox selected to be able to use the File > Purge > Documents function.  |
| Mailing Address          | Mailing addresses of Address Book entries   |
| Company Library          | Files and folders in the Company Library  |
| OrderDesk                | Entries in the OrderDesk window   |
| Opportunities            | Entries in the Opportunities window   |
| Strategy Library         | Strategy Library information for opportunities  |
| Campaigns                | Entries in the Campaigns window   |
| Customer Service         | Entries in the Customer Service window  |
| Knowledge base           | Articles in the Knowledge Base window   |
| User/Group setup         | Users and Security Groups <ul style="list-style-type: none"> <li>If the user does not have any User/Group Setup rights, other users' or groups' properties are not accessible.</li> <li>If the user has read rights only, the related tabs are visible, but information cannot be modified.</li> <li>Insert, Modify, and Delete rights provide the corresponding access rights to all user and group properties.</li> </ul> |
| Accounting               | Accounting transactions.<br>This access right applies only to earlier versions of Maximizer.  |

| Permissions         | Controls the selected user's or group's right to view, add, change, or remove . . . |
|---------------------|---|
| Action Plan Library | Action plan templates in the Action Plan Library                                    |
| Dashboards          | Dashboard entries   |

## Privileges

| Privilege                                 | Grants authorization to . . .  |
|---|--|
| Allow Global Edit                         | Perform global edits of Address Book entries in Maximizer. Consider advising users with this privilege to back up the Address Book before making significant changes with Global Edit.   |
| Allow private entries                     | Add entries that are not visible to other users. The user can use the Owner, Full Access, or Read Access fields to create private entries or restrict entries to a group or a user.  |
| Allow public entries                      | Add entries that are visible to all other users in the Address Book.<br>Note that the Allow private entries and Allow public entries options cannot be denied at the same time. If both of these options are denied in two different groups a user belongs to (i.e., the checkboxes contain an x), the user is granted the Allow private entries right by default. |
| Allow transfer                            | Transfer Address Book entries between Maximizer Address Books. If you do not select this option, the menu items for transferring are disabled.   |
| Allow import                              | Import Address Book entries between Maximizer Address Books or from external applications. If you do not select this option, the commands for importing are disabled.  |
| Allow export                              | Export Address Book entries between Maximizer Address Books, and export information to Microsoft Excel. If you do not select this option, the commands for exporting are disabled.   |
| Allow sync contacts with external clients | Synchronize Address Book entries and notes using Outlook Synchronization. However, users can still synchronize calendar appointments or Hotlist tasks without this access right.   |

| Privilege                               | Grants authorization to . . .  |
|---|--|
| Modify note properties                  | Change the values of the date, time, and creator fields in notes.  |
| Modify distribution field               | Change the value of the MaxExchange Distribution field of Address Book entries.  |
| Modify system tables                    | Add, modify, or delete available values (items) of system fields, such as City and Category in Address Book entries. See “System Table Fields” on page 97 for more information.  |
| Modify/delete other owners’ notes       | Change and delete other users’ notes. However, to be able to view other users’ private notes, the user must have the “Modify other users’ private entries” privilege enabled.  |
| Modify other users’ private entries     | View and modify entries marked as private that belong to other users.<br>This security privilege will override any other security settings for entries, including any settings based on security groups, so if a user has this privilege enabled, the user has full read and modify access to all entries, regardless of the entry’s Full Access, Read Access, or Owner settings. This security privilege is very powerful and should be granted with caution.   |
| Modify other users’ general information | Change information in the General and User-Defined Fields tabs of the user properties for other users.<br>Modifying a user’s general information, such as Last Name, First Name, Company, and Phone Number, does not have to be restricted to the MASTER user. In many cases, an administrative assistant or a receptionist can be granted the rights to modify user’s general information without compromising the security of Maximizer. This privilege allows the user to have access to all Maximizer users’ general information without giving them full security rights to the Address Book. |
| Allow manage currencies                 | Access the Currency Library in Maximizer, and add, edit, or delete entry currencies  |

## User’s Roles

| User Role                       | Grants authorization to . . .   |
|---------------------------------|---|
| Administrator                   | Log in to Administrator and perform tasks based on the user's security settings.  |
| Customer Service Manager        | Have customer service cases assigned or escalated to the user. It also allows the user to change the value of the Case owner field. This role also contains all functions of the Customer Service Representative role.                                  |
| Customer Service Representative | Have customer service cases assigned to the user.   |
| Knowledge Base Approver         | Approve Knowledge Base articles. A newly created article is assigned a draft status until it is opened and assigned a different status by an approver.  |
| Sales Manager                   | Re-assign the Account Manager field to a different user. This role also contains all functions of the Sales Representative role.  |
| Sales Representative            | Be assigned to the Account Manager field. A Sales Representative can assign the Account Manager field to other Sales Representatives only if the Account Manager field is already assigned to the user or it is empty and not assigned to another user. |

### Allow printing to these destinations

Printing to certain destinations, such as files or email, can pose security risks for your organization. For example, a user could print important data fields to a file. This file would then contain information in a format that could easily be transported elsewhere. Consider these security risks in balance with the improved business processes that can be achieved by using print destinations other than Printer.

| Destination             | Grants authorization to . . .                                  |
|-------------------------|--|
| Printer                 | Print to the default printer.                                  |
| File (Rich Text Format) | Print to a .RTF file.  |
| File (PDF Format)       | Print to a .PDF file.  |
| Email                   | Attach the report to an email message, usually in a .RTF file. |
| HTML Format             | Print to a .HTM file.  |

| Destination   | Grants authorization to . . .   |
|---------------|---|
| Preview       | Display a preview of the print output on the screen.  |
| Custom Report | Open and print reports from the Crystal Reports option in the Reports tab in Maximizer. Note that the user cannot create custom reports unless he or she is also a member of the Crystal Reports Users security group.<br>For more information about security settings related to Crystal Reports, refer to "Access Rights Required to View or Generate Crystal Reports" on page 115. |

## System Table Fields

Items (available values) for the following fields can be added, modified, or deleted for users who are granted the ***Modify system tables*** privilege.

| Field   | Description   |
|---|---|
| <b><i>Address Book Entry Fields</i></b>           | Mr/Mrs, Position, Salutation, Company, Department, Division, City, St/Prov, Country, Email Description, Phone Description, Do Not Solicit By, Category, Lead Source, MaxExchange Distribution, and Related Address Book Entry Relationship Type |
| <b><i>Phone Fields</i></b>                        | Subject and Phone Call Result   |
| <b><i>Hotlist Task and Appointment Fields</i></b> | Activity and Priority   |
| <b><i>Campaign Fields</i></b>                     | Traditional Campaign Objective, Traditional Campaign Activity, Traditional Campaign Template Activity Description, Automated Campaign Products/Services, and Automated Campaign Categories  |
| <b><i>Customer Service Fields</i></b>             | Products/Services, Categories, and Subject  |
| <b><i>Opportunity Fields</i></b>                  | Products/Services, Categories, Objective, and Next Action   |

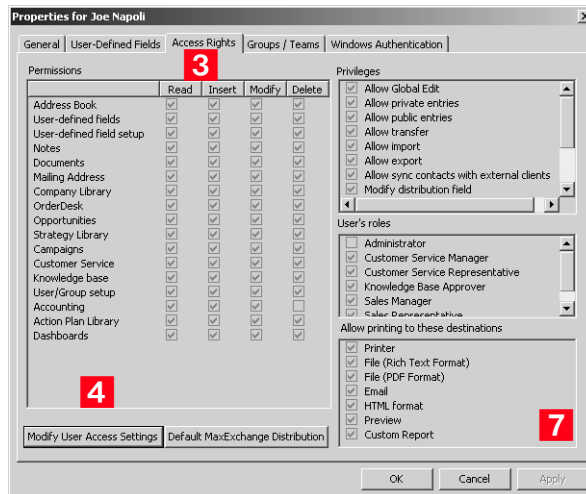
## Modifying User Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 92.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 93.

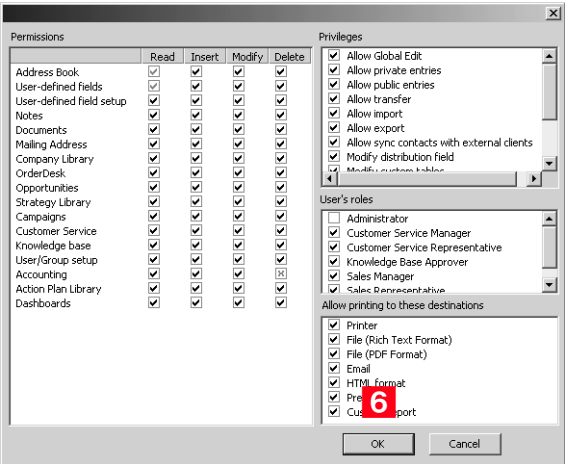
### ➤ *To modify access settings of an existing user*

- 1** Select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Properties**.
- 3** Select the **Access Rights** tab.



- 4** Click **Modify User Access Settings**.

5 Modify any of these settings as appropriate.



6 Click **OK** to close the Access Settings.

7 Click **OK** to save the changes.

# Security Groups

**i** It is important to note that groups have access settings, but they do not have access rights that users do.

A security group is a group of users, usually belonging to a functional group such as a Finance department, who have access to entries related to their group and have specific security access settings. A user may be a member of more than one security group.

The properties, access settings, and group members are specified in the Group dialog box.

**Modify Group - Accounting**

General | Members

Group name and ID

Name: Accounting ID: ACCTNG

Access Settings

| Permissions              | Read                                | Insert                              | Modify                              | Delete                              |
|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Address Book             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| User-defined fields      | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| User-defined field setup | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Notes                    | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Documents                | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Mailing Address          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Company Library          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| OrderDesk                | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Opportunities            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Strategy Library         | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Campaigns                | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Customer Service         | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Knowledge base           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| User/Group setup         | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Accounting               | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Action Plan Library      | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Dashboards               | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |

Privileges

- ☐ Allow Global Edit
- ☐ Allow private entries
- ☐ Allow public entries
- ☐ Allow transfer
- ☐ Allow import
- ☐ Allow export
- ☐ Allow sync contacts with external clients
- ☐ Modify distribution field

User's roles

- ☐ Administrator
- ☐ Customer Service Manager
- ☐ Customer Service Representative
- ☐ Knowledge Base Approver
- ☐ Sales Manager

Allow printing to these destinations

- ☐ Printer
- ☐ File (Rich Text Format)
- ☐ File (PDF Format)
- ☐ Email
- ☐ HTML Format
- ☐ Preview
- ☐ Custom Report

OK Cancel Apply

## Group Name and ID

Every security group has a name and an ID that identify the group. Changing the name has no effect on the group functionality. However, you cannot change the group ID. If you ever need to recreate these security groups, it is imperative that you use the correct security group IDs. (The group name is irrelevant.)

## Group Access Settings

A security group has Access Settings that affect the level of access its members have within the Address Book. It is important to note that granting an Access Setting to a group does not necessarily mean that all members of the group will have that Access Right. The level of access each individual user has to the Address Book is controlled by the Access Settings of the user account and the Access Settings of any groups the user belongs to. For more information about user and



group Access Settings, refer to “User and Group Security” on page 92.

## Group Members

You can add or remove users from the group in the Members tab of the Group dialog box.

You can also add or remove a user from any groups on the Groups/Teams tab of the User properties.

## Default Security Groups in all New Address Books

Every new Address Book contains several security groups, described in the following table. Only the MASTER user belongs to these groups by default, but you can add additional users to each group.

| Security Group Name          | Group ID | Enables group members to...   |
|------------------------------|----------|---|
| Accounting                   | ACCTNG   | Restrict accounting transaction notes to members of this group. This security group applies only to previous versions of Maximizer.   |
| Company Announcement Authors | A_CAA    | Access the Company Announcements folder in Company Library, where group members can add announcements that appear in the Company Announcements box on the My Work Day page in Maximizer and Maximizer Web Access.   |
| Crystal Reports Users        | R_CRU    | Generate new reports from the Crystal Reports option in the Reports tab in Maximizer. Note that the user must also have the Custom Reports access right enabled to be able to generate reports. For more information about security settings related to Crystal Reports, refer to “Access Rights Required to View or Generate Crystal Reports” on page 115. |
| Customer Access Admin Users  | C_ADM    | Access the News Manager section of the Customer Access Administrator. In Address Books that have been upgraded from a previous version, this group may be called “Customer Portal Administration Users”.  |

| <b>Security Group Name</b>       | <b>Group ID</b> | <b>Enables group members to...</b>   |
|----------------------------------|-----------------|--|
| Customer Access Config Users     | C_CFG           | Access the Configuration Manager section of Customer Access Administrator.<br>In Address Books that have been upgraded from a previous version, this group may be called "Customer Portal Configuration Users".                      |
| Maximizer Web Access Admin Users | EMPADM          | Access the Edit section of the Maximizer Web Access, where the user can update external links.<br>In Address Books that have been upgraded from a previous version, this group may be called "Employee Portal Administration Users". |
| Partner Access Admin Users       | P_ADM           | Access the News Manager section of the Partner Access Administrator.<br>In Address Books that have been upgraded from a previous version, this group may be called "Partner Portal Administration Users".                            |
| Partner Access Config Users      | P_CFG           | Access the Configuration Manager section of Partner Access Administrator.<br>In Address Books that have been upgraded from a previous version, this group may be called "Partner Portal Configuration Users".                        |
| SSRS Report Management           | R_SSRS          | Add and edit SQL Server Reporting Services reports in Maximizer Web Access.<br>You must specify the login credentials for a member of this group when you enable SQL Server Reporting Services.                                      |

## Creating a New Security Group

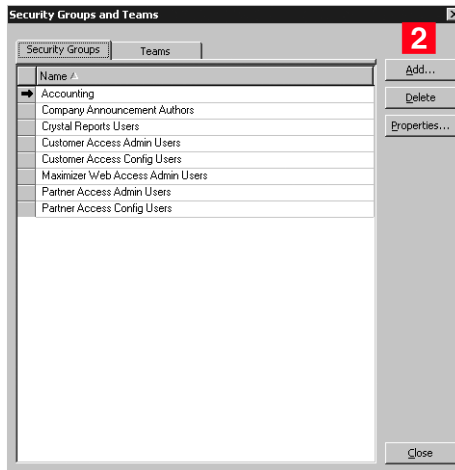
For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 92.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 93.

### ➤ *To create a new security group and assign members*

- 1** Select **File > Security Groups and Teams**.
- 2** Click **Add**.

**i** The Security Groups and Teams command is also available in Maximizer if the logged-in user has Insert rights for User/Group setup. On the Setup tab, select Security Groups or Teams from the User Management group.



- 3** Enter a **Group Name**.
- 4** Enter a unique **Group ID** (up to 6 characters). The first character of the Group ID must be a letter.
- 5** Assign **Access Settings** to the group.

Access Settings for the group affect the Access Rights of all users who are members of the group.

**Add Group**

General | Members

Group name and ID

Name:  (3) ID:  (4)

Access Settings

Permissions

|                          | Read                                | Insert                   | Modify                   | Delete                              |
|--------------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|
| Address Book             | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| User-defined fields      | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| User-defined field setup | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Notes                    | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Documents                | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Mailing Address          | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Company Library          | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| OrderDesk                | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Opportunities            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Strategy Library         | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Campaigns                | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Customer Service         | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Knowledge base           | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| User/Group setup         | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Accounting               | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Action Plan Library      | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Dashboards               | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |

Privileges

- ☐ Allow Global Edit
- ☐ Allow private entries
- ☐ Allow public entries
- ☐ Allow transfer
- ☐ Allow import
- ☐ Allow export
- ☐ Allow sync contacts with external clients
- ☐ Modify distribution field

User's roles

- ☒ Administrator (5)
- ☐ Customer Service Manager
- ☐ Customer Service Representative
- ☐ Knowledge Base Approver
- ☐ Sales Manager

Allow printing to these destinations

- ☐ Printer
- ☐ File (Rich Text Format)
- ☐ File (PDF Format)
- ☐ Email
- ☐ HTML format
- ☐ Preview
- ☐ Custom Report

OK Cancel Apply

6 Select the **Members** tab.

7 From the **Available Users** list, select a user to add to the security group, and click **Add**. Repeat to add additional users.

**Add Group**

General | Members (6)

Available users:

| Name           |
|----------------|
| Billie Holly   |
| Celine Dancer  |
| COMPANY        |
| Daniel Brown   |
| EMAILUSER      |
| Jon Bowser (7) |
| Lucy Garcia    |
| Mark Bertolli  |
| Miranda Corell |
| Matt Graham    |
| Wonda White    |

Members:

| Name       |
|------------|
| Joe Napoli |
| Lou Jones  |

Add > (7)

Add All >>

Add Members of other Groups...

< Remove

<< Remove All

Remove Members of other Groups...

Modify Access Settings

View User Access Rights

OK Cancel Apply

**i** To remove a user, select the user from the Members list, and click Remove.

8 Click **OK** to save the new security group.

## Modifying Group Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 92.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 93.

### ➤ *To modify access settings of an existing group*

- 1** Select **File > Security Groups and Teams**.
- 2** Select the group name.
- 3** Click **Properties**.
- 4** Select the appropriate settings for the group, and click **OK**.

**Modify Group - Accounting**

General | Members

Group name and ID  
Name: Accounting ID: ACCTNG

Access Settings

| Permissions              | Read                                | Insert                              | Modify                              | Delete                              |
|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Address Book             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| User-defined fields      | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| User-defined field setup | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Notes                    | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Documents                | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Mailing Address          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Company Library          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| OrderDesk                | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Opportunities            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Strategy Library         | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Campaigns                | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Customer Service         | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Knowledge base           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| User/Group setup         | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Accounting               | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Action Plan Library      | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Dashboards               | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |

Privileges

- ☐ Allow Global Edit
- ☐ Allow private entries
- ☐ Allow public entries
- ☐ Allow transfer
- ☐ Allow import
- ☐ Allow export
- ☐ Allow sync contacts with external clients
- ☐ Modify distribution field

User's roles

- ☐ Administrator
- ☐ Customer Service Manager
- ☐ Customer Service Representative
- ☐ Knowledge Base Approver
- ☐ Sales Manager

Allow printing to these destinations

- ☐ Printer
- ☐ File (Rich Text Format)
- ☐ File (PDF Format)
- ☐ Email
- ☐ HTML Format
- ☐ Preview
- ☐ Custom Report

OK Cancel Apply

## Record Ownership

In Maximizer, many entries have an Owner field, or Full Access and Read Access fields. These fields control who can view or edit the entry. Users can access their own private records, all publicly owned records, and private records owned by their group. For example, the user "Alice" of the "Finance" group can view all of her own records, all records owned by the "Finance" group, and all Public records.

Sometimes it's important to allow users to have private entries because some entries aren't meant to be shared with your entire organization. In Maximizer, it's possible to specify Full Access and Read Access to specific users or groups for each entry in the Address Book. In addition to Address Book entries, you can specify ownership of notes, documents, and other types of entries.

When a user creates a new Address Book entry, he or she can designate access for that entry. Full Access or Read Access can be granted to specific users or groups, or it can be Public.

To be able to use the Owner, Full Access, or Read Access fields, the user must have the "Allow private entries" access right enabled.

| Field       | Value  | Description   |
|-------------|--------|---|
| Owner       | Public | All users can view and modify the entry, regardless of their user or group security settings.   |
|             | User   | Only the specified user can view or modify the entry.   |
|             | Group  | Only members of the specified group can view or modify the entry, regardless of their user or group security settings.  |
| Full Access | Public | All users can modify the entry, regardless of their user or group security settings.<br>Note that the Read Access field becomes disabled if Full Access is set to Public. |
|             | User   | Only the specified user can modify the entry.   |
|             | Group  | Only members of the specified group can modify the entry, regardless of their user or group security settings.  |
| Read Access | Public | All users can view the entry.   |
|             | User   | Only the specified user can view the entry.   |
|             | Group  | Only members of the specified group can view the entry.   |

## Sales and Marketing Teams

**i** To learn about using teams with MaxExchange, refer to the *MaxExchange Administrator's Guide*. Teams may also be set up using MaxExchange Site Manager, which is accessible through the Utilities menu in Administrator if MaxExchange is installed.

**i** You can set up Teams in both Maximizer and Administrator.

**i** If you have someone in mind as a team member with edit rights, it saves time to assign rights in Administrator rather than on a per-campaign or per-opportunity basis.

If your company or organization is using opportunity or campaign management, you can set up sales and marketing teams. Sales teams are used for sales opportunities in Maximizer, and marketing teams are used for traditional marketing campaigns. Teams perform the following functions:

- Teams help leaders delegate and manage opportunities and traditional campaigns in Maximizer. Team leaders can delegate tasks in an opportunity or a traditional campaign to team members.
- Teams are used in conjunction with MaxExchange—the program you can use to synchronize Address Books between a central server and remote sites. You can associate Address Book entries with teams to ensure each sales or marketing team always gets the Address Book entries they need.

A team is composed of a team leader and team members:

- **Team Leader:** In a team, one person is designated as a team leader who has the right to make changes to the opportunity or traditional campaign, as well as to the opportunity's or traditional campaign's team.
- **Team Member:** A regular team member does not have the right to change the traditional campaign/opportunity or the team. The member's role is to perform the tasks the team leader assigns.

A team member has either edit, audit, or standard rights, as described below. The team leader always has edit rights.

- **Edit:** Allows a member full access to all campaigns and opportunities assigned to the team. Members with this type of access have full team leader rights and may modify the status of an opportunity or campaign and may also reassign tasks.
- **Audit:** Allows a member to view all campaigns and opportunities assigned to him/her.
- **Standard:** Allows for basic rights to “work” (apply steps) opportunities and campaigns. These rights do not allow the member to change a status of an opportunity or campaign.

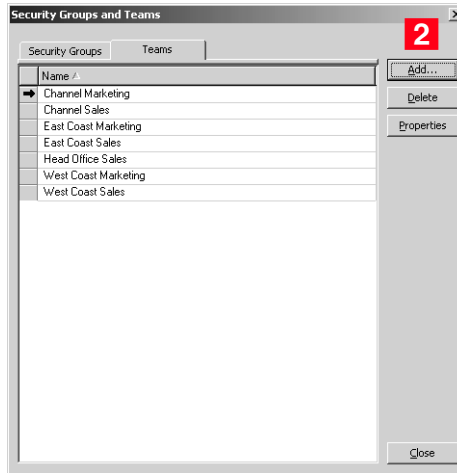
Security, or access rights, cannot be assigned to sales or marketing teams. Therefore, to control the security of more than one user, you must set up a security group for the team members.

**i** If you are using MaxExchange, you may also set up teams using MaxExchange Site Manager. (In Administrator, select Utilities > MaxExchange Site Manager.)

➤ *To create a new sales or marketing team*

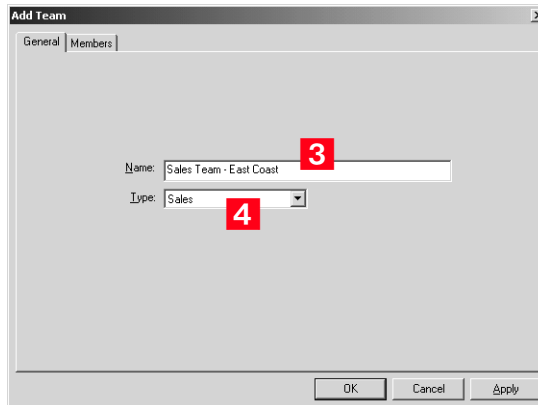
**1** Select **File > Security Groups and Teams**.

**2** Select the **Teams** tab, and click **Add**.



**3** On the **General** tab, enter a team name.

**4** Select Sales or Marketing from the **Type** drop-down list.



**5** Select the **Members** tab.

**6** From the **Available Users** list, select a user to add to the team, and click **Add**. Repeat to add additional users to the team.

To remove a user, select the user from the Members list, and click **Remove**.

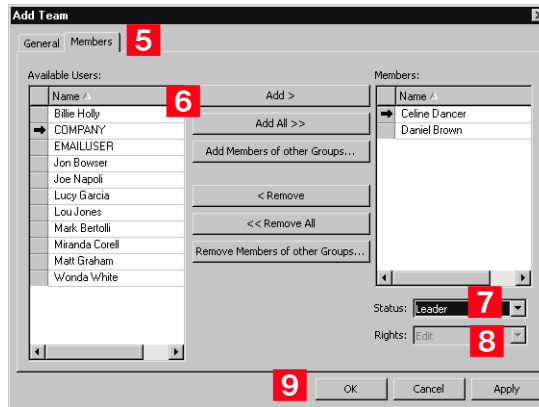


- 7** In the **Members** list, select a member to assign as the Leader, and select Leader from the **Status** drop-down list.

There can be only one leader in the team.

- 8** For each member other than the Leader, select the appropriate member right from the **Rights** drop-down list.

- 9** Click **OK** to save the new team.



## Setting Windows Authentication for Users

Setting up Maximizer users with Windows authentication enables them to access Maximizer Address Books without specifying a user name and password. This provides a “single sign-on” configuration for Maximizer users—they won’t need to log into the network with one user name and password and log into Maximizer with another.

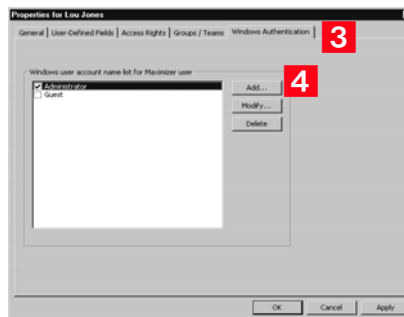
If Windows Authentication is specified as the means of user authentication during the installation, and users are not mapped in the Windows Authentication tab, Maximizer will prompt users for their Maximizer user name and password.

### ➤ *To enable Maximizer users to log in to Maximizer using Windows Authentication*

- 1** Select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Properties**.

The Properties dialog box opens.

- 3** Select the **Windows Authentication** tab.
- 4** Click **Add**.



- 5** Enter the qualified name of the user that corresponds to the Maximizer user (e.g., DOMAIN-NAME\user\_name).
- 6** Select the **Enabled** checkbox, and click **OK**.

You can assign multiple network users to a Maximizer user.



**i** Each user entered in this dialog box must be added as a Windows user for SQL on the SQL Server. These users must also be given database access with the database role set to CRMGroup.

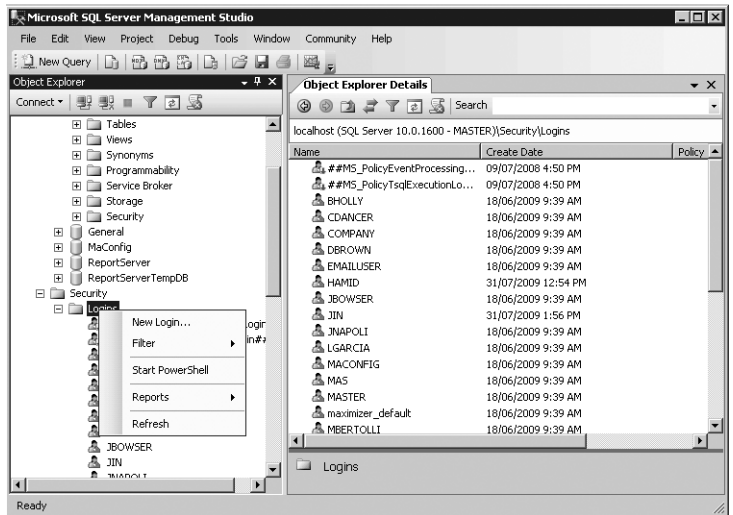
**i** This procedure is written for network and database administrators. For more information, refer to the Windows operating system documentation.

### ➤ *To create Maximizer user groups in Windows*

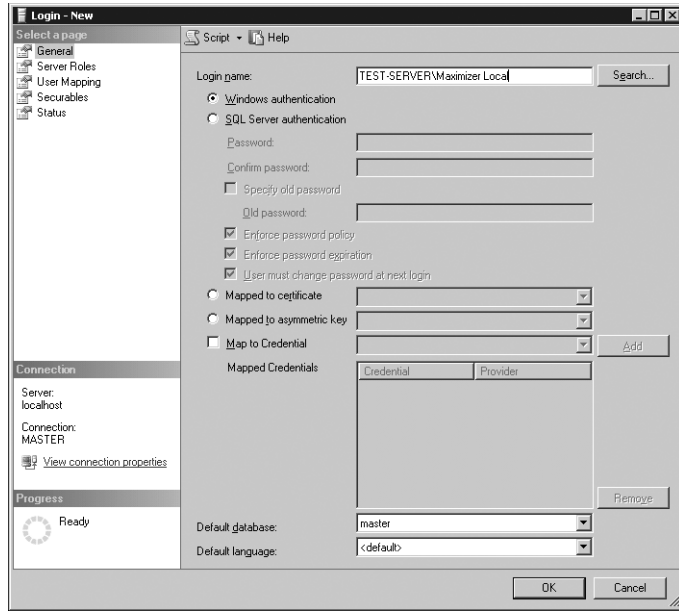
- 1** On the domain server, create a new user group called Maximizer Global.
- 2** Add the user accounts of all Maximizer users to the Maximizer Global group.
- 3** On the SQL Server computer, create a new user group called Maximizer Local.
- 4** Add the Maximizer Global group as a member of the Maximizer Local group.

### ➤ *To grant database access to the users*

- 1** In SQL Server Management Studio navigate to the **Logins** branch.
- 2** Right-click and select **New Login** from the shortcut menu.

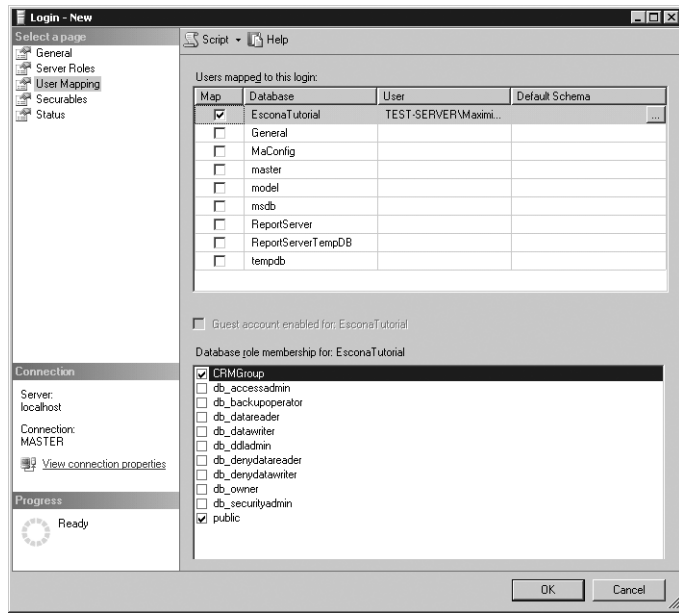


- 3 Create a new SQL login account and assign the *Maximizer Local* as the name.



- 4 In the User Mapping page, select the databases that Maximizer Local should be able to access.
- 5 For each database, select the *public* and *CRMGroup* database roles.

- 6** For the *MaConfig* database, select the *db\_datareader* and *db\_datawriter* database roles.

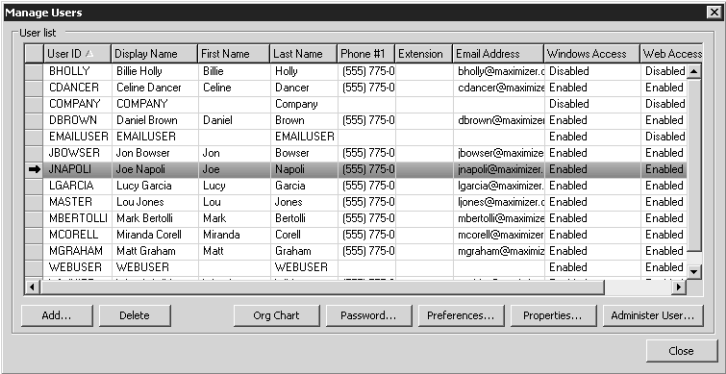


# User Preferences

The Address Book administrator is responsible for setting up initial user preferences in Administrator. However, users can change many of their user preferences in Maximizer.

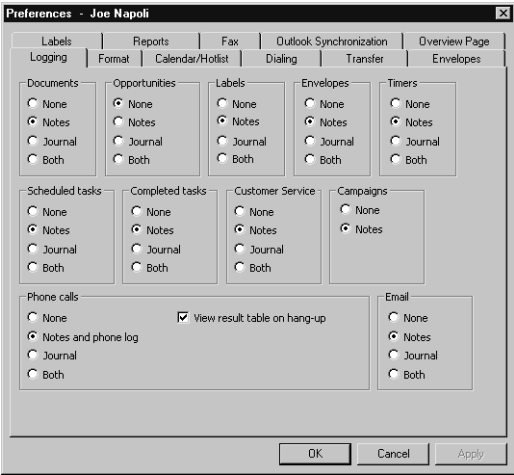
➤ *To set Address Book user preferences*

- 1 Select *File > Manage Users*.
- 2 Select the Maximizer user, and click *Preferences*.



❗ See the *Maximizer CRM User's Guide* for more information on user-related preferences.

- 3 Set the user-related preferences on each of the tabs.



## Access Rights Required to View or Generate Crystal Reports

The following table explains how the Crystal Reports Users security group and the Custom Report access right control whether a user can view or generate Crystal Reports in Maximizer (On the Reports tab, select Crystal Reports).

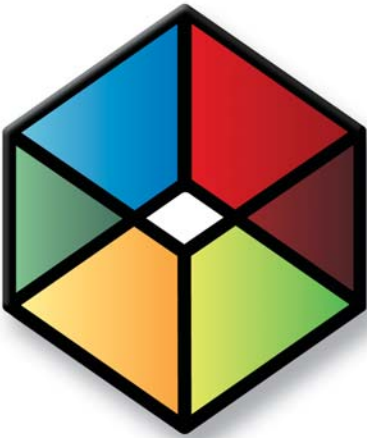
| Is the user a member of the Crystal Reports Users security group? | Does the user have the Custom Report access right? | How much access does the user have to the Reports > Crystal Reports menu in Maximizer? |
|---|--|--|
| No  | No   | The user can see the menu but cannot view or generate reports.                         |
| Yes   | No   |  |
| No  | Yes  | The user can open existing reports but cannot generate new reports.                    |
| Yes   | Yes  | The user can open and generate reports.  |

While the Crystal Reports Users security group and the Custom Report access right control whether a user can view and generate reports, the user permissions control the type of information the user can access in those reports. If a user does not have rights to view information for a Maximizer window/module, and the user creates a report related to the window/module, the related information does not appear in the report. For example, if the user has Read permissions to Address Book entries, but not to Opportunities, any reports the user views or creates may contain Address Book information but will not contain Opportunity information.

To enable the user to include the data in the report, ensure that the user has at least Read permission to the window/module. In Administrator, individual user permissions are available through the File > Manage User dialog box. For more information, see “User Access Rights and User/Group Access Settings” on page 93








## CHAPTER 6 **Configuring an Address Book**


### In this chapter...

- "Address Book Preferences" on page 118
- "System Fields" on page 122
- "Mandatory Fields" on page 124
- "Preventing Duplicate Address Book Entries" on page 125
- "Setting Up User-Defined Fields for an Address Book" on page 129
- "Creating Key Fields Lists" on page 151
- "Email Notification for Opportunities/Customer Service Cases" on page 155
- "Enabling Event Notification" on page 164
- "Recording Holidays in the Holiday Editor" on page 167
- "MaxExchange Distribution" on page 168

## Address Book Preferences

You can set Address Book preferences in Administrator. The following table outlines the settings available in each tab of the Preferences dialog box.

| In this section,   | You can set the following preferences:   |
|--------------------|--|
| Address Book       | <ul style="list-style-type: none"> <li>Values available in the Category field for Address Book entries.</li> <li>Fields to check for duplication of Address Book entries (refer to "Preventing Duplicate Address Book Entries" on page 125 for more information).</li> </ul>   |
| Automated Services | <ul style="list-style-type: none"> <li>Automated email preferences and initialization.</li> </ul> <p> If you are using automated campaigns, ensure you have the "Activate services for the currently open Address Book" checkbox selected in the Automated Services tab.</p>  |
| Campaigns          | <ul style="list-style-type: none"> <li>Campaign completion reasons</li> <li>Settings for campaign monitoring.</li> </ul>   |
| Customer Service   | <ul style="list-style-type: none"> <li>Customizable values for the Billing type, Subject, Case origin, Case queue, Case reason, Status, and Case Type fields.</li> <li>Default case response time and case status.</li> <li>Settings to disallow direct changes to case fields.</li> <li>Default case monitoring lists.</li> <li>Assign or unassign email templates for user and customer notification (refer to "Email Notification for Opportunities/Customer Service Cases" on page 155 for more information).</li> </ul> |
| Dashboards         | <ul style="list-style-type: none"> <li>Configure dashboards from the server.</li> <li>Add or modify SQL metrics for dashboard indicators (refer to "Customizing Dashboards" on page 305 for more information).</li> </ul>  |
| Diagnostic         | <ul style="list-style-type: none"> <li>Log file settings for Maximizer modules. Note that users can also set Diagnostic preferences in Maximizer. Refer to "Maximizer Email Service Log Files" on page 381 for more information.</li> </ul>  |

| In this section,            | You can set the following preferences:   |
|-----------------------------|--|
| Key Fields                  | <ul style="list-style-type: none"> <li>Key field lists available on the Basic Information tab of Address Book entries, opportunities, campaigns, and customer service cases (refer to “Creating Key Fields Lists” on page 151 for more information).</li> </ul>  |
| Location/Resource           | <ul style="list-style-type: none"> <li>Locations available for appointments.</li> <li>Resources available for appointments.</li> </ul>   |
| Mandatory Fields            | <ul style="list-style-type: none"> <li>Mandatory or optional data entry requirements for basic fields in Address Book entries, customer service cases, campaigns, and opportunities.</li> </ul>  |
| MS Exchange Synchronization | <ul style="list-style-type: none"> <li>MaxSync for Microsoft Exchange (refer to “Setting Up MaxSync for Microsoft Exchange” on page 178 for more information)</li> </ul> <p> Available only if MaxSync for Microsoft Exchange is installed.</p> |
| Opportunity                 | <ul style="list-style-type: none"> <li>Opportunity stages and probabilities of close.</li> <li>Opportunity confidence rating schemes.</li> <li>Opportunity completion reasons.</li> <li>Opportunity monitoring lists.</li> <li>Email notification templates for opportunities.</li> </ul>  |
| System Fields               | <ul style="list-style-type: none"> <li>Add, modify, and delete note and document categories.</li> <li>Add, modify, and delete values of the products/services and categories (in opportunities, campaigns, customer service cases, and appointments) and Do Not Solicit By (in Address Book entries) fields.</li> </ul>          |

| In this section, | You can set the following preferences:   |
|------------------|--|
| System Options   | <ul style="list-style-type: none"> <li>• Global server.</li> <li>• Address Book name and ID.</li> <li>• System-assigned Address Book entry IDs, campaign IDs, customer service case IDs, and opportunity IDs.</li> <li>• Overview page caption.</li> <li>• Default settings for Maximum entries field in Maximizer search dialog boxes.</li> <li>• TAPI phone number format.</li> <li>• Turn user security on, forcing users to log in whenever they turn on Maximizer.</li> <li>• Partner notification of assigned Address Book entries or opportunities.</li> <li>• User/group setting which determines if lists of users/groups display only groups to which the current user belongs and other users in the groups in fields such as Read Access and Full Access.</li> <li>• Event notification (refer to “Enabling Event Notification” on page 164 for more information).</li> <li>• Live Update options.</li> <li>• Multi-currency.</li> <li>•</li> <li>• Create the MaxExchange Distribution field (refer to “MaxExchange Distribution” on page 168 for more information).</li> <li>• MaxExchange transaction journaling.</li> <li>• Opportunity and campaign synchronization.</li> </ul> |

➤ **To set Address Book preferences**

- 1** Select **File > Preferences**.
- 2** Set the Address Book preferences on each of the tabs.

The screenshot shows the 'Preferences' dialog box with the 'Address Book' tab selected. The 'System defaults' section includes fields for 'Global server' (C:\Documents and Settings\All Users\), 'Address Book name' (Escona Tutorial), 'Address Book ID' (772238169), 'Short ID' (HQ), 'Caption text displayed for Overview Page' (My Work Day), and 'Maximum number of entries to retrieve' (1000). There are several checkboxes for system defaults, all of which are checked: 'System to assign Address Book entries' ID field values', 'System to assign Opportunities' ID field values', 'System to assign Campaigns' ID field values', 'TAPI format Address Book entry phone numbers', 'Notify partner of assigned Address Book entry or Opportunity', 'Enable security', and 'Show only groups (and related users) which the current user is member of'. There are also buttons for 'Event Notification...', 'Live Update...', and 'Multi-Currency...'. The 'MaxExchange' section has checkboxes for 'Enable transaction journaling' (unchecked) and 'Set Opportunity and Campaign status to 'Updated' when modified and then synchronized by MaxExchange' (checked). A 'Create MaxExchange Distribution' button is also present.

## Using Passwords

If you apply a user password for an Address Book, all Address Books on the server hosting the Address Book will use the same password. It is not possible to have different passwords for different Address Books for the same user on the same server computer.

Note that it is possible to have your local Address Books and global Address Books configured for different servers, so in this situation the password for local Address Books and global Address Books can be different. For more information on local/global Address Books, see "Global and Local Address Book Lists" on page 73.

## System Fields

You can set up custom values for system fields in the following tabs in the preferences:

- **System Fields** – The Category fields in notes and documents, the Do not solicit by field in Address Book entries, the MaxExchange Distribution field in Address Book entries, and the Products/Services and Categories fields in opportunities, campaigns, customer service cases, and appointments.
- **Locations/Resources** – The Location and Resources fields in appointments.
- **Customer Service** – The Billing Type, Case or Article Subject, Origin, Queue, Reason, Status, and Type fields in customer service cases.
- **Opportunity** – The Stage, Confidence Rating, and Completion Reason fields in opportunities.
- **Campaign** – The Completion Reason field in automated campaigns.
- **Address Book** – The Category field in Address Book entries.

## Adding Custom Items to System Fields

You can use Administrator to add custom items to system fields. The steps may differ slightly depending on the field.

### ➤ *To add an item to a system field*

**1** In Administrator, select **File > Preferences**.

**2** Select the tab that contains the system field.

You can modify system fields in the System Fields, Locations/Resources, Customer Service, Opportunity, Campaign, and Address Book preferences.

**3** If you are working in the System Fields, Customer Service, or Locations/Resources tabs, select the field in the list on the left.

The current list of values for the field are displayed on the right.

In the other tabs, the current list of values is displayed under the field name.

**4** To the right of the list, click **Add**.

**5** Enter the name of the item.

**6** If necessary, enter other properties of the item.

- For most fields, specify the user who requested the item.
- For the **Status** field in customer service cases, select the actions (assign, escalate, or resolve) for which you want to apply the item.
- For the **Stage** field in opportunities, specify the range of the probability of close to apply to the stage.
- For the **Completion reason** field in opportunities and campaigns, specify the completion status the item applies to.

**7** Click **OK** to finish adding the item.

**8** Click **OK** to save the changes to the preferences.

## Mandatory Fields

You can set up lists of mandatory fields in Administrator. When users save entries, they are prompted to specify values for any mandatory fields that do not have values.

You can specify mandatory system fields in the Mandatory Fields preferences. You can also specify that user-defined fields must be mandatory when you create or modify the user-defined field.

You can set up different lists of mandatory fields for Companies, Individuals, Contacts, customer service cases, opportunities, automated campaigns, and traditional campaigns.

Some system fields, such as Company name and Full access, are mandatory by default. In the Mandatory Fields preferences, they are displayed as "Always Mandatory". The other fields are optional by default, but you can specify that any of the fields must be mandatory.

### ➤ *To set a field as mandatory/optional*

- 1** In Administrator, select **File > Preferences**.
- 2** Select the **Mandatory Fields** tab.
- 3** From the **Show mandatory entries for** drop-down list, select the type of entry that the field applies to.

The list of system fields for the entry is displayed with the fields' current status: Optional, Always Mandatory, or Mandatory.

- 4** Select the field.
- 5** Click **Mandatory** or **Optional**.

The status of the field is changed to Mandatory or to Optional.

- 6** Click **OK** to save the changes.



## Preventing Duplicate Address Book Entries

When more than one Address Book entry exists for the same person or organization, the entries are considered duplicates. These duplicates may occur when users create a new Address Book entry without determining whether an entry already exists for the person or organization. They can also occur when entries are created automatically by operations such as importing. Duplicate entries are undesirable because information related to the person or organization becomes fragmented. You can prevent most duplicate entries by using Maximizer's duplicate Address Book entry checking options.

**i** For information about preventing duplicates when importing data, refer to the sections about importing in chapter 13 "Managing Address Book Data" on page 315.

You can configure duplicate checking in the Address Book preferences in Administrator.

**Preferences**

System Options | System Fields | Locations/Resources | Customer Service | Key Fields | Opportunity  
 Campaign | Automated Services | Diagnostic | Address Book | Dashboard | Mandatory Fields

Values for Category field's selection list

| Value       | Type     |
|-------------|----------|
| Analyst     | (system) |
| Colleague   | (system) |
| Competitor  | (system) |
| Consultant  | (system) |
| Customer    | (system) |
| Dealer      | (system) |
| Distributor | (system) |
| Key Account | (system) |
| Media       | (system) |

Buttons: Add..., Modify..., Delete

**Duplicate Address Book entry checking**

☒ Check for duplicates when adding Address Book entries

Duplicate check list: Duplicate Check List 1

| Fields to match for the selected list |                        |
|---------------------------------------|------------------------|
| 1st field to match                    | Full Name/Company Name |
| 2nd field to match                    | All Phone Numbers      |
| 3rd field to match                    | None                   |

☒ Allow partial match

Duplicates may be entered by: None

You can prevent most duplicate Address Book entries by specifying up to three combinations of fields that must be unique to each entry. If a user attempts to create a new Address Book entry, and the values of any of those field combinations match an existing entry, Maximizer does not allow the duplicate entry to be created.

A combination of fields that must be unique to each entry is called a "duplicate check list". You can create up to three duplicate check lists, using up to three fields in each list.

Maximizer considers an entry to be a duplicate if the values of all fields from List 1, or all fields from List 2, or all fields from List 3 match an existing entry.

The default duplicate check lists, described below, effectively prevent most duplicate entries:

| Check List                            | Fields   |
|---------------------------------------|--|
| <b><i>Duplicate Check List 1:</i></b> | 1. Full Name/Company Name<br>2. All Phone Numbers<br>3. None |
| <b><i>Duplicate Check List 2:</i></b> | 1. Full Name/Company Name<br>2. Zip/Postal<br>3. None        |
| <b><i>Duplicate Check List 3:</i></b> | 1. None<br>2. None<br>3. None                                |

**i** The "Full Name/Company Name" matching field checks the Full Name of Individual or Contact entries and checks the Company field of Company entries. The "Company for Individual" matching field checks the Company field of Individual entries.


When a user creates a new Address Book entry in Maximizer, and Maximizer detects it as a potential duplicate Address Book entry, the user is presented with the following list of options:

- ***Merge with selected entry*** – The newly created or modified Address Book entry merges with, and overwrites, the existing (selected) entry. If a duplicate entry is private, this option is unavailable.
- ***Edit selected entry*** – The existing (selected) Address Book entry opens, allowing it to be edited by the user. Any information entered in the newly created entry that was detected as a duplicate must be re-entered. If a duplicate entry is private, this option is unavailable.
- ***Add the new entry*** – This option adds the new entry. It is available only under certain circumstances. If a user or group has permission to create duplicate entries ("Duplicates may be entered by" field in the Address Book tab), he or she has the option to create duplicate entries. This option is also available if partial matching is enabled and Maximizer finds a partial match. If a duplicate entry is private, only users with the ability to enter duplicates can create the duplicate entry.

## Partial Matching

Partial matching identifies an entry as a possible duplicate even if not all fields in any of the duplicate check lists are the same in both the new entry and an existing entry.

With partial matching, the order of the fields (1st, 2nd, 3rd) in the duplicate check lists is important, as described in the following scenarios:


 If the first field only is defined in the list (the second and third fields are set to None), partial matching doesn't apply because matching one field is a complete match.

- If the first and second fields only are defined in the list (the third field is set to None), an entry is considered a possible duplicate if only the first field matches.
- If all three fields are defined in the list, an entry is considered a possible duplicate if only the first field matches, or if both the first and second field match.

If the first field doesn't match, an entry is never considered a possible match, even if the second and/or third field matches.

Maximizer displays the list of possible duplicates in order of number of fields matched.

By default, partial matching is disabled. To turn partial matching on, select the "Allow partial match" checkbox.

 If the Address Book has been upgraded from a previous version of Maximizer, and duplicate checking was enabled, partial matching is enabled after upgrading the Address Book to the new version.

The "Allow partial match" checkbox applies to all Duplicate Check Lists. You cannot allow partial matches for some lists and not for others.

Partial matching is relevant only if no exact matches exist. If all the fields in any of the duplicate check lists match an existing entry, it is considered a duplicate entry, and partial matching does not apply. However, if Maximizer finds no exact matches, it returns a list of entries matching any of the fields from the duplicate check lists.

## Permission to Create Duplicate Entries

If some users or groups require the ability to create duplicate Address Book entries, you can select a user or group from the "Duplicates may be entered by" drop-down list. If more than one user requires this ability, add those users to a new security group and then select that group from this drop-down list.

## Retrieving Private Entries with Duplicate Checking


When a private entry is found by duplicate checking, the name of the entry is displayed, but the details of the entry are not. Also, when this type of entry is found, the merge entry and open entry functionality is disabled.


## Configuring Duplicate Address Book Entry Checking

➤ *To configure duplicate Address Book entry checking*

- 1** In Administrator, select **File > Preferences**.
- 2** Select the **Address Book** tab.
- 3** Select **Check for duplicates when adding Address Book entries**.
- 4** From the **Duplicate check list** drop-down list, select one of the Duplicate Check Lists.
- 5** In the **Fields to match for the selected list** box, select the first, second, and third fields to match.  
  
You can select up to three fields, but selecting all three fields is not required.
- 6** Repeat the previous two steps to configure any of the other Duplicate Check Lists.
- 7** To enable partial matching, select **Allow partial match**.
- 8** If you want any users or groups to be able to create duplicate entries, select the name of the user or group from the **Duplicates may be entered by** drop-down list.

# Setting Up User-Defined Fields for an Address Book

 Refer to “ ” on page 409 for information about creating reports with user-defined fields.

 User-defined fields can be created and modified in both Administrator and Maximizer (if users have the necessary rights).


Although the information you can record in Maximizer covers the basics, you probably want to record additional information, such as budgets, income, interests, number of employees, or other data. You can record this information in Maximizer with user-defined fields, which are custom fields for storing information in any of the following categories:

- **Address Book entries:** Available in the Address Book window
- **Opportunities:** Available in the Opportunities window.
- **Campaigns:** Available in the Campaigns window.
- **Customer Service Cases:** Available in the Customer Service window.
- **User accounts:** Available in the user properties dialog box.

Once you have created a user-defined field, users can enter data in the field.

## Types of User-Defined Fields

There are different types of user-defined fields. Each type has different properties and uses.

 Encrypted user-defined fields cannot be searched, transferred, imported, or exported.

- **Alphanumeric user-defined fields** record any alphanumeric text (letters and numbers) up to a maximum number of characters that you specify. Alphanumeric fields can be encrypted for security protection. Note that you cannot disable or enable encryption once you have created the field.
- **Date user-defined fields** can store a specific date or an annually recurring date.
- **Formula user-defined fields** calculate values based on other basic or user-defined fields. You can set up these fields with formulas that create alphanumeric, date, or numeric values. Because they are calculated from values of other fields, values for formulas fields can be viewed in entries but cannot be set manually.
- **Numeric user-defined fields** record any numeric value you wish to keep for the Address Book entries. If you specify a number of decimal places for the user-defined field, you can use this field type for monetary amounts.
- **Table user-defined fields** enable you to select a value or values from a list. This type of field is very useful for multiple choice or multiple value fields. If you create a table user-defined field with the “single value only” attribute, no more than one value can be selected from the list, which is particularly useful

for fields where it wouldn't make sense to select more than one value.

- **Yes/No user-defined fields** contain either a yes or no value. Since the field always contains a yes or no, the mandatory attribute is disabled.

## User Access Rights for User-Defined Fields

As the Address Book administrator, you are responsible for creating user-defined fields in Administrator for Maximizer users. However, you can give any user the ability to create, change, or delete user-defined fields in Maximizer by enabling the following access rights in Administrator (See “Modifying User Access Settings” on page 98):

- The **User-defined fields** access right enables the user to assign values to user-defined fields, but not create fields.
- The **User-defined field setup** access right enables the user to create new user-defined fields.

For information about assigning user access rights, refer to “User and Group Security” on page 92.

You can also restrict user access to a specific user-defined field. The user-defined field properties has options for Full Access (read and write) and Read Access (read-only) permissions.

The screenshot shows the 'Add User-Defined Field' dialog box. The 'Folder Name' is set to 'Sales'. The 'Field Name' is empty. The 'Type' is set to 'Table'. Under 'Field may be added to', 'Companies', 'Individuals', and 'Contacts' are all checked. In the 'Attributes' section, 'Single value only', 'Include in Hotlist', 'Encrypted', 'Set to hidden', 'Annually recurring event', 'Retain year', and 'Mandatory' are all unchecked. 'Maximum field length' is set to 29 and 'Number of decimals' is set to 0. Both 'Full access' and 'Read access' are set to 'Public'. In the 'Creation Details' section, 'Creator' is 'Lou Jones' and 'Requested by' is 'Lou Jones'. The 'Description' field is empty. At the bottom, there are 'Spelling', 'OK', and 'Cancel' buttons.

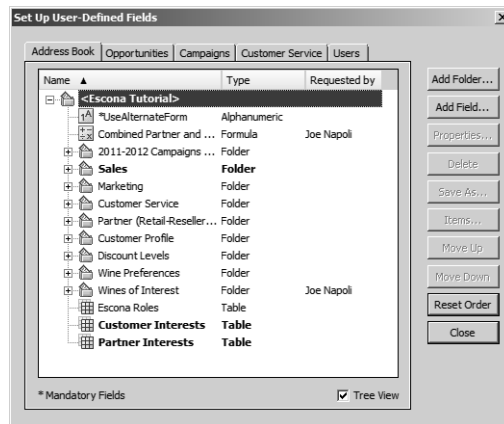
The Full Access and Read Access fields contain a drop-down list of users, groups, and Public. Select which user(s) the Full Access or Read Access permission applies to:

- **Public** assigns the user-defined field access permission to all users

- **[user]** assigns the user-defined field access permission to an individual user
- **[security group]** assigns the user-defined field access permission to all members of a security group

## Setting Up User-Defined Fields

User-defined fields are created and modified in the Set Up User-Defined Fields dialog box. In Administrator, select File > Set Up User-Defined Fields. In Maximizer, from the Setup tab, select User-Defined Fields. The fields and folder are organized in a tree view. There can be multiple levels of folders, each containing other folders or user-defined fields. The folder structure allows a maximum of three folder levels.



You can set up different lists of user-defined fields for each type of entry. The user-defined field structure can be multi-tiered with multiple levels of user-defined field folders, each of which may contain other folders or user-defined fields. The folder structure may contain a maximum of three folder levels.

## Mandatory User-Defined Fields and System Fields

Some user-defined fields are displayed in bold or with an asterisk:

- ***Mandatory*** user-defined fields are denoted with an asterisk displayed after the field type.
- ***System*** fields are shown in bold, black text.

## Sort order

You can change the order of fields and folders:

- **Drag and drop** – You can use the mouse to drag and drop fields or folders to a different position in the list. Dragging it onto a field places it immediately below that field. Dragging onto a folder places it at the top of the list inside that folder. Holding the mouse on a folder for about a second expands the folder, and then you can continue dragging the item to a specific position in that folder.
- **Move Up and Move Down buttons** – Click the Move Up and Move Down buttons to move a field or folder up or down in the list. These buttons only move items within their current folder level. You cannot use them to move items in or out of folders.
- **Reset Order** – Use the Reset Order button to sort items in alphabetical order. All user-defined fields and folders in the selected folder are resorted.

## Creating a New Folder for User-Defined Fields

You can group similar user-defined fields into folders and sub-folders to a maximum folder depth of 3 levels. Grouping user-defined fields into folders is particularly useful if you have a large number of user-defined fields. Grouping them makes them easier to find and reduces the amount of scrolling needed to find the one you're looking for.

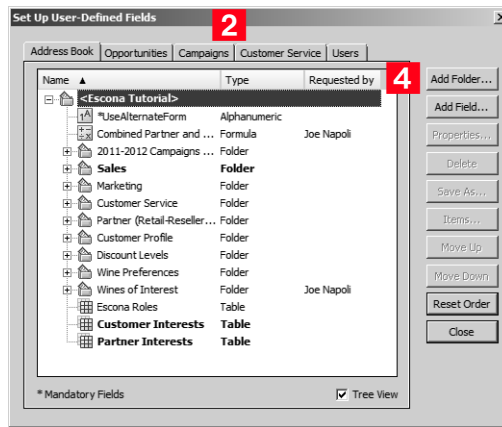
### ➤ *To create a new folder*

- 1** Select **File > Set Up User-Defined Fields**.
- 2** Select the tab for the category of user-defined field to create.
- 3** To create a top-level folder, select the Address Book name at the top of the list.  
– or –

To create a folder within an existing folder, select the existing folder.



**4** Click **Add Folder**.



**5** Enter a name for the new folder, and click **OK**.



**i** User-defined field and folder names cannot contain forward slash or backward slash characters (/ \).

The new folder now appears in the Set Up User-Defined Fields dialog box.

**6** If necessary, move the new folder to a different position in the list.

## Creating a New User-Defined Field

Create user-defined fields for Address Book entries, opportunities, campaigns, customer service cases, and user accounts.

➤ **To create a new user-defined field**

**1** Select **File > Set Up User-Defined Fields**.

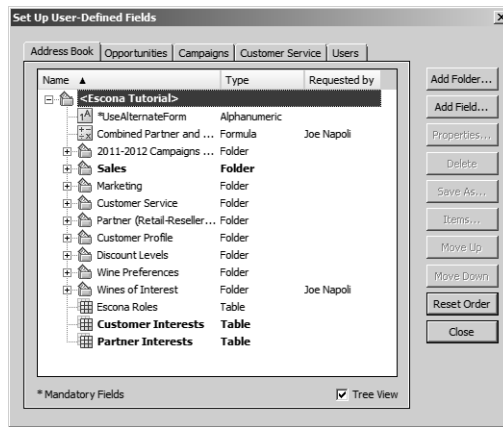
**2** Select the tab for the category of user-defined field to create.

**3** Select an existing folder, inside which to create a new field.

– or –

Select a user-defined field. The new field will be created at the same level as the selected user-defined field.

**4** Click **Add Field**.



**i** User-defined field and folder names cannot contain forward slash or backward slash characters (/ \).

**5** In the **Field Name** field, type a name for the user-defined field.

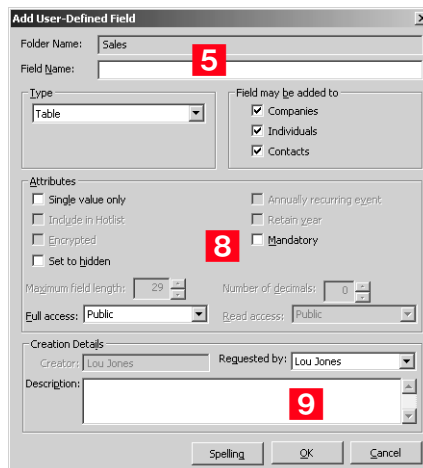
**6** From the **Type** drop-down list, select the type of user-defined field you want to add.

**7** If you are adding a formula user-defined field, select the type of value the formula should return from the **Return type** drop-down list.

**8** Specify the properties of the user-defined field.

For formula user-defined fields, click the ellipsis button next to the **Formula** field to specify the formula. Then, click **Insert Field** to add basic or user-defined fields to the formula.

**9** Click **OK**.



## Adding Items to a Table User-Defined Field

Table user-defined fields contain a list of similar items from which a user may select one or more items. As part of the process of creating a new table user-defined field, you should add the items to the field as well. However, while using the user-defined field in Maximizer, users may find a need to add an item to the list. A user can add items to a table user-defined field on-the-fly if the user account has sufficient privileges.

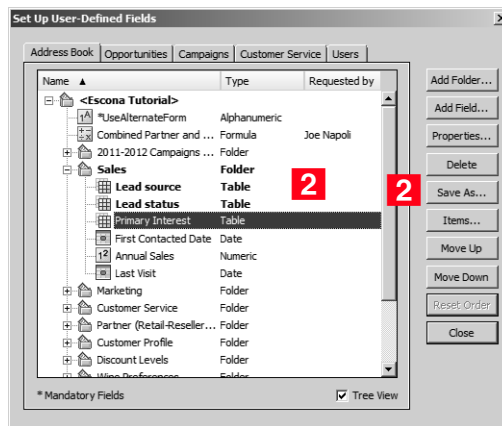
### ➤ *To add items to a table user-defined field*

**1** Select **File > Set Up User-Defined Fields**, and select the tab for the category of user-defined field.

**2** Select the table user-defined field, and click **Items**.

– or –

Double-click the table user-defined field.



The list of existing items for the table user-defined field is displayed.

**3** Click **Add**.

The 'Set Up Items' dialog box is shown. It has a title bar with a close button. Inside, there's a section for 'Items list' with a 'Name' field containing 'Primary Interest'. Below it is a list of 'Item value' options: 'As an agent/distributor', 'Corporate gift or occasion', 'Personal gift or occasion', and 'To sell in a restaurant/bar'. To the right of this list is a 'Requested by' field. On the far right, there are buttons: 'Add...', 'Modify...', 'Delete', 'Properties', 'Move Up', 'Move Down', and 'Reset Order'. The 'Add...' button is highlighted with a red '3'. At the bottom right is a 'Close' button.

**i** If you set the item to hidden, the user can hide it from the Available values list by deselecting the Show hidden items option. The user must also ensure that the item is not selected in the list. If it is, the item will still be displayed.

**4** Enter the name of the item.

**5** In the **Requested by** field, select the name of the user who requested the item creation.

**6** Click **OK**.

The 'Add Item' dialog box is shown. It has a title bar with a close button. Inside, there's a section for 'Item details' with fields for 'Item', 'Creator', and 'Requested by'. The 'Item' field is empty. The 'Creator' field is set to 'Lou Jones'. The 'Requested by' field is set to 'Lou Jones'. Below these fields is a checkbox labeled 'Set to hidden'. At the bottom right are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red '6'.

**7** Repeat these steps to add any additional items to the table user-defined field.

## Transferring User-Defined Fields between Address Books

➤ **To transfer user-defined fields between Address Books**

**i** Encrypted user-defined fields cannot be transferred between Address Books.

**1** In Maximizer, select the **Maximizer** button and select **Import/Export/Transfer > User-Defined Fields**.

**2** In the Transfer User-Defined Fields dialog box, select the user-defined fields to transfer.

**3** Click the **Transfer** button.

**4** To copy the data into a target Address Book that is accessible from the computer, select the **Direct Address Book access** transfer method. Accessible Address Books are listed in **Available target Address Books**.

– or –

If the target Address Book is not listed, select the **Email** transfer method. The data is compressed into a .MET file and attached to an email message.


**5** If you selected **Direct Address Book access**, select the target Address Book, click **OK**, and log on to the Address Book. Maximizer transfers the user-defined fields and notifies you when the transfer is complete.

– or –

If you selected **Email**, click **OK**. Maximizer creates an email message with the user-defined fields attached in a .MET file. Type an email address in the **To** field, and click **Send**.

## Formula User-Defined Fields

When you create a new or modify an existing formula user-defined field, you can click the ellipsis button next to the Formula field to specify the formula for the user-defined field. You can write the formula using existing basic and user-defined fields. Click the Insert Field button to select fields to add to the formula.

 You cannot insert other formula user-defined fields into the formula.

You can add arithmetic expressions to your formulas. You can also add functions and conditional expressions to create more complex formulas.

Formula user-defined fields can return alphanumeric, date, or numeric values. You specify the type of return value while creating the user-defined field. The functions available depend on the types of fields that you want to manipulate.

### Arithmetic Expressions

You can create basic arithmetic expressions for formula user-defined fields using the basic arithmetic symbols. Multiple expressions can be combined to create complicated arithmetic formulas.

To write arithmetic expressions for formula user-defined fields, you can use the following symbols:

- + for addition.

You can add any numeric values to each other, add integers to date values, and add alphanumeric fields or strings separated with quotation marks to each other.

- - for subtraction.

You can subtract any numeric values from each other, and subtract date values from each other. Date values return integers representing the number of days between the dates.

- \* for multiplication.

You can multiply any numeric values together.

- / for division.

You can divide any numeric values together

- ( ) for nested operations.

You can use parentheses to create more complex operations on several numeric values.

#### Example: Numeric Values

Formula: ([Numeric field] + [Numeric field]) \* [Numeric field]

Return value: Numeric

**Example: Date Values**

Formula: [Date 1] - [Date 2]

Return value: Numeric, the number of days between the two dates.

**Example: Date and Numeric Values**

Formula: [Date 1] + [Numeric field]

Return value: Date

**Example: Alphanumeric Values**

Formula: [FirstName] + " " + [LastName]

Return value: Alphanumeric, the two words listed together, separated by a space (FirstName LastName).

## Alphanumeric Functions

Use alphanumeric functions to manipulate alphanumeric fields. When you use alphanumeric functions, you can insert alphanumeric fields as the parameters for the function or you can use any text strings. When you insert strings into functions, enclose the text of the string in quotation marks.

You can add the following functions to formulas using alphanumeric user-defined fields.

- **Len** – Returns the number of characters in a text string.
- **Mid** – Returns a specific number of characters from the text string starting at the position you specify.
- **Search** – Searches for text in a string and returns the position of the text.
- **Substitute** – Substitutes existing text with specified text.
- **Text** – Changes a numeric value to an alphanumeric text string. You can manipulate the returned string using any of the other alphanumeric functions.
- **Value** – Converts an alphanumeric value to a numeric value. Alphanumeric values beginning with alphabetical characters return a value of 0. You can manipulate the string using any of the numeric functions.

### Len

Returns the length of a string.

**Syntax**

*Len*(Alphanumeric)

**Parameters**

| Parameter    | Data Type | Description                         |
|--------------|-----------|-------------------------------------|
| Alphanumeric | String    | The string to return the length of. |

**Example**

*Len*([Company])

This example returns the number of characters in the company's name.

**Mid**

Returns a specific number of characters from a text string starting at a specified position.

**Syntax**

*Mid*(Alphanumeric, StartInt, LengthInt)

**Parameters**

| Parameter    | Data Type | Description  |
|--------------|-----------|--|
| Alphanumeric | String    | The string that you want to search through. Normally, this would be a merge field. |
| StartInt     | Integer   | The position of the first character in the string you want to return.              |
| LengthInt    | Integer   | (Optional) The length of the string you want to return.                            |

**Example**

*Mid*("First Last", 7)

This example returns the text starting at the 7th position in the field. In this case, it returns "Last".



## Search

Searches a string for text and returns the position of the text in the string.

### Syntax

**Search**(SearchString, Alphanumeric, StartInt)

### Parameters

| Parameter    | Data Type | Description                                  |
|--------------|-----------|--|
| SearchString | String    | The text to search for in the string.        |
| Alphanumeric | String    | The string to search through.                |
| StartInt     | Integer   | (Optional) The starting character to search. |

### Example

Search("Wine", [Company\_Name])

This example searches for the text "Wine" in the company name and returns the place in the name where the text starts as an integer.

## Substitute

Substitutes existing text with specified text. This function returns the entire string containing the new text.

### Syntax

**Substitute**(Alphanumeric, OldText, NewText)

### Parameters

| Parameter    | Data Type | Description  |
|--------------|-----------|--|
| Alphanumeric | String    | The string containing the text you want to change. |
| OldText      | String    | The text you want to change.                       |
| NewText      | String    | The text substituted into the string.              |

Example

Substitute([Address], "St", "Street")

This example returns the address with the abbreviation "St" substituted with the text "Street".

Text

Converts a numeric value to a string. You can then use the other alphanumeric functions to manipulate the returned string.

Syntax

*Text*(Number, DecPlace)

Parameters

| Parameter | Data Type | Description  |
|-----------|-----------|--|
| Number    | Decimal   | The numeric value that you want to convert.        |
| DecPlace  | Integer   | (Optional) The number of decimal places to return. |

Example

Text([Revenue], 2)

This example returns the revenue as an alphanumeric string with two decimal places. If revenue, a numeric field, is 50000, the Text function in the above example returns 50000.00 as an alphanumeric value.

Value

Converts an alphanumeric value to a numeric value. If the value contains alphabetic characters, it returns 0. You can then manipulate the numeric value using any numeric functions.

Syntax

*Value*(Alphanumeric)

## Parameters

| Parameter    | Data Type | Description                         |
|--------------|-----------|-------------------------------------|
| Alphanumeric | String    | The alphanumeric string to convert. |

## Example

Value([Contract Number])

This example returns the alphanumeric user-defined field, Contract Number, as a numeric value. If the field contains an alphabetical character, it returns 0.

## Date Functions

Use date functions to manipulate date fields. When you use date functions, you can use date fields as the parameters for the function or you can supply date values for the functions. When you supply date values, use the Date function to format the values as dates.

You can add the following functions to formulas using date fields.

- **Date** – Converts integers to date values.
- **Day** – Returns the day of the month as an integer from a date value.
- **Dayofweek** – Returns the day of the week expressed as an integer.
- **Month** – Returns the month as an integer from a date value.
- **Year** – Returns the year as an integer from a date value.

## Date

Converts integers to date values.

## Syntax

*Date*(Year, Month, Day)

## Parameters

| Parameter | Data Type | Description          |
|-----------|-----------|----------------------|
| Year      | Integer   | The four-digit year. |

| Parameter | Data Type | Description                  |
|-----------|-----------|------------------------------|
| Month     | Integer   | The one- or two-digit month. |
| Day       | Integer   | The one- or two-digit day.   |

### Example

Date(2009, 7, 9)

This example returns July 9, 2009 as the date value.

## Day

Returns the day of the month as an integer from a date value.

### Syntax

*Day*(Date)

### Parameters

| Parameter | Data Type | Description                     |
|-----------|-----------|---------------------------------|
| Date      | Date      | The date to return the day for. |

### Examples

Day(Date(2009, 7, 9))

This example returns 9 as the day of the month in the date value.

Day([Creation Date])

This example returns the day of the month that an entry was created.

## Dayofweek

Returns the day of the week expressed as an integer for a specified date value, with 1 = Sunday, 2 = Monday, 3 = Tuesday, and so on.

### Syntax

*Dayofweek*(Date)

## Parameters

| Parameter | Data Type | Description   |
|-----------|-----------|---|
| Date      | Date      | The date value for which to return the day of the week. |

## Examples

Dayofweek(Date(2009, 7, 9))

This example returns 5, for Thursday, as the day of the week for the given date.

Dayofweek([Creation Date])

This example returns the day of the week that an entry was created.

## Month

Returns the month as an integer from a date value.

## Syntax

*Month*(Date)

## Parameters

| Parameter | Data Type | Description                              |
|-----------|-----------|--|
| Date      | Date      | The date from which to return the month. |

## Examples

Month(Date(2009, 7, 9))

This example returns 7, for July, as the month in the date value.

Month([Creation Date])

This example returns the month that an entry was created.

## Year

Returns the year as an integer from a date value.

## Syntax

*Year*(Date)

## Parameters

| Parameter | Data Type | Description                              |
|-----------|-----------|--|
| Date      | Date      | Date value for which to return the year. |

## Examples

Year(Date(2009, 7, 9))

This example returns 2009 as the year for the date value.

Year([Creation Date])

This example returns the year that an entry was created.

## Numeric Functions

Use numeric functions to manipulate numeric fields. You can add the following functions to formulas using numeric fields.

- ***Ceiling*** – Rounds a number up to the nearest integer or up to a specified number of decimal points.
- ***Floor*** – Rounds a number down to the nearest integer or down to a specified number of decimal points.
- ***Round*** – Rounds a number to the nearest integer or to a specified number of decimal points.

## Ceiling

Rounds a number up to the nearest integer or up to a specified number of decimal points.

## Syntax

***Ceiling***(Number, DecPlace)

## Parameters

| Parameter | Data Type | Description   |
|-----------|-----------|---|
| Number    | Decimal   | The numeric value to round.                             |
| DecPlace  | Integer   | (Optional) The number of decimal places to round up to. |

### Example

Ceiling(2.32, 1)

This example returns 2.4.

## Floor

Rounds a number down to the nearest integer or down to a specified number of decimal points.

### Syntax

*Floor*(Number, DecPlace)

### Parameters

| Parameter | Data Type | Description   |
|-----------|-----------|---|
| Number    | Decimal   | The numeric value to round.                               |
| DecPlace  | Integer   | (Optional) The number of decimal places to round down to. |

### Example

Floor(2.36, 1)

This example returns 2.3

## Round

Rounds a number to the nearest integer or to a specified number of decimal points.

### Syntax

*Round*(Number, DecPlace)

### Parameters

| Parameter | Data Type | Description  |
|-----------|-----------|--|
| Number    | Decimal   | The numeric value to round.                          |
| DecPlace  | Integer   | (Optional) The number of decimal places to round to. |

### Example

Round(2.45687, 2)

This example returns 2.46.

## Conditional Expressions

You can create conditional expressions in your formula user-defined fields. Conditional expressions use the If expression to evaluate comparison statements and return values based on the results of the statements.

Conditional expressions use the following syntax:

**If** (Comparison Statement, True Value, False Value)

- **Comparison Statement** – Uses comparison operators to compare two values. It can be combined with logical operators (and, or, and not), as well as additional conditional expressions
- **True Value** – The value of the expression when the comparison statement is true. It can also be combined with other expressions.
- **False Value** – The value of the expression when the comparison statement is false. You can include other conditional statements to supply different answers for different values.

## Comparison Statements

You can use symbols to create comparison statements for formula user-defined fields. You can compare any values including alphanumeric, date, and numeric values. Alphanumeric values are compared by checking the alphabetical order of the string.

You can create comparison statements with the following symbols.

- **=** to check that two values are equal to each other.
- **>** to check that the first value is greater than the next value.
- **<** to check that the first value is less than the next value.
- **>=** to check that the first value is greater than or equal to the second value.
- **<=** to check that the first value is less than or equal to the next value.

Comparison statements are often combined with logical operators to add multiple statements together. They're added to conditional expressions using If statements.



## Logical Operators

You can use logical operators to help build comparison statements for your formula user-defined fields.

- **Or** – Combines two comparison statements where either one of the statements is true.
- **And** – Combines two comparison statements where both of the statements is true.
- **Not** – Negates a comparison statement.

## Examples of Conditional Expressions

The following examples illustrate complex formula user-defined fields using conditional expressions.

### Example 1

If ([Creation Date] > Date(2009, 7, 9), "New", "Old")

This example compares a date field with a constant date, using the Date function to format the date properly. The formula returns an alphanumeric value. If the date is later than the supplied date, the field has a value of "New". If the date is earlier than the supplied date, the field has a value of "Old".

### Example 2

If(Not(Search("Canada",[Country])>0 Or Search("USA",[Country])>0 Or Search("Mexico",[Country])>0),"Other","North America")

This example inspects the Country field of an Address Book entry to determine if the entry is located in North America or not. It uses the alphanumeric Search function to look for the countries "Canada", "USA", or "Mexico". If none of those strings are found in the entry's Country field, the formula evaluates to "Other", but if one of those strings is found it outputs "North America".

### Example 3

If (Dayofweek([Creation Date]) == 1, "Sunday",

If (Dayofweek([Creation Date]) == 2, "Monday",

If (Dayofweek([Creation Date]) == 3, "Tuesday",

If (Dayofweek([Creation Date]) == 4, "Wednesday",

If (Dayofweek([Creation Date]) == 5, "Thursday",

If (Dayofweek([Creation Date]) == 6, "Friday",

```
If (Dayofweek([Creation Date]) == 7, "Saturday", " "))))))
```

This example uses the Dayofweek function to get the day of the week expressed as an integer value for a date field. It compares the value with integer values and outputs a string representing the day of the week in. If it does not have a value, it outputs an empty string.

## Creating Key Fields Lists

Key Fields are important user-defined fields and system fields that are highlighted on the Basic Information tab in Address Book entries, opportunities, campaigns, and customer service cases, making them more readily accessible.

You can choose any user-defined fields and some system fields to include in the Key Fields lists. You may want to select mandatory fields as Key Fields, so users don't miss them when creating new records. You may also select frequently used fields, making it easier for users to quickly enter these values. And you may select fields important to a particular group of users because different Key Field lists can be defined for a specific user or group, or for all users.

The following sections contain information on creating lists of Key Fields:

- “Specifying Key Fields by Entry Type” on page 151
- “Restricting Key Fields to Specific Users” on page 152
- “Creating a Key Fields List” on page 153

### Specifying Key Fields by Entry Type

You can create an unlimited number of Key Fields lists. Key Fields are available for the entry types described in this section.

The fields available for each entry type correspond to the related type of field and the related Maximizer entries. For example, within a Key Fields list, the Opportunity Key Fields entry type may contain only opportunity detail fields and user-defined fields, and these Key Fields will be available only in the Opportunity dialog box in Maximizer.

There are different list of Address Book entry Key Fields for Companies, Individuals, and Contacts. Only fields for the type of Address Book entry (Company, Individual, or Contact) are available for each Key Fields entry type. For example, only fields that are available for Contact Address Book entries will be available for Contact Key Fields entry types. As well, each type of Address Book entry has different lists for sales leads and for regular entries. For example, Individual - Non-Lead Key Fields appear only in Individual Address Book entries that are not marked as leads.

| Key Fields Entry Type | Type of User-Defined Field                | Visible in Maximizer Entry Type          |
|-----------------------|---|--|
| Company - Lead        | Address Book entry fields for Companies   | Companies that are marked as Leads       |
| Company               | Address Book entry fields for Companies   | Companies that are not marked as Leads   |
| Individual - Lead     | Address Book entry fields for Individuals | Individuals that are marked as Leads     |
| Individual            | Address Book entry fields for Individuals | Individuals that are not marked as Leads |
| Contact - Lead        | Address Book entry fields for Contacts    | Contacts that are marked as Leads        |
| Contact               | Address Book entry fields for Contacts    | Contacts that are not marked as Leads    |
| Opportunity           | Opportunity user-defined fields           | Opportunities                            |
| Campaign              | Campaign user-defined fields              | Campaigns                                |
| Customer Service      | Customer Service user-defined fields      | Customer Service cases                   |

## Restricting Key Fields to Specific Users

The Key Fields in the Basic Information tab Details following pane of Address Book entries are visible only to the user or group specified as the owner of the Key Fields list. However, other users may still be able to access the fields in the list through the User-Defined Fields tab or through other Key Fields lists. Assigning a field to a Key Fields list does not determine who can access the field. The field is available as a Key Field only to users with access to both the user-defined field and to the Key Fields list.

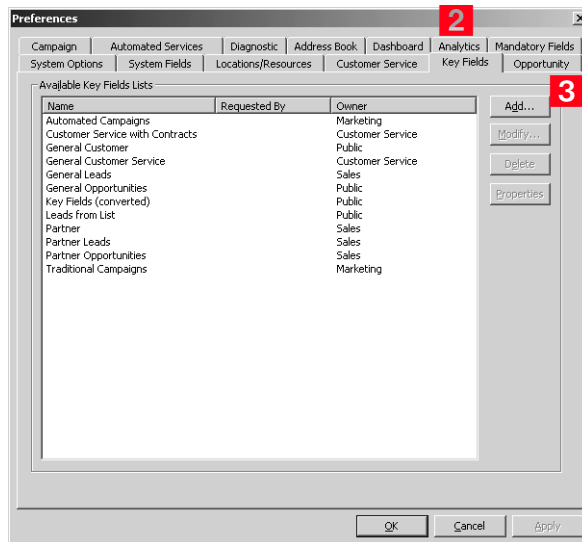
## Creating a Key Fields List

Create Key Fields lists, as described in the following procedure.

### ► To create a Key Fields List

**i** The Default Key List is created by default for all Address Books. Fields can be added to this list, but the list cannot be deleted.

- 1** In Administrator, select **File > Preferences**.
- 2** Select the **Key Fields** tab.
- 3** Click **Add**.



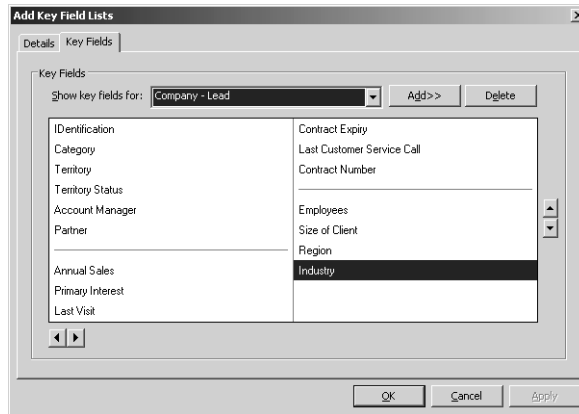
- 4** In the **List name** field, enter a name for the Key Fields list.
- 5** From the **Owner** drop-down list, select the user or security group with access to the Key Field list, or leave it as Public and if necessary, specify who the Key Fields list was requested by.
- 6** Select the **Key Fields** tab and from the **Show key fields for** drop-down list, select the type of Maximizer entry to assign Key Fields to.
- 7** Add any number of user-defined fields and system fields to the Key Fields list.

**i** The Owner field determines which users will see these fields in their Key Fields list in Maximizer.

- Click **Add** select **Key Field**, select a system or user-defined field, and click **Insert**.
- To insert a separator, click **Add**, and select **Separator**.  
Separators are used to group the Key Fields into visible groups. If you add a separator at the top or bottom of the

list, or if you add two separators in a row, the separators will be suppressed when the entry is viewed in Maximizer.


- Use the Move buttons to reposition the selected field or separator in the list.



**8** If necessary, from the **Show Key Fields for** drop-down list, select a different type of entry, and add fields to the list for that entry.

**9** Click **OK** to save the Key Fields list.

# Email Notification for Opportunities/Customer Service Cases

 If you are using case or opportunity notification in Maximizer Web Access, you must specify an email address for WEBUSER. Go to File > Manage Users, select WEBUSER from the list of users, and click Properties. Enter an email address on the General tab of the Properties dialog box.

Maximizer can send email to customers, partners, and users when the status of customer service cases or opportunities changes.

Maximizer includes default notification messages that are sent to users. You can also create custom email notification templates in Administrator. You can assign email templates for each action such as when you create a customer service case or when you win an opportunity. Each action can also have separate templates sent to customers/partners and to users.

When writing the email templates, remember that each template applies to all customer service cases or opportunities of that notification event type. They should be specific to the action they are assigned to but generic enough to apply to all cases or opportunities with that action. Use merge fields to personalize emails based on generic templates.

Notifications for cases and opportunities created by MaxExchange Remote users will be sent by the MaxExchange Server. In an n-tier environment, the notification is sent by the first parent MaxExchange Remote Server or MaxExchange Server that has an activated Maximizer Email Service.

## Customer Service Email Notification

Maximizer sends email messages to customers, partners, and users when you create, assign, escalate, or resolve customer service cases. You can configure the email notifications in the Notification tab of the Customer Service preferences in Administrator. (Select File > Preferences, and click Notification.)

You can choose to send notification automatically to Address Book entries when cases are first created. For the other customer notification templates, users have the option to send the notification while performing the specified actions in Maximizer. You also have the option to send a copy of the email message to the partners when notifying customers. User notification email messages are sent to the users identified in the Owner and Assigned To fields for the case.

## Opportunity Email Notification


Maximizer can automatically send email to users and partners when opportunities are created, abandoned, lost, suspended, or won. You can configure the email notifications in the Opportunities preferences in Administrator. (Select File > Preferences, and click Notification.)

When partner or user templates are assigned to the various actions, the email messages are automatically sent to the assigned partner or

users when the actions are performed. You can choose to send a copy of email messages sent to partners to the associated Account Manager as well. You can also notify sales leaders automatically whenever the leader field is changed. User notification email is sent to users identified as monitors for the opportunities.

## Merge Fields in Templates

Merge fields in the email template personalize the message for each recipient by replacing the merge field syntax with the actual field value for the Address Book entry. For example, including the {First\_Name?} merge field in an email template replaces the syntax with each email recipient's actual first name.

 The question mark in a merge field is used to alert users to not leave a space if no value is assigned to the related Address Book entry for the merge field.

Commonly used customer service and opportunity merge fields are described below. For a complete list of merge fields to include in the email templates, see the Insert Merge Field dialog box in the Maximizer Word Processor. Press F1 when a field is selected to view its description.

You can create templates in either .ETF (Maximizer Word Processor) or .HTML format. When you create templates in the Maximizer Word Processor, click the Merge Field button and select the merge field to insert into your email template. When you create HTML templates in an HTML or text editor, you must enter the merge field syntax manually or copy the syntax from the Maximizer Word Processor.

## Customer Service Case Merge Fields

The following table lists the basic customer service case merge fields to include in email templates.

| Customer Service Merge Field | Description  |
|------------------------------|--|
| {My_Name?}                   | Full name of the logged-in user (first name, initial, and last name)   |
| {My_Company?}                | Name of the logged-in user's company   |
| {CS.Case_Number?}            | Case number  |
| {CS.Client_Name?}            | Name of the associated Address Book entry (Company or Individual)  |
| {CS.Contact_Name?}           | Name of the Contact associated with the case<br>Because this field is not mandatory in customer service cases, a value may not display in case notification emails |
| {CS.Subject?}                | Case subject   |



| Customer Service Merge Field | Description  |
|------------------------------|--|
| {CS.Assigned_To?}            | Name of the user who the case is assigned to<br>Applies to case assignment or escalation emails only   |
| {CS.Resolved_By?}            | Name of the user who resolved the case<br>Applies to case resolution emails only   |
| {CS.Resolved_Date?}          | Date when the case was resolved<br>Applies to case resolution emails only  |
| {CS.Resolved_Time?}          | Time when the case was resolved<br>Applies to case resolution emails only  |
| {Case_Solution?}             | Knowledge base article number associated with the case resolution<br>Applies to case resolution emails only                                    |
| {Case_Solution_Note?}        | Notes from the Solution Notes field in the Solution Information & Billing tab of the Case dialog box<br>Applies to case resolution emails only |

## Opportunity Merge Fields

The following table lists the basic opportunity merge fields to include in email templates.

| Opportunity Merge Field                  | Description   |
|--|---|
| {My_Name?}                               | Full name of the logged-in user (first name, initial, and last name)  |
| {My_Company?}                            | Name of the logged-in user's company  |
| {Opportunity.Client_Name ?}              | Name of the associated Address Book entry (Company or Individual)   |
| {Opportunity.Opportunity _Contact_Name?} | Name of the Contact associated with the opportunity.<br>Because this field is not mandatory in customer service cases, a value may not display in case notification emails. |
| {Opportunity.Objective?}                 | The objective of the opportunity.   |
| {Opportunity.Categories?}                | The category of the opportunity.  |
| {Opportunity.Products_Services?}         | The products/services of the opportunity.   |
| {Opportunity.Description?}               | The opportunity's description.  |
| {Opportunity.Stage?}                     | The stage the opportunity is at.  |
| {Opportunity.Confidence_Rating?}         | The current confidence rating of the opportunity.   |
| {Opportunity.Status?}                    | The current status of the opportunity.  |
| {Opportunity.Start_Date?}                | The start date of the opportunity.  |
| {Opportunity.Close_Date?}                | The close date of the opportunity.  |
| {Opportunity.Next_Action ?}              | The opportunity's next action.  |
| {Opportunity.Revenue?}                   | The opportunity's projected revenue.  |
| {Opportunity.Cost?}                      | The opportunity's cost.   |
| {Opportunity.Team_Name ?}                | The name of the team associated with the opportunity.   |
| {Opportunity.Opportunity _Leader?}       | The leader of the opportunity.  |

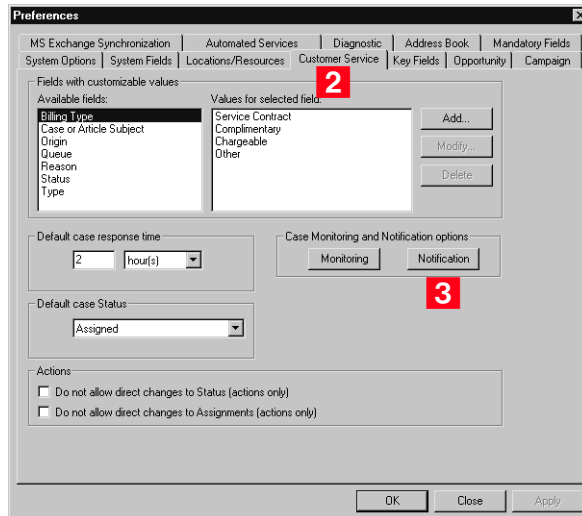
## Creating and Assigning Email Notification Templates

➤ *To create and assign a customer service case or opportunity email notification template*

- 1** In Administrator, select **File > Preferences**.
- 2** If you are creating and assigning a customer service case email notification template, select the **Customer Service** tab.

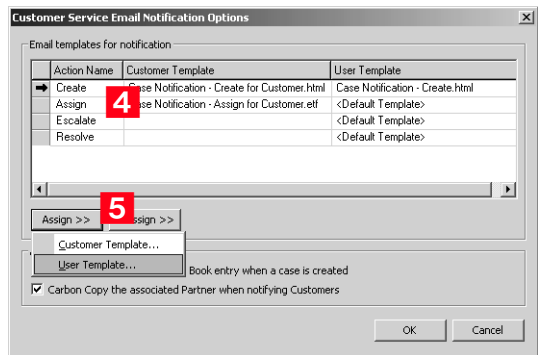
If you are creating and assigning an opportunity email notification template, select the **Opportunity** tab.

- 3** Click **Notification**.



- 4** Under **Email templates for notification**, select an **Action Name**.

- 5** Click **Assign**. For customer service case email notification, select **Customer Template** or **User Template**. For opportunity email notification, select **Partner Template** or **User Template**.



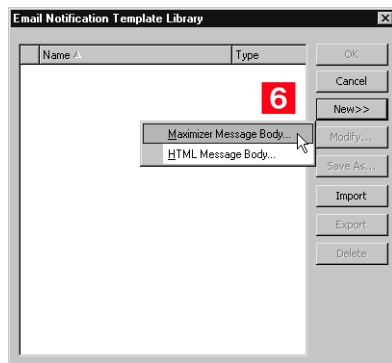
The Email Notification Template Library opens.

- 6** Select an existing template from the list and click **OK**. Then skip to step 10 of this procedure.

– or –

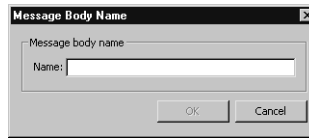
Create a new template.

- Click **New**.
- Select **Maximizer Message Body** (Maximizer Word Processor .ETF template) or **HTML Message Body** (HTML template).



The Message Body Name dialog box opens.

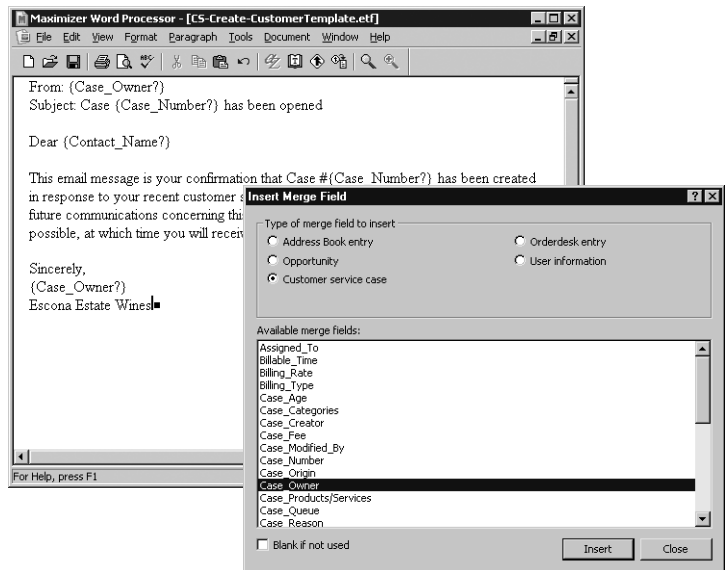
- 7** Type a name to identify the template and click **OK**.



It's a good idea to include the action (Create, Assign, Escalate, or Resolve) and the recipient type (Customer or User) in the template name, so the template is easier to identify.

- 8** Create the template, including customer service case or opportunity merge fields where appropriate, and then save and close the Maximizer Word Processor or HTML editor.

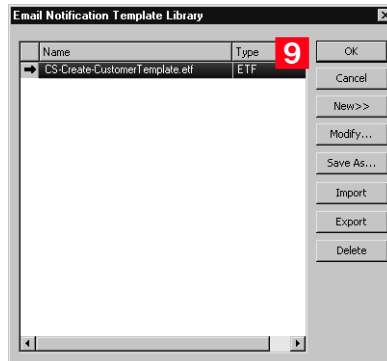
To insert merge fields in the Maximizer Word Processor, click the Merge Field button.



To use merge fields in HTML email templates, you must type the merge field syntax manually. To simplify the process, you might choose to create the template with its merge field syntax in the Maximizer Word Processor, and then copy and paste the text into the HTML document.

The template name now appears in the Email Notification Template Library.

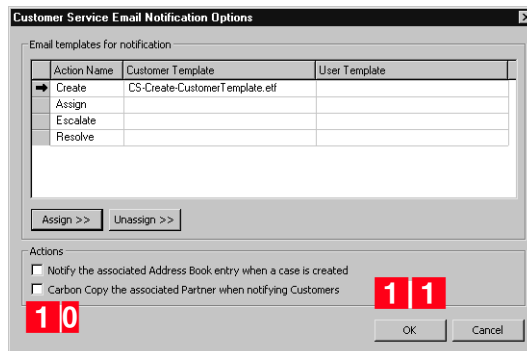
**9** Select the template and click **OK**.



The template is now associated with the action name for customers or users.

**10** For customer service email notifications, to email the associated partner when notifying a customer, select the ***Carbon Copy the associated Partner when notifying Customers*** checkbox.

For opportunity email notifications, to email the associated account manager when notifying a partner, select the ***Carbon Copy the Associated Account Manager when notifying the Partner*** checkbox.



**11** Click **OK** to save the changes.

➤ ***To turn customer service case notification off***

**1** In Administrator, select **File > Preferences**.

**2** Select the **Customer Service** tab.

**3** Click the **Notification** button.

**4** In the *Email templates for notification* group, select an *Action Name*.

**5** Click *Unassign* and select *User Template*.

The template is removed from the action and the email notification for the action will no longer be sent.

## Setting Up Default Opportunity/Case Monitoring Lists

You can set up default opportunity and customer service case monitoring lists in Administrator. Users can assign the default list of monitors to opportunities and cases in Maximizer. Users can also specify custom lists of opportunity and case monitors in specific entries.

### ➤ *To set up the default opportunity/case monitoring list*

**1** In Administrator, select *File > Preferences*.

**2** Select the *Opportunity* or *Customer Service* tab.

**3** Click *Monitoring*.

The current list of users assigned for monitoring is displayed.

**4** Add or remove users from the list.

- To add a user to the list, click *Add*, select a user, and click *OK*.
- To remove a user from the list, select the user, and click *Delete*.

**5** Click *OK* to save the changes.

# Enabling Event Notification

Maximizer enables you to send email notifications to a definable list of recipients when specific Maximizer and MaxExchange events occur and to log these events to a file.

Most often these events are significant error conditions requiring human intervention, such as a severe Email Server error during an email marketing campaign. They may also be notifications of irregularities in business process, such as a remote user who has not synchronized in a threshold number of days.

Event notification email messages and log files contain the following information about events:

- Date and time when the event occurred
- Type of event
- Address Book in which the event occurred
- Action resulting from the event (for example, activity suspended due to fatal error)
- Additional information about the event, such as error codes, suggested resolutions, etc.

 For descriptions of the MaxExchange events, refer to the *MaxExchange Administrator's Guide*.

The following table describes the events for which notification is available, as well as probable causes and suggested resolutions for each.

| Event description         | Module    | Cause  | Resolution  |
|---------------------------|-----------|--|---|
| Email service fatal error | AutoEmail | The connection to the SMTP Email Server has failed or the SMTP authentication username and/or password is incorrect. | Check the SMTP server name, check the network connection, and check the authentication username and password on the Automated Services tab (available in Administrator from the File > Preferences menu). |



➤ **To enable event notification**

- 1** In Administrator, select **File > Preferences**.
- 2** On the **System Options** tab, click **Event Notification**.

- 3** Select the **Enable event notification** checkbox.
- 4** Select an event from the **Events** list, and click **Properties**.

- 5** Select the notification options to enable for this event.

**i** On the Event Notification Properties dialog box, press F1 to open online help and read descriptions of the available notification options.

**6** If you selected **Via email** as one of the notification options, click **Add** to specify names and email addresses of notification recipients.

**7** Click **OK** to close the Event Notification Properties.

**8** Repeat steps 4 through 7 for each event for which you want to enable notification or logging.

**9** Complete the **SMTP server settings** fields as they apply to your SMTP server, and click **OK**.

Event notification is now configured.

### ➤ **To view the Event Notification log file**

**1** In Administrator, select **File > Preferences**.

**2** On the **System Options** tab, click **Event Notification**.

**3** On the Events Notification dialog box, click **View Log File**.

The EventNotification.log file opens in a text editor.

### ➤ **To open the Windows Event Viewer**

**1** Select **Start > Programs > Administrative Tools > Event Viewer**.

**2** In the left pane, select **Application Log**.

Maximizer event notifications appear in the right pane of the Event Viewer.

## Recording Holidays in the Holiday Editor

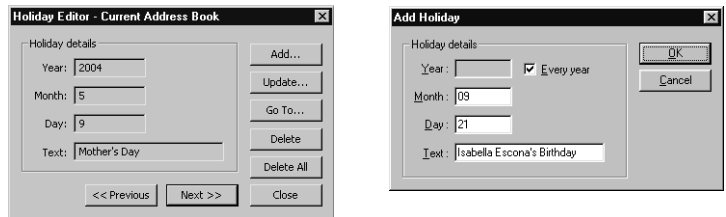
The Holiday Editor is a utility you can use to add or edit holidays in the Maximizer calendar. By default, the Holiday Editor contains many North American holidays. The holidays listed in the Holiday Editor also appear in the Calendar window in Maximizer. You can use Administrator to modify or delete existing holidays, or add new holidays.

If you wish to add personal holidays or events to your calendar, such as “Alice’s birthday”, you must create a yearly recurring appointment using the Calendar window in Maximizer.

The Holiday Editor’s data file—*Mxzhol.nam*—is inserted in the Maximizer program folder when you install Maximizer. In this location, you use Administrator’s Holiday Editor to manage one set of holidays for your installation of Maximizer.

### ➤ *To add a holiday to your calendar*

- 1** In Administrator, select *Utilities > Holiday Editor*.
- 2** Click **Add**.
- 3** Enter the details of the new holiday.
- 4** Click **OK** to close the Add Holiday dialog box.



### ➤ *To share your holidays with another Maximizer workstation*

- Copy the *Mxzhol.nam* file from your Maximizer program folder to the program folder on the other computer.

Note that this replaces any existing holidays on the destination computer with your own.

# MaxExchange Distribution

**i** This information is required for MaxExchange installations only.

The **MaxExchange Distribution** field is a system user-defined field. The table items within this user-defined field are referred to as Distribution Groups.

If your Maximizer setup includes MaxExchange, you must create the MaxExchange Distribution user-defined field as part of the Address Book setup. After you create this field, it appears in the User-defined fields tab of the Address Book entry in Maximizer. Users assign a MaxExchange Distribution value(s) to each Address Book entry, which assigns the Address Book entry to a MaxExchange Distribution Group(s).

Refer to the **MaxExchange Administrator's Guide** for more information about this field.

## ➤ To create the MaxExchange Distribution field

- 1** Open the Address Book in Administrator.
- 2** Select **File > Preferences**.
- 3** Click the **Create MaxExchange Distribution** button.

If this button is disabled, the field has already been created.

**Preferences**

Campaign | Automated Services | Diagnostic | Address Book | Dashboard | Mandatory Fields  
System Options | System Fields | Locations/Resources | Customer Service | Key Fields | Opportunity

System defaults

Global server: C:\Documents and Settings\All Users\ [Browse]

NOTE: The above setting applies only to the local machine where this application is accessed.

Address Book name: Escona Tutorial

Address Book ID: 772238169 Short ID: HQ

Caption text displayed for Overview Page: My Work Day

Maximum number of entries to retrieve: 1000

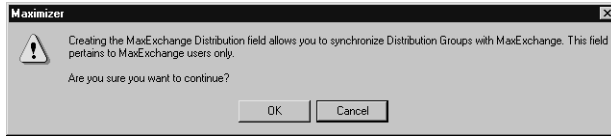
☒ System to assign Address Book entries' ID field values [Event Notification...]  
☒ System to assign Opportunities' ID field values [Live Update...]  
☒ System to assign Campaigns' ID field values [Multi-Currency...]  
☒ TAPI Format Address Book entry phone numbers  
☒ Notify partner of assigned Address Book entry or Opportunity  
☒ Enable security  
☐ Show only groups (and related users) which the current user is member of

MaxExchange

☐ Enable transaction journaling [Create MaxExchange Distribution]  
☒ Set Opportunity and Campaign status to 'Updated' when modified and then synchronized by MaxExchange

OK Cancel Apply

- 4 Click **OK** on the dialog box.



After you click this button, Maximizer creates the MaxExchange Distribution user-defined field, and the button becomes disabled in Preferences.

- 5 Click **OK** to close the Preferences window.

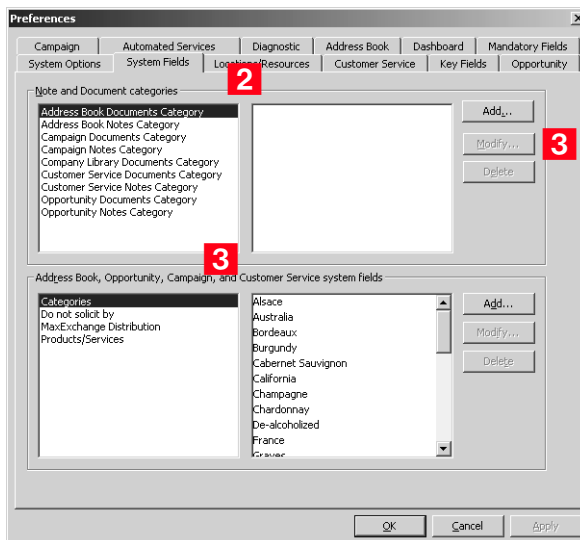
The MaxExchange Distribution field now appears on the User-Defined Fields tab of all Address Book entries.

## Adding MaxExchange Distribution Groups

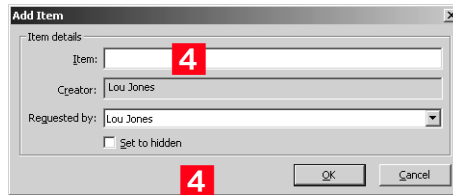
After you have enabled the MaxExchange Distribution field, you must create Distribution Groups.

### ➤ *To add a MaxExchange Distribution Group*

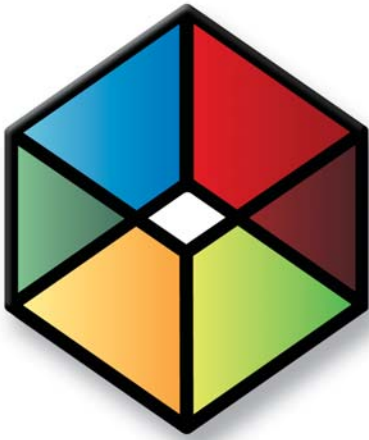
- 1 In Administrator, select **File > Preferences**.
- 2 Click the **s** tab.
- 3 Select **MaxExchange Distribution**, and click **Add**.



- 4** Enter the name of the new Distribution Group, and click *OK*.



The new MaxExchange Distribution Group has been added to the list.



# CHAPTER 7 **Configuring Email, Phone, and Synchronization**

## In this chapter...

- "Configuring Microsoft Outlook Synchronization" on page 172
- "Setting Up MaxSync for Microsoft Exchange" on page 178
- "Configuring Email" on page 190
- "Configuring MaxMobile Wireless Server" on page 198
- "Enabling TAPI" on page 200
- "Phone Masks" on page 205
- "Using Fax Software with Maximizer" on page 206

## Configuring Microsoft Outlook Synchronization

**i** Outlook Synchronization works with Microsoft Outlook only.

Outlook Synchronization mirrors select appointments, tasks, and Address Book entries between Maximizer and Microsoft Outlook to ensure the entries exist in both programs and that they both contain the same information.

Outlook Synchronization settings are configured on a per-user basis, and each Maximizer user has one set of configuration settings. Typically, users configure their own Outlook Synchronization settings in Maximizer by going to the Setup tab and selecting Preferences. However, you can also configure their settings through Administrator's user preferences.

Outlook Synchronization preferences enable you to select which entries will be synchronized:

**i** For information on how Maximizer and Outlook fields are mapped to each other in Outlook Synchronization, refer to "Field Mapping" on page 341.

- For appointments and tasks, only entries scheduled within the specified date ranges will synchronize, with the exception of recurring appointments and tasks, as described in the following section. These settings apply to appointments and tasks in both Maximizer and Outlook.
- For Maximizer Address Book entries, only the entries belonging to the selected Favorite List will synchronize with Outlook. Those entries will be assigned to the specified Outlook category.
- For Outlook contacts, only the contacts assigned to the specified category will synchronize with Maximizer. Those entries will be assigned to the selected Favorite List in Maximizer.
- Products/Services and Categories are synchronized to Outlook if you are using Microsoft Outlook Synchronization or MaxSync for Microsoft Exchange. Attendees, resources, and any notes you add to an appointment are also synchronized. These items appear as part of the appointment dialog box in Outlook.

Outlook Synchronization preferences also enable you to specify how often to synchronize and how to handle conflicts when the same entry has been modified in both Outlook and Maximizer.

Maximizer can synchronize only with Outlook profiles on the same machine. When configuring a user's Outlook Synchronization settings through Administrator, you must manually enter the Outlook profile name, but it cannot be verified until the Outlook Synchronization process runs on the user's machine. If you don't know the Outlook profile name, leave the field blank and the user can select it through Maximizer's user preferences. When Outlook Synchronization runs, it checks that the configuration has a valid Outlook profile name. If not, Outlook Synchronization logs the error.



## Appointment and Task Synchronization

When Outlook Synchronization is configured, it can synchronize select appointments and tasks between the Maximizer Address Book and Microsoft Outlook. Only those appointments and tasks scheduled within the specified date ranges will synchronize, with the following exceptions:

- If an instance of a recurring appointment occurs within the specified date range, all instances of the recurring appointment will be synchronized
- If a task is scheduled prior to the specified date range, but the “Carry forward unfinished tasks” option is selected, the task will be synchronized

You can also specify whether to synchronize private appointments and/or tasks.

### Recurring Appointments

Recurring appointments in Microsoft Outlook synchronize to Maximizer as recurring appointments unless they have no end date. If the recurring appointment has no end date, only the first occurrence synchronizes with Maximizer, not the recurrences. To synchronize recurring appointments with Maximizer, always provide an end date.

Note that while it is possible to modify the Private property of a single instance of a private appointment in Maximizer, this property can be changed only for the entire series of recurring appointments in Outlook. Therefore, if you change the Private property of a single instance of a recurring appointment in Maximizer, this change will not be synchronized to Outlook.

### Recurring Tasks

If you synchronize a recurring task from Outlook, and then mark the task as complete in Maximizer, Maximizer cannot create the next instance of the recurring task. You should mark the task as complete in Outlook, which will create the next instance of the task, and then re-synchronize with Maximizer.


If you synchronize a recurring task from Outlook, and then delete the task in Maximizer, all instances of the recurring tasks are deleted. If you want to delete a single instance of a recurring task, you should delete the task in Outlook and then re-synchronize with Maximizer.

## Group Appointments

When using Outlook Synchronization, group appointments in Maximizer synchronize to Outlook for the current user only. However, the synchronized appointment in Outlook includes all the locations, resources, and attendees information in the appointment notes.

To fully synchronize group appointments between Maximizer and Outlook, use MaxSync for Microsoft Exchange.

## Microsoft Outlook Synchronization and MaxSync for Microsoft Exchange

 Refer to "Setting Up MaxSync for Microsoft Exchange" on page 178 for more information.

If MaxSync for Microsoft® Exchange is installed and configured for the current Address Book, Outlook Synchronization no longer synchronizes appointments or tasks. However, Address Book entry synchronization can be handled by MaxSync or Outlook synchronization based on your settings. If MaxSync for Microsoft Exchange is active, the appointment and task synchronization sections of the Outlook Synchronization configuration properties are disabled.

## Microsoft Outlook Synchronization and MaxExchange Synchronization

In a MaxExchange environment with Microsoft Outlook Synchronization enabled, Maximizer can synchronize with Outlook on a single server or remote only. Otherwise, duplication of entries may occur.

When MaxExchange is installed, and at least one MaxExchange remote has been added as a distribution site, a MaxExchange Location button appears at the bottom of the Outlook Synchronization tab. Clicking this button opens a dialog box containing a drop-down list of MaxExchange servers and remotes for the current Address Book. Select the MaxExchange server or remote where Maximizer will synchronize entries with an Outlook profile for the selected user.

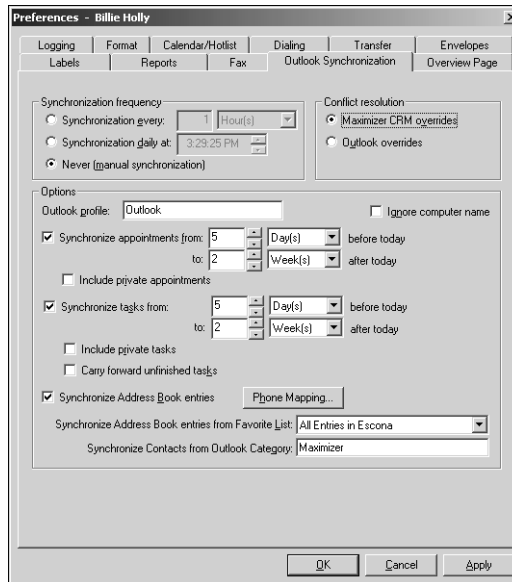
## Synchronization from Outlook to Your PDA

In addition to synchronizing Maximizer data with Outlook, you can synchronize information from Outlook to your PDA. There are several selections of available software to perform this synchronization. Please consult with your PDA manufacturer or supplier for more information.

## Configuring Outlook Synchronization

### ► To configure Outlook Synchronization

- 1 In Administrator, select **File > Manage Users**.
- 2 Select the Maximizer user, and click **Preferences**.
- 3 Select the **Outlook Synchronization** tab.



- 4 In the **Synchronization frequency** group box, specify how often Maximizer should synchronize with Outlook.

If you select **Never (manual synchronization)**, the user must synchronize manually by selecting the **Tools** tab and clicking **Synchronize with Outlook** in the **Office** group.

- 5 In the **Conflict resolution** group box, select the desired method of handling entries that have been changed in both Maximizer and Outlook since the last synchronization.
- 6 In the **Outlook profile** field, enter the name of the user's Outlook profile. This information must be obtained from the user's computer.

To ignore the computer name when synchronizing, select the **Ignore computer name** checkbox.

**i** Do not select Ignore computer name if the user uses multiple computers and synchronizes to a different Outlook profile on each computer.

**7** To synchronize appointments, select the **Synchronize appointments** checkbox and specify the date range of appointments to synchronize.

Private appointments will not be synchronized unless the **Include private appointments** checkbox is also selected.

**8** To synchronize tasks, select the **Synchronize tasks** checkbox and specify the date range of tasks to synchronize.

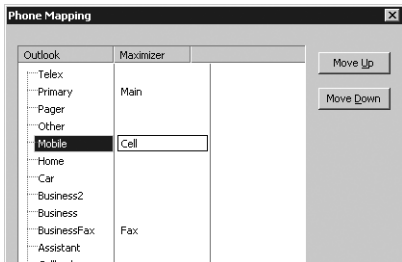
Private tasks will not be synchronized unless the **Include private tasks** checkbox is also selected.

To also synchronize incomplete tasks that are scheduled prior to the specified date range, select the **Carry forward unfinished tasks** checkbox.

**9** To synchronize Maximizer Address Book entries and Outlook contacts, select the **Synchronize Address Book entries** checkbox. Note that this option is used to synchronize a personal Contacts Address Book list. For information on selecting the Outlook address list for integration with Maximizer, see the *Maximizer CRM User's Guide*.

**i** The Synchronize Address Book entries checkbox is disabled if the user does not have the "Allow sync contacts with external clients" access right.

**10** To specify the mapping between Outlook phone number fields and Maximizer phone number fields, click the **Phone Mapping** button, select the Maximizer phone number field to map to each Outlook phone number field, and click **OK**.



Do not map all Outlook phone number fields. Maximizer supports only four phone numbers for each Address Book entry. If an Outlook contact has more than four phone numbers, and more than four types are mapped between Outlook and Maximizer, not all the Outlook phone numbers can be synchronized with Maximizer.

**11** In the **Synchronize Address Book entries from Favorite List** drop-down list, select the Maximizer Favorite List to synchronize.

**12** In the **Synchronize Contacts from Outlook Category** drop-down list, select the Outlook category to synchronize.

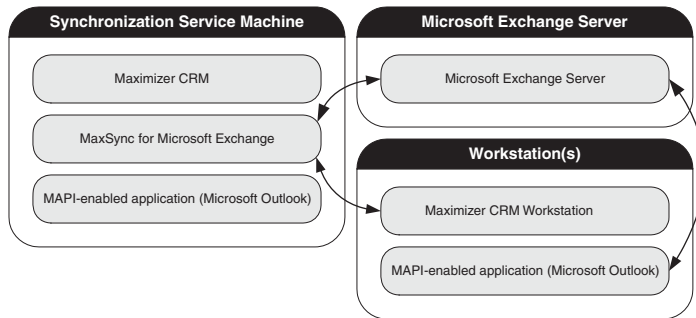
**1 3** If the selected user is a MaxExchange user, click the ***MaxExchange Location*** button, select the MaxExchange server or remote where this Outlook profile can synchronize with Maximizer, and click ***OK***.

**1 4** Click ***OK***.

## Setting Up MaxSync for Microsoft Exchange

MaxSync for Microsoft Exchange is a Maximizer add-on that mirrors select appointments and tasks between a Maximizer Address Book and a Microsoft Exchange Server. This add-on is similar to Maximizer's built-in Outlook Synchronization tool, which synchronizes Maximizer directly with Outlook. For more information, refer to "Configuring Microsoft Outlook Synchronization" on page 172.

MaxSync for Microsoft Exchange synchronizes information between the Microsoft Exchange server and Maximizer workstations. The Microsoft Exchange server communicates with MAPI-enabled applications, like Microsoft Outlook, on workstations. MaxSync ensures that information in the email applications matches information in Maximizer.




**i** MaxSync for Microsoft Exchange is not supported in multi-server Microsoft Exchange environments.

Select one machine where you will install MaxSync for Microsoft Exchange for one or more Address Books. One installation of MaxSync for Microsoft Exchange can apply to multiple Address Books. Do not activate multiple installations of MaxSync for the same Address Book.

You can install MaxSync for Microsoft Exchange on either the Maximizer server or on a workstation. However, it must be installed on a machine where Maximizer and a MAPI-enabled application, such as Microsoft Outlook, are installed. Do not install MaxSync for Microsoft Exchange on your Microsoft Exchange Server machine.

## Appointment and Task Synchronization

 Products/Services and Categories are synchronized to Outlook if you are using MaxSync for Microsoft Exchange. Attendees, resources, and any notes you add to an appointment are also synchronized. These items appear as part of the appointment dialog box in Outlook.

When MaxSync is installed and configured, it can synchronize select appointments and tasks between the Maximizer Address Book and Microsoft Exchange. Only those appointments and tasks scheduled within the specified date ranges will synchronize, with the following exceptions:

- if an instance of a recurring appointment occurs within the specified date range, all instances of the recurring appointment will be synchronized
- if a task is scheduled prior to the specified date range, but the “Carry forward unfinished tasks” option is selected, the task will be synchronized

You can also specify whether to synchronize private appointments and/or tasks.

Note that under some circumstances, if a task is assigned to you and you assign the task to another user, and the user accepts it, after synchronizing with MaxSync the task will be synchronized for one of the users only, not both. This situation occurs only if the user accepting the task does not open the task and is using the “simple” (rather than “detailed”) task view. Otherwise, the task synchronization will occur normally.

## Recurring Appointments

As with Microsoft Outlook synchronization, recurring appointments in Microsoft Exchange synchronize to Maximizer as recurring appointments unless they have no end date. If the recurring appointment has no end date, only the first occurrence synchronizes with Maximizer, not the recurrences. To synchronize recurring appointments with Maximizer, always provide an end date.

Note that while it is possible to modify the Private property of a single instance of a private appointment in Maximizer, this property can be changed only for the entire series of recurring appointments in Microsoft Exchange. Therefore, if you change the Private property of a single instance of a recurring appointment in Maximizer, this change will not be synchronized to Microsoft Exchange.

## Recurring Tasks

If you synchronize a recurring task from Outlook, and then mark the task as complete in Maximizer, Maximizer cannot create the next instance of the recurring task. You should mark the task as complete in Outlook, which will create the next instance of the task, and then re-synchronize with Maximizer.

If you synchronize a recurring task from Outlook, and then delete the task in Maximizer, all instances of the recurring tasks are deleted. If you want to delete a single instance of a recurring task, you should delete the task in Outlook and then re-synchronize with Maximizer.

## Group Appointments

With MaxSync for Microsoft Exchange, you can also synchronize group appointments. However, when changing the attendees for individual instances of a recurring appointment, Maximizer cannot synchronize that change.



## Using Both MaxSync for Microsoft Exchange and Outlook Synchronization

You can use MaxSync for Microsoft Exchange and Microsoft Outlook Synchronization together in the same Address Book. If MaxSync for Microsoft Exchange is enabled for the current Address Book, Outlook Synchronization no longer synchronizes appointments and tasks, and the appointment and task synchronization section of Outlook Synchronization configuration properties becomes disabled. However, Address Book entry synchronization is handled by Outlook synchronization.

The screenshot shows the 'Preferences' dialog box with the 'MS Exchange Synchronization' tab selected. The 'Activate MaxSync for Microsoft Exchange for currently open Address Book' checkbox is checked. Under 'Synchronization frequency', 'Synchronization every:' is set to 1 Hour(s), 'Synchronization daily at:' is set to 3:31:23 PM, and 'Never (manual synchronization)' is selected. The 'Conflict resolution' section has 'Maximizer CRM overrides' selected. The 'Options' section includes an 'Outlook profile:' field, 'Synchronize appointments from:' (5 Day(s) before today to 2 Week(s) after today), 'Include private appointments' (checked), 'Synchronize tasks from:' (5 Day(s) before today to 2 Week(s) after today), 'Include private tasks' (checked), 'Carry forward unfinished tasks' (checked), 'Synchronize Address Book entries' (unchecked), 'Synchronize Address Book entries from Favorite List:' (dropdown), and 'Synchronize Contacts from Outlook Category:' (Maximizer). Buttons for 'User Administration...', 'Phone Mapping...', 'OK', 'Cancel', and 'Apply' are visible.

**Preferences**

System Options | System Fields | Locations/Resources | Customer Service | Key Fields | Opportunity | Campaign  
MS Exchange Synchronization | Automated Services | Diagnostic | Address Book | Dashboard | Mandatory Fields

☒ Activate MaxSync for Microsoft Exchange for currently open Address Book

Synchronization frequency:

☐ Synchronization every: 1 Hour(s)

☐ Synchronization daily at: 3:31:23 PM

☒ Never (manual synchronization)

Conflict resolution:

☒ Maximizer CRM overrides

☐ Outlook overrides

Options:

Outlook profile:

☒ Synchronize appointments from: 5 Day(s) before today to 2 Week(s) after today

☒ Include private appointments

☒ Synchronize tasks from: 5 Day(s) before today to 2 Week(s) after today

☒ Include private tasks

☒ Carry forward unfinished tasks

☐ Synchronize Address Book entries Phone Mapping...

Synchronize Address Book entries from Favorite List:

Synchronize Contacts from Outlook Category: Maximizer

User Administration...

OK Cancel Apply

## Windows Account for MaxSync for Microsoft Exchange

MaxSync for Microsoft Exchange runs as a service under an account that has the necessary permissions to the Microsoft Exchange mailbox store. This account must be specified during the MaxSync for Microsoft Exchange installation.

The specified service account must have the "Send As", "Receive As", "Administer Information Store", and the "View Information Store Status" rights on the mailbox store in Microsoft Exchange.

### ➤ *To assign permissions for the mailbox store in Microsoft Exchange 2007 or 2010*

**1** Launch Microsoft Exchange 2007/2010 Power Shell.

**2** Enter the following script:

```
get-mailboxserver [ServerName] | add-adpermission -user  
[UserAccount] -extendedrights "Send As", "Receive As",  
"Administer Information Store", "View Information Store  
Status"
```

**i** Replace [ServerName] with the name of the Exchange server, and replace [UserAccount] with the user account that MaxSync for Microsoft Exchange will run under.

### ➤ *To assign permissions for the mailbox store in previous versions of Exchange*

**1** Launch Microsoft Exchange System Manager.

**2** Navigate to the Mailbox Store.

**3** Right-click and select *Properties*.

**4** Click the *Security* tab.

**5** Select the user account that MaxSync for Microsoft Exchange will run under.

**6** Allow the following permissions: *Administer information store*, *View information store status*, *Receive As*, and *Send As*.

**7** Click *OK*.

## Installing MaxSync for Microsoft Exchange

Select one machine where you will install MaxSync for Microsoft Exchange for one or more Address Books. While one installation of MaxSync for Microsoft Exchange can apply to multiple Address Books, do not activate multiple installations of MaxSync for the same Address Book.

MaxSync for Microsoft Exchange can be installed on either the Maximizer server or on a workstation. However, it must be installed on a machine where Maximizer and a MAPI-enabled application, such as Microsoft Outlook, are installed. Do not install MaxSync for Microsoft Exchange on your Microsoft Exchange Server machine.

### ➤ *Before installing MaxSync for Microsoft Exchange*

- 1** On the machine where MaxSync for Microsoft Exchange will be installed, log in using the Windows account identified above.
- 2** Create a Mail profile for that account.
- 3** Open the Mail profile in Outlook to test connectivity.
- 4** Open Maximizer and log into every Address Book that will synchronize using MaxSync for Microsoft Exchange.

### ➤ *To install MaxSync for Microsoft Exchange*

- 1** Close all programs running on the server.
- 2** Insert the MaxSync for Microsoft Exchange disc.
- 3** Click *Install MaxSync for Microsoft Exchange*.

The setup starts automatically.

The InstallShield Wizard starts.

- 4** Follow the on-screen installation instructions.
- 5** On the Account Details screen, enter the account details for a valid user in the domain where the Microsoft Exchange Server resides, and click *Next*.

 If the setup doesn't start automatically, you can start it manually by running `autorun.exe` from the disc.

**i** This is the Windows user account for MaxSync for Microsoft Exchange discussed earlier.

**Domain:** Name of the Windows domain where the Microsoft Exchange Server resides.

**User:** Username of a Windows account with administrative rights to the Microsoft Exchange Server. This user must have full access to all mailboxes on the Microsoft Exchange Server.

**Password:** Password for the specified user account.

**Confirm password:** Same as the previous field.

**6** Click **Next** to start the installation.

**7** When the installation is complete, click **Finish**.

Once you have installed MaxSync for Microsoft Exchange, you must enable it for the Address Book and for each user.

## Enabling MaxSync for Microsoft Exchange for the Address Book


**i** MS Exchange Synchronization preferences are available through Administrator only, not Maximizer.

After MaxSync for Microsoft Exchange is installed, configuration properties are available through File > Preferences > MS Exchange Synchronization in Administrator. These preferences are configured on a system-wide basis, rather than per-user as with Outlook Synchronization. After you have configured the MaxSync for Microsoft Exchange preferences, you must enable it for each user through their user properties.

### ➤ **To enable and configure MaxSync for the Address Book**

**1** In Administrator, select **File > Preferences**.

**2** Click the **MS Exchange Synchronization** tab.

 This tab is not available until after MaxSync for Microsoft Exchange is installed.

**3** Select **Activate MaxSync for Microsoft Exchange for currently open Address Book**.

**4** In the **Synchronization frequency** group box, specify how often Maximizer should synchronize with Microsoft Exchange.

If you select **Never (manual synchronization)**, a user can synchronize data manually by clicking the Synchronize with MS Exchange toolbar button or selecting **Synchronize with Outlook** from the Office group on the Setup tab in Maximizer. This synchronizes data for this particular user only.

**5** In the **Conflict resolution** group box, select the desired method of handling entries that have been changed in both Maximizer and Outlook since the last synchronization.

**6** In the **Outlook profile** field, enter the name of a Microsoft Exchange profile. This is the profile of the Microsoft Exchange administration user, which was specified during the installation.

This mail profile must exist on the machine where the MaxSync service is running.

**7** To synchronize appointments, select the **Synchronize appointments** checkbox and specify the date range of appointments to synchronize.

Private appointments will not be synchronized unless the **Include private appointments** checkbox is also selected.

**8** To synchronize tasks, select the **Synchronize tasks** checkbox and specify the date range of tasks to synchronize.

Private tasks will not be synchronized unless the **Include private tasks** checkbox is also selected.

To also synchronize incomplete tasks that are scheduled prior to the specified date range, select the **Carry forward unfinished tasks** checkbox.

**9** Click the **User Administration** button to create disabled Maximizer user accounts for Microsoft Exchange users, so you can create Maximizer appointments for those users and synchronize the appointments with a Microsoft Exchange server.

**10** Click the **Resource Mapping** button to map Maximizer resources/locations to Exchange Server resources.

**11** If the selected user is a MaxExchange user, click the **MaxExchange Location** button, select the MaxExchange server or remote where this Outlook profile can synchronize with Maximizer, and click **OK**.

## Enabling MaxSync for Microsoft Exchange for Maximizer Users

Once MaxSync for Microsoft Exchange is installed and configured, you must enable it for individual users before they can synchronize Maximizer and Outlook appointments and tasks.

➤ **To enable MaxSync for Microsoft Exchange for a Maximizer user**

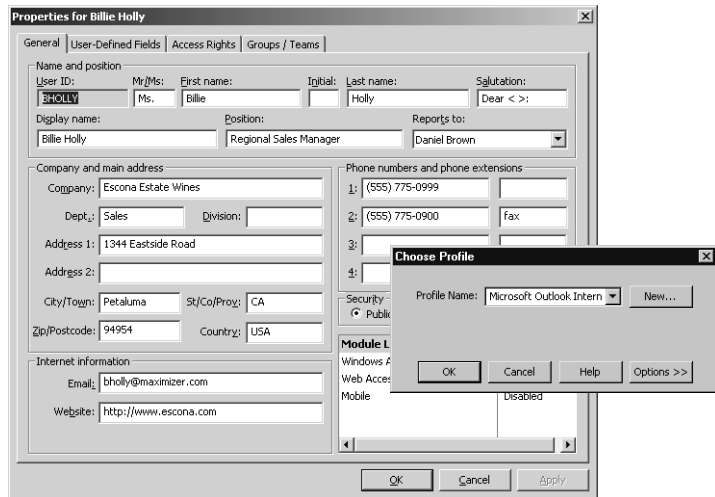
- 1** Click **File > Manage Users**.
- 2** Select the Maximizer user, and click **Properties**.
- 3** Select the **Windows Authentication** tab.
- 4** Click the **MS Exchange User** drop-down arrow.

The Choose Profile dialog box opens.

- 5** Select a Microsoft Exchange profile name, and click **OK**.

The MS Exchange User drop-down list is now populated with a list of mail profiles on the Microsoft Exchange Server.

- 6** From the **MS Exchange User** drop-down list, select the mail profile name for the selected user.
- 7** Click **OK** to close the user properties dialog box.



The Maximizer user account is now configured to use MaxSync for Microsoft Exchange.

## Enabling MaxSync for Microsoft Exchange for Other Users

If you are using MaxSync for Microsoft Exchange, and you want to create Maximizer appointments with non-Maximizer users, create disabled Maximizer user accounts for those users and map them to their Microsoft Exchange user accounts. You can then create Maximizer appointments with those users and synchronize the appointments with Microsoft Exchange. MaxSync User Administration in Administrator enables you to automatically create disabled Maximizer user accounts for non-Maximizer users and automatically map them to their Microsoft Exchange user accounts.

These disabled Maximizer user accounts do not consume any Maximizer licenses, and they do not give those users any access to the Maximizer Address Book. They simply enable you to add those users to Maximizer appointments that synchronize to a Microsoft Exchange server.

Do not use MaxSync User Administration to map Microsoft Exchange user accounts to existing Maximizer users. Doing so may create duplicate disabled Maximizer user accounts for those users. To map Microsoft Exchange user accounts to existing Maximizer user accounts, use the procedure described in “Enabling MaxSync for Microsoft Exchange for Maximizer Users” on page 186.

### ➤ *To automatically create disabled Maximizer user accounts for Microsoft Exchange users*

- 1** In Administrator, on the machine where MaxSync is installed, select **File > Preferences**.
- 2** Open the **MS Exchange Synchronization** tab.
- 3** Click **User Administration**.
- 4** In the Choose Profile dialog box, select the Microsoft Exchange server **Profile Name**, and click **OK**.

The dialog box shows available Microsoft Exchange users in the list on the left, and it shows Microsoft Exchange users that have already been mapped to a Maximizer user account in the list on the right. Both lists show the user's display name from the Microsoft Exchange server.

- 5** In the **Available Microsoft Exchange users** list, select any users for whom you want to create disabled Maximizer user accounts.

You can select a range of users by selecting the first user in the range, holding down the Shift key, and then selecting the last user in the range. You can select multiple users by holding down the Ctrl key while you click.

**6** Click **Add**.

The selected users appear in the Users selected for synchronization list.

**7** Click **OK**.

Maximizer creates the disabled user accounts. Those users will now appear in the Manage Users dialog box (File > Manage Users), but their Maximizer login status is disabled.

Once you have created disabled Maximizer user accounts for Microsoft Exchange users, you cannot remove them using the MaxSync User Administration dialog box. See the procedure below for information on removing them.

## Disabling MaxSync for a Maximizer User Account

To disable MaxSync for a Maximizer user account, unmap the connection between the user's Maximizer account and Microsoft Exchange account. Perform this procedure on the computer where MaxSync is installed in Maximizer or Administrator.

➤ ***To unmap a Maximizer user account from a Microsoft Exchange user account***

**1** In Maximizer, on the **Setup** tab, select **Manage Users** from the **User Management** group.

– or –

In Administrator, select **File > Manage Users**.

**2** Select the Maximizer user, and click **Properties**.

**3** Select the **Windows Authentication** tab.

**4** Click the **MS Exchange User** drop-down arrow.

**5** Select the Microsoft Exchange server name from the **Profile Name** drop-down list.

**6** Change the value of the **MS Exchange User** drop-down list to the blank value at the top of the list.

**7** Click **OK**.

The Maximizer user account is no longer mapped to a Microsoft Exchange user account on that Microsoft Exchange server. If you open the MaxSync User Administration dialog box, the user is also removed from the column on the right.



## Configuring Windows Authentication for MaxSync

To run MaxSync for Microsoft Exchange in a Windows Authentication environment, the Windows user account running MaxSync must have the db\_owner role for the MaConfig database and for the Maximizer databases that are synchronizing with Microsoft Exchange. For more information on setting up Windows Authentication, see “Setting Windows Authentication for Users” on page 110.

## Moving MaxSync to a Different Computer

To move MaxSync for Microsoft Exchange to a different computer, set up MaxSync on the new computer in the same way as you set up MaxSync on the original computer.

To ensure duplicate entries are not created, MaxSync must be set up using a Mail profile with the same name and for the same user account as on the original computer. To verify the name of the Mail profile on the original computer, in Administrator, select File > Preferences, and select the MS Exchange Synchronization tab. The name of the Mail profile is displayed in the Outlook profile field.

When installing MaxSync, ensure you select the same Windows user account to run the MaxSync service as was set up on the original computer.

For more information on setting up the Mail profile and installing MaxSync, see ‘Installing MaxSync for Microsoft Exchange’ on page 183.

## Configuring Email

The Maximizer Email Service sends email messages as part of automated campaigns, opportunity and case email notification, and appointment reminders. You must configure the Maximizer Email Service to use these features properly.

Automated campaigns track various statistics for email activities, including the number of bounces and replies generated from email activities. To track these statistics, you must specify the email accounts to monitor.

The following sections contain information on configuring email:

- “Configuring the Maximizer Email Service” on page 190
- “Configuring Email Accounts for Campaign Monitoring” on page 192

## Configuring the Maximizer Email Service

The Maximizer Email Service is installed automatically with Maximizer, and it works with the following operations in Maximizer:

- Automated campaign email activities
- Opportunity and customer service email notifications
- Appointment notification using iCalendar attachments and appointment reminders
- Email messages sent through Maximizer Web Access or Mobile Access

The Maximizer Email Service must be running for these operations to function.

Note that for Windows XP Professional, the Maximizer Email Service must run as an application, not as a service.

By default, Maximizer will delete any email messages queued by the email service that are older than 14 days. Messages are queued when the email service is stopped. To change the maximum age of unsent email messages, modify the value of the EMGR\_MSG\_AGE\_LIMIT key in the MaConfig table. To disable email message age limits, set this value to 0.

Ensure that users have an email address entered in their user properties, so they can receive customer service case email notifications and appointment reminders by email. Users should also set their email appointment notification option in Maximizer (In the Setup tab, select Preferences. In the Preferences dialog, select the Calendar/Hotlist tab).

For more information about the properties in the Automated Services tab, click inside the tab and press **F1**.

➤ **To configure the Maximizer Email Service**

- 1** In Administrator, select **File > Preferences**.
- 2** Select the **Automated Services** tab.
- 3** Select **Email** from the **Preferences for Activity type** drop-down list.
- 4** Set the **Service cycle time check**.

The service cycle time check controls how often the Maximizer Email Service processes the email activities in automated campaigns. By default, this option is set to 1 minute.

- 5** To send large quantities of email messages, select the **Enable sending in batch mode** option, and set the **Batch size**.

If you are using an ISP, it's important to control the email batch settings.

- 6** Enter a URL in the **URL of Campaign Manager Statistics** field.

This URL specifies the URL of the script that redirects the email recipients to the Landing page URL (as specified in the Add Email Activity dialog box), which is included in automated email activities. This option applies to automated email activities only, and it is available only if Maximizer Components for Microsoft IIS is installed.

- 7** Choose a character set from the **Character set used by email service** drop-down list. This is the friendly name for the character set. The actual name of the character set is shown in the field on the right of the drop-down list.

This character set is used for all outgoing email sent by the Maximizer Email Service.

If the character set does not appear in the list, you can enter the name of the character set in the field on the right. The field on the left is then displayed as a blank value.

- 8** Select the **Activate services for the currently open Address Book** option.

This checkbox must be enabled to use automated email campaigns, customer service case email notifications, and appointment reminders by email.

- 9** Enter the **Service computer** and **SMTP server** names and the **SMTP port** number.

- 10** If the **SMTP server requires authentication**, select the checkbox and enter the account name and password.

**i** The SMTP server is specified during the Maximizer installation and the port number is set to 25 by default.

**i** The authentication settings are specified during Maximizer installation.

**1 1** Click **OK**.

Maximizer is now configured to use the Maximizer Email Service for automated email campaign activities, customer service case email notifications, and appointment reminders by email.

## Configuring Email Accounts for Campaign Monitoring

To track some statistics for email campaigns, you must specify the settings for the IMAP server and email accounts used for monitoring bounces and replies for campaign email activities. Maximizer tracks the number of email messages sent to these accounts and generates statistics for each campaign.

You must specify settings for the same email accounts that are specified as the "From" and "ReplyTo" addresses in the Email Addresses tab of a campaign email activity.

### ➤ *To configure campaign monitoring email accounts*

- 1** In Administrator, select **File > Preferences**.
- 2** Select the **Campaign** tab.
- 3** Under **Campaign monitoring options**, click **Monitoring**.

The Campaign Monitoring Settings dialog box opens.

- 4** Under **Server settings**, specify settings for the IMAP email server.

- In the **IMAP Server** field, enter the URL for the IMAP server.

- In the **Port** field, enter the port number for the IMAP server.
- Select **SSL** if Secure Sockets Layer (SSL) is enabled on the IMAP server.

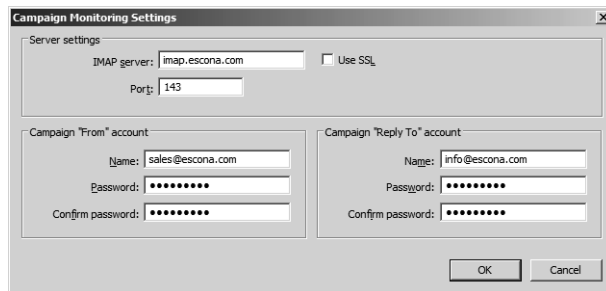
- 5** Under **Campaign “From” account**, specify the name and password for the email account that appears as the “From” address in campaign messages.

This account must match the email address specified as the “From” address in the Email Addresses tab of campaign email activities.

- 6** Under **Campaign “Reply To” account**, specify the name and password for the email account to which to send replies.

This account must match the email address specified as the “ReplyTo” address in the Email Addresses tab of campaign email activities.

If the From and Reply To accounts are the same, you need to specify the credentials only once, in either section. The specified email account is monitored for both replies and bounces.



- 7** Click **OK** to close the Campaign Monitoring Settings dialog box.
- 8** Click **OK** to save the changes to the preferences.

## User Account for SQL Server Reporting Services Integration

In order to enable the SQL Server Reporting Services Integration, you must specify a user account to connect with the Maximizer database. The user account must match the following criteria:

- The user is a member of the SSRS Report Management security group in Maximizer. For information on security groups, see “Security Groups” on page 100.
- The login for the user has the sysadmin server role on the SQL Server hosting the Maximizer database. For information on user

logins in Microsoft SQL Server, see the SQL Server documentation.

The MASTER user automatically meets these criteria.

## Enabling SQL Server Reporting Services

You can enable SQL Server Reporting Services in the System Options preferences in Maximizer Web Access Administrator. When you enable SQL Server Reporting Services, a number of default reports are automatically created on the SQL Server Reporting Services server.

### ► To enable SQL Server Reporting Services

- 1** Log in to Maximizer Web Access Administrator.
- 2** In the left pane, under *Preferences*, click *System Options*.
- 3** Select the *SQL Server Reporting Services Settings* tab.
- 4** Click *Modify Options*.
- 5** Select *Enable SQL Server Reporting Services Integration*.

The URL to the Reporting Services server and the path to the current Address Book are automatically filled in.

- 6** Under *Database Account*, enter the username and password for the user account used to connect to the Maximizer database.

If you are using Windows Authentication, you must specify the Windows domain and user account in the *Account* field.

Whenever the password changes, you must specify the new password in this page.

Preferences  
for System Options

Options SQL Server Reporting Services Settings

SQL Server Reporting Services Settings

Save Cancel

☒ Enable SQL Server Reporting Services Integration

Reporting Services Server Web Service URL:

Reporting Services Path for Address Book:

Database Account

Specify an account which will be used to connect to your AddressBook.

Account:

Password:

☐ Use as Windows credentials when connecting to the data source

- 7** Click **Save**.
- 8** The SQL Server Reporting Services settings are saved on the report server. You may need to wait a moment for the settings to save.

## Adding Users to the SSRS Report Management Security Group

Members of the SSRS Report Management Security Group can create and modify folders and reports in the Reports module in Maximizer Web Access. The MASTER user is automatically added to this security group, but you can add any Maximizer user to the security group.

### ➤ *To add a user to the SSRS Management security group*

- 1** In the left pane, select **Security Groups**.
- 2** Click **SSRS Report Management**.
- 3** Select the **Members** tab.
- 4** From the **Available Users** list, select the users to add to the security group, and click **Add**.
- 5** Click **Save**.

## Configuring the Maximizer Print/Fax Service

Much like the Maximizer Email Service, the Maximizer Print/Fax Service enables you to create automated campaigns for fax and printing. The Maximizer Print/Fax Service is part of the Maximizer installation. However, you must configure it in Administrator before you can use it for automated campaigns.

You must already have a fax modem and fax software installed and functioning before you can integrate these services with Maximizer.


Note that for Windows XP Professional, the Maximizer Print/Fax Service must run as an application, not as a service.

For more information about the properties in the Automated Services tab, click inside the tab and press **F1**.

### ➤ *To configure the Maximizer Print/Fax Service*

- 1** In Administrator, select **File > Preferences**.
- 2** Select the **Automated Services** tab.
- 3** Select **Print/Fax** from the **Preferences for Activity type** drop-down list.
- 4** Set the **Service cycle time check**.  
  
The service cycle time check controls how often the Maximizer Print/Fax Service processes the Print/Fax activities in automated campaigns. By default, this option is set to 1 minute.
- 5** To send large quantities of faxes or print jobs, select the **Enable sending in batch mode** option, and set the **Batch size**.
- 6** Select the **Activate services for the currently open Address Book** option.  
  
This checkbox must be enabled to use automated fax or print campaigns.
- 7** Enter the **Service computer** name.
- 8** Click the **Initialize Print/Fax Service** button to update the list of available printers and faxes in the "Add or Modify Print/Fax Campaign Activity" dialog box.

Each time you add or remove a printer or fax application on the service computer, or when you install or re-install Maximizer, you must initialize the Print/Fax Service.

 Note that the Initialize Print/Fax button is available on the Maximizer server only; it is disabled for workstations.



**9** Click *OK*.

The screenshot shows the 'Preferences' dialog box with the following elements and numbered callouts:

- 2**: Points to the 'Email' dropdown menu under 'Preferences for Activity type:'.
- 3**: Points to the 'Preferences that apply to all Address Books' section header.
- 4**: Points to the 'Service cycle time check:' dropdown menu.
- 5**: Points to the 'Batch size:' input field.
- 6**: Points to the 'Activate services for the currently open Address Book' checkbox.
- 7**: Points to the 'Service computer:' input field.
- 8**: Points to the 'Initialize Print/Fax Service' button.
- 9**: Points to the 'OK' button at the bottom right.

Other visible text in the dialog includes: 'System Options', 'System Fields', 'Locations/Resources', 'Customer Service', 'Key Fields', 'Opportunity', 'Campaign', 'Automated Services', 'Diagnostic', 'Address Book', 'Dashboard', 'Analytics', 'Mandatory Fields', 'URL of Campaign Manager Statistics: http://SERVER/Campaigns/Resource.aspx', 'Character set used by email service:', 'Click the Initialize Print/Fax Service button to initialize settings for print/fax services.', 'SMTP server: smtp.mail.com', 'SMTP port: 25', 'Account name:', 'Password:', and 'Confirm password:'.

Maximizer is now configured to use the Maximizer Print/Fax Service for automated fax or print campaigns.

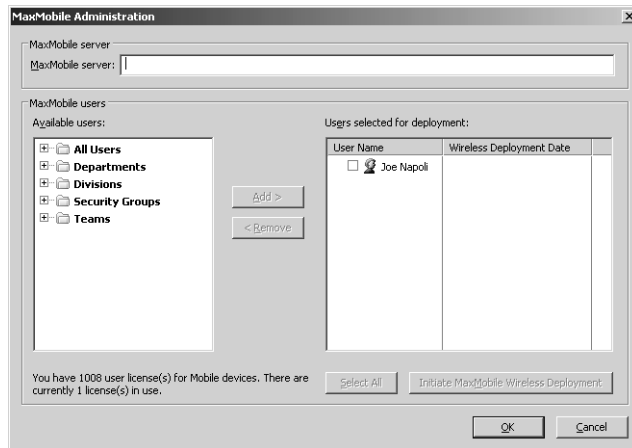
# Configuring MaxMobile Wireless Server

Before users can use MaxMobile, the administrator must configure the wireless server in Administrator. The number of users allowed to use MaxMobile is controlled through your product license number.

To access the Company Library and Dashboards from MaxMobile, you must also enable Mobile Access and specify the Mobile Access URL in Administrator. For more information see “Enabling Web Access Sites” on page 211 and “Specifying the Mobile Access URL for Integration” on page 241.

## ► To configure MaxMobile Wireless Server

- 1 In Administrator, open the Address Book to use with MaxMobile.
- 2 Select **File > MaxMobile Administration**.



- 3 Enter the URL of the MaxMobile Wireless Server. The URL should be in the following format:  
***http://[server\_name]:port/MaxMobileService***  
***https://[server\_name]:port/MaxMobileService***
- 4 For each ***user, department, division, security group, and team*** using 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 as shown below in the Module Login section of a user's properties. 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.

For more information about deploying MaxMobile, see the *MaxMobile Wireless Server Getting Started Guide*.

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', 'Company and main address', 'Phone numbers and phone extensions', 'Security', 'Module Login', and 'Internet information'. The 'Name and position' section contains fields for User ID (JNAPOLI), Mr/Ms (Mr.), First name (Joe), Initial (N), Last name (Napoli), Salutation (Dear < >:), Display name (Joe Napoli), Position (President), and Reports to (a dropdown menu). The 'Company and main address' section includes Company (Escona Estate Wines), Dept. (Executive), Division (CAN - East), Address 1 (1344 Eastside Road), Address 2, City/Town (Petaluma), St/Co/Prov. (CA), Zip/Postcode (94954), and Country (USA). The 'Phone numbers and phone extensions' section has four rows for phone numbers and extensions, with the first two rows populated: 1: (555) 775-0982 and 2: (555) 775-0900. The 'Security' section has radio buttons for Public (selected) and Private. The 'Module Login' section has a table with three rows: Windows Access (Enabled), Web Access (Disabled), and Mobile (Enabled). The 'Internet information' section has fields for Email (jnapoli@maximizer.com) and Website (http://www.escona.com). At the bottom are OK, Cancel, and Apply buttons.

| Name and position |  |
|-------------------|--|
| User ID:          | Mr/Ms: First name: Initial: Last name: Salutation: |
| JNAPOLI           | Mr. Joe N Napoli Dear < >:                         |
| Display name:     | Position: Reports to:                              |
| Joe Napoli        | President  |

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

| Phone numbers and phone extensions |                     |
|------------------------------------|---------------------|
| 1:                                 | (555) 775-0982      |
| 2:                                 | (555) 775-0900 Fax: |
| 3:                                 |                     |
| 4:                                 |                     |

| Security  |  |
|---|--|
| <input checked="" type="radio"/> Public <input type="radio"/> Private |  |

| Module Login   |          |
|----------------|----------|
| Windows Access | Enabled  |
| Web Access     | Disabled |
| Mobile         | Enabled  |

| Internet information |                       |
|----------------------|-----------------------|
| Email:               | jnapoli@maximizer.com |
| Website:             | http://www.escona.com |

OK Cancel Apply

## Enabling TAPI

Maximizer can use TAPI (Telephony Application Programming Interface) to detect incoming phone numbers (using caller ID) and log the phone conversation for the matching Address Book entry.

The following requirements must be met to use TAPI with Maximizer:

- Your telephone system must be TAPI-enabled.
- Your phone system's TAPI driver must be installed.
- Your computer's modem must be compatible with TAPI.

You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.

- Maximizer must be configured for TAPI.

## Requirements for Caller ID

Specific requirements are essential to implement caller ID detection:

- Caller ID service from the local telephone company.
- TAPI-compliant hardware that is Caller-ID capable.
- A TSPI component (such as an .INF file driver) for your Caller-ID enabled TAPI hardware (e.g., UniModemV)
- Microsoft TAPI software components.

Even if you meet these requirements, caller ID may not operate properly, especially if your local telephone company uses a different standard for caller ID than your TAPI driver. Call your local phone company to obtain more information regarding your caller ID standard and compare it to the standard used by the TAPI driver.

## Reasons Why Caller ID May Not Work

If you use a TAPI-enabled modem (as opposed to a PBX, H.323, or other TAPI hardware), and your telephone company provide MESSG-format caller ID information (rather than SDM, another common format), caller ID call detection is unlikely to work. Microsoft's UniModemV TAPI driver and MODEM.INF file, provided with most TAPI modems, do not support MESSG caller ID format, which means your modem (and Maximizer) may never receive caller ID information from TAPI. If your modem manufacturer provides its own TAPI modem or PBX driver and the appropriate INF file, or you are able to obtain SDM-format caller ID, you might have more success.

## Phone Number Matching with TAPI

When Maximizer uses TAPI to detect an incoming phone call, it matches the phone call to a Maximizer Address Book entry and logs the call as a note for the entry. Depending on your TAPI configuration in Maximizer, it uses either the “Smart Phone Number Matching” or “Exact Phone Number Matching” algorithm to determine which Address Book entry matches the incoming phone number.

### Smart Phone Number Matching

By default, Maximizer uses the Smart Phone Number Matching algorithm to determine which Address Book entry matches the incoming call.

When a call comes in, Smart Phone Number Matching looks for all Address Book entries with phone numbers ending with the incoming phone number string and displays those Address Book entries in a list so you can select the correct entry.

For example, if the incoming phone number string is four digits, Maximizer displays a list of all Address Book entries ending in those four digits.

Smart Phone Number Matching matches the digits from right to left. The number of matched digits required for matching is equal to the shorter length of the two phone numbers.

The following table illustrates Smart Phone Number Matching for four-digit and seven-digit incoming phone numbers.

| Address Book entry phone number | Does the incoming four-digit phone number (2314) match? | Does the incoming seven-digit phone number (732-2314) match? |
|---------------------------------|---|--|
| 9-604-732-2314                  | Yes   | Yes  |
| 1-604-732-2314                  | Yes   | Yes  |
| 403-732-2314                    | Yes   | Yes  |
| 732-2314                        | Yes   | Yes  |
| 497-2314                        | Yes   | No   |
| 2314                            | Yes   | Yes  |
| 3514                            | No  | No   |
| 14                              | Yes   | Yes  |

## Exact Phone Number Matching

If you select the “Enable exact number matching” checkbox in the TAPI preferences in Maximizer, it uses the Exact Phone Number Matching algorithm instead of Smart Phone Number Matching. Exact Phone Number Matching considers an Address Book entry to match the incoming call only if both numbers contain exactly the same phone number with the specified number of digits.

By default, Exact Number Matching requires both phone numbers to be seven digits, but you can change the required number of digits.

The advantage of Exact Phone Number Matching is that when Maximizer finds an Address Book entry that matches exactly, you do not need to select it from a list of possible matches, as you do with Smart Phone Number Matching.

The following table illustrates Exact Phone Number Matching for four-digit and seven-digit incoming phone numbers.

| Address Book entry phone number | Does the incoming four-digit phone number (2314) match? | Does the incoming seven-digit phone number (732-2314) match? |
|---------------------------------|---|--|
| 9-604-732-2314                  | No  | No   |
| 1-604-732-2314                  | No  | No   |
| 403-732-2314                    | No  | No   |
| 732-2314                        | No  | Yes  |
| 497-2314                        | No  | No   |
| 2314                            | Yes   | No   |
| 3514                            | No  | No   |
| 14                              | No  | No   |

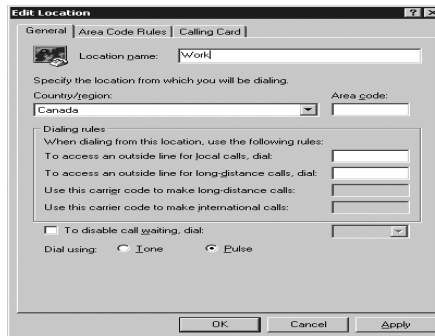
## Configuring Maximizer to Use TAPI

Before you can configure Maximizer to use TAPI, you must have a TAPI-enabled telephone system, and your computer's modem must be configured to use TAPI. You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.

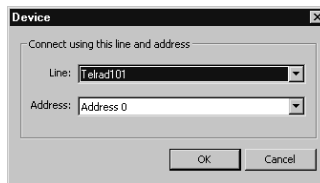
### ➤ *To configure Maximizer to use TAPI*

- 1** Select *File > Manage Users*.
- 2** Select the Maximizer user, and click *Preferences*.

- 3 Select the *Dialing* tab.
- 4 Under *Method*, select *TAPI*.
- 5 Under *TAPI*, click *Properties*.
- 6 Fill in your location information, and click **OK** to return to the Dialing Preferences.

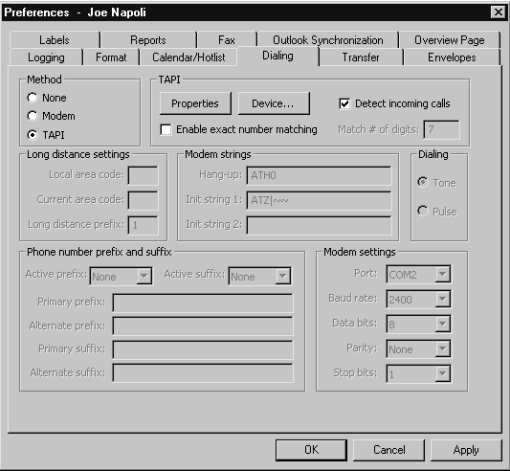


- 7 Click *Device*.



- 8 From the *Line* drop-down list, select the TAPI device name, and click **OK**.
- 9 Select the *Detect incoming calls* option.

- 10** If desired, select the *Enable exact number matching* option, and specify the number of phone number digits to match.



- 11** Click **OK** to close the Preferences dialog box.



# Phone Masks

The registry entry (HKEY\_CURRENT\_USER\Software\Maximizer Software\Maximizer\Modules\AMGR\INTL\Phone Mask) overrides the default format of a phone number with the phone mask provided as a value. The mask uses # to indicate digits and can include any other characters (e.g., + - ,). If the Phone Mask registry key does not exist, you must create it as a String value.

 Exercise caution when working in the Windows Registry.

The mask formats from right to left. For example, if the phone mask value is ###-####, but a user enters a 10-digit phone number (e.g., 1234567890), the result would be formatted as 123456-7890. If the value has fewer digits than the mask allows, the extra (left-most) placeholders are not used.

The following table shows how some examples of how phone numbers are displayed using phone masks:

| Phone Mask         | Digits | Value Typed In  | Value Displayed    |
|--------------------|--------|-----------------|--------------------|
| Not specified      | 7      | 1234567         | 123-4567           |
| "                  | 10     | 1234567890      | 123456-7890        |
| ###-####           | 7      | 1234567         | 123-4567           |
| "                  | 10     | 1234567890      | 123456-7890        |
| (###) ###-####     | 7      | 1234567         | 123-4567           |
| "                  | 10     | 1234567890      | (123) 456-7890     |
| +1 (###) ###-####  | 7      | 1234567         | 123-4567           |
| "                  | 10     | 1234567890      | +1 (123) 456-7890  |
| ### ## #####-##### | 15     | 123456789012345 | 123 45 6789-012345 |

The Phone Mask value affects the display of phone numbers in Maximizer program dialog boxes and window lists. The Phone Mask value is read during program startup.

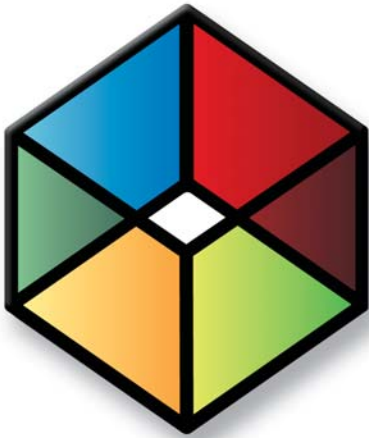
## Using Fax Software with Maximizer

 Visit the Maximizer website at [www.maximizer.com](http://www.maximizer.com) to obtain an updated list of supported fax applications.

You can set up Maximizer for faxing anytime after you have installed the fax modem and fax application.

To fax any document with Microsoft Fax, simply select the fax driver in place of a printer when you print the document. The Maximizer Word Processor also supports merging directly to faxing software, which enables you to perform broadcast faxing.

For information about setting up Microsoft Fax, refer to your Windows operating system documentation.




# CHAPTER 8

## Configuring Web Access

### In this chapter...

- "Introduction to Web Access" on page 208
- "Enabling Web Access Sites" on page 211
- "Escona Tutorial Sample Sites" on page 212
- "Application Settings for Web Access Sites" on page 221
- "Setting Up Windows Authentication for Web Access" on page 228
- "Web Access Users and Security Groups" on page 231
- "Maximizer Web Access" on page 235
- "Maximizer Web Access Administrator" on page 238
- "Mobile Access" on page 239
- "Customer Access and Partner Access" on page 242
- "Advanced Site Configurations" on page 253

## Introduction to Web Access

 The Maximizer CRM Server setup program installs and registers several machine-level COM DLLs and sets up some machine-level registry settings. If you are moving Maximizer Web Access to a different server, ensure you run the setup program again.

Maximizer Web Access, Customer Access, Partner Access, and Mobile Access are installed automatically with Maximizer CRM Server. The Maximizer web access sites provide web browser access to a Maximizer Address Book from any Internet-connected computer or mobile device.

The Maximizer CRM Server installation provides the option to install Start Menu shortcuts to the sites. These links are intended to connect to Maximizer Web Access Administrator for the convenience of internal users. Only one instance of a Partner Access and one instance of a Customer Access can be set up for this quick access for each Address Book. To set it up, log into the Address Book you want to set up in Maximizer Administrator, select File > Web Access > Shortcuts, and enter the URL to be accessed on the relevant line. Both the Partner Access URL and the Customer Access URL can be specified here.

Maximizer Web Access can be configured in many different ways. Refer to the Maximizer knowledge base for information on setting up Maximizer Web Access in different environments.

## Site Types

There are several site types, each with a different purpose and functionality. The site types are described below.

### Maximizer Web Access

Maximizer Web Access is a browser-based application providing the functionality of Maximizer over the Internet. Employees can work with Address Book entry information, notes, calendar appointments, Hotlist tasks, user-defined fields, and opportunities, as well as view company documents and other pertinent information.

- **Local path:** C:\Program Files\Maximizer\Portals\Employee
- **Virtual folder:** http://<server name>/MaximizerWebAccess
- **Main login URL:** http://<server name>/MaximizerWebAccess/Default.aspx

## Mobile Access

Mobile Access provides access to Maximizer through mobile web browsers. When users open Mobile Access from the Windows Start menu, a URL displays. Users enter this URL into a mobile browser to access Mobile Access.

- **Local path:** C:\Program Files\Maximizer\Portals\Wireless
- **Virtual folder:** http://<server name>/MaximizerMobileAccess
- **Main login URL:** http://<server name>/MaximizerMobileAccess/

## Partner Access

Partner Access is a browser-based application providing a two-way flow of information between your organization and its business partners. This medium allows for a multi-tier distribution group to effectively distribute sales opportunities and keep all involved parties informed.

All aspects of the site are administered with a separate web access administrator application.

- **Local path:** C:\Program Files\Maximizer\Portals\Partner
- **Virtual folder:** http://<server name>/MaximizerPartner
- **Main login URL:** http://<server name>/MaximizerPartner/Default.aspx
- **Administrator login URL:** http://<server name>/MaximizerPartner/Admin/Default.aspx

The following third-party applications are installed with Customer and Partner Access, and are available from the Windows Start menu:

- Excentrics World Components
- Microsoft Internet Explorer WebControls

## Customer Access

Customer Access is similar to Partner Access. It's a browser-based application providing a two-way flow of information between your organization and its customers. Customers have access to news and events.

Like Partner Access, the site is administered with a web access administrator application. This is separate from the main site.

- **Local path:** C:\Program Files\Maximizer\Portals\Customer
- **Virtual folder:** http://<server name>/MaximizerCustomer

- **Main login URL:** http://<server name>/MaximizerCustomer/Default.aspx
- **Administrator login URL:** http://<server name>/MaximizerCustomer/Admin/Default.aspx

The following third-party applications are installed with Customer and Partner Access, and are available from the Windows Start menu:

- Excentrics World Components
- Microsoft Internet Explorer WebControls

## Supported File Types in Company Library and Documents

The following document types are supported in the Company Library and Document window of the web access sites:

- .DOC and .RTF (Microsoft Word)
- .XLS (Microsoft Excel)
- .PPT (Microsoft PowerPoint)
- .HTM and .HTML
- .BMP (bitmaps)
- .TXT (text files and Company Library notes)
- .JPG, .GIF, and .TIF (graphics files)
- .PDF (Adobe Portable Document Format)

You can add support for other file types using Microsoft Internet Information Services (IIS) Manager. For more information, see "Adding Support for File Types" on page 27.

## Enabling Web Access Sites

By default, all Maximizer web access sites are disabled. Enabling a site is a simple process, which must be completed before anybody can access them. You can activate them during installation, or modify the Web.Config file for each site you want to enable. To enable a site during installation, see “Installing Maximizer CRM Server” on page 42.

### ➤ *To enable a site via the Web.Config file*

- 1 Open the site's **Web.Config** file in a text editor, such as Notepad.

The Web.Config file is located on the Maximizer server at the following path:

C:\Program Files\Maximizer\Portals\<site>\Web.Config

If Maximizer was installed in a folder other than the default location of C:\Program Files\, replace that portion of the path with the folder where Maximizer was installed.

- 2 In the **appSettings** section, locate the **Enabled** key, which is shown below:

```
<add key="Enabled" value="false" />
```


- 3 Change the value to **true**, as show below:

```
<add key="Enabled" value="true" />
```

- 4 Save the Web.Config file.

Note that if you are using Windows 2008, you must also select the “Detailed errors” option in IIS. This setting is found under Error Pages > Edit Feature Settings.

# Escona Tutorial Sample Sites

 The IIS Server must be started for the sites to function.

The Escona Tutorial Address Book includes sample web access sites. The sample sites, Maximizer Web Access, Customer Access, and Partner Access, require no configuration and are accessible from the Maximizer folder on the Windows Start menu. These sample sites are installed on the Maximizer IIS Server as part of the Maximizer Components for Microsoft IIS installation.

You can access the sample sites using the following user IDs and passwords.

| Sample Site                        | User ID | Password  |
|------------------------------------|---------|-----------|
| Maximizer Web Access Administrator | master  | control   |
| Maximizer Web Access               | jnapoli | maximizer |
| Customer Access Administrator      | jnapoli | maximizer |
| Partner Access Administrator       | jnapoli | maximizer |
| Customer Access                    | mary    | password  |
| Partner Access                     | paul    | password  |
| Mobile Access                      | jnapoli | maximizer |

This section steps you through the following procedures with the Escona Tutorial sample sites:

- “To start the Default Web Site” on page 213
- “To access Escona Tutorial Maximizer Web Access” on page 216
- “To change a site to an application” on page 213
- “To access Escona Tutorial Customer or Partner Access Administrator” on page 218
- “To enable Address Book entries to access the site” on page 246
- “To access Escona Tutorial Customer or Partner Access” on page 219

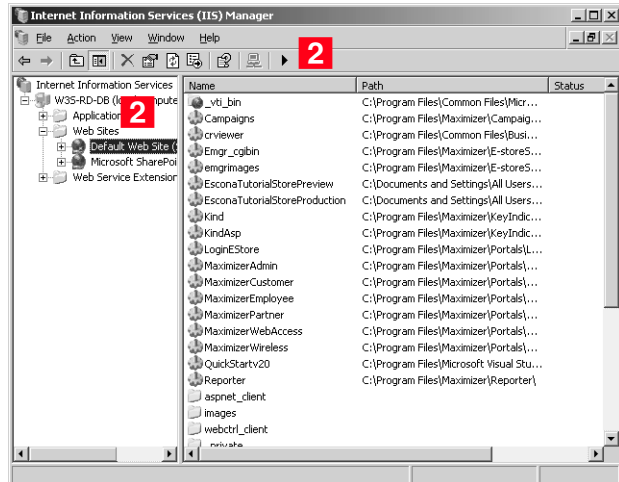
Many of these procedures also apply to your own sites.



**i** Before accessing the sample sites, ensure that the Default Web Site is started.

➤ **To start the Default Web Site**

- 1** On the Maximizer IIS Server, select **Start > Programs > Control Panel > Administrative Tools > Internet Information Services Manager**.
- 2** Select **Default Web Site**, and click the **Start item** button.



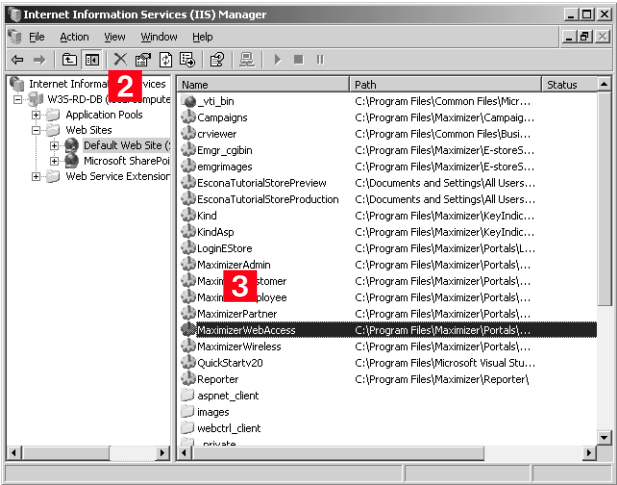
When the Start item button becomes dimmed, the Default Web Site is started, and you can access the sites.

➤ **To change a site to an application**

**i** Do not use this procedure unless you received a "Server Error in "/" Application" error when you opened the site.

- 1** On the Maximizer IIS Server, select **Start > Programs > Control Panel > Administrative Tools > Internet Information Services Manager**.
- 2** Open the **Default Web Site** branch.

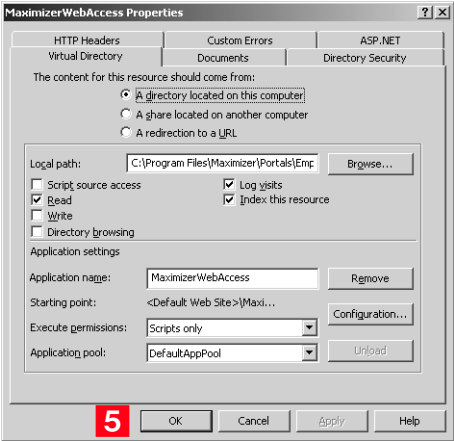
**3** Right-click *MaximizerWebAccess*, and click *Properties*.



**4** Click *Create*.

Maximizer Web Access has now been converted to an application.

**5** Click *OK* and then close Internet Information Services.



## Escona Tutorial Maximizer Web Access Administrator

➤ **To access Escona Tutorial Maximizer Web Access Administrator**

- 1** Select **Start > Programs > Maximizer CRM > Web Access > Maximizer Web Access Administrator**.

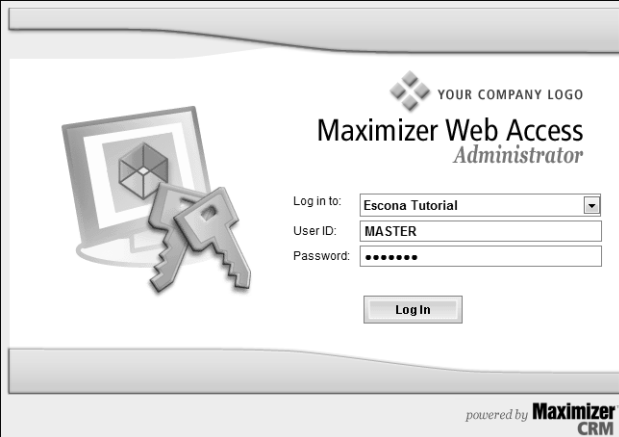
The Maximizer Web Access Administrator login page opens.

- 2** Log into the site using the following login information:

User ID = **MASTER**

Password = **control**

**i** You can access Maximizer Web Access Administrator from Maximizer Web Access. In the left navigation pane, hover your mouse over Administration and select Administrator from the pop-up window.



YOUR COMPANY LOGO

**Maximizer Web Access**  
*Administrator*

Log in to:

User ID:

Password:

**Log In**

powered by **Maximizer**  
CRM

## Escona Tutorial Maximizer Web Access

➤ *To access Escona Tutorial Maximizer Web Access*

- 1 Select **Start > Programs > Maximizer CRM > Web Access > Maximizer Web Access**.

The Maximizer Web Access login page opens.

- 2 Log into the site using the following login information:

User ID = **JNAPOLI**

Password = **maximizer**

**i** If the Maximizer Web Access login page does not open, and you see a "Server Error in "/" Application" error message, then you need to change the site to an application. See "To change a site to an application" on page 213.

## Escona Tutorial Mobile Access

➤ *To access Escona Tutorial Mobile Access*


- 1 On your mobile device, open a web browser.
- 2 In the Address bar, enter the Mobile Access URL.

The default, the URL is in the form: ***http://<server name>/MaximizerMobileAccess***

**3** Log into the site using the following login information:

User ID = *JNAPOLI*

Password = *maximizer*



The image shows a mobile application login screen for Maximizer CRM 12. At the top, there is a header bar with the text "Log In". Below the header, the Maximizer CRM 12 logo is displayed, featuring a stylized cube icon and the text "Maximizer CRM 12 Mobile Access". The main login area contains a "Log in to:" section with a dropdown menu showing "Escona Tutorial" and a checkmark. Below this, there are input fields for "User ID:" (containing "JNAPOLI") and "Password:" (displayed as a series of dots). A "Remember me" checkbox is checked. At the bottom, there is a "Log In" button.

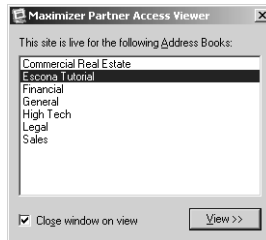
## Escona Tutorial Customer and Partner Access Administrator

➤ **To access Escona Tutorial Customer or Partner Access Administrator**

- 1** On the server, select **Start > Programs > Maximizer CRM > Web Access > Customer Access** or **Partner Access**.

The Maximizer Customer or Partner Access Viewer opens.

- 2** Select **Escona Tutorial**, and click **View**.

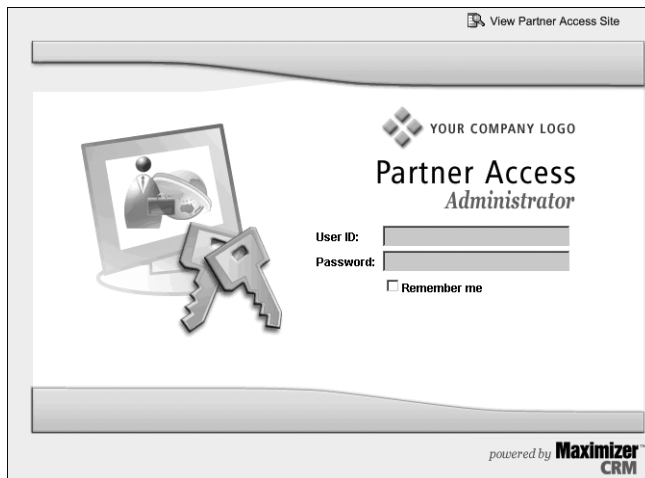


The Customer/Access Partner Administrator login page opens.

- 3** Log into Customer/Partner Access Administrator:

User ID = **JNAPOLI**

Password = **maximizer**



Customer/Partner Access Administrator opens, with either or both of the News Manager and Configuration Manager links

**i** The News Manager link is available only if you are logged in with a User ID belonging to the Customer or Partner Access Administration Users security group. The Configuration Manager link is available only if you are logged in with a User ID belonging to the Customer or Partner Access Configuration Users security group.

available, depending on which web access security groups you belong to.

For information about web access security groups, refer to “Web Access Security Groups” on page 231.

### ➤ *To create a site PIN for the sample sites*

- Refer to “Assigning Site Login PINs to Contacts and Individuals” on page 248 for an explanation of how to create a site PIN for yourself. When you are creating the PIN for the Escona Tutorial sample sites, modify the email address and category of one of the Address Book entries, so you can use that Individual or Contact as your site user account:
  - **Email Address:** When you are creating a customer and/or Partner Access login account for the Escona Tutorial sample sites, enter your own email address into a sample Contact or Individual’s Address Book entry. Then, when you send a site PIN email, it sends the PIN to your email address instead of to the fictional email address in the sample database.
  - **Category:** Select both the Customer and Partner categories in the Address Book entry.

## Escona Tutorial Customer and Partner Access

### ➤ *To access Escona Tutorial Customer or Partner Access*

- 1** Select **Start > Programs > Maximizer CRM > Web Access > Customer Access** or **Partner Access**.

The Maximizer Customer or Partner Access Viewer opens.

- 2** Select **Escona Tutorial**, and click **View**.

The login page opens.

- 3** Click the **View Customer/Partner Access Site** link.

**4** Log in to the site.

To log into the sample *Partner Access* site, use the sample Address Book contact, Paul Samson of Samson Consulting:

- User ID = *paul*
- Password = *password*

To log into the sample *Customer Access* site, use the sample Address Book contact, Mary Smart of Acme Tool Co.:

- User ID = *mary*
- Password = *password*

YOUR COMPANY LOGO

## Partner Access

User ID:

Password:

☐ Remember me

[Forgotten Login Credentials?](#)

[Register Now](#)

powered by **Maximizer CRM**

Customer or Partner Access opens.



## Application Settings for Web Access Sites

The XML-formatted Web.config file, stored in the ...\\Program Files\\Maximizer\\Portals\\<site> folder, is the key to configuring the sites and any other ASP.NET web application.

You can edit this file using Windows Notepad or another text editor. For Windows 2003 Server or later, you can also edit the settings in Internet Information Services (IIS) Manager on the ASP.NET tab of the site's properties.

The Partner Access and Customer Access sites are configured to connect to a single Address Book each. Which Address Book the site connects to is defined in a file called Web.config, which is located in the root folder of the Partner and Customer folders (which are located in ...\\Program Files\\Maximizer\\Portals\\). Initially, the Web.config file is configured to connect to the Escona Tutorial sample Address Book. Before you deploy Partner Access or Customer Access, you must update the Web.config file for your Address Book.

After you have deployed Maximizer Web Access, Mobile Access, Customer Access, or Partner Access for your Address Book, you can make further changes to the Web.config file at any time. You are not required to restart the IIS service for changes to take effect.

### ➤ *To configure the external site application settings*

- 1** Browse to the Web Access folder where you have installed Maximizer Components for Microsoft IIS (...\\Program Files\\Maximizer\\Portals\\<site>).
- 2** Open the Web.config file in the Employee, Customer, Partner, or Wireless folder. Note that the following application settings do not apply to all web access sites.

## Site Application Settings <appSettings>

**i** It is optional to change these application settings with the exception of the Enabled setting. This value must be set to true in order make the site accessible.

You can update any of the site application settings values if they appear under the appSettings parent node. The settings that appear in the Web.config file are dependant on the Web Access application that it is associated with.

| Child   | Description   |
|---|---|
| <add key="AddressBook" value="name" />  | The name is the true name of the Address Book. See 'AddressBook' on page 226.   |
| <add key="AddressBookColumnSetup" value="user/Address Book window column setup name" /> | Specifies a specific column setup to be used for the Address Book page in Mobile Access.<br>Only the first two columns of a column setup can be displayed (from left to right). The user specified in this setting is the creator of the column setup. This setting is optional.  |
| <add key="AlarmCheckPeriod_Seconds" value="x">  | The site will check for alarms every x seconds.   |
| <add key="EmailAttachmentLimitSizeInKB" value="x">                                      | Sets the largest allowable email attachment size to be x KiloBytes. The default is 1024 KB but this limit can be increased if necessary.  |
| <add key="AllowUnsupportedBrowsersWithWarning" value="True">                            | This setting allows users to log in to Maximizer Web Access with unsupported web browsers, such as Apple Safari. Users are prompted with a warning message when they first log in to Maximizer Web Access with unsupported browsers. You can change the value to "False" to block users from accessing Maximizer Web Access with unsupported web browsers. Note that Maximizer Software recommends that users access Maximizer Web Access only with supported web browsers. You can access the current list of supported browsers on our website. |

| Child  | Description   |
|--|---|
| <add key="AlternateRequiredCategory" value="" />                                       | By default, to access Partner Access or Customer Access, an entry must have a category of Partner or Customer, respectively. This setting specifies an alternative category. See 'AlternateRequiredCategory' on page 226  |
| <add key="Context" value="MA_PARTNER" />   | The only difference between the default Partner Access site and the default Customer Access site is the value in the Context key. See 'Context' on page 225.  |
| <add key="CSCaseColumnSetup" value="user/Customer Service window column setup name" /> | Specifies a specific column setup to be used for customer service cases. Only the first two columns of a column setup can be displayed (from left to right). The user specified in this setting is the creator of the column setup. This setting is optional.                               |
| <add key="DefaultAddressBook" value="name" />  | The name is the true Address Book name, rather than the "friendly" name, meaning it does not contain spaces or special characters.  |
| <add key="Enabled" value="true" />   | By default, sites are disabled, and you must change the Enabled setting to "true" before you can use the sites. Setting Enabled to "false" instantly stops new visitors to the site from being allowed to log in, while allowing already-logged-in visitors to continue with their session. |
| <add key="EnableOutlookIntegration" value="true" />                                    | The value must be set to true to enable Microsoft Outlook integration with Maximizer Web Access. Note that this integration applies to Outlook 2003 and higher. See 'EnableWordIntegration/EnableOutlookIntegration' on page 226  |

| Child  | Description  |
|--|--|
| <add key="EnableRecordLocking" value="true" />   | Enables record locking for Address Book entries in Maximizer Web Access to prevent two or more people from modifying an entry at the same time. Change the value to "false" to disable record locking.   |
| <add key="EnableWordIntegration" value="true" />                                       | The value must be set to true to enable Microsoft Word integration with Maximizer Web Access. Note that this integration applies to Word 2003 and higher. See 'EnableWordIntegration/EnableOutlookIntegration' on page 226   |
| <add key="JavaMaxRecToRetrieve" value="200">   | The maximum number of records (Address Book entries, opportunities, customer service cases, notes, or documents) to retrieve in a list in Mobile Access. The default value is 200, but you can change this setting to display more or fewer entries in a list.           |
| <add key="MaximizerMobileRedirectURL" value=""/>                                       | Redirects mobile device users to the specified URL.  |
| <add key="MobileUserAgent" value=""/>  | Lists the HTTP user agent values for mobile web browsers. Users who visit the site from these web browsers are automatically redirected to the Mobile Access URL specified in the MaximizerMobileRedirectURL key.  |
| <add key="NotificationCheckPeriod_Seconds" value="x">                                  | The site will check for notifications every x seconds.   |
| <add key="OpportunityColumnSetup" value="user/Opportunity window column setup name" /> | Specifies a specific column setup to be used for Opportunities in Mobile Access.<br>Only the first two columns of a column setup can be displayed (from left to right). The user specified in this setting is the creator of the column setup. This setting is optional. |

| Child   | Description  |
|---|--|
| <code>&lt;add key="ShowAllPhoneNumberAndEmail" value="false" /&gt;</code> | This setting can be set to true and it is an optional setting. All phone numbers and email addresses are displayed in the appointment dialog box if this is set to true. |
| <code>&lt;add key="SubContext" value="name"&gt;</code>                    | The SubContext key is provided to implement more than one of a certain type (context) of site. See 'SubContext' on page 225.   |

## Context

The only difference between the default Partner Access site and the default Customer Access site is the value in the Context key. The two possible values for this key are MA\_PARTNER and MA\_CUSTOMER. This key determines the following settings:

- The default graphic for the main login page can be replaced with a custom graphic. For more information, see "Customizing the Graphic on the Site Main Page" on page 253.
- The groups controlling access to the administration-side of the sites (Customer Access Administration Users / Partner Access Administration Users and Customer Access Configuration Users / Partner Access Configuration Users)
- The default name of the site —"Partner Access" and "Customer Access". These names can be overridden with the Name setting under General Settings in the Configuration Manager.
- The default name of the type of user accessing the site. For example, when logged into Partner Access, Paul Samson could expect to see "Partner: Paul Samson" at the top of the screen. This name may be overridden with the Name setting under General Settings in the Configuration Manager.

## SubContext

The SubContext key is provided to implement more than one of a certain type (context) of site. Application settings within an external site's Configuration Manager are stored in the Address Book (in the ADMN\_Config table) referencing the site's Context and SubContext keys.

If you would like two Customer Access sites, each with their own application settings, you would give both instances a Context value of MA\_CUSTOMER, but make sure each instance has a *different value* for SubContext. For example, give one a value of WINE and

one a value of BEER if you were in the business of selling both products but wanted a different site for each customer base.

If, however, you were setting up the application across two servers in a load-balancing scenario, you would give each version of the application the *same value* for SubContext because you'd want each instance to share one set of application settings.

## **AddressBook**

The AddressBook key must be set with the database name of the Address Book to use for this site. Note that this is not the friendly name for the Address Book set in Administrator to reference the Address Book but the actual SQL database name. It makes a specific Address Book accessible for customers and partners and it must be set to enable the sites for access.

## **AlternateRequiredCategory**

In Maximizer CRM, membership in a segment of the Address Book is specified using an Address Book entry's Category field. By default, Partner Access requires accessing visitors to have a Category of Partner, and Customer Access requires accessing visitors to have a Category of Customer. These defaults may be overwritten, however, by setting a different value in the AlternateRequiredCategory key. The company implementing Beer Customer Access and Wine Customer Access would add items for each site to the Category field in Maximizer, and then reference the required item's name in the AlternateRequiredCategory key for each site.

## **EnableWordIntegration/EnableOutlookIntegration**

If the Word or Outlook integration is enabled, users can set up the integration directly from Maximizer Web Access. The setup involves downloading Active X controls, which may be disallowed on some networks. To disable Word or Outlook integration, change the value to "false".

## Session State Storage Options <sessionState>

By default, the web access sites are configured to store session identifiers in a cookie and to use a timeout value of 20 minutes. Maximizer ships Mobile Access, Customer Access, and Partner Access with a sessionState element containing default values. You can modify the value of the "timeout" attribute to set a different timeout value, in minutes, for the site.

## Outlook Integration Options <httpRuntime>

The settings that control the Outlook integration options for Web Access are located in a Web.config file in the services folder (...\\Program Files\\Maximizer\\Portals\\Employee\\Services\\). The following is a description of the httpRuntime settings that control various aspects of the Web Access Outlook integration.

| Option           | Description  |
|------------------|--|
| maxRequestLength | The value following maxRequestLength is the size, in kilobytes, of the largest email (including the size of all attachments) that can be saved. It is advisable to set this number to twice the desired maximum size, since temporary encoding can require a larger request size. For example, if your email system allows attachments up to 20 MB in size, set maxRequestLength to "40000" to allow the largest emails to be saved. |
| executionTimeout | The value following executionTimeout is the maximum number of seconds a request to save an email is allowed to take before an error occurs. The default is 10 minutes (600 seconds).   |

## Setting Up Windows Authentication for Web Access

In addition to specifying Windows Authentication as the means of user authentication during the installation, you must follow additional steps to set up Windows Authentication for web access.

The following sections contain information on setting up Windows Authentication for web access sites:

- “Setting Up Windows Authentication for Web Access in SQL” on page 228
- “Configuring the Web.config files for Windows Authentication for Web Access” on page 228
- “Downloading Documents” on page 229
- “Configuring IIS for Windows Authentication for Web Access” on page 229
- “Windows Authentication for Partner Access and Customer Access” on page 230

### Setting Up Windows Authentication for Web Access in SQL

➤ *To set up Windows Authentication for Web Access in SQL*

- 1** In SQL Server Management Studio, on the Security tab of the SQL server properties, select **Windows Only** as the type of authentication.
- 2** Set the **USE\_NT\_AUTHENTICATION** key to **YES** in the MaConfig table for each Address Book.

### Configuring the Web.config files for Windows Authentication for Web Access

You must configure the Web.config file in the web access sites to use Windows Authentication. The procedure is different depending on which web access site you are configuring.

➤ *To configure the Maximizer Web Access, Maximizer Web Access Administrator, or Mobile Access Web.config file for Windows Authentication*

- Set the authentication setting to true as follows:  
`<authentication mode="Windows"/> <identity impersonate="true">`



➤ ***To configure the Customer Access or Partner Access Web.config file for Windows Authentication***

- 1** Set the authentication setting to true as follows:

```
<identity impersonate="true">
```

- 2** Append the authentication setting with the IUSR machine name and password as follows:

```
<identity impersonate="true"  
  userName="IUSR_MachineName"  
  password="IUSR_password">
```

The username and password are for a user to run under the external site login. This user needs SQL permission equal to WEBUSER, and file permissions equal to NETWORK SERVICE. File permissions apply to the portal (web access site) folder, and to the following folder:

```
C:\WINDOWS\Microsoft.Net\Framework\v4.0.30319\Temporary  
ASP.NET Files.
```

## Downloading Documents

To allow users to download documents, users must be able to access the Microsoft Internet Information Services (IIS) metabase and other directories used by ASP.NET.

➤ ***To set up access the IIS metabase and other directories used by ASP.NET.***

- 1** Create a group on the IIS machine.
- 2** Add the domain users or domain groups to the group on the IIS machine.
- 3** Run the following command in the command line. The command is located in the  
c:\Windows\Microsoft.NET\Framework\v4.0.30319\ folder.  
Replace group\_name with the name of the group you created.

```
aspnet_regiis -ga "group_name"
```

## Configuring IIS for Windows Authentication for Web Access

The procedure for configuring Microsoft Internet Information Services (IIS) for Windows Authentication is different depending on the version of Windows Server you are using. For detailed information on configuring Microsoft IIS for Windows Authentication, see “Microsoft IIS for Windows Authentication” on page 23.

## Windows Authentication for Partner Access and Customer Access

In some scenarios, you must complete an additional step to configure Partner Access and Customer Access for Windows Authentication. The IUSR\_MACHINENAME user on the Microsoft Internet Information Services (IIS) server must be duplicated on the SQL Server. The user must have the same username and password on both computers. This step is necessary only if your SQL Server is on a different computer than your IIS server and Delegation is not set up between IIS and SQL Server.

# Web Access Users and Security Groups

The following sections describe how to configure users in Maximizer to access web access sites:

- “Web Access Security Groups” on page 231
- “Web Access Users” on page 234

## Web Access Security Groups

Every Address Book contains several web-access-related security groups, which are described in the following table. The MASTER user belongs to these groups by default, but you can add additional users to each group as required.

 The Company Announcements Authors security group does not apply to sites.

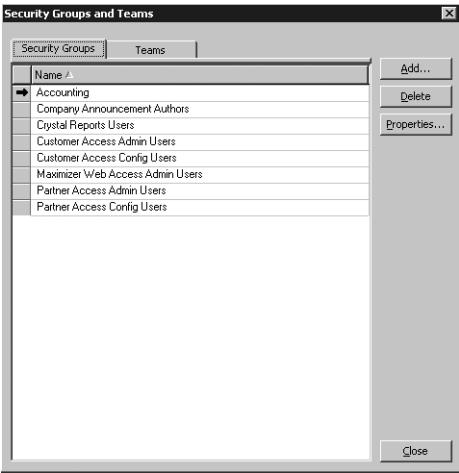
Every security group has a name and an ID. Changing the name has no effect on the group functionality. However, you cannot change the group ID. If you ever need to recreate these security groups, it is imperative that you use the correct security group IDs (the group name is irrelevant).

To be able to access Customer or Partner Access Administrator, a user must belong to at least one of the Administration Users or Configuration Users security groups for that site.

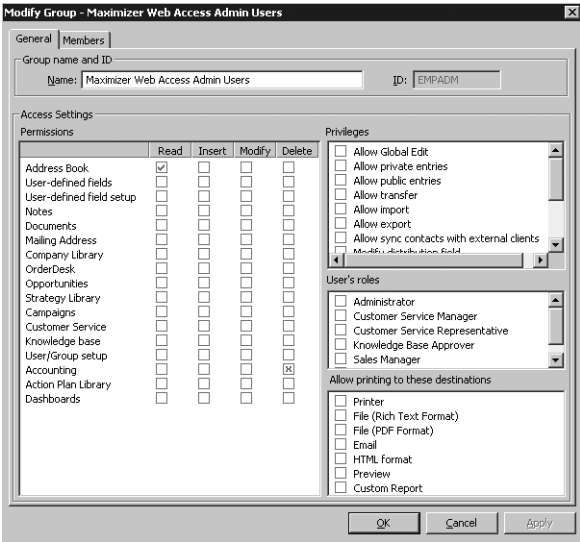
| Security Group Name              | Group ID | Enables group members to access the...   |
|----------------------------------|----------|--|
| Customer Access Admin Users      | C_ADM    | News Manager section of Customer Access Administrator                          |
| Customer Access Config Users     | C_CFG    | Configuration Manager section of Customer Access Administrator                 |
| Maximizer Web Access Admin Users | EMPADM   | Edit section of Maximizer Web Access, where the user can update external links |
| Partner Access Admin Users       | P_ADM    | News Manager section of Partner Access Administrator                           |
| Partner Access Config Users      | P_CFG    | Configuration Manager section of Partner Access Administrator                  |

➤ *To add a user to a site security group*

- 1 In Administrator, select **File > Security Groups and Teams**.
- 2 Select the security group, and click **Properties**.



- 3 Set the appropriate Access Settings for the group members.

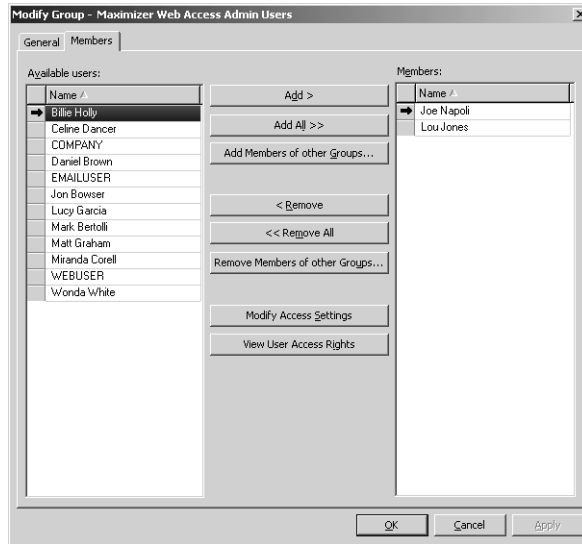


- 4 Click the **Members** tab.

- 5** Select a member to add to the group, and click **Add**. Repeat this process for all members to add to the group.

– or –

Click **Add All** to add all users to the group.



- 6** Click **OK** to close dialog boxes.
- 7** Repeat this procedure to add users to the other site security groups.

The selected users can now log into the site and access the functions available to their security group(s).

## Web Access Users

Address Book users are enabled to access the web access sites by default. However, you can change user access to sites in the user's general properties if required. The "Web Access" access right in User Properties applies to all sites.

➤ *To set web access rights*


- 1** In Administrator, select *File > Manage Users*.
- 2** Select the Maximizer user, and click *Properties*.
- 3** In the *Module Login* section (bottom right), select *Web Access*.
- 4** From the drop-down list, select *Enabled* or *Disabled*.

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

- Name and position:** Fields for User ID (bholly), Mr/Ms (Ms.), First name (Billie), Initial (H), Last name (Holly), Salutation (Dear < >:), Display name (Billie Holly), Position (Regional Sales Manager), and Reports to (Daniel Brown).
- Company and main address:** Fields for Company (Escona Estate Wines), Dept. (Sales), Division, Address 1 (1344 Eastside Road), Address 2, City/Town (Petaluma), St/Co/Prov (CA), Zip/Postcode (94954), and Country (USA).
- Phone numbers and phone extensions:** Fields for 1: (555) 775-0999, 2: (555) 775-0900, fax, 3:, and 4:.
- Security:** Radio buttons for Public (selected) and Private.
- Module Login:** A table with three rows: Windows Access (Enabled), Web Access (Enabled), and Mobile (Disabled).

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

# Maximizer Web Access

 Maximizer Web Access settings follow the Maximizer Address Book settings in Administrator.

Maximizer Web Access is functional automatically for all Address Books. Anybody with a user account for that Address Book can access it immediately, provided that the IIS Server is running and the “Web Access Login” right has not been disabled in the user’s account. (For more information about the “Web Access Login” right, refer to “Web Access Users” on page 234.)

On the IIS Server, you can access the sites from the Windows Start menu (Start > Programs > Maximizer CRM > Web Access). Other computers can access Maximizer Web Access with the following URL (unless it has been changed from the default):

`http://<IIS_Server_Name>/MaximizerWebAccess/Default.aspx`

The following sections contain information specific to Maximizer Web Access:

- “Creating External Links in Maximizer Web Access” on page 235
- “Passing a Search String Parameter to the Login Page” on page 236
- “ActiveX Controls in Maximizer Web Access” on page 237

## Creating External Links in Maximizer Web Access

To customize external links available on Maximizer Web Access, you must log into the site as the MASTER user, or as a user who belongs to the Maximizer Web Access Administration Users security group. (For information on this security group and how to add users to it, refer to “Web Access Security Groups” on page 231.)

### ➤ *To create external links on Maximizer Web Access*

- 1** Log into Maximizer Web Access as MASTER or as a user who belongs to the Maximizer Web Access Admin Users security group.
- 2** In the left navigation pane, hover your mouse over **Links**, and select **Edit** from the pop-up window.

**i** In Maximizer Web Access, an external link must be a URL.

**3** Add, edit, or remove any groups or links as desired.

**4** Click **Close** to finish.

The External Links section of the Maximizer Web Access main page now reflect the changes you just made.

## Passing a Search String Parameter to the Login Page

You can pass a search string parameter to the login page to display a search after logging in to Maximizer Web Access. The Address Book page is opened directly after successfully logging in—the My Work Day page and the Choose Address Book List dialog box is bypassed.

### ➤ *To add a search string parameter to the Login Page*

Append the Maximizer Web Access URL with the search string parameter. Note that the search string must be URL encoded. Following are some examples of the search string that you can use in the URL:

- ***To retrieve a Favorite List from the Address Book***  
http://[server name]/MaximizerWebAccess/default.aspx?ss=FLIST%28[Favorite list key]%29  
e.g., http://[server name]/MaximizerWebAccess/default.aspx?ss=FLIST%288cfOcdn15sZluP9HO7luclrMRGI892Gp%29

The above search retrieves the “All entries in Escona” Favorite List in the Escona Tutorial Address Book.

- ***To retrieve a particular company and its associated contacts from the Address Book***



`http://[server name]/MaximizerWebAccess/  
default.aspx?ss=EQ%28ClientID%2c[Identification]%29`

Note that the [Identification] can be found in Properties of the ABEntry > Identification.

e.g. `http://[server name]/  
MaximizerWebAccess?ss=EQ%28ClientID%2c37266200083%29`

A simple way to build your search string is by copying the search source code from Maximizer Web Access directly following a search performed in the Address Book page.

➤ ***To use source code from Maximizer Web Access***

- 1** Perform a search in Maximizer Web Access.
- 2** Immediately following the search, right-click in Internet Explorer, and choose ***View Source***.
- 3** Copy the first line of source code shown at the top of the window prefixed by ***http://[server name]/  
MaximizerWebAccess?ss=*** as shown above in the examples.


For more information on Maximizer search string language, refer to “Search String Language” on page 428.

## ActiveX Controls in Maximizer Web Access

Maximizer Web Access uses an ActiveX control for its integrations with Microsoft Office products, including Microsoft Word, Microsoft Excel, and Microsoft Outlook. These integrations are supported only in Microsoft Internet Explorer.

If your web server configuration includes a firewall, you may need to configure the firewall to allow the MaThinIEActiveX.ocx file to be downloaded from the server. The MaThinIEActiveX.ocx file is an ActiveX control used to run the Export to Excel command and to install the Word and Outlook integrations in Maximizer Web Access.

## Maximizer Web Access Administrator

 For login information, go to "Escona Tutorial Maximizer Web Access Administrator" on page 208.

Use Maximizer Web Access Administrator for the following tasks:

- Create and configure Address Books
- Manage users, sales/marketing teams, and security groups
- Manage Maximizer application settings

You can access Maximizer Web Access Administrator from Maximizer Web Access. You can also enter the Maximizer Web Access Administrator URL directly in a web browser. Only administrators can log in to Maximizer Web Access Administrator.

### ➤ *To log in to Maximizer Web Access Administrator*

- 1** Enter the Maximizer Web Access URL in a web browser:

By default, the URL is in the form: [server]/  
MaximizerAdministrator.

– or –

From Maximizer Web Access, in the left pane, hover your mouse over Administration, and select Administrator from the pop-up.

- 2** If necessary, select the Address Book, enter the User ID and password of an administrator, and click **Log In**.

If you are access Maximizer Web Access Administrator from Maximizer Web Access, you are automatically logged in to the Address Book.

# Mobile Access

As with the other sites, Mobile Access is installed automatically when you select the Maximizer Components for IIS option in the Server Components screen of the Maximizer installation. You must then enable the site as described in “Enabling Web Access Sites” on page 211. To access the site, enter the Mobile Access URL into your browser. By default, the Mobile Access URL is in the following form:

<Server Name>/MaximizerMobileAccess

e.g., <http://mobile.maximizer.com/MaximizerMobileAccess>

The following sections contain information specific to Mobile Access:

- “Supported Browsers for Mobile Access” on page 239
- “Configuring Automatic Redirection to Mobile Access” on page 239
- “Limiting the Number of Entries Displayed in Mobile Access” on page 240
- “Specifying the Mobile Access URL for Integration” on page 241

## Supported Browsers for Mobile Access

The following web browsers are compatible with Mobile Access:

- BlackBerry web browser
- Apple Safari
- Android web browser

Visit Maximizer’s website at [www.maximizer.com](http://www.maximizer.com) for the most up to date list of supported browsers.

To use the full functionality in Mobile Access, users may need to configure their browsers in the following ways:

- Enable JavaScript.
- Enable browser cookies.

## Configuring Automatic Redirection to Mobile Access

You can set up automatic redirection from Maximizer Web Access to Mobile Access. When users access Maximizer Web Access from a mobile web browser associated with a specified mobile user agent, they are redirected to the Mobile Access URL.

➤ *To configure automatic redirection for mobile users*

- 1 Open the web.config file for Maximizer Web Access.

The file is stored in the following folder:

...|*Program Files*|*Maximizer*|*Portals*|*Employee*

- 2 In the *<appSettings>* section, locate the *MaximizerMobileRedirectURL* key.
- 3 Next to *value*, enter the Mobile Access URL between the quotation marks.
- 4 Locate the *MobileUserAgent* key.
- 5 If necessary, next to *value*, modify the list of user agents that are redirected to Mobile Access.

The major mobile browsers are included in the list by default.

- 6 Save the changes to the web.config file.

## Limiting the Number of Entries Displayed in Mobile Access

In the Mobile Access web.config file, you can specify the maximum number of entries retrieved in lists. The default value is 200, but you can change this setting to display more or fewer entries in a list. The setting affects lists of Address Book entries, opportunities, customer service cases, notes, and documents.

➤ *To change the maximum number of entries displayed in lists*

- 1 Open the Mobile Access web.config file.

The file is stored in the following folder:

...|*Program Files*|*Maximizer*|*Portals*|*Wireless*

- 2 In the *<appSettings>* section, locate the *JavaMaxRecToRetrieve* key.
- 3 Next to *value*, enter the maximum number of entries between the quotation marks.
- 4 Save the changes to the web.config file.

## Specifying the Mobile Access URL for Integration

You can specify the Mobile Access URL in Administrator to ensure the site is available for integration with other programs. MaxMobile users can access the Company Library and Dashboards through Mobile Access. As well, Maximizer users can access the Mobile Access URL from the Start menu.

You must specify the URL in every Address Book that uses Mobile Access or MaxMobile.

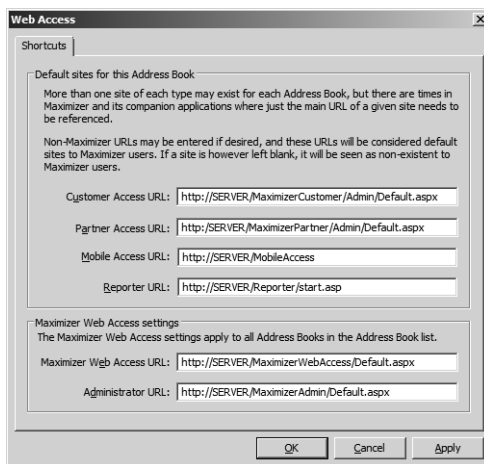
Note that in previous versions of Maximizer, Mobile Access was named Wireless Access. The default name of the Mobile Access virtual directory and the default URL have also changed. If you are upgrading from a previous version of Maximizer and you keep the default virtual directory, you should update the Mobile Access URL specified in Administrator to maintain integration between Mobile Access and MaxMobile.

### ► To specify the Mobile Access URL in Administrator

- 1** Open Administrator and log in to the Address Book.
- 2** Select **File > Web Access**.
- 3** Next to **Mobile Access URL**, enter the URL.

By default the URL is in the form ***http://[server]/MaximizerMobileAccess***.

- 4** Click **OK**.



- 5** If necessary, repeat this procedure for any other Address Books that use Mobile Access or MaxMobile.

## Customer Access and Partner Access

Unlike Maximizer Web Access, you must enable Customer Access and Partner Access yourself.

### ➤ *To enable and configure Customer Access or Partner Access*

- 1** Add administrators to the appropriate **Security Groups** in Administrator, as described in "Adding Users to Site Security Groups" on page 243.
- 2** Ensure the **Web Access Login** right is enabled for any users who will access the site. (This right is enabled by default. For further information, refer to "Web Access Users" on page 234.)
- 3** Customize the **Web.config** file for the site, as described in "Application Settings for Web Access Sites" on page 221.
- 4** Customize the **graphic** on the main site page. Typically, you would replace it with your company's logo. For instructions on changing this graphic, refer to "Customizing the Graphic on the Site Main Page" on page 253.
- 5** Assign a **URL** to the site, as described in "Determining External Site URLs" on page 243.
- 6** Enable any site **configuration options** as desired, as described in "Configuring Site Options" on page 245.
- 7** Assign Contacts and/or Individuals the status of Customer or Partner in the **Category** field as part of the entry's basic information, as described in "Setting Up Business Partners and Customers" on page 246.
- 8** Give business partners and customers access using the **External Site PIN** merge field, as described in "Assigning Site Login PINs to Contacts and Individuals" on page 248.

## Introduction to Customer and Partner Access Administrator

Consisting of both the News Manager and the Configuration Manager, Customer/Partner Access Administrator is part of each instance of a Partner or Customer Access site and provides a way for administrators to complete the following tasks:

- turn site sections on and off
- specify the properties of generated emails
- specify the name of the site

- add and modify news items

The options available in Customer and Partner Access are primarily the same.

The main page of Customer/Partner Access Administrator contains one or both of the following links, depending on which site security groups you belong to:

- **News Manager** – This link is available if you are a member of the Customer Access Administration Users or Partner Access Administration Users security group for the selected site type.
- **Configuration Manager** – This link is available if you are a member of the Customer Access Configuration Users or Partner Access Configuration Users security group for the selected site type.


You can also click the **View Customer/Partner Access Site** link in the upper-right corner of the screen to view the site itself, rather than the administrator.

For more specific information about Customer/Partner Access Administrator, open it and click **Help**.

## Adding Users to Site Security Groups

The default configuration for Customer and Partner Access allows any Maximizer user to access Customer/Partner Access Administrator if they have rights to the section granted through Security Groups. Use the File > Security Groups and Teams dialog box in Administrator to control user access. Site security groups function in the same way as general Maximizer security groups. For more detailed information about site security groups, refer to “Web Access Security Groups” on page 231.

## Determining External Site URLs

 You must configure the external sites before these URLs are enabled for the Address Book as described in the previous section.

Once you have configured the database and enabled both Partner Access and Customer Access for an Address Book, the sites are available for use through the URLs. Maximizer Web Access requires no additional configuration for use with an Address Book.

The default URLs are listed below, although you can change them as necessary. To determine the URL for a site, substitute your IIS Server name for [YourServerName].

- **Maximizer Web Access URL**  
`http://[YourServerName]/MaximizerWebAccess/Default.aspx`
- **Customer Access URL**  
`http://[YourServerName]/MaximizerCustomer/Default.aspx`

- **Partner Access URL**  
http://[YourServerName]/MaximizerPartner/Default.aspx
- **Customer Access Administrator**  
http://[YourServerName]/MaximizerCustomer/Admin/Default.aspx
- **Partner Access Administrator**  
http://[YourServerName]/MaximizerPartner/Admin/Default.aspx

## Accessing Sites from the Start Menu

To access your sites through the Maximizer CRM program Start menu, enter your URLs in the Sites dialog box in Administrator.

### ► *To set up access for the sites from the Windows Start menu*

- 1** In Administrator, select **File > Web Access**.
- 2** Enter the URLs for sites in the corresponding fields.

For example, for Partner Access Administrator, you would enter the following in the Partner Access URL field:

http://[YourServerName]/MaximizerPartner/Admin.aspx

**Web Access**

Shortcuts

Default sites for this Address Book

More than one site of each type may exist for each Address Book, but there are times in Maximizer and its companion applications where just the main URL of a given site needs to be referenced.

Non-Maximizer URLs may be entered if desired, and these URLs will be considered default sites to Maximizer users. If a site is however left blank, it will be seen as non-existent to Maximizer users.

Customer Access URL: http://SERVER/MaximizerCustomer/Admin/Default.aspx

**2** Partner Access URL: http://SERVER/MaximizerPartner/Admin/Default.aspx

Mobile Access URL: http://SERVER/MobileAccess

Reporter URL: http://SERVER/Reporter/start.asp

Maximizer Web Access settings

The Maximizer Web Access settings apply to all Address Books in the Address Book list.

Maximizer Web Access URL: http://SERVER/MaximizerWebAccess/Default.aspx

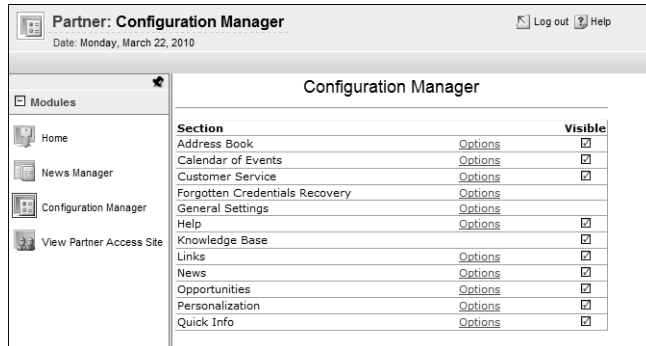
Administrator URL: http://SERVER/MaximizerAdmin/Default.aspx

OK Cancel Apply



## Configuring Site Options

Use the Configuration Manager to set preferences for the sites such as Address Book, calendar of events, customer service, forgotten credentials recovery, general settings, help, knowledge base, leads, links, news, opportunities, personalization, and quick info.



To access the Configuration Manager, you must be a member of the Customer or Partner Access Configuration Users security group. When you log into Customer/Partner Access Administrator, you will see a Configuration Manager link.

For information about each of the configuration options, open Customer/Partner Access Administrator and click **Help**.

## Setting Up Business Partners and Customers

Start Maximizer and create Address Book entries for all the business partners and customers who need to access the sites. Each customer and partner must be set up as follows:

- Be a Contact or Individual in Maximizer
- Have an assigned email address in Maximizer
- Have "Partner" and "Customer" as the assigned value in the Category field, which is in the Contact Details section of the entry's basic information tab
- Have at least one entry in the Partner Interests or Customer Interests user-defined field if you would like only certain new items to appear by default

Set up a test account for yourself so you can log into the site as a business customer and partner and confirm that everything is working correctly. Do this by creating an Individual record with your name, email address, and the selected values of Customer and Partner for the Category field on the entry's Basic Information tab.

### ➤ *To enable Address Book entries to access the site*

- 1** Run Maximizer and open the Address Book entry for the Contact or Individual for whom to create a site login account.
- 2** Ensure that the Contact or Individual's correct email address is entered in the *Email address* field.

- 3 Click the button beside the *Category* field.

- 4 Select the checkbox beside either the *Customer* or *Partner* category, and click **OK**.

If you select Customer, the Contact or Individual will be able to log into Customer Access.

If you select Partner, the Contact or Individual will be able to log into Partner Access.

The selected category now appears in the Category field of the Basic Information tab.

- 5 Click **OK** to close the Address Book entry.
- 6 Repeat this procedure to enable any other Address Book entries to access the sites.

After you have completed this procedure, you must provide the customer or partner with a site PIN, which enables them to register and log into the site.

## Assigning Site Login PINs to Contacts and Individuals

You provide each business customer and partner with a PIN. The PIN works only once. Each customer or partner can set up only one web account. Site PINs and logins are shared for both Partner Access and Customer Access.

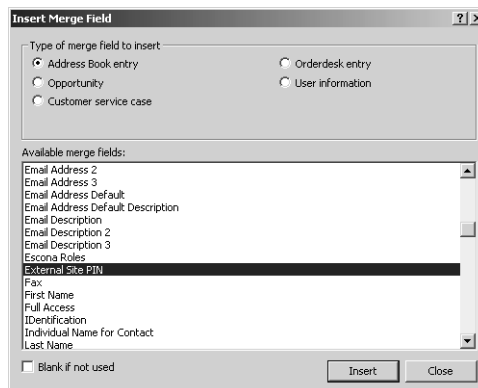
Login PINs are created by a Maximizer merge field called External Site PIN. The values of the External Site PIN merge field are generated when you do a merge to print, email, or fax in the Maximizer Word Processor or when you generate an automated activity for an automated campaign.

### ➤ *To send Site PINs by mail, email, or fax*

- 1 In Maximizer, on the **Tools** tab, select **Maximizer Editor** from the **Other** group to open the Maximizer Word Processor.
- 2 Create a template for the email message that goes out to customers or partners to inform them of their Site PIN, which is required to access the sites.
- 3 Click the Merge Field button to enter any merge fields.

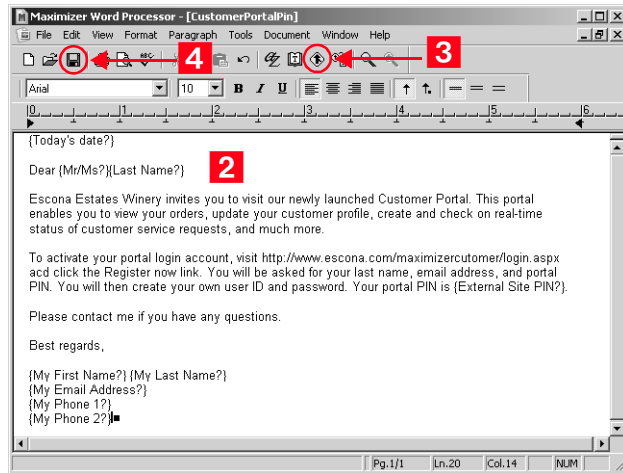
You must include the **External Site PIN** merge field to send it to customers or partners, so they can create their login accounts.

**i** For more information about the Maximizer Word Processor and merge fields, refer to the *Maximizer CRM User's Guide*.



**i** You can include any content in the merge document such as the URL for the site. If you are using email, the URL can be formatted as an HTML link.

**4** Save the document as an email template.

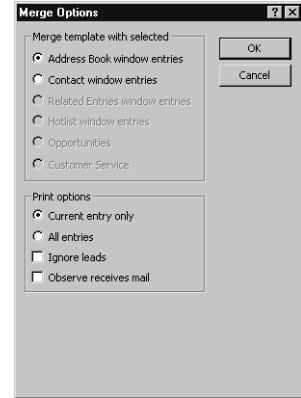
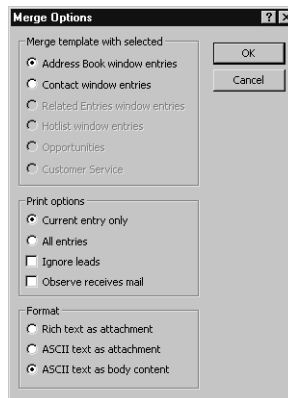


**5** Select **File > Merge > to Printer, to Email, or to Microsoft Fax**.

**i** You can generate PINs for a whole list of entries or just the current entry.

**6** Specify your desired options, and click **OK**.

The available merge options depend on which merge destination you chose in the previous step.

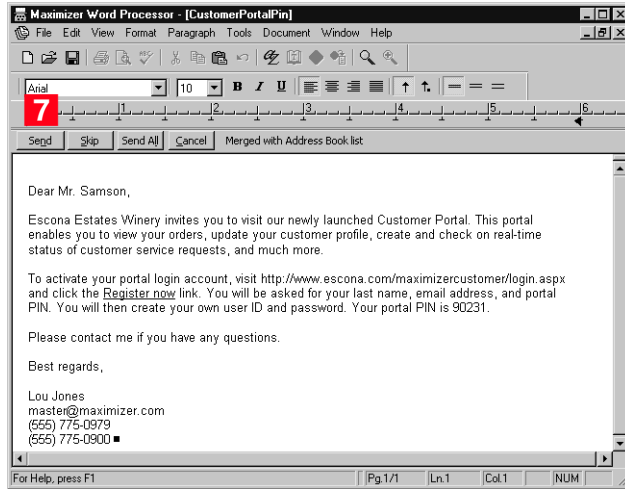


An assigned PIN appears in each merge document or email you create.

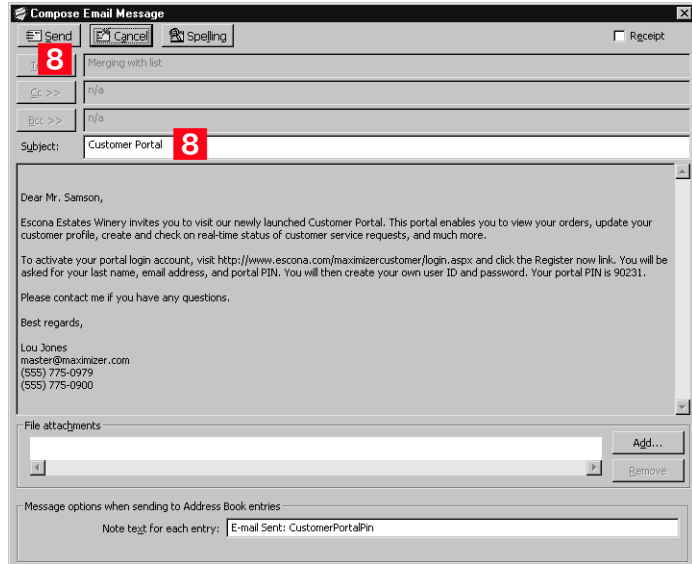
- 7** Click **Send** or **Print** to view each email or document before you send or print it.

– or –

Click **Send All** or **Print All** to send or print all emails or documents at once, without previewing them individually.



- 8** If you are sending by email, the Compose Email Message dialog box opens. Enter a subject in the **Subject** line, and click **Send**.



– or –

If you are printing documents, the Windows Print dialog box opens.

When the Customer or Partner receives the site PIN, he or she can go to the site login page, and click **Register now** to activate the login account.

➤ ***To activate a site login PIN through an automated campaign activity***

- When setting up your automated campaign template, use the **External Site PIN** merge field in one of the automated campaign activities.

➤ ***To open the main site for Partner Access or Customer Access***


- 1** Set up a site PIN for yourself and activate a login.
- 2** Log into either Partner Access Administrator or Customer Access Administrator.
- 3** Click the **View Partner/Customer Access Site** link to see the main web access sites.

**i** For more information on creating automated campaign templates, refer to the *Maximizer CRM User's Guide* and online help files.

## Activating a Login Account

The following procedure explains the steps for the business customer or partner to activate a login account with the provided PIN.

### ► *To activate a login account*

 See "Determining External Site URLs" on page 243 for more information on the site URLs.

**1** Open Customer Access or Partner Access using the provided URL.

**2** At the Login screen, click the ***Register now*** link.

The registration page opens.


**3** Enter your last name, email address, PIN, user ID, and password.

The Customer or Partner Access page displays.

## Removing Web Access

To block access to Customer or Partner Access for a business customer or partner who currently has access, start Maximizer, locate the Address Book entry, and remove the Customer or Partner value from the Category field.

## Retrieving a Forgotten Password

 For this feature to work, the Forgotten Credentials Recovery configuration must have been set up previously in Customer/Partner Access Administrator.

A customer or partner who forgets a password can use the "Forgotten Login Credentials" link to load a page that asks for an email address and last name or user ID. The customer or partner then receives the password by email.

## Changing a Password

Partners or customers can change their password from inside the site any time they want (if you enable that feature through the Personalization link in Configuration Manager). All passwords are encrypted; your Maximizer users do not have access to passwords.




## Advanced Site Configurations

This section describes the following additional site customizations:

- “Customizing the Graphic on the Site Main Page” on page 253
- “The sections.xml File” on page 254
- “The followingWindowSets.xml File” on page 255
- “Displaying Custom System Messages” on page 256
- “Adding Custom Actions to the CustomActions.xml File” on page 258
- “Creating Custom Links to External Websites” on page 250
- “Specifying the Address Book on the Site Login Screen” on page 261
- “Globalization of Sites” on page 263
- “Configuring Multiple IIS Servers to Connect to a Single Maximizer CRM Server” on page 264
- “Moving a Site” on page 264
- “Installing Sites to Non-Default Folders” on page 264
- “Setting Up Multiple Customer or Partner Sites” on page 266
- “Creating a Custom Case Wizard for Partner Access” on page 271

### Customizing the Graphic on the Site Main Page

 With the exception of the contents of the \CustomGraphics folder, you should not modify application files, including graphics.

You can replace the default graphic on the site main page with your own custom graphic. This procedure applies to all sites.

#### ➤ *To customize the graphic on the site main page*

- 1** Create a graphic that is 280 pixels wide by 130 pixels in height and save it as ***LoginCorporate.gif***.
- 2** Copy the graphic file to the appropriate folder:  
...\\Program Files\\Maximizer\\Portals\\<site>\\CustomGraphics\\

## The sections.xml File

The sections.xml file contains information on modules that are available to users in Maximizer Web Access and the other web access sites such as Partner Access. By editing the sections.xml file, you can add, disable, or change the default order that the modules appear.

The sections.xml file is located on the machine where the Maximizer Components for IIS are installed, at the following path:

\\Program Files\\Maximizer\\Portals\\<site>\\Config\\sections.xml

## Disabling Modules in Sites

You can disable specific modules in the web access sites. The sections.xml file determines what modules are displayed in the site.

The easiest way to disable a module is to comment out the shortcut element for that module in the sections.xml file. The shortcut element will remain in the file, but it will be enclosed between XML comment tags and ignored by Maximizer.

### ► To disable a module in a site

**i** Always back up the sections.xml file before making any changes.

**1** Open the site's *sections.xml* file in a text editor such as Notepad.

**2** Locate the *shortcut* element containing the module.

The name of the module, as it appears in Maximizer, is displayed between the title tags in the shortcut element.

**3** Add an opening comment tag, *<!--*, before the shortcut opening tag, *<shortcut>*.

**4** Add a closing comment tag, *--!>*, after the shortcut closing tag, *</shortcut>*.

**5** Save the file.

The following example shows comment tags around the opportunities shortcut element. In this example, the opportunities module would be disabled on the site.

```
<!--
<shortcuts>
  <id>opp</id>
  <title>Opportunities</title>
  <image>opportunity</image>
  <module_id>0<module_id>
  <url>/Content/Opportunities.aspx</url>
```

```
<external>No</external>  
<has_grid>Yes</has_grid>  
</shortcuts>  
-->
```

## The followingWindowSets.xml File

The followingWindowSets.xml file contains information on following windows that are available to users in Maximizer Web Access and the other web access sites such as Partner Access. By editing the followingWindowSets.xml file, you can change the name (title) of a following window or disable a following window entirely.

The followingWindowSets.xml file is located on the computer where the Maximizer Components for IIS are installed, at the following path:

\\Maximizer\Portals\<site>\Config\followingWindowSets.xml

## Renaming or Disabling Following Windows in Sites

You can rename or disable specific following windows in the web access sites.

### ➤ *To rename or disable a following window*

**i** Always back up the followingWindowSets.xml file before making any changes.

**1** Open the site's *followingWindowSets.xml* file in a text editor such as Notepad.

**2** Locate the *following window* element.

The name of the following window, as it appears in Maximizer, is displayed between the title tag.

**3** Adjust the tags as necessary to rename or disable a following window, as follows:

**<title>** - contains the *name* of the following window

**<url>** - contains the *ASPX file* that is displayed when a user selects this following window

**<visible>** - the value of *yes* is specified to display the following window and the value *no* is specified to disable or hide the following window

**4** Save the file.

The following example shows comment tags around the Social Networking following window. In this example, the Social Networking following window would be renamed to Social Media.

```
<tab id="social">  
    <title>Social Media</title>  
    <url>fwSocial.aspx</url>  
    <visible>Yes</visible>  
</tab>
```

## Changing the Order of Modules in the Icon Bar

In Maximizer Web Access, you can define the icons and the default order that they appear in the icon bar by modifying the sections.xml file. Users will only see the icons for the modules that they have the rights to view.

The easiest way of doing this is copying the module section of the module you want to move (the code surrounded by the <shortcut> tags) and pasting it between other module sections.

If the order of the icons has been changed by a user in the Icon Bar Properties dialog box (in Maximizer Web Access, from the top right corner, select preferences), the new order is saved in the ADMN\_Config table where the TaskCode = the user's ID and the KeyCode = IconBarButtonOrder. If modules are hidden in the Icon Bar Properties, references to the hidden modules are saved in the ADMN\_Config table where the TaskCode = the user's ID and the KeyCode = IconBarButtonHide.

## Displaying Custom System Messages

You can create custom system messages that are broadcast to all Maximizer Web Access users. System messages display across the top of web access pages. They can include two lines of text and a hyperlink. The properties of a message are specified in the SystemMessages.xml file. The file specifies the content of the message, the appearance of the message, and the start and end date/time that the message is displayed.

### ➤ *To display a custom system message*

- 1** Open the site's *SystemMessages.xml* file in a text editor such as Notepad.

The file is located on the Maximizer server at the following path:

```
C:\Program Files\Maximizer\Portals\Employee\Config\  
SystemMessages.xml
```

- 2** Use the XML tags in the bottom part of the SystemMessages.xml file to specify the properties of the system message. The top part of the file explains the role of each set of tags. The bottom part of the file contains the actual tags that are used.

For descriptions and examples of each element, see “Elements in SystemMessages.xml File” and “Example SystemMessages.xml File” below.

- 3** Between the *Enabled* tags, replace *False* with *True*. The line in the file should be `<Enabled>True</Enabled>`.

- 4** Save the file.

## Elements in SystemMessages.xml File

The SystemMessages.xml file contains one `<SystemMessages>` element, which in turn contains one `<SystemMessage>` element. This element determines the properties of the message.

The following table describes each of the sub-elements in the `<SystemMessage>` element.

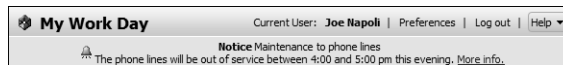
| Element                               | Description  |
|---------------------------------------|--|
| <code>&lt;HeaderLine1&gt;</code>      | Bolded text at the beginning of the first line   |
| <code>&lt;TextLine1&gt;</code>        | Plain text placed at the end of the first line.  |
| <code>&lt;TextLine2&gt;</code>        | Plain text placed at the beginning of the second line.   |
| <code>&lt;HyperlinkText&gt;</code>    | Text for a hyperlink placed at the end of the second line.   |
| <code>&lt;HyperlinkUrl&gt;</code>     | The URL for the hyperlink.   |
| <code>&lt;BackgroundColor1&gt;</code> | The background color of the message.   |
| <code>&lt;StartDate&gt;</code>        | The start date and time in the format yyyy-mm-dd hh:mm. If specified, the message is displayed only after this date and time.  |
| <code>&lt;EndDate&gt;</code>          | The end date and time in the format yyyy-mm-dd hh:mm. If specified, the message is displayed only before this date and time.   |
| <code>&lt;Enabled&gt;</code>          | True means the system message will display if at least one text element has a value and the current date/time is within the start and end date/time values.<br>False means the system message will not display regardless of the other elements. |

## Example SystemMessages.xml File

The following example shows the content of the <SystemMessages> element:

```
<SystemMessages>
  <SystemMessage>
    <HeaderLine1>Notice</HeaderLine1>
    <TextLine1>Maintenance to phone lines</TextLine1>
    <TextLine2>The phone lines will be out of service
    between 4:00 and 5:00 pm this evening.</TextLine2>
    <HyperlinkText>More info.</HyperlinkText>
    <HyperlinkUrl>http://Server/Maintenance</HyperlinkUrl>
    <BackgroundColor1>Yellow</BackgroundColor1>
    <StartDate>2011-11-10</StartDate>
    <ExpiryDate>2011-11-10 17:30</ExpiryDate>
    <Enabled>True</Enabled>
  </SystemMessage>
</SystemMessages>
```

The example displays a message alerting Maximizer Web Access users that phone lines are out of service. The message is displayed only on the specified day until 5:30 pm.



## Adding Custom Actions to the CustomActions.xml File

The Address Book, Customer Service, and Opportunities pages, along with the Details tab in the Address Book following pane and the read-only Address Book dialog in Maximizer Web Access each contain an Actions menu, and you can add custom action commands to those menus. Clicking on a custom action in the menu will open a custom dialog box created by you, in which you can display information about the current record, selected records, or all records in the list. You can add as many custom actions as you want to the Actions menu.

To enable Maximizer Web Access to register and recognize your custom actions, you must add information to the CustomActions.xml file. The file identifies which custom actions are enabled and defines specifics about the dialog box. The file is located in the <portal\_root>\Config\ folder.

**i** If the XML is not well-formed, no custom actions will appear, and no error messages will appear.

The file contains four sections, one for each page (Address Book, Campaigns, Customer Service, and Opportunities). Each section contains the following XML elements.

| Element Tag    | Description   |
|----------------|---|
| <id>           | Identifies which page the custom action is for (ab = Address Book, cam = Campaigns, cs = Customer Service, and opp = Opportunities). Do not change the value of this element. |
| <CustomAction> | Defines what page should be called when a user clicks a the custom action in the Actions menu.  |

The following table describes each of the sub-elements in the <CustomAction> element.

| Element Tag           | Description  |
|-----------------------|--|
| <ID>                  | Unique ID of the menu command.<br>Can be any value, but must be unique within the <Page> element.  |
| <Title>               | Menu command title as it will appear in the Actions menu.  |
| <Url>                 | Name of the file that will appear in the pop-up dialog box after the command is called by a user. This file must reside in <portal_root>\Dialogs\CustomDialogs\. |
| <MergeURL>            | Custom URL containing a merge field from Maximizer.  |
| <Width>               | Width of the pop-up dialog box, in pixels.   |
| <Height>              | Height of the pop-up dialog box, in pixels.  |
| <DisabledIfNoRecords> | Defines whether the custom Action menu command will be disabled when there are no entries displayed in the grid on the page. Must have a Yes or No value.        |
| <Resizable>           | Determines if the custom window can be resized. Must have a Yes or No value.   |
| <Scrollable>          | Determines if the custom window can be scrolled. Must have a Yes or No value.  |

## Example of the CustomActions.xml File

```
<?xml version="1.0" encoding="utf-8" ?>
<!--
    ConfigActions.xml
    =====
    This file manages custom actions.
    Sample:
    =====
```

```

<CustomAction>
    <ID>CA_id</ID>                : Must be unique
    <Title>Custom Action...</Title>: As it will
appear in the Actions menu
    <Url>c.aspx</Url>              : Must exist in
<EmployeePortalRoot>\Dialogs\CustomDialogs\ folder
    <MergeUrl>No</MergeUrl>       : Must be Yes or No
    <Width>800</Width>            : Must be a number
(width in pixels)
    <Height>200</Height>         : Must be a number (height
in pixels)
    <DisabledIfNoRecords>Yes</DisabledIfNoRecords>:
Must be Yes or No
    <Resizable>No</Resizable>    : Must be Yes or No
    <Scrollable>No</Scrollable>  : Must be Yes or No
</CustomAction>

```

## Creating Custom Links to External Websites

You can create custom links in the CustomActions.xml file to external websites that include merge fields from Maximizer. The custom URLs are then accessible from the Actions menu in Maximizer Web Access. This allows a user to link to a web page based on the contents of the current record. For example, you could include the “city” merge field as part of the external link URL and based on the city contained in the record, information related to the associated city would be shown in the web page.

Note the URLs must be encoded. Different types of encryption are supported for passing parameters to URLs.

To create a custom link with a merge field, add the custom link information to the CustomActions.xml file. See the following example of a CustomActions.xml file for more information.

### Example of an Integration with a Wikipedia Search

```

<CustomAction>
    <ID>CA_id</ID>
    <Title> Wikipedia...</Title>
    <Url>http://en.wikipedia.org/wiki/
[EncodingStartSpaceAsUnderscore] [C.CompanyName]
[EncodingEnd]</Url>
    <MergeUrl>yes</MergeUrl>
    <Width>700</Width>
    <Height>400</Height>

```



```

        <DisabledIfNoRecords>No</DisabledIfNoRecords>
        <Resizable>Yes</Resizable>
        <Scrollable>Yes</Scrollable>
    </CustomAction>

```

## Example of an Integration with a Google Search

```

<CustomAction>
    <ID>CA_id2</ID>
    <Title>Google Search...</Title>
    <Url>http://www.google.ca/
search?q=[EncodingStartSpaceAsPlus][C.CompanyName][EncodingEnd]</Url>
    <MergeUrl>Yes</MergeUrl>
    <Width>700</Width>
    <Height>400</Height>
    <DisabledIfNoRecords>No</DisabledIfNoRecords>
    <Resizable>Yes</Resizable>
    <Scrollable>Yes</Scrollable>
</CustomAction>

```

## Example of an Integration with Google Maps

```

<CustomAction>
    <ID>CA_id3</ID>
    <Title>Google Map...</Title>
    <Url>http://maps.google.ca/
maps?q=[EncodingStartSpaceAsPlus][C.AddressLine1]%2c[C.City]
%2c[C.StateProvince][EncodingEnd]</Url>
    <MergeUrl>Yes</MergeUrl>
    <Width>1100</Width>
    <Height>800</Height>
    <DisabledIfNoRecords>Yes</DisabledIfNoRecords>
    <Resizable>Yes</Resizable>
    <Scrollable>Yes</Scrollable>
</CustomAction>

```

## Specifying the Address Book on the Site Login Screen

There are several methods of controlling which Address Books are available through the login screens of Maximizer Web Access and Mobile Access:

- Users enter the site URL, and the resulting login page displays a drop-down list of available Address Books
- Users enter the site URL, appended by the "ab" parameter, and the resulting login page displays the specified Address Book name as a static field
- You enter a value in the AddressBook key of the site's Web.config file, and when users enter the site URL, the resulting login page displays the specified Address Book name as a static field

## Displaying a Drop-down List of Available Address Books

You can provide access to any Address Book through Maximizer Web Access or Mobile Access. By default, when a user enters the site URL in a browser, the resulting login screen includes a drop-down list of available Address Books.

## Specifying the Address Book in the URL

You can also specify the Address Book in the URL. By specifying the new parameter called "ab" in the URL, you can provide a direct shortcut to the Address Book in Maximizer Web Access or Mobile Access.

- **Maximizer Web Access:** `http://SERVERNAME/MaximizerWebAccess/default.aspx?ab=EsconaTutorial`
- **Mobile Access:** `http://SERVERNAME/MobileAccess/default.aspx?ab=EsconaTutorial`

The value of the ab parameter must be the Address Book's SQL database name, not the user-definable Address Book name set in Administrator (File > Preferences > System Options tab).

## Enabling Access to a Single Address Book Only

You can also restrict an instance of Maximizer Web Access or Mobile Access to be able to access a single Address Book only, rather than showing the Address Book drop-down list or specifying the Address Book in the URL. Specify the "AddressBook" property in the appSettings section of the site's Web.config file, as shown in the following example:

```
<add key="AddressBook" value="EsconaTutorial" />
```

The value of the AddressBook key must be the Address Book's SQL database name, not the user-definable Address Book name set in Administrator (File > Preferences > System Options tab).

If the value of the AddressBook key does not correspond to a valid Address Book, the login page displays the Address Book list.

Similarly, you can display a default Address Book. This is also specified in the `appSettings` section of the site's `Web.config` file, as shown in the following example:

```
<add key="DefaultAddressBook" value="EsconaTutorial" />
```

## Globalization of Sites

The `Globalization` element in the `web.config` file enables you to change the site's regional display settings such as numbers and dates. The `Globalization` element is optional. If it or any of its attributes are not added to the `Web.config` file, US English is used by default.

In Maximizer Web Access, users can also choose a locale in the user preferences. The user's locale setting takes precedence over the globalization element in the `web.config` file.

To change the globalization settings of a site, you must add the section below as a child to the `system.web` element

```
<globalization
    requestEncoding="utf-8"
    responseEncoding="utf-8"
    culture="en-US"
    uiCulture="en"
/>
```

The regional settings are defined in the ***culture*** and ***uiCulture*** attributes. To use display settings other than US English, replace the values of the `culture` and `uiCulture` attributes in the `Globalization` element. The following list includes some of the possible values:

| Country, Language      | culture | uiCulture |
|------------------------|---------|-----------|
| United States, English | en-US   | en        |
| Britain, English       | en-GB   | en        |
| Canada, English        | en-CA   | en        |
| France, French         | fr-FR   | fr        |
| Canada, French         | fr-CA   | fr        |
| Belgium, French        | fr-BE   | fr        |
| Germany, German        | de-DE   | de        |
| China, Chinese         | zh-CN   | zh        |

The country codes are defined in the ISO 3166 standard, which is available at the following URL:

[http://www.iso.org/iso/country\\_codes.htm](http://www.iso.org/iso/country_codes.htm)

The concept of combining these country codes with language is defined in RFC 3066, which is available at the following URL:

<http://www.faqs.org/rfcs/rfc3066.html>

## Configuring Multiple IIS Servers to Connect to a Single Maximizer CRM Server

You can use the procedure described below to configure multiple Address Books on multiple IIS servers to connect to a single Maximizer CRM server.

### ➤ *To configure multiple IIS servers to connect to a single Maximizer CRM Server*

- 1** On each IIS server, install **Maximizer Components for Microsoft IIS** from the Maximizer CRM Server disc and during setup, select your Maximizer CRM Server machine.
- 2** On each IIS server, change the AddressBook key of the Web.config file for Customer and Partner Access to point to the appropriate Address Book.

## Moving a Site

Web access sites are ASP.NET web applications, which implies a level of portability. If you choose, you can rename the virtual folder holding the application and therefore its URL. You may even change the physical path of the application by copying the application someplace else on the IIS machine's hard drive. When doing this, be sure to move the **entire** folder.

## Installing Sites to Non-Default Folders

The Maximizer installation creates an XML file called PortalLocations.xml (unless the file already exists on the machine, in which case it does not overwrite the existing file). The PortalLocations.xml file is located in the folder where the sites are installed. The default site installation folder is ...Program Files\Maximizer\Portals. There is only one PortalLocations.xml file for each Maximizer CRM Server.

The PortalLocations.xml file describes the folder location of each site. If you install any sites to a non-default location, you can optionally add their location to the PortalLocations.xml file. Any sites identified in this file will be updated by the Maximizer installation for any upgrades or updates such as service releases. Any sites installed to non-default locations will not be updated unless they are added to the PortalLocations.xml file.

By default, the PortalLocations.xml file contains location information for the four default sites.

```
<Portals>
  <Portal ID="DefCustomerPortal">
    <Location>C:\Program
Files\Maximizer\Portals\Customer</Location>
    <Context>MA_CUSTOMER</Context>
    <Description>Maximizer Default Customer Portal</
Description>
  </Portal>
  <Portal ID="DefPartnerPortal">
    <Location>C:\Program
Files\Maximizer\Portals\Partner</Location>
    <Context>MA_PARTNER</Context>
    <Description>Maximizer Default Partner Portal</
Description>
  </Portal>
  <Portal ID="DefEmployeePortal">
    <Location>C:\Program
Files\Maximizer\Portals\Employee</Location>
    <Context>MA_EMPLOYEE</Context>
    <Description>Maximizer Default Employee Portal</
Description>
  </Portal>
  <Portal ID="DefWirelessPortal">
    <Location>C:\Program
Files\Maximizer\Portals\Wireless</Location>
    <Context>MA_WIRELESS</Context>
    <Description>Maximizer Default Wireless Portal</
Description>
  </Portal>
</Portals>
```

The XML file contains a site ID, location, context, and description for each site. These elements are described in the following table.

| Element       | Description   |
|---------------|---|
| <Site/Portal> | This element has an ID attribute, which must be unique for each site. This ID will not be displayed in the site itself. |
| <Location>    | Installation location of the site.  |

| Element       | Description   |
|---------------|---|
| <Context>     | Identifies the type of site. Must be one of the following values: <ul style="list-style-type: none"> <li>• MA_Employee</li> <li>• MA_Customer</li> <li>• MA_Partner</li> <li>• MA_Wireless</li> </ul> |
| <Description> | Description of the site.  |

## Setting Up Multiple Customer or Partner Sites

**i** If you want the sites to be updated by the Maximizer installation, refer to "Installing Sites to Non-Default Folders" on page 264.

To this point, the chapter has explained how to set up a single Partner Access site and a single Customer Access site. However, you can create additional Partner and Customer Access sites for one or more Address Books. For example, you might want to create a Media Site for your Address Book, or you might want to create a Customer or Partner Access site for a second Address Book.

The major steps involved in creating additional Partner or Customer Access sites is as follows:

- Assign a Category field value to Address Book entries. The Category field of an Address Book entry controls which sites(s) an Address Book entry can access. Therefore, you must assign a Category field value to all Address Book entries that should be granted access to the new site. You can create a new field value, or you can assign one of the existing field values.
- Create the new site. The process of creating a new site is very simple. Essentially, you duplicate an existing Customer or Partner Access site folder, rename it, and edit the Web.config file for the new site.
- Configure the new site. At this point, the site is functional. The only remaining task is to configure the new site using Customer/ Partner Access Administrator and provide access PINs to those Individuals and Contacts who you want to be able to log into it.

Each of these procedures are described in detail below.

### ➤ *To create a new Category field value*

- 1** Run Maximizer and log into the Address Book.
- 2** Open an Address Book entry to grant access to the new site.
- 3** If the Address Book entry is in View mode, click **Edit** to switch to Edit mode.

- 4 Click the ellipsis button beside the **Category** field.

The screenshot shows the 'All The Best Spirits' customer record form. The 'Company' field is 'All The Best Spirits'. The 'Address 1' is '1155 E Putnam Ave'. The 'City/Town' is 'Riverside', 'St/Co/Prov' is 'CT', and 'Zip/Postal' is '06878'. The 'Country' is 'USA'. The 'Phone numbers' section has 'Main' as '(604) 601-8000' and 'Fax' as '(604) 601-8001'. The 'Email addresses' section has 'Main' as 'escona@maximizer.com'. The 'Website' is 'www.maximizer.com'. The 'Key Fields for: General Customer' section shows 'Primary Interest' as 'As an agent/distributor', 'Annual Sales' as '975,000.00', 'Retail Wine Cost' as 'US - Northeast', 'Region' as 'Wine-Retail', 'Size of Client' as 'Mark Bertolli', and 'First Contacted Date' as 'Joe Napoli, Lucy Gar...'. The 'Company details' section has 'Do not solicit by' as 'Distributor, Partner', 'Territory' as 'East', 'Territory Status' as 'Set by rule', 'Account Manager' as 'Mark Bertolli', 'Full Access' as 'Joe Napoli, Lucy Gar...', 'Read Access' as 'Sales', 'Partner' as 'No', and 'Sales Lead' as 'No'. The 'Category' field is highlighted with a red box and a red '4'.

- 5 If a new field value is required, click **New Value** and add an item to the list.
- 6 Select the checkbox beside the field value that enables the Address Book entry to access the new site, and click **OK**.

For example, if you are creating a Media Access site, you would probably select Media as the required Category field value. If you were creating an Investor Access site, you would create a new Category field value of Investor.

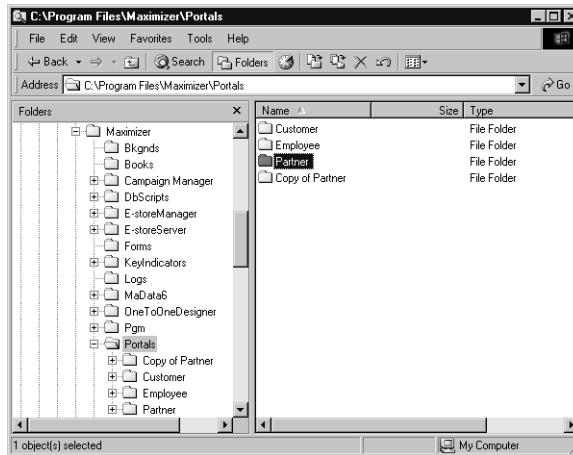
The screenshot shows the 'Select Values for Category' dialog box. The 'Field Name' is 'Category'. The 'Description' is empty. The 'Available values' list includes: Analyst, Colleague, Competitor, Consultant, Customer, Dealer, Distributor, Key Account, Media (checked), Other, Partner, Relative, Reseller, Reviewer, and Supplier. The 'Selected values' list is empty. The 'New Value...' button is highlighted with a red box and a red '5'.

- 7 Repeat this process to assign the Category to any other Address Book entries which should have access to the new site.

➤ **To create the new site**

- 1 Open Windows Explorer, and navigate to the sites directory. (In a default installation, this folder is located at C:\Program Files\Maximizer\Portals.)
- 2 Create a copy of the **Customer** or **Partner** folder inside the Portals folder.

Make sure you copy the entire Customer or Partner folder, including all subfolders and files.

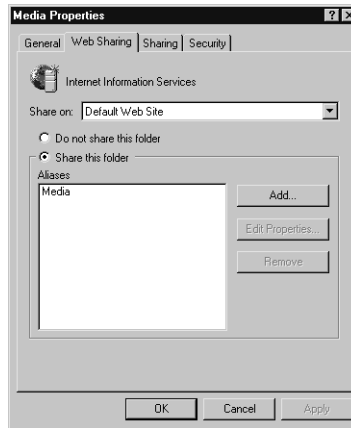


- 3 Rename the folder with the new site name.
- 4 Right-click the new folder, and select **Properties** from the shortcut menu.
- 5 Select the **Web Sharing** tab.



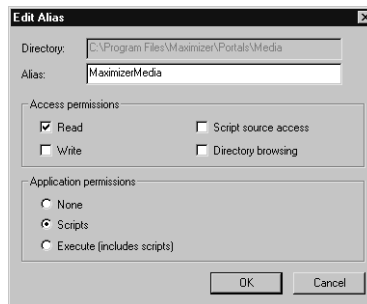
**i** Do not use spaces in the virtual folder name.

- 6** Select **Default Web Site** from the **Share on** drop-down list, and select the **Share this folder** option.



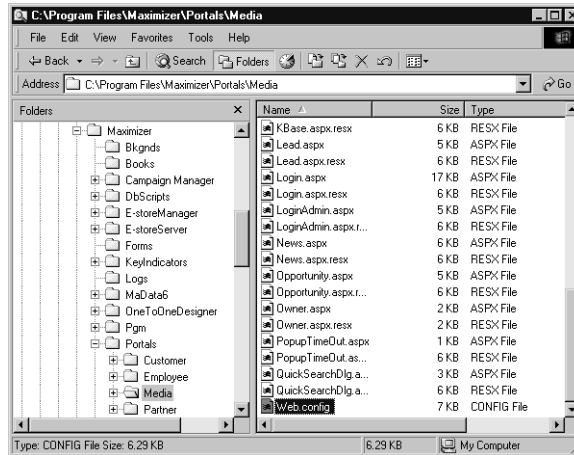
The Edit Alias dialog box opens.

- 7** Enter an alternate **Alias** if desired, select the **Read** access permission, select the **Scripts** application permissions, and click **OK**.



- 8** Click **OK** to close the Properties dialog box.

- 9 In the new folder, select the **Web.config** file and open it in a text editor, such as Windows Notepad.



- 10 Assign a meaningful value to the **SubContext** key.

The sites have a Context value and a SubContext value. The Context value is MA\_PARTNER for a Partner Access site and MA\_CUSTOMER for a Customer Access site. The Context value for the new site is already defined because you copied it from an existing site, so you just need to assign a SubContext value, which differentiates this new site from the original.

For example, if you are creating a Media site, you would probably choose to assign a SubContext value of "Media".

- 11 Enter the Category field value (from the previous procedure) as the **AlternateRequiredCategory** value.

If you used the "Media" Category field value, you would assign "Media" as the AlternateRequiredCategory value.

- 12 Save the Web.config file.

Do not change the name or location of this file.

➤ *To configure the new site*

- 1 Open a web browser and enter the URL of the new site. The default site URL is

`http://<web_server_name>/<site_alias>/Admin.aspx`

In the case of the example site, the URL is `http://test-server/MaximizerMedia/Admin.aspx`.

Customer/Partner Access Administrator opens. The login page appears as the Partner Access Administrator or Customer Access Administrator login page, depending on which site you copied the new one from.

- 2 Log into Customer /Partner Access Administrator.
- 3 Configure the site as desired. Refer to the previous sections of this chapter for more information.

Include setting the site name as part of the configuration. You can set the name in the General Settings page of the Configuration Manager.

- 4 Assign a site PIN to all Individuals and Contacts who should have site access, as described in “Assigning Site Login PINs to Contacts and Individuals” on page 248.

## Creating a Custom Case Wizard for Partner Access

Partner Access includes a wizard for creating new customer service cases. It is available from the Edit > Create a Customer Service Case menu item on the Customer Service page of the site. You can also create your own custom customer service case wizards and make them accessible from the Edit menu.

Create your own case wizards by describing them in an XML file, naming the file `CustomCSCaseWizards.xml`, and placing it in the Config folder of Partner Access. The XML elements that your `CustomCSCaseWizards.xml` file may contain are described below, along with a sample XML file. When you create multiple case wizards, they must all be described in the same XML file, with each wizard set apart by the `<CSCaseWizard>` element.

Note that if the XML is not well-formed, the custom wizards will not appear in the Edit menu, and no error messages will appear.

➤ **To create a custom customer service case wizard**

- 1** Create an xml file describing the contents of each screen of the wizard.

For more information, refer to the custom wizard example and the table describing the XML tags, which are provided in this section.

- 2** Name the xml file *CustomCSCaseWizards.xml*.

- 3** Place the xml file in the following folder:

...\\Maximizer\\Portals\\Partner\\Config

This folder is typically located in the C:\Program Files\ folder.

## Custom Wizard Example

Below are the contents of an example CustomCSCaseWizards.xml file.

```
<CustomCSCaseWizards>
<CSCaseWizard>
<Id>SuggestionWizard</Id>
<MenuOption>Enter a Suggestion</MenuOption>
<HeaderStep1>Categorize your suggestion</HeaderStep1>

<ShowOrigin>true</ShowOrigin>
<OriginPrompt>Suggestion origin</OriginPrompt>
<DefaultOrigin>Website</DefaultOrigin>
<MandatoryOrigin>true</MandatoryOrigin>

<ShowType>true</ShowType>
<TypePrompt>Suggestion type</TypePrompt>
<DefaultType>Suggestion</DefaultType>
<MandatoryType>true</MandatoryType>

<ShowProduct>true</ShowProduct>
<ProductPrompt>Product or service</ProductPrompt>
<DefaultProduct>Accessories</DefaultProduct>
<MandatoryProduct>true</MandatoryProduct>

<ShowCategory>true</ShowCategory>
<CategoryPrompt>Category</CategoryPrompt>
```

```
<DefaultCategory>Other</DefaultCategory>
<MandatoryCategory>true</MandatoryCategory>

<ShowPriority>true</ShowPriority>
<PriorityPrompt>Priority</PriorityPrompt>
<DefaultPriority>Medium</DefaultPriority>

<ShowSeverity>true</ShowSeverity>
<SeverityPrompt>Severity</SeverityPrompt>
<DefaultSeverity>Medium</DefaultSeverity>

<DefaultAssignedTo>JNAPOLI</DefaultAssignedTo>
<DefaultOwner>JNAPOLI</DefaultOwner>
<DefaultQueue>Standard</DefaultQueue>

<udfPrompt1>Send acknowledgement email</udfPrompt1>
<udfTypeId1>107</udfTypeId1>
<MandatoryUdf1>true</MandatoryUdf1>
<DefaultUdf1>No</DefaultUdf1>

<HeaderStep2>Provide details</HeaderStep2>

<SubjectPrompt>Short description</SubjectPrompt>
<DescriptionPrompt1>Details</DescriptionPrompt1>
<DescriptionPrompt2>More details</DescriptionPrompt2>

<HeaderStep3>Review your suggestion</HeaderStep3>
</CSCaseWizard>
<CSCaseWizard>...(Second custom wizard)...</CSCaseWizard>
<CSCaseWizard>...(Third custom wizard)...</CSCaseWizard>
</CustomCSCaseWizards>
```

The first screen of the example custom wizard displays the following fields: Suggestion origin, Suggestion type, Product or service,

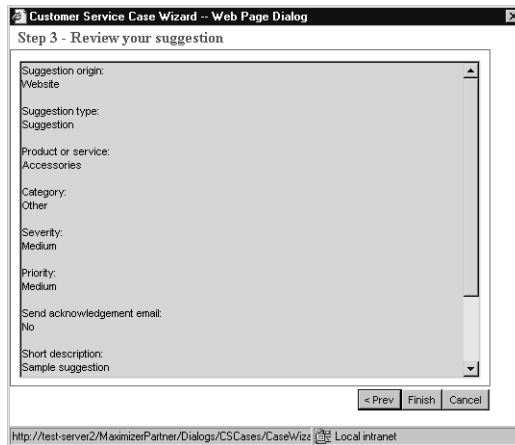
Category, Priority, Severity, and Send acknowledgement email. All of the fields have default values.

The screenshot shows a web browser window titled "Customer Service Case Wizard -- Web Page Dialog". The main heading is "Step 1 - Categorize your suggestion". Below this, there are several dropdown menus for categorization: "Suggestion origin:" (set to "Website"), "Suggestion type:" (set to "Suggestion"), "Product or service:" (set to "Accessories"), "Category:" (set to "Other"), "Priority:" (set to "Medium"), "Severity:" (set to "Medium"), and "Send acknowledgement email:" (set to "No"). At the bottom right of the form area are "Next >" and "Cancel" buttons. The status bar at the bottom shows the URL "http://test-server2/MaximizerPartner/Dialogs/CSCases/CaseWiz" and "Local intranet".

The second screen of the example custom wizard contains three fields: Short description, Details, and More details.

The screenshot shows a web browser window titled "Customer Service Case Wizard -- Web Page Dialog". The main heading is "Step 2 - Provide details". Below this, there are three text input fields: "Short description: \*" (with an asterisk indicating it's required), "Details:", and "More details:". Each field has a vertical scrollbar on its right side. At the bottom right of the form area are "< Prev", "Next >", and "Cancel" buttons. The status bar at the bottom shows the URL "http://test-server2/MaximizerPartner/Dialogs/CSCases/CaseWiz" and "Local intranet".

The third screen in the example custom wizard displays a summary of the values entered in the previous screens.




## XML Tags in the CustomCSCaseWizards.xml File

The following table lists each of the XML tags in the CustomCSCaseWizards.xml file, as well as their data type and a description.

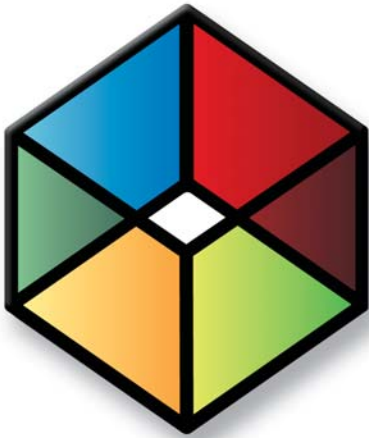
All XML tags are case-sensitive.

| XML Tag      | Data Type | Description  |
|--------------|-----------|--|
| CSCaseWizard |           | Contains all other tags describing a single wizard. Each custom case wizard must be set apart by its own set of CSCaseWizard tags inside the file.   |
| Id           | string    | Mandatory.<br>Unique identification of the wizard.   |
| MenuOption   | string    | Mandatory.<br>Menu item text as it will appear in the Edit menu of the Customer Service page.  |
| HeaderStep1  | string    | Header text that appears at the top of each page of the wizard. Header text is automatically prefixed by "Step 1 - ", "Step 2 - ", or "Step 3 - ".<br>If these tags are not included, the wizard will use the default header text, as it appears in the default Customer Service Case Wizard.  |
| HeaderStep2  | string    |  |
| HeaderStep3  | string    |  |
| ShowOrigin   | boolean   | Specifies whether to display the Case origin, Case type, Products/ Services, Categories, Priority, and Severity fields: <ul style="list-style-type: none"> <li>If "true", the field(s) appear on the first page of the wizard.</li> <li>If "false", the field(s) do not appear in the wizard.</li> <li>If you omit the XML tag, all of these fields, except "Origin" appear in the wizard by default.</li> </ul> |
| ShowType     | boolean   |  |
| ShowProduct  | boolean   |  |
| ShowCategory | boolean   |  |
| ShowPriority | boolean   |  |
| ShowSeverity | boolean   |  |



| XML Tag            | Data Type | Description   |
|--------------------|-----------|---|
| DefaultOrigin      | string    | <p>Specifies the default value of the Case origin, Case type, Products/ Services, Categories, Priority, and Severity fields.</p> <p>The value of the XML element must be a valid value of the related field in the Address Book.</p> <p>The values of the DefaultAssignedTo, DefaultOwner, and DefaultQueue fields are not visible in the wizard because there is no related "Show..." XML tag. Therefore, site users cannot change the value of these fields through the wizard.</p> <p> The DefaultAssignedTo tag does not check whether the specified user has the "Customer Service Representative" or "Customer Service Manager" access right. It is up to you to verify that the user identified in the DefaultAssignedTo tag has the appropriate access rights.</p> |
| DefaultType        | string    |   |
| DefaultProduct     | string    |   |
| DefaultCategory    | string    |   |
| DefaultPriority    | string    |   |
| DefaultSeverity    | string    |   |
| DefaultAssignedTo  | string    |   |
| DefaultOwner       | string    |   |
| DefaultQueue       | string    |   |
| OriginPrompt       | string    | <p>Specifies the text that appears beside the field in the wizard.</p> <p>If you omit an XML tag, the wizard uses the default prompt, as it appears in the "Create a Customer Service Case" wizard.</p>   |
| TypePrompt         | string    |   |
| ProductPrompt      | string    |   |
| CategoryPrompt     | string    |   |
| PriorityPrompt     | string    |   |
| SeverityPrompt     | string    |   |
| SubjectPrompt      | string    |   |
| DescriptionPrompt1 | string    | <p>Specifies the text that appears above the last two fields on the second page of the wizard.</p> <p>If you omit an XML tag, the wizard uses the default prompt, as it appears in the "Create a Customer Service Case" wizard.</p>   |
| DescriptionPrompt2 | string    |   |

| XML Tag                            | Data Type | Description  |
|------------------------------------|-----------|--|
| MandatoryOrigin                    | boolean   | Specifies whether site user must provide a value for the Case origin, Case type, Products/ Services, or Categories field in the wizard:  |
| MandatoryType                      | boolean   |  |
| MandatoryProduct                   | boolean   |  |
| MandatoryCategory                  | boolean   |  |
| udfTypepeld1 ...<br>udfTypepeld7   | integer   | Specifies the user-defined field to include on the first page of the wizard. Specify the Type_Id of the user-defined field as the value of this XML tag.<br>You can include up to seven user-defined fields. The wizard can display only table user-defined fields defined for customer service cases. |
| udfPrompt1 ...<br>udfPrompt7       | string    | Specifies the text that appears beside each user-defined field included in the wizard.   |
| MandatoryUdf1 ...<br>MandatoryUdf7 | boolean   | Specifies whether the site user must provide a value for each user-defined field included in the wizard.   |
| DefaultUdf1 ...<br>DefaultUdf7     | string    | Specifies the default value of each user-defined field included in the wizard.   |



## CHAPTER 9 **Live Update**

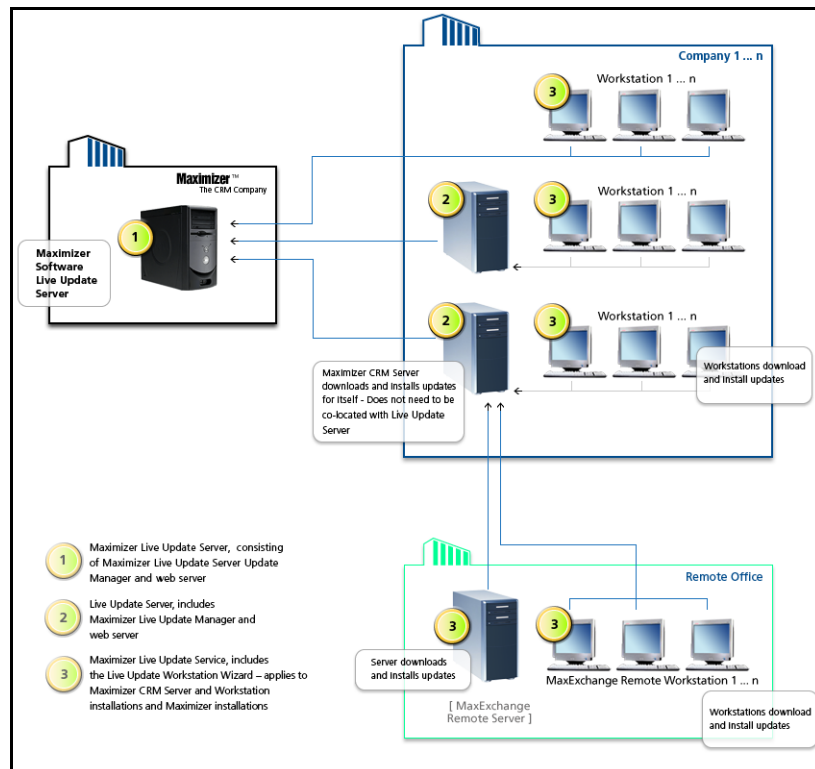
### In this chapter...

- "Introduction to Maximizer Live Update" on page 280
- "Installing Live Update Manager" on page 281
- "Configuring Live Update Manager" on page 283
- "Downloading Updates from Maximizer with Live Update" on page 284
- "Approving Updates" on page 285
- "Copying the Update and XML Files to the Web Server" on page 287
- "Configuring the Maximizer Live Update Service" on page 288
- "Updating Maximizer with Live Update" on page 289

## Introduction to Maximizer Live Update

The Live Update service checks for and downloads appropriate Maximizer CRM software updates for your local Maximizer CRM installation. The Live Update service can be configured to point to either the Maximizer Software update server (which is the default setting) or to your organization's own Live Update server. The Live Update service is installed and enabled automatically as part of the regular Maximizer CRM installation. However, to use your own Live Update server, you must install and configure Live Update Manager separately, as described in this chapter.

Live Update Manager is an optional component of the Maximizer Live Update service and is available on the Maximizer CRM Server disc. Live Update Manager is a standalone component that enables you to control the timing and distribution of software updates, as well as to test them before releasing Maximizer software updates to your users.




# Installing Live Update Manager

Before you install Live Update Manager, you will need to create a virtual directory on your web server. The following sections describe how to install Live Update Manager:

- “Creating a Virtual Directory for Live Update on your Web Server” on page 281
- “Installing Maximizer Live Update Manager” on page 281

## Creating a Virtual Directory for Live Update on your Web Server

 For instructions on creating a virtual directory, refer to your web server software documentation.

Designate a machine as your Live Update server, which will serve updates to the Live Update service on Maximizer machines in your organization. It can be a web server outside the firewall if Internet access is required (for example to support remote offices) or a web server available locally only. In either case, it must be an IIS server.

Create a virtual directory for Live Update on your web server. You will be prompted for the URL of your Live Update server during the Live Update Manager installation.

You will also be prompted for the location to save updates that Live Update Manager downloads from Maximizer Software. If possible, use the same location as the physical location of the virtual directory of your Live Update server. However, in some situations (such as when the URL is of a web server outside the firewall) this configuration is not the most secure and you should specify a different location.

## Installing Maximizer Live Update Manager

Live Update Manager is the program that enables you to check for, download, and manage updates for Maximizer CRM installations. The Live Update Manager installation is available on the Maximizer CRM Server disc. Live Update Manager does not need to be co-located with a Maximizer CRM Server, but it can be if desired. The installation location of the Live Update Manager (by default C:\Program Files\Maximizer Live Update) must have network access to the physical folder that will be used to store Maximizer CRM product updates downloaded from the Maximizer Software update server.

### ➤ *To install Maximizer Live Update Manager*

- 1** Close all programs running on the machine.
- 2** Insert the Maximizer CRM Server disc.

**i** If the setup doesn't start automatically, you can start it manually by running setup.exe from the disc.

**i** You can modify the URL and Download settings through Live Update Manager after it is installed.

- 3** On the Autorun screen, click **Install Maximizer Live Update Manager**.
- 4** On the Welcome screen, click **Next**.
- 5** On the Customer Information screen, enter your **User Name**, **Company Name**, and select whether to install the application for all users of the computer or only for the current user.
- 6** On the Choose Destination Location screen, click **Next** to install the application to the default folder.  
– or –  
Click **Browse**, select an alternative location, and click **Next**.
- 7** On the Corporate Update Server properties screen, enter the **URL** for the Live Update virtual directory you created previously (e.g., <http://www.escona.com/liveupdate>).  
– or –  
Enter the UNC network path of the Live Update folder on your Live Update web server (e.g., `\\LiveUpdateServer\\liveupdate`).  
The **Download** field specifies the folder that updates from Maximizer will download to. You can change this path if needed.  
Click **Next**.
- 8** On the Start Copying Files screen, review your installation settings and click **Next** to begin the installation.
- 9** When the installation is complete, click **Finish**.  
Live Update Manager is now accessible from the Start menu.

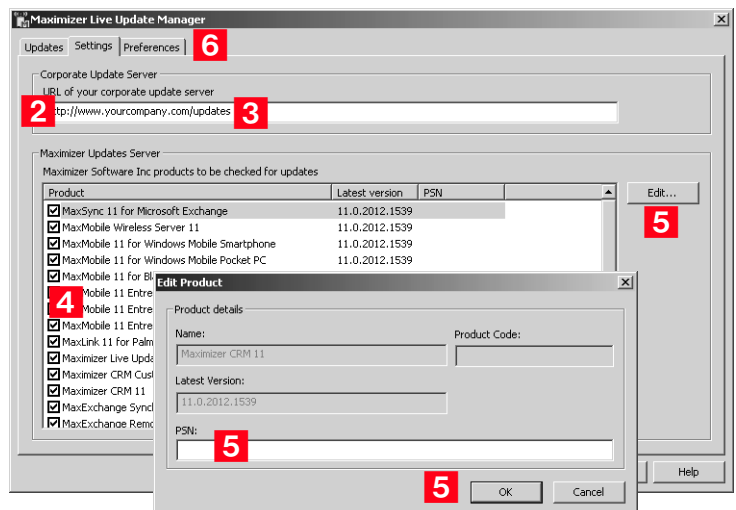
# Configuring Live Update Manager

Once you have installed Live Update Manager, configure it and enter the PSNs for your Maximizer products.

## ➤ To configure Live Update Manager

- 1** Run Live Update Manager. It is available from **Start > Programs > Maximizer Live Update > Live Update Manager**.
- 2** Click the **Settings** tab.
- 3** Ensure that the **URL of your corporate update server** field contains the URL (e.g., `www.escona.com/liveupdate`) or the UNC network path (e.g., `\\LiveUpdateServer\\liveupdate`) of the Live Update virtual folder on your Live Update web server.
- 4** In the **Product** list, ensure the checkboxes are selected for all Maximizer Software Inc. products installed in your organization. De-select the checkboxes for any products not installed.
- 5** For each installed product, select the product, click **Edit**, enter your **PSN(s)** for that product, and click **OK**. If you have more than one PSN for a product, separate the PSNs with commas.
- 6** You can optionally change any of the settings on the **Preferences** tab. For information about each of these options, select the Preferences tab and press **F1**.
- 7** Click **Apply** to save your changes.

**i** The Base URL of the update server field may already be completed if you provided the information during the Live Update Manager installation.



## Downloading Updates from Maximizer with Live Update

The Live Update Wizard in the Live Update Manager connects to the Maximizer Live Update Server and downloads available updates from Maximizer Software Inc.

### ➤ *To start the Live Update Wizard*

- If the **Enable automatic Maximizer Live Update notification** option is selected on the **Preferences** tab, a message box notifies you when new updates are available. Click **OK** to start the Live Update Wizard.  
– or –
- In Live Update Manager, click the **Check for updates** button on the **Updates** tab, which opens the Live Update Wizard.

### ➤ *To download software updates from Maximizer*

- 1** Start the **Live Update Wizard** as described above.

If you started the Live Update Wizard from the automatic notification message box, it takes you directly to the Available Updates screen. Skip to step 3.

- 2** Click **Next** on the welcome screen.

The Live Update Wizard connects to the Maximizer Live Update Server to check for any available updates.


- 3** Select the update(s) to download.

- 4** Click **Next** to download the selected updates.

- 5** Click **Finish** to close the wizard.

The update files are now located in the updates download folder. The default location of this folder is **C:\Documents and Settings\All Users\Application Data\Maximizer\Live Update Manager**.

If your Live Update Manager configuration does not use the default location, this folder may be in a different location.

 The updates download folder path is specified in the Preferences tab of Live Update Manager.



## Approving Updates

Once you have downloaded any available updates with the Live Update Wizard, they appear in the Available Updates list of the Updates tab in Live Update Manager. You must approve these updates before copying them (and the MaxUpdates.xml file) to your Live Update server.

Use the Approve button on the Updates tab to approve and disapprove updates. Approving an update modifies the MaxUpdates.xml file, which keeps track of approved updates. Once an update is approved, it is available to any Maximizer CRM servers or workstations that check for updates.

The following sections contain more information on approving updates for Maximize users:

- “Testing Updates Before Approval” on page 285
- “Approving Updates for Download by Maximizer Users” on page 286

## Testing Updates Before Approval

Between receiving an update from Maximizer Software and releasing it to your organization, you should test the update in a test environment and once satisfied should deploy it to all Maximizer CRM servers that host Address Books. Assuming that you have already deployed a production Live Update Manager deployment, the two ways to set up testing are as follows:

- Install a test deployment of Live Update Manager on another machine, with its own testing Live Update server URL. The download location could be the same as for the production Live Update Manager. One Maximizer CRM server and one or more Maximizer CRM workstations should be configured for testing and to download updates from the test Live Update server. Once these updates are verified, you can return to the production Live Update Manager and approve the updates.
- Alternatively, rather than using a test Live Update Manager to manage updates, simply copy the downloaded updates to the test Maximizer CRM server and workstation(s) and run the update(s) manually on the test machines (i.e., distribute the updates for testing manually rather than using Live Update Manager to distribute the updates). Following testing, return to the production Live Update Manager and approve the updates.

## Approving Updates for Download by Maximizer Users

After testing the updates, you can use Live Update Manager to approve updates. After approving the updates, you must copy the update files and MaxUpdates.xml file to your Live Update server before users can download the updates from Administrator or Maximizer.

### ► *To approve software updates for download by workstations*

- 1** In the **Updates** tab of Live Update Manager, select one or more downloaded update(s).
- 2** Click the **Approve** button.  
  
The values of the Approved column changes from "No" to "Yes".
- 3** Click **Apply** to save your changes.
- 4** Repeat these steps to approve any other updates, as needed.

## Copying the Update and XML Files to the Web Server

After you have downloaded and approved any updates, you must copy the files and the MaxUpdates.xml file to the virtual directory on your Live Update server. The location of the files on the server must match the URL specified in the updates properties.

Once you have copied the files to your Live Update server, you can verify the URLs for each update using Live Update Manager. The Verify URLs button checks that the approved update file(s) and updated MaxUpdates.xml file actually exist at the location specified by the Live Update server URL.

### ➤ *To copy the update files to the Live Update server*

- Copy the following files to the virtual directory on your Live Update server.

| File(s) to copy           | Location to copy file(s) from  |
|---------------------------|--|
| Downloaded update file(s) | Updates download folder, specified on the Preferences tab of Live Update Manager. The default updates download folder is C:\Documents and Settings\All Users\Application Data\Maximizer\Live Update Manager  |
| MaxUpdates.xml            | Live Update Manager program folder (usually C:\Program Files\Maximizer Live Update).<br>This file contains information about downloaded updates and gets updated every time you download an update. You have to copy the most recent version of this file to your web server each time you approve a new update. |

### ➤ *To verify update URLs*

- On the **Updates** tab of Live Update Manager, click **Verify URLs**.

Live Update Manager verifies all approved updates. If the verification succeeds, Maximizer users can download the updates from your Live Update server.

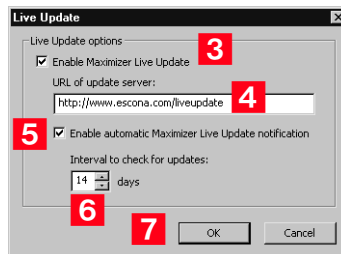
If the verification fails, ensure that the update files and current MaxUpdates.xml file have been copied to the correct location on the Live Update server, that the URL defined for the update is correct, and that your web server settings are correct.

## Configuring the Maximizer Live Update Service

The default configuration for Maximizer CRM servers and workstations is with the Live Update service enabled and using the URL for the Maximizer Software update server. Change the URL in Administrator Preferences to point to your own Live Update server to enable all Maximizer CRM workstations and servers that connect to global Address Books on that server to use the Live Update service through your Live Update server.

### ► *To configure the Live Update Service*

- 1** In Administrator, select **File > Preferences**.
- 2** On the System Options tab, click **Live Update**.
- 3** The **Enabled Maximizer Live Update** checkbox is selected by default. If it has been cleared, make sure to select it.
- 4** By default, the **URL of update server** field contains the URL of the Maximizer Software Live Update server. Change it to the URL (e.g., [www.escona.com/liveupdate](http://www.escona.com/liveupdate)) or the UNC network path (e.g., `\\LiveUpdateServer\\liveupdate`) of the Live Update folder on your web server.
- 5** By default, **Enable automatic Maximizer Live Update notification** is turned on. When enabled, Live Update displays a message on the Maximizer server(s) and workstations when a new update becomes available on the Live Update server. If you turn automatic notification off, users must manually check for updates on each machine.
- 6** By default, Live Update automatically checks for updates every 14 days. You can optionally change the **Interval to check for updates**.
- 7** Click **OK** to save your changes and close the dialog box.





# Updating Maximizer with Live Update

The Maximizer Live Update Service is installed automatically with Maximizer CRM server and workstation. It enables users to download updates such as hot fixes and service releases, and you can configure Live Update to provide automatic notification of available updates.

The Live Update Wizard on Maximizer workstations connects to your Live Update Server and downloads any available updates.

After downloading the software updates, the downloaded executable file should launch immediately to start the installation. If you need to locate the downloaded file, it is in the user's Application Data folder (typically C:\Documents and Settings\<CurrentUser>\Application Data\Maximizer\Live Update).

 The updates download folder path is specified in the Preferences tab of Live Update Manager.

 Live Update options are accessible through the Live Update button on the System Options preferences in Administrator. (Select File > Preferences.)

If the Enable automatic Maximizer Live Update notification option is selected in the Live Update options in Administrator, a message box you when new updates are available. You can also check for updates at any time from Maximizer or Administrator.

## ➤ To download software updates from the server

**1** If you are notified that new updates are available, click **OK** in the message box to start the Live Update Wizard.

– or –

In the top-left corner of the Maximizer window, click the **Maximizer** button, and select **Help**. Then, under **About Maximizer**, select **Maximizer Live Update**.

– or –

In Administrator, select **Help > Maximizer Live Update**.

**2** Click **Next**.

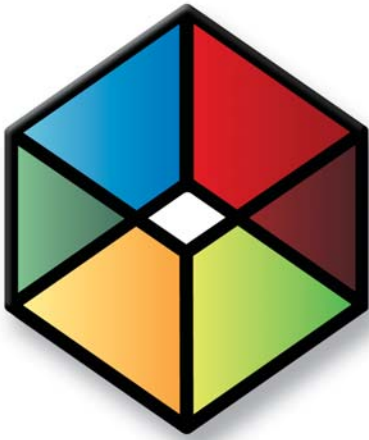
The Live Update Wizard connects to the Live Update Server to check for any available updates.

**3** Select the update(s) to download.

**4** Click **Next** to download the selected updates.

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





# CHAPTER 10 **Setting Up Remote Automated Installation**

## In this chapter...

- "Introduction to Remote Automated Installation" on page 292
- "Requirements for Recording Setup Script Files" on page 292
- "Creating the Script Files" on page 294
- "Systems Management Server (SMS) Software Distribution" on page 295
- "Other Distribution Methods" on page 296

## Introduction to Remote Automated Installation

**i** The setup script files are InstallShield response files and have an .ISS extension.

Maximizer CRM setup supports remote automated installation and uninstallation in environments with multiple workstations. Record script files of the installation and uninstallation processes, and then use these scripts with automated installation tools, such as Microsoft Systems Management Server (Microsoft SMS) to install Maximizer.

## Requirements for Recording Setup Script Files

**i** This sequence is not required. However, creating the scripts in this order is most likely to produce successful results.

Before recording the setup script for distribution in your system, ensure the workstation computer you are using is in the same state as workstations where the setup script will run. Otherwise, the remote installation may encounter dialog boxes not included in the script file. Any unexpected event, such as a message box waiting for user input, may cause installation to fail.

It is beneficial to record the setup scripts in the following sequence to ensure the machine is in the same state as a typical workstation when recording the installation scripts:

- 1** Ensure Maximizer is installed on the machine.
- 2** Record the uninstallation script, as described on page 294.
- 3** Install Maximizer again. Do not create the installation script at this time.

This installation enables you to run the uninstallation script for the first time in the next step.

- 4** Uninstall Maximizer from the workstation computer using the uninstall script file.

You can run the uninstallation script from the Windows command line using the commands described on page 296. Running the uninstallation script before recording the installation script enables you to put the machine into the correct state for creating the installation script.

- 5** Record the installation script on the workstation, as described on page 294.

This sequence helps ensure that the installation script records the dialog boxes and response actions encountered during installation.



When preparing to create a setup script, take the following components of Maximizer installation into consideration:

- MDAC components version
- .NET Framework version (if applicable)
- SQL Server Express engine (if applicable)
- MaxExchange Remote installation (if applicable)
- Maximizer Program installation folders
- Maximizer Data installation folders
- Maximizer Sample Data files
- Microsoft Word installation
- Microsoft Outlook installation
- Corel WordPerfect installation

Record separate setup script files for each variation in setup options. For example, to install MaxExchange Remote on some workstations, you must either modify the setup script file manually or record a separate sample installation to generate a new setup script file for that option.

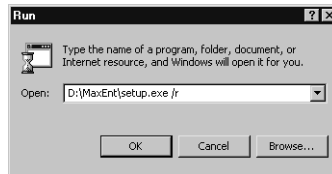
## Creating the Script Files

Use the following procedure to create both the uninstallation and the installation script files. If Maximizer is already installed on the machine where you create the script, setup.exe removes the program, and the resulting script file is an uninstallation script. Conversely, if Maximizer is not installed on the machine, setup.exe installs the program, creating an installation script file.

Complete this procedure twice—once to create an uninstallation script file, and again to create an installation script file. If the automated installation will be re-installing Maximizer, it must first remove the existing installation.

### ➤ *To create a setup (install or uninstall) script file*

- 1** Click **Start > Run**.
- 2** In the **Open** field, enter the path to the Maximizer CRM **setup.exe** file (e.g., D:\MaxEnt\setup.exe), followed by **/r**, which tells Windows to record the setup as a script file.



- 3** Click **OK**.  
The Maximizer setup process begins.
- 4** Follow the on-screen setup instructions.
- 5** When setup is complete, reboot the computer if required.
- 6** Locate the **setup.iss** file in the Windows folder (usually C:\WINNT or C:\Windows).
- 7** Rename the file (e.g., MEInstall.iss or MEUninstall.iss).

You now have the installation or uninstallation script file. Repeat the procedure to create the second script file.

**i** You must rename the script file from the default name because setup.iss will be automatically overwritten next time you record a setup script file.

## Systems Management Server (SMS) Software Distribution

Once you have recorded the setup script files, you can use Systems Management Server (SMS) software to install Maximizer on workstations using a “push” method. Set up these distribution packages from the SMS administration console. Every package consists of three tasks that you must create and manage:

- the package definition
- the program that carries out the package tasks
- the process of distributing the packages to distribution points that are accessible by SMS clients that need to run the program that is targeted to them

SMS packages contain the files and commands for the user to run the programs in the package, in addition to information such as which distribution points provide the package source files to client computers. For each package, you must specify

- general information about the package, such as the name, version number, and vendor of the software
- whether the package includes package source files
- if there are package source files, specify
  - the package source folder that contains the package source files
  - whether SMS should create and store a compressed copy of the package source files
  - how SMS stores the package source files on distribution points
  - whether and how often the package source files on distribution points must be updated

Refer to your SMS documentation for more information.

## Other Distribution Methods

If you don't have SMS, you can use other tools to distribute Maximizer remotely. The following sections contain information on other distribution methods:

- "Windows Scheduler" on page 296
- "Batch Files" on page 297

### Windows Scheduler

If you don't have SMS, you can use Soon.exe for remote distribution. Soon.exe is a tool for scheduling Windows Scheduled Tasks on any machine in a domain.

- For installation, Scheduled Tasks should specify the path to the Maximizer **setup.exe** with **/s /f1<iss file path>** parameters.

For example,

**D:\MaxEnt\setup.exe /s /f1C:\Winnt\MEInstall.iss**

To bypass the call to the live update server to check for updates, add the **/z"nouupdatecheck"** parameter.

- For uninstallation, Scheduled Tasks should specify the path to the Maximizer **setup.exe** with **/s /x /f1<iss file path>** parameters.

For example,

**D:\MaxEnt\setup.exe /s /x /f1C:\Winnt\MEUninstall.iss**

As with SMS, using Windows Scheduled Tasks requires the setup script file to be created on a sample workstation machine and then reused for all other workstations on the network.

For more information about Soon.exe, refer to the Microsoft Knowledge Base.

 There is no space between /f1 and the .ISS file path.

## Batch Files

You can also distribute Maximizer installations using batch files, if the user logs into a domain. This method is similar to Windows Scheduled Tasks, except that the installation runs when the user logs into the domain.

The following example shows the contents of a batch file that runs the Maximizer setup program (D:\MaxEnt\setup.exe) and uses the setup script file (C:\Winnt\MEInstall.iss):

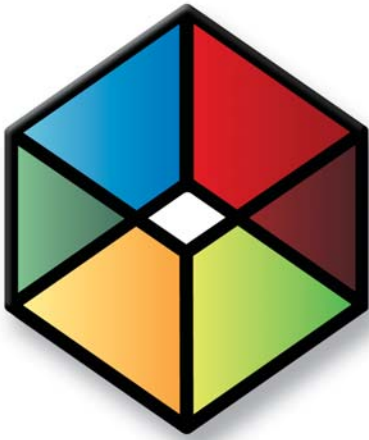
```
@echo on
```

```
D:\MaxEnt\setup.exe /s /f1C:\Winnt\MEInstall.iss
```

When creating your own batch file, change the paths and filenames from this example to the paths and filenames of the Maximizer CRM setup and setup script file on your system.

Refer to your Windows documentation for more information about creating batch files.





# CHAPTER 1 **SQL Server Reporting Services**

In this chapter...

“About Microsoft SQL Server Reporting Services” on page 300

“Integrating SQL Server Reporting Services with Maximizer Web Access” on page 301

## About Microsoft SQL Server Reporting Services

Microsoft SQL Server Reporting Services is a server-based reporting system that's included with most editions of Microsoft SQL Server.

Maximizer Web Access can integrate with SQL Server Reporting Services. You can create custom reports that point to Maximizer data, and host the reports in SQL Server Reporting Services. Then, you can access the reports from Maximizer Web Access.

The Maximizer Web Access integration with SQL Server Reporting Services creates a number of default reports that users can access from the Reports page in Maximizer Web Access. Users can also create new reports using Microsoft SQL Server Report Builder.



# Integrating SQL Server Reporting Services with Maximizer Web Access

You can integrate Microsoft SQL Server Reporting Services with Maximizer Web Access. The integration is installed automatically when you install Maximizer CRM Server. To use the integration, you must complete the following steps:

- Set up a user account for the integration. For information, see “User Account for SQL Server Reporting Services Integration” on page 301
- Enable SQL Server Reporting Services in Maximizer Web Access Administrator. For information, see “Enabling SQL Server Reporting Services” on page 301.

If you run Maximizer Web Access on HTTPS, you must also follow additional steps to configure SQL Server Reporting Services. For information, see “SQL Server Reporting Services with Maximizer Web Access on HTTPS” on page 303.

## User Account for SQL Server Reporting Services Integration

In order to enable the SQL Server Reporting Services Integration, you must specify a user account to connect with the Maximizer database. The user account must match the following criteria:

- The user is a member of the SSRS Report Management security group in Maximizer. For information on security groups, see “Security Groups” on page 100.
- The login for the user has the sysadmin server role on the SQL Server hosting the Maximizer database. For information on user logins in Microsoft SQL Server, see the SQL Server documentation.

The MASTER user automatically meets these criteria.

## Enabling SQL Server Reporting Services

You can enable SQL Server Reporting Services in the System Options preferences in Maximizer Web Access Administrator. When you enable SQL Server Reporting Services, a number of default reports are automatically created on the SQL Server Reporting Services server.

➤ **To enable SQL Server Reporting Services**

- 1** Log in to Maximizer Web Access Administrator.
- 2** In the left pane, under *Preferences*, click **System Options**.
- 3** Select the **SQL Server Reporting Services Settings** tab.
- 4** Click **Modify Options**.
- 5** Select **Enable SQL Server Reporting Services Integration**.

The URL to the Reporting Services server and the path to the current Address Book are automatically filled in.

- 6** Under **Database Account**, enter the username and password for the user account used to connect to the Maximizer database.

If you are using Windows Authentication, you must specify the Windows domain and user account in the **Account** field.

Whenever the password changes, you must specify the new password in this page.

The screenshot shows a 'Preferences for System Options' window. Inside, the 'SQL Server Reporting Services Settings' tab is active. It contains a 'Save' button and a 'Cancel' button. Below these, there is a checkbox labeled 'Enable SQL Server Reporting Services Integration' which is checked. Underneath this checkbox are two text fields: 'Reporting Services Server Web Service URL' with the value 'http://W2K8-RD-MGUD/ReportServer\_MAXIMIZER' and 'Reporting Services Path for Address Book' with the value 'EsconaTutorial'. A section titled 'Database Account' contains a label 'Specify an account which will be used to connect to your AddressBook.' followed by an 'Account' field with the value 'master' and a 'Password' field with masked characters. At the bottom of this section is an unchecked checkbox labeled 'Use as Windows credentials when connecting to the data source'.

- 7** Click **Save**.
- 8** The SQL Server Reporting Services settings are saved on the report server. You may need to wait a moment for the settings to save.

## SQL Server Reporting Services with Maximizer Web Access on HTTPS

If you run Maximizer Web Access using HTTP Secure (HTTPS), you must configure SQL Server Reporting Services to connect with Maximizer Web Access under HTTPS.

### ➤ *To configure SQL Server Reporting Services for HTTPS*

- 1** On the computer hosting SQL Server Reporting Services, open the Report Manager web.config file.

The file is stored in the following location:

*[SQL Server Installation Folder]\Reporting Services\ReportManager\web.config*

- 2** In the <appSettings> element, locate the *MaxAuthWebServicesURL* key.

- 3** Next to *value*, change *http* to *https*.

- 4** Save the file.

- 5** Open the *rsreportserver.config* file.

The file is stored in the following location:

*[SQL Server Installation Folder]\Reporting Service\ReportServer\rsreportserver.config*

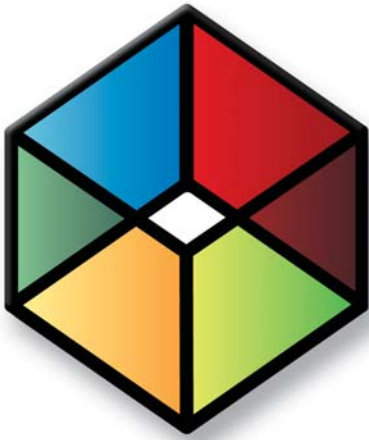
- 6** Locate all lines containing the <*MaxAuthWebServicesURL*> element.

The element is located in the <*Security*> and <*Authentication*> elements.

- 7** In the URL for each <*MaxAuthWebServicesURL*> element, change *http* to *https*.

- 8** Save the file.





# CHAPTER 12 **Customizing Dashboards**

## In this chapter...

- "Working with Dashboards" on page 306
- "Configuring Dashboards" on page 307
- "SQL Metrics for Indicators" on page 310
- "Windows Authentication for Dashboards" on page 313

## Working with Dashboards

Dashboards are graphical display of quantitative Address Book information. They include a variety of indicators that display information about Address Book entries, opportunities, campaigns, customer service cases, quotas, and activities. Dashboards are accessible from the My Work Day window in Maximizer and Maximizer Web Access. Users can also view dashboards from mobile devices using Mobile Access.

Users must have the rights to be able to view and modify dashboards. For more information, see “User Access Rights and User/Group Access Settings” on page 93.

In Administrator, you can delete or view the properties of dashboards and create SQL metrics for dashboard indicators. In Maximizer, you can create and modify dashboards and dashboard indicators. For information on setting up dashboards and dashboard indicators, see the *Maximizer CRM User's Guide*.

### Dashboard Indicators

Indicators display the information in dashboards. Each dashboard can contain multiple indicators.

You can set up indicators to access information in the Address Books in the following ways:

- **Searches** – Users can link indicators with existing searches in the search catalog. The indicator reports either the number of entries returned in the search or a calculation based on fields in the entries.
- **SQL metrics** – In Administrator, you can set up SQL queries that report on any information in your Address Book. While they are defined in Administrator, users can add any of these metrics to dashboard indicators in Maximizer and Maximizer Web Access.

Users can choose from a number of indicator controls to display the data. These controls format your Address Book data in charts, lists, and gauges.

# Configuring Dashboards

You must install the Dashboard Components for Microsoft IIS in order to use dashboards. Dashboards should work with the default configuration after installation. You can specify a different dashboard URL and specify how often to refresh dashboards in the dashboards preferences.

## ➤ To configure dashboards

**1** In Administrator, select **File > Preferences**.

**2** Select the **Dashboards** tab.

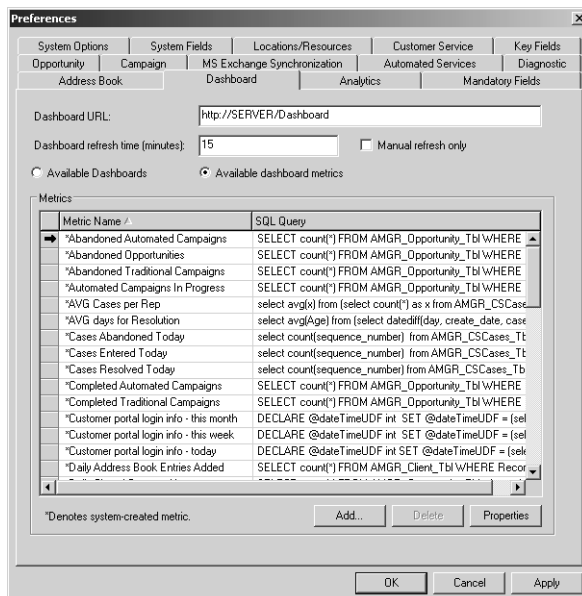
**3** If you are using a different server to host your dashboards, specify the **Dashboards URL**.

If you are using a different port from the default port (80), enter the port number as part of the URL. For example, `https://TEST-SERVER2:8080/Dashboard`.

**4** In the **Dashboard refresh time (minutes)** field, enter the refresh rate for dashboards.

– or –

Select **Manual refresh only** to refresh dashboards only when users select Refresh.



**5** Click **OK** to save the changes.

## Configuring Dashboards in a MaxExchange Environment

If you work in a MaxExchange environment, you can configure dashboards to run on the main server with data from the central Address Book or on the remote or remote server with data from the local copy of the central Address Book.

### Running Dashboards on Remotes or Remote Servers

To run dashboards on a MaxExchange Remote or Remote Server, the remote or remote server must be running on a Maximizer Server installation. In this configuration, dashboards displays information on the local copy of the central Address Book by default. Any users connecting to the Address Book, including MaxExchange remotes and Maximizer workstations connected to the Address Book, view data from the local copy of the central Address Book in the dashboards.

### Running Dashboards on MaxExchange Servers

To run dashboards on the main MaxExchange Server, the remote or remote server must have the following configuration:

- The dashboards URL on the remote points to the URL of the Dashboard virtual directory on the server.
- The remote is able to access the dashboards URL through the network.
- The dashboard web.config file on the server is configured to point each remote database to a server database.

In this configuration, dashboards are run on the main MaxExchange Server and reports on information in the central Address Book. The data reported in the dashboards may be inconsistent with the data in your local Address Book.

Note that the dashboards URL can also point to any other server in the MaxExchange distribution list as long as the web.config file on that server lists the remote database.

#### ➤ *To configure the web.config file on the dashboard server*

- 1** On the computer hosting dashboards for the central Address Book, open the **web.config** file for dashboards.

The file is stored in the following folder:

...|**Program Files**|**Maximizer**|**Portals**|**Dashboard**

**i** You can set the Dashboard URL in the Dashboard preferences in Administrator.

**i** If the local Address Book has the same name as the global Address Book, you do not need to modify the web.config file.



- 2** In the `<appSettings>` section, add the following line:

```
<add key="RemoteDatabaseName"  
value="ServerDatabaseName"/>
```

***RemoteDatabaseName*** is the name of the database on the remote or remote server.

***ServerDatabaseName*** is the name of the database on the MaxExchange server.

You can verify the name of the database in the DB\_NAME key for the Address Book in the MaConfig table. Typically, the database names are the same as the Address Book names without special characters.

- 3** Repeat Step 2 for every remote Address Book that points to the dashboard on the server.
- 4** Save the changes to the web.config file.

## SQL Metrics for Indicators

Dashboard indicators display numeric values returned by catalog searches or by custom SQL queries. You can define your own SQL metrics in Administrators to display custom data in dashboard indicators. The SQL metrics consist of custom SQL queries and the click-through URL for the indicator.

Users can associate indicators with SQL metrics in Maximizer or Maximizer Web Access. Users can also link indicators with catalog searches.

The following sections contain information on setting up SQL metrics for dashboard indicators:

- “Queries for SQL Metrics” on page 310
- “SQL Queries Across Databases” on page 310
- “Creating or Modifying Custom SQL Metrics” on page 311

### Queries for SQL Metrics

A SQL query used in a SQL metric must return a single numeric value (real). Otherwise, the indicator will display a 0. You must have a good understanding of SQL syntax and the database structure to create SQL queries.

SQL queries are run for the current logged in user. A dashboard indicator using a SQL metric may display different results to different Maximizer users.

SQL queries must select data from database views, and not from tables. For example, to query data in AMGR\_CSCases\_Tbl, you should write the query for the AMGR\_CSCases view.

### SQL Queries Across Databases

SQL queries for dashboard indicators are not restricted to the current Maximizer Address Book database. You can define SQL metrics that query another database on the same SQL server.

To create a cross-database SQL query, use the following syntax:

```
Select * from <database name>.<db owner>.<table name>
```

The following example shows a cross-database SQL query:

```
Select SUM (Revenue) from Accounting.dbo.Purchases
```

## Requirements for Cross-Database Queries

To successfully use cross-database SQL queries in dashboard indicators, the following conditions must be met:

- Database(s) referenced in the SQL query must all reside on the same SQL Server as the Maximizer Address Book where the dashboard indicators are being created.
- The Maximizer user running the SQL queries must be granted Select access (read access) to the views in database(s) being queried.

Alternatively, in the Maximizer Address Book, you can create views that reference an external database and grant users access to these views. This method may require enabling the “Cross database ownership chaining” option on the SQL server, which is not recommended for security reasons.

## Creating or Modifying Custom SQL Metrics

Use the procedure below to create a new SQL metric. You can also follow these instructions to modify an existing SQL metric. Instead of clicking Add, select the indicator to change and click Properties.

### ➤ *To create a custom SQL metric*

- 1** In Administrator, select **File > Preferences**.
- 2** Click the **Dashboard** tab.
- 3** Click **Add**.
- 4** Enter a **Name** and **Description** for the SQL metric.
- 5** Enter the **SQL Query**.

 SQL metrics query only values that the logged in user can access.

The SQL query must return a single numeric value (real). Otherwise it displays a 0 in the dashboard.

- 6** Click **Test Query** to test the SQL query.

**7** Click *OK* to save the new SQL metric.

The screenshot shows the 'Add SQL Metric' dialog box. It has two main sections: 'Metric Details' and 'Metric SQL Query'. In the 'Metric Details' section, the 'Name' field contains 'Cases Entered Today' (callout 4) and the 'Description' field is empty. In the 'Metric SQL Query' section, there is a note about SQL Server databases and a text area for the SQL query (callout 5) containing: 'Select count(sequence\_number) from AMGR\_CS\_Cases where convert(char(10), create\_date, 111) = {char(10), getdate(), 111} AND Record\_Type = 0'. A 'Test Query' button is to the right of the text area (callout 6). At the bottom of the dialog are 'Spelling...', 'OK' (callout 7), and 'Cancel' buttons.

## Windows Authentication for Dashboards

If you are running dashboards in a Windows Authentication environment, you may need to perform additional steps to set up Windows Authentication for dashboards.

If you are using Maximizer Web Access to access dashboards, you need to configure Windows Authentication for Maximizer Web Access. You do not need to specify any additional settings for Windows Authentication to work for dashboards. For more information, see “Setting Up Windows Authentication for Web Access” on page 228.

If you are running dashboards in Maximizer, you must configure the Dashboard virtual directory for Windows Authentication in Microsoft IIS. For more information, see “Microsoft IIS for Windows Authentication” on page 23. As well, you must enable Windows Authentication in the Web.Config file for the Dashboard virtual directory.

### ➤ *To enable Windows Authentication in the Web.Config file*

- 1 Open the Web.Config file for the Dashboard virtual directory.

By default, the Dashboard web.config file is stored in the following location on the server:

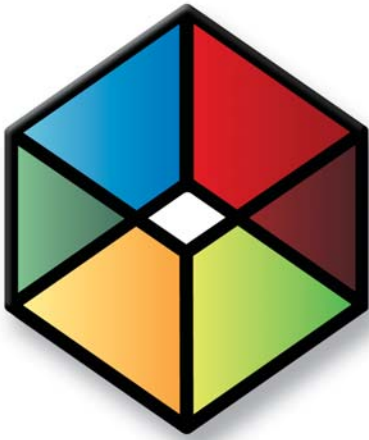
*...\\Maximizer\\Portals\\DashboardWeb.Config*

- 2 In the `<system.web>` section, locate the `<authentication>` element, and change the setting to true as follows:

*`<authentication mode="Windows"/> <identity impersonate="true">`*

- 3 Save the Web.Config file.





# CHAPTER 13 **Managing Address Book Data**

## In this chapter...

- "Backing Up and Restoring Address Book Data" on page 316
- "Converting Embedded Documents to Linked Documents" on page 322
- "Verifying and Recovering Address Book Data" on page 324
- "Exporting Data from Maximizer" on page 327
- "Importing Address Book Data from MXI or XML Files" on page 336
- "Importing Data from Other File Formats" on page 339
- "Transferring Entries between Address Books" on page 359
- "Purging Outdated Notes and Documents" on page 362
- "Using Log Files for Diagnosis" on page 364 "System Reports" on page 366

## Backing Up and Restoring Address Book Data

This section explains how to back up and restore Maximizer Address Book database files, which contain the majority of your Maximizer data, including Address Book entries, opportunities, customer service cases, campaigns, etc. However, if your Address Book uses a custom dictionary or holidays, you must back up those files separately.

The following sections contain information on backing up Address Book data in Maximizer:

- “Backing Up an Address Book” on page 316
- “Restoring an Address Book from a Backup” on page 319
- “Moving an Address Book to a Different Server” on page 321
- “Backing Up the Dictionary and Holiday Files” on page 321

### Backing Up an Address Book

There are two types of backup procedures available:

- **Regular Backup.** This backup procedure requires the Address Book to be closed. Regular backup can be performed only in Maximizer.
- **Quick Backup.** This backup procedure is performed on an open Address Book. You can perform a Quick Backup from either or Maximizer. If security is enabled, you will need access to the MASTER user password.

#### Regular Backup

 The extension of the backup file is .BAK.

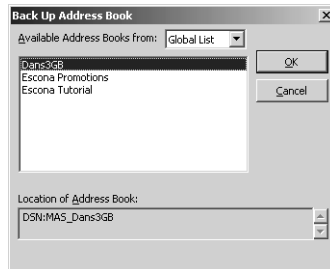
A regular backup is saved by default to the folder containing the SQL database files for the Address Book. If you don't want to save the backup to this location, you can browse to another one.

#### ➤ *To perform a regular backup*

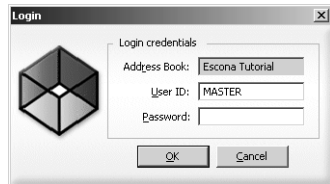
- 1** To verify currently logged in users, open the Address Book in Administrator and select Reports > Current Users. Ensure that no users are logged into the Address Book you want to back up.
- 2** In Administrator, close the Address Book and select **Utilities > Back Up Address Book**.



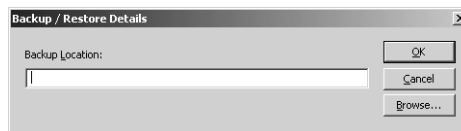
- 3 Select the Address Book to back up, and click **OK**.



- 4 Enter the MASTER user password, and click **OK**.



The Backup / Restore Details dialog box opens.



- 5 Select the backup folder:

- If you want to save the backup to the default location, leave the Backup Location field blank.
- If you want to save the backup file to a different folder, click **Browse**. Select a folder for the backup file and click **OK**.

**i** The default location is where the SQL database files for the Address Book are stored.

Maximizer starts backing up the files. Depending on the size of the Address Book, the backup could take several minutes or several hours. A message box confirms that the backup is complete. The backup file name is displayed.

- 6 Click **OK**.

## Quick Backup

The advantage of using Quick Backup is that you can perform frequent backups of any open Address Book.

If you are backing up a global Address Book from a workstation, the backup is automatically saved to the default SQL Server Express backup folder. You do not have the option to save the backup to a different location. By default, the backup is saved to the current Address Book folder. If you don't want to save the backup to this location, you can browse to another one.

If you choose to save the backup to the default location, Quick Backup creates a subfolder named Backup in the same folder as the Address Book files.

The backup file name includes the current date as an identifier. For example, the following backup file was created from a Quick Backup performed on March 23, 2007. (The backup was saved to the following default location).

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial\_20070323\_01.BAK

The "\_01" is added to the file name to differentiate between backups from the same day, so a second backup on the same day would be saved as follows:

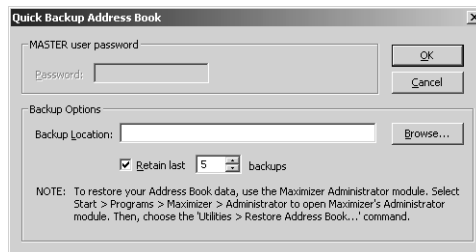
C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial\_20070323\_02.BAK

Quick Backup also lets you determine how many backups are kept. If you were to set Quick Backup to retain only five backups, then when you create the sixth backup, Quick Backup deletes the oldest backup.

### ➤ *To perform a Quick Backup*

**1** Open the Address Book to back up.

**2** Select **File > Quick Backup**.



**3** Enter the MASTER user password.

If this box is disabled, continue to the next step.

**4** Select the backup folder:

If you want to save the backup file to the default location (Address Book folder), leave the Backup Location field blank.

If you want to save the backup file to a different location, click Browse. Select a folder in the Browse for Folder dialog box and click OK. The location is displayed in the Backup Location field.

**5** Specify the number of previous backups to retain.

This option is disabled if you are backing up a global database on a workstation.

**6** Click **OK** to begin backing up.

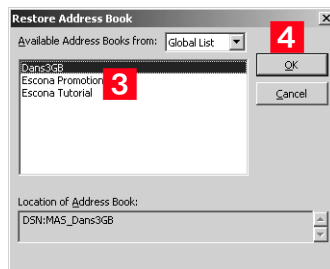
When the Quick Backup is complete, a message box confirms that the backup was successful. The backup file name and location are displayed.

**7** Click **OK**.

## Restoring an Address Book from a Backup

If you lose or damage your Address Book, you can restore it to a previously backed up version. When you perform a restore, existing Address Book data is replaced with backup Address Book data.

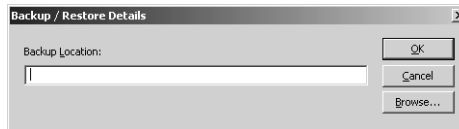
➤ **To restore an Address Book**

**1** To determine if users are logged in, open the Address Book in Administrator and select Reports > Current Users. Ensure that the Address Book you want to restore is not currently open by a user.**2** In Administrator, close the Address Book and select **Utilities > Restore Address Book**.**3** Select the Address Book to restore.**4** Click **OK**.

- 5** Enter the MASTER user password, and click **OK**.

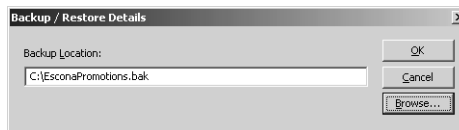


The Backup / Restore Details dialog box opens.



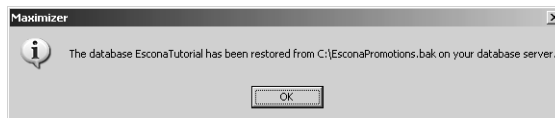
- 6** Click **Browse**, select the backup file you want to restore, and click **Open**.

The full path of the backup file is displayed in the Backup Location field.



- 7** Click **OK**.

Maximizer restores the Address Book from the selected backup file. A message box confirms that the restore is successful.



## Moving an Address Book to a Different Server

You can use the backup and restore functionality to move an Address Book to a different computer.

### ➤ *To move an Address Book*


- 1** Backup up the Address Book. For more information, see “Backing Up an Address Book” on page 316.
- 2** Move the backup Address Book (.BAK) file to the new computer.
- 3** Restore the Address Book on the new computer. For more information, see “Restoring an Address Book from a Backup” on page 319.

## Backing Up the Dictionary and Holiday Files

The Maximizer dictionary and holiday files are not backed up as part of the Address Book backup procedure(s) described previously. Therefore, if you have customized the dictionary or holidays, you need to back up those files separately, especially before upgrading or re-installing Maximizer.

To back up the dictionary and holiday files, copy them from the following location and paste them to another location, preferably the same location where your Address Book is backed up.

The user dictionary file is unique to each Maximizer workstation, so you will need to back up this file for each workstation.

 By default, the Maximizer program folder is C:\Program Files\Maximizer. If Maximizer was installed in a different folder, then change the path accordingly.

User Dictionary File Location:

...\Program Files\Maximizer\MaData6\Userdict.lex

Holiday File Location:

...\Program Files\Maximizer\MaData6\Mxzholiday.nam

## Converting Embedded Documents to Linked Documents

**Note** that a converted Address Book size cannot exceed 4 GB (4000 MB). If you are upgrading a Pervasive.SQL database to SQL Express, and the Address Book size exceeds 4 GB, the upgrade process is stopped and the initial state of the Pervasive.SQL is retained.

Maximizer has a built-in utility in Administrator for converting embedded documents to linked documents. This allows you to manage the size of your Address Book.

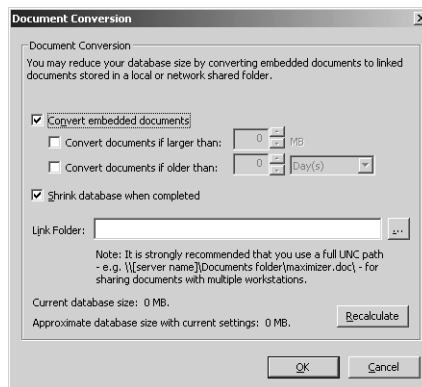
If you use MaxExchange, converting embedded documents to linked documents causes documents to be removed from the remotes. The documents remain on the server.

If you use MaxMobile or web access sites, converting embedded documents to linked documents causes the documents to be unavailable to MaxMobile, Maximizer Web Access, Mobile Access, Partner Access, and Customer Access users. The documents are accessible only through Maximizer.

If necessary, you can move your linked documents from one location to another.

### ➤ *To convert embedded documents to linked documents*

- 1 In Administrator, select **File > Document Administration > Convert Embedded Documents**.



- 2 Select the **Convert embedded documents** checkbox.
- 3 Specify the document size and age limits. If these values are left as zeros, all embedded documents regardless of size/age are converted to linked documents.
- 4 Optionally, select the **Shrink database when completed** checkbox. This reduces the size of the Address Book once the conversion is complete. If you haven't chosen to convert your embedded documents, this reduces the size of the Address Book by removing any unused space.

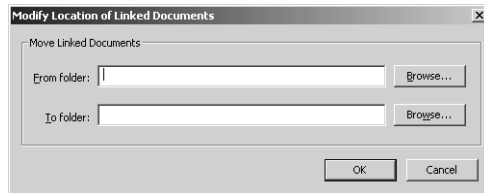
- 5** Specify the folder in which linked documents will be stored in the **Link Folder** field.

You should use the full UNC path as the location. For example, enter \\[computer name]\\Linked Documents\\. To ensure the correct UNC path is used, browse to computer and folder where the linked documents are to be stored.

- 6** Click the **Recalculate** button after revising the conversion settings to estimate the size of the Address Book with the revised settings.

➤ **To modify the location of linked documents**

- 1** In Administrator, select **File > Document Administration > Move Linked Documents**.



- 2** Specify the folder where the linked documents were previously stored in the **From folder**.

- 3** Specify the new folder where the linked documents will be stored in the **To folder**.

You should use the full UNC path for both folders.

## Verifying and Recovering Address Book Data

 You can verify and recover only one Address Book at a time.

Address Book verification enables you to quickly identify and resolve invalid and orphan items in your Address Book. You should always run Address Book verification and recovery after upgrading or restoring an Address Book. Also, if database views have not been created for any user-defined fields and are needed for generating reports, use Address Book verification and recovery to create the missing database views.

Address Book verification and recovery identifies the following Address Book items.

| Address Book Item                                       | Description   |
|---|---|
| Orphan Contacts   | Contacts that are not associated with a Company record.   |
| Orphan alternate addresses                              | Addresses that are not associated with an Address Book record.  |
| Orphan notes  | Notes that are not associated with an Address Book entry, campaign, customer service case, or opportunity.                                      |
| Opportunity records with invalid Start_Date field value | Opportunities whose start date does not match the earliest Sales Step start date (applies only to opportunities with an assigned strategy).     |
| Notes with undefined Entity Type                        | Notes that do not have an entity type value (Address Book entry, opportunity, campaign, customer service case, or user) assigned to the record. |
| Orphan Link Records                                     | Opportunities that do not have a related Address Book entry.  |
| Broken Company Library links                            | Company Library links that try to connect to a missing document (link exists but the document is missing).                                      |
| Orphan Company Library links                            | Company Library links that link to a missing Company Library folder (document exists, link exists, but the Company Library folder is missing).  |
| Orphan Company Library documents                        | Company Library documents not listed in the Company Library folders (document exists but the link is missing).                                  |
| Misplaced Document records                              | Documents whose Owner field contains an incorrect value.  |



| Address Book Item  | Description   |
|--|---|
| User-defined fields that do not have associated database Views | User-defined fields for which a database view has not been created.                           |
| Invalid Table UDF Item records                                 | Table user-defined field items that have the wrong type (Company, Individual, Contact, etc.). |
| Invalid/orphan Table UDF values                                | Table user-defined field values that reference non-existent table items.                      |

**i** To see recovered entries, you must log in as MASTER or have rights to open other users' entries.

When you choose to recover the Address Book, Maximizer transfers recovered Address Book entries into a single entry called "Recovered on [date of recovery]", and it transfers recovered Company Library documents into a single folder called "Recovered on [date of recovery]". You can then view the recovered entries and either delete or move them as needed.

➤ *To verify an Address Book*

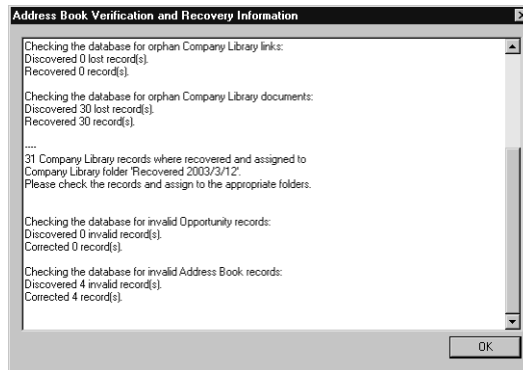
- 1** In Administrator or MaxExchange Server Manager, open the Address Book.
- 2** Select *File > Address Book Verification*.
- 3** Choose either the *Verify Only* or *Verify and Recover* option, and click *OK*.



**i** If you select Verify Only and Maximizer detects invalid records, it prompts you to recover them.

Maximizer runs the Address Book verification process, as well as the recovery process if you selected the second option. When it is complete, you see the Address Book Verification and Recovery

Information dialog box, which contains a summary of each verification performed and the results of the verification.



- 4 If you selected the **Verify and Recover** option, open the Address Book in Maximizer, and view the **Recovered on [date]** Address Book entry. You can then delete or move the recovered entries.

# Exporting Data from Maximizer


You can export Address Book entries, customer service cases, and Knowledge Base articles from Maximizer only, not Administrator.

Exporting Address Book entries creates a text file or XML file containing information from the current Address Book. It exports any Companies and Individuals selected in the Address Book list. If no Address Book entries are selected, it exports all Companies and Individuals currently displayed in the list.

The following sections contain information on exporting data from Maximizer:

- “Exporting Address Book Entries in XML Format” on page 327
- “Exporting Address Book Entries in Text Format” on page 330
- “Selecting Fields for Export” on page 332
- “Exporting Customer Service Cases” on page 333
- “Exporting Knowledge Base Articles” on page 335

## Exporting Address Book Entries in XML Format


 The unique ID is exported with each Company or Individual, but unique IDs for contacts are not exported.

By default, exporting Address Book entries in XML format exports name, address, phone number, email address, and company details information from the Basic Information tab of the selected Companies and Individuals (or all entries in the list if none are selected). You can easily import this file into another Address Book.

You can optionally export the following additional information:

 These options are available for XML export only, not CSV or tab-delimited exports.

- ***Include contacts*** exports the contacts associated with the exported Address Book entries.
- ***Include Customer Service Cases*** exports customer service cases associated with the exported Address Book entries.
- ***Include Opportunities*** exports Opportunities associated with the exported Address Book entries.
- ***Include UDFs*** exports all Address Book user-defined fields associated with the exported Address Book entries, along with their attributes, and in the case of table user-defined fields, any items they contain. Keep in mind that exporting user-defined fields increases the length of time required for the export process, and not selecting this option improves speed.
- ***Include notes*** exports notes associated with the exported Address Book entries, including date and time, owner, creator, type, and text fields.
- ***Include documents*** exports documents associated with the exported Address Book entries, including date and time,

 Formula user-defined fields are exported as alphanumeric, date, or numeric user-defined fields. The values are exported, but they will not be recalculated after export.

document type, document name, creator, owner, as well as the document data itself.

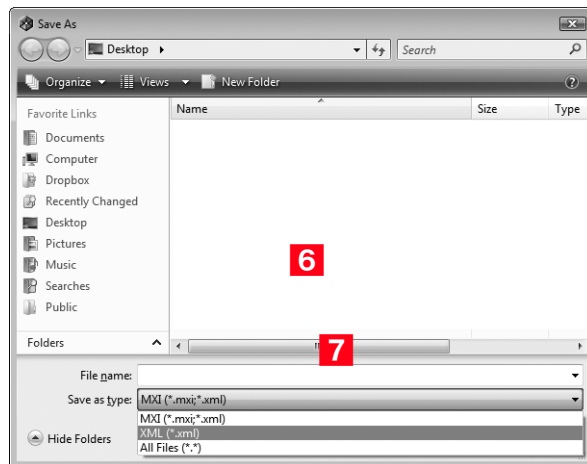
- **Support non-English characters** converts the contents of the exported XML file to Unicode format, which is required for languages using more than one byte per character, such as Chinese. If you don't select this checkbox, characters will be exported in ASCII format.

➤ **To export Address Book entries in XML format**

- 1** In Maximizer, open the Address Book window.
- 2** Select the Companies and Individuals to export. If you don't select any entries, Maximizer will export all entries currently displayed in the Address Book list.
- 3** In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Address Book entries**

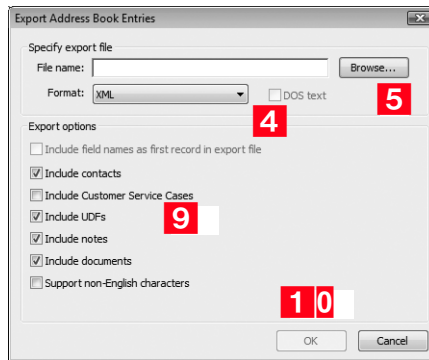
The Export Address Book Entries dialog box opens.

- 4** From the **Format** drop-down list, select **XML**.
- 5** Click the **Browse** button.



- 6** Specify the destination location and **File name** for the exported file.
- 7** In the **Save as type** drop-down list, select either **MXI** or **XML**.

**8** Click **Save**.



**9** Select any of the **Export options**, as needed. Each of the options is described before this procedure.

**10** Click **OK**.

Maximizer exports the Address Book entries and additional data as selected in the options to the specified file.

## Exporting Address Book Entries in Text Format

**i** User-defined fields that contain more than one item are not supported in a CSV or tab-delimited export. Use XML export instead.

Exporting to comma-separated values (CSV) format creates a file with a .CSV extension, which is readable by spreadsheets such as Microsoft Excel and many other programs.

Exporting to tab-delimited format creates a text (.txt) file with tabs separating each field value. This file is readable by any program that supports .txt files.

Exporting to these formats exports selected Companies and Individuals in the Address Book, but you do not have the option of exporting Contacts.

Unlike XML Format, exporting to CSV and tab-delimited format enables you to specify individual fields to export, including Address Book user-defined fields.

You can also export Notes associated with the Companies or Individuals. You have the option of exporting all notes or most recent notes.

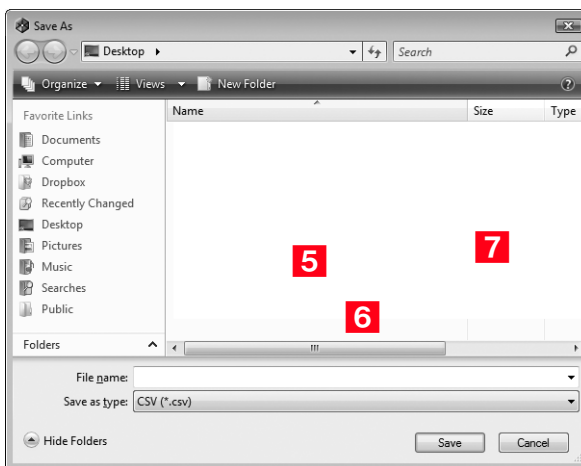
### ➤ *To export Address Book entries in CSV or tab-delimited format*

- 1** In Maximizer, open the Address Book window.
- 2** In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under Export, select **Address Book entries**.

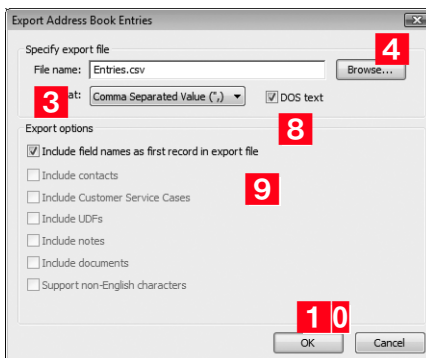
The Export Address Book Entries dialog box opens.

- 3** From the **Format** drop-down list, select **Comma Separated Value** or **tab-delimited**.

- 4 Click the **Browse** button.



- 5 Specify the destination location and **File name** for the exported file.
- 6 Verify that the format you selected previously appears in the **Save as type** field.
- 7 Click **Save**.



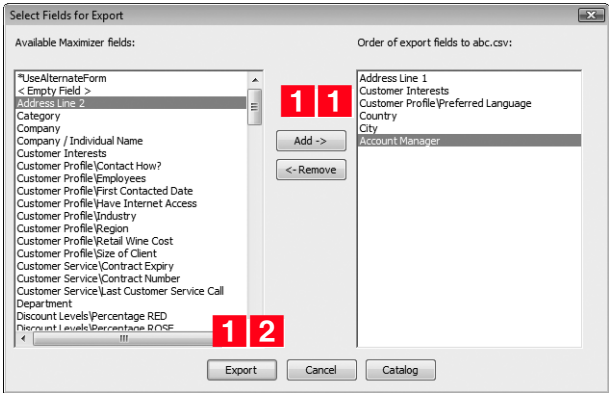
- 8 Select the **DOS text** checkbox to export data that is in DOS standard ASCII.

If the data is in ANSI ASCII (Windows default), do not select the checkbox.

- 9 If you want the field names to be exported as the first record in the exported file, similar to a headings row, select the **Include field names as first record in export file** checkbox.

**10** Click **OK**.

The Select Fields for Export dialog box opens.



**11** From the **Available Maximizer fields** list, select the fields to export by selecting each field and clicking **Add**.

– or –

Click **Catalog** to retrieve a previously saved export list.

**12** Click **Export** to begin the export process.

## Selecting Fields for Export

**i** You cannot export encrypted user-defined fields.

When exporting to CSV or tab-delimited format, you must select which fields to export, and in which order. The Select Fields for Export dialog box has two columns: the left column lists the Address Book entry basic fields, user-defined fields, and two fields for notes; the right column is initially blank. Select the fields to export from the left column and add them to the right column.

The order of fields in the right column is the order in which they will be exported. If you need to change the order of any fields, select each one and click Remove to delete it from the list; then, in the right column, select the field after which you want to place another field. Fields added to the right column appear directly below the field currently selected in the right column.

Once you have established the order of export fields as you would like it, you can click the Catalog button to save the export list for future exports. In the Export Catalog dialog box, click Add to create a new saved export list, or click Save to overwrite an existing export list. The Retrieve button opens an existing export list.



## Exporting Customer Service Cases

You can export customer service cases, their associated Address Book entries, as well as any related user-defined fields, notes, or documents. Exporting customer service cases exports any cases that have been selected in the Customer Service window (or all cases in the list if none are selected). The export file can be in either Maximizer XML Interface (MXI) or XML format.

**i** You can also export Customer Service Cases from the Export Address Book Entries dialog box, but doing so only exports cases associated with the exported Address Book entries. For more control over which cases are exported, use the Export Customer Service Cases menu item.

**i** Formula user-defined fields are exported as alphanumeric, date, or numeric user-defined fields. The values are exported, but they will not be recalculated after export.

MXI and XML files are both in XML format. However, you can import into Maximizer with MXI files more easily than XML format. To import an MXI file, simply double-click the file and it automatically handles the import.

The Export Customer Service Cases dialog box includes the following options:

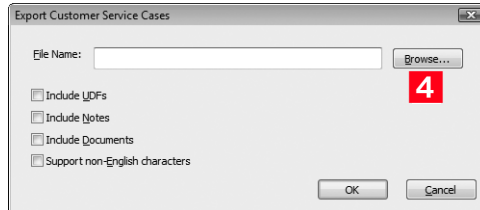
- **Include UDFs** exports all Customer Service user-defined fields associated with the exported cases, along with their attributes, and in the case of table user-defined fields, any items they contain. Keep in mind that exporting user-defined fields increases the length of time to export, and not selecting this option improves speed.
- **Include notes** exports notes associated with the exported cases, including date and time, owner, creator, type, and text fields.
- **Include documents** exports documents associated with the exported cases, including date and time, document type, document name, creator, owner, as well as the document data itself.
- **Support non-English characters** converts the contents of the exported MXI or XML file to Unicode format, which is required for languages using more than one byte per character, such as Chinese. If you don't select this checkbox, characters will be exported in ASCII format.

### ➤ *To export customer service cases*

- 1** In Maximizer, open the **Customer Service** window.
- 2** Select the cases to export. If you don't select any cases, Maximizer will export all cases currently displayed in the Customer Service window.

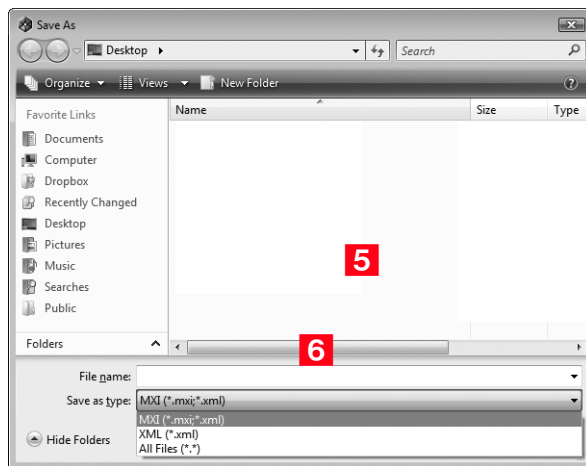
- 3** In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Export**, select **Customer Service Cases**.

The Export Customer Service Cases dialog box opens.



- 4** Click the **Browse** button.

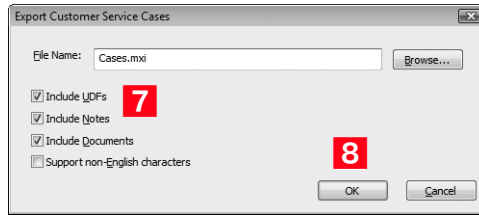
The Save As dialog box opens.



- 5** Specify the destination location and **File name** for the exported file.

- 6** From the **Save as type** drop-down list, select either **MXI** or **XML**, and click **Save**.

The Save As dialog box closes.



**7** Select any of the *Export options*, as needed. Each of the options is described before this procedure.

**8** Click *OK*.

Maximizer exports the customer service cases, associated Address Book entries, and additional data as selected in the options, to the specified file.

## Exporting Knowledge Base Articles

As with customer service cases, you can export knowledge base articles to either MXI or XML format. The resulting file contains the content of the article itself, as well as additional information, such as filename, file extension, keywords, product, status, and creator.

### ➤ *To export knowledge base articles*

**1** In Maximizer, open the *Knowledge Base* window.

**2** In the top-left corner of the window, click the *Maximizer* button, and select *Import/Export/Transfer*. Then, under *Export*, select *Knowledge Base Articles*.

**3** Specify the destination location and *File name* for the exported file.

**4** From the *Save as type* drop-down list, select either *MXI* or *XML*.

**5** Click *Save*.

Maximizer exports the Knowledge Base articles to the destination file.

## Importing Address Book Data from MXI or XML Files

You can use Administrator or Maximizer to import Address Book entries, customer service cases, knowledge base articles, and other data from MXI (Maximizer XML Interface) or XML Files. These MXI and XML files may have been created by exporting from Maximizer or by exporting the information from another source and converting it to XML using the Maximizer XML schema. For more information about the Maximizer XML Schema, refer to “ ” on page 409.

After importing Address Book entries into Maximizer, you can identify the imported records by selecting the **View** tab, and selecting **All Lists** from the **Favorite List** group in the Address Book window. A list of imported Address Book entries is stored in a favorite list named according to the file format and import date and time.

### About the MaxExchange Distribution field and XML Import

When importing the MaxExchange Distribution field from an XML file, if the destination Address Book hasn't created the field already, a version of this field will be created in the Address Book during the XML import, but it will NOT be the system MaxExchange Distribution field, and therefore will not work with the MaxExchange product.

If your XML file contains the MaxExchange Distribution field, please ensure that the destination Address Book has created the field already. (For information about creating the MaxExchange Distribution field, refer to “MaxExchange Distribution” on page 168.) This measure will ensure proper MaxExchange distribution in the destination Address Book.

The following sections contain additional information on importing data from MXI and XML files:

- “Importing MXI or XML Files Using Advanced Import” on page 336
- “Unattended Import of MXI or XML Files” on page 338

## Importing MXI or XML Files Using Advanced Import

For more control over importing MXI files, or to import XML files, use the Advanced Import method described below, which enables you to specify a number of preferences about how to import the file.

Note that customer service cases are always imported as separate records and are never merged with existing cases. Formula user-defined fields are imported as formulas as values.

**i** Always back up the Address Book before importing.

➤ **To import from an MXI or XML file**

- 1** In Administrator, select **File > Import > Advanced Import**.
- 2** For the **File name** field, click **Browse** and locate the .XML or .MXI file to import.
- Once you have selected the file to import, Maximizer fills in the Log File field automatically.
- 3** To change the default **Log File**, click **Browse** and provide an alternate log file location and/or name.
- 4** Select a **Log Level** from the drop-down list.
- 5** Specify any additional import options in the other group boxes, or just use the default values.
- 6** Click **OK** to begin the import.

The screenshot shows the 'Advanced Import' dialog box. It has several sections: 'Select XML or MXI import file' with 'File name' and 'Log File' fields and 'Browse...' buttons; 'Log Level' dropdown; 'Address Book entry update options' with radio buttons for 'Always insert', 'Use Identification field to match entries', 'Use Name field to match entries', and 'Use this user-defined field to match entries'; 'Contact update options' with similar radio buttons; 'Lead handling' with radio buttons for 'Use values from the import file', 'Import all entries as leads', and 'Import all entries as non-leads'; and 'Client ID generation' with radio buttons for 'Follow system setting' and 'Use values from the import file'. At the bottom are 'OK' and 'Cancel' buttons. Red numbered callouts are placed over the dialog: '2' over the 'File name' field, '3' over the 'Log File' field, '4' over the 'Log Level' dropdown, '5' over the 'Contact update options' section, and '6' over the 'Follow system setting' radio button.

Maximizer imports the data and then displays the number of records inserted, updated, and failed for each record type.

- 7** Click **OK** to close the message box.

## Unattended Import of MXI or XML Files

**i** To import an MXI or XML file using OLE automation, refer to the ImportXMLFile function documentation in the Customization Suite documentation.

An alternative to Advanced Import is an unattended import, which you can initiate by double-clicking the MXI or XML file or by passing parameters to the Maxwin executable (MaxWin.exe) through a command-line interface. When using unattended import, you may choose to specify some of the import preferences within the MXI or XML file itself. For more information about MXI and XML files, refer to " " on page 409.

### Importing MXI or XML Files by Double-Clicking

#### ➤ *To import an MXI or XML file by double-clicking*

- 1** Locate the MXI file on the computer.
- 2** Double-click the file.
- 3** Select the Address Book to import into, and click *Open*.
- 4** Enter your *User ID* and *Password* in the Login dialog box, and click *OK*.

Maximizer imports the data, and then displays a message identifying the number of records inserted, updated, and failed for each record type.

- 5** Click *OK*.

Maximizer displays a message with the name of the Favorite List, which lists the imported Address Book entries.

- 6** Click *OK* to view the Favorite List.

### Importing MXI or XML Files from the Command Line

To import an MXI or XML file from a command line, call Maxwin.exe with the following command-line syntax:

**i** The command-line syntax shown here uses sample parameter values.

```
Maxwin.exe /DATABASE "EsconaTutorial" /USERID "JNAPOLI"
/PASSWORD "maximizer" /FILE="d:\ABentries051013.mxi"
```

Keep the following points in mind:

- Only one space is allowed after the DATABASE, USERID, and PASSWORD keywords.
- Values must be surrounded by double quotation marks.
- The equal sign (=) after the FILE keywords must NOT have space before or after it.
- The FILE parameter must be the last parameter.

## Importing Data from Other File Formats

You can use Administrator to import Address Book information from other sources, such as ACT!, GoldMine, or Outlook.

After importing Address Book entries into Maximizer, you can identify the imported records by clicking the **View** tab, and selecting **All Lists** from the **Favorite Lists** group, in the Address Book window. A list of imported Address Book entries is stored in a favorite list named according to the file format and import date and time.

Administrator provides the following methods of importing data. The best import method depends on the type of data you are importing.

- **Address Book Entries:** This method imports entries from a CSV (comma-separated values) or tab-delimited text file that is created when you export from Maximizer or another application. Outlook, for example, can export its address book to a text file. When you import from a text file, you must choose to import all the entries as Companies/Individuals or as Contacts, or you can do a two-tier import to import Companies/Individuals first and then import the associated Contacts. For more information, refer to “Two-Tier Import” on page 341.
- **ACT! or GoldMine Database:** Importing an ACT! or GoldMine database is straightforward because Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. Refer to “Importing Data from ACT! and GoldMine” on page 347.
- **Other Contact Manager Database:** This option enables you to import a variety of data file formats, including Organizer, Clipper, dBASE, FoxBase, and FoxPro, among others. For more information, refer to “Importing from Other Contact Managers” on page 344.

Use the following table to determine which import method to use.

| <b>File Type</b>  | <b>Import Method(s)<br/>(File &gt; Import &gt; ...)</b>  |
|---|--|
| ACT! 1.x, 2.x, 3.x, 4.x, 2000, 6.x (*.dbf)              | ACT! 6.0 or 2004 or earlier                              |
| ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012 | ACT! 2005–2012 and ACT! Premium for Workgroups 2005–2012 |
| GoldMine 2.x, 3.x, 4.x, 5.x, 6.x (*.dbf)                | GoldMine 6.7 or earlier                                  |
| GoldMine 6.7 Corporate Edition (MSSQL)                  | GoldMine 6.7 Corporate Edition or earlier                |
| GoldMine 8.x Premium Edition (Firebird SQL, MSSQL)      | GoldMine Premium Edition 8.x                             |
| Organizer 1.x (*.org)                                   | Other Contact Manager Database                           |
| Delimited (*.txt, *.prn)                                | Other Contact Manager Database                           |
| Comma Delimited (*.csv)<br>Tab Delimited (*.txt)        | Address Book Entries                                     |
| Clipper Summer '87 (*.dbf)                              | Other Contact Manager Database                           |
| Clipper 5.x (*.dbf)                                     | Other Contact Manager Database                           |
| dBase III, III+, IV (*.dbf)                             | Address Book Entries                                     |
| dBase V (*.dbf)   | Other Contact Manager Database                           |
| Visual dBase 5.x (*.dbf)                                | Other Contact Manager Database                           |
| FoxBase/FoxBASE+ (*.dbf)                                | Other Contact Manager Database                           |
| FoxPro 1.x, 2.x (*.dbf)                                 | Other Contact Manager Database                           |
| Visual FoxPro 3.x (*.dbf)                               | Other Contact Manager Database                           |

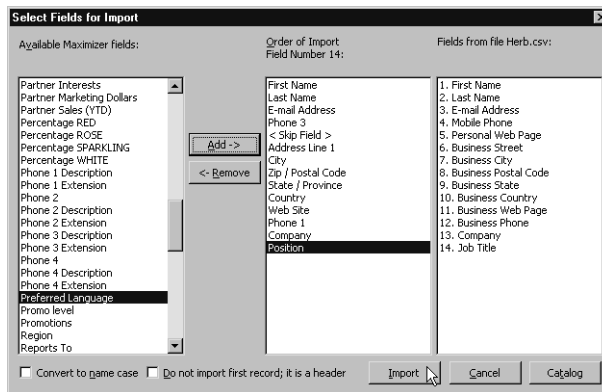


## Field Mapping

**i** When you import from a recognized database type, such as GoldMine or ACT!, Maximizer automatically maps the fields for you.

When importing some types of data files, you need to map (create an association between) the fields in the source file and the fields in Maximizer. Keep in mind that different applications name their fields differently. For example, the field for a company name is called “Company” in Outlook and “Company or Individual” in Maximizer.

When you are importing a file type that requires you to map fields the Field Mapping dialog box opens where you can map Maximizer fields to fields in the source file. For each field in the source file, select one of the available Maximizer fields, and click Add to map the fields. Select a corresponding Maximizer field for every field in the source file. If there is no corresponding field, select <Skip Field> from the list of Maximizer fields. When you have finished mapping the fields, the Order of Import (middle column) displays the corresponding Maximizer field beside each field in the Fields from File column.



## Two-Tier Import

**i** If you import a Company record, and an existing Company record in the database has an identical “Company” field, then the records are considered duplicates, and Maximizer will not import the duplicate Company record. However, Maximizer will import duplicate Individual and Contact records.

Many contact management programs keep two types of address book entries:

- Companies
- Contacts for Companies

Maximizer keeps its Address Book entries organized in a similar way:

- Companies/Individuals
- Contacts (associated with a Company or Individual)

The Import Address Book Entries function enables you to perform a two-tier import. In a two-tier import, you first import Company entries as Companies/Individuals Address Book entries, and then you import the people as Contacts.

Two-tier importing is only applicable to comma-separated value files, tab-delimited files, dBase III, III+, or IV, or XML files using the File > Import > Address Book Entries command.

➤ **To import Address Book entries (two-tier import)**

**i** Always back up the Address Book before importing.

**1** From the **File** menu, select **Import > Address Book Entries**.

The Import Address Book Entries dialog box opens.

**2** Click **Browse** and locate the file to import.

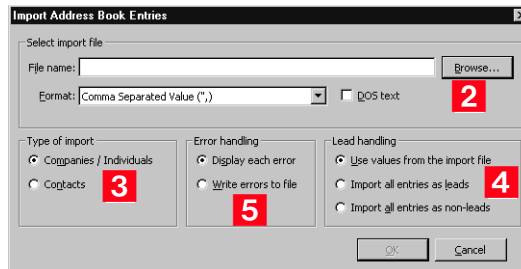
**3** Select the **Companies / Individuals** option to import all records in the source file as Company or Individual Address Book entries.

(After you complete this procedure, repeat it a second time to import the Contacts. If you choose not to do a two-tier import, just select either **Companies / Individuals** or **Contacts**.)

**4** In the **Lead handling** box, select the appropriate option for importing records as lead or non-lead Address Book entries.

**5** Click **OK**.

**i** User-defined fields containing more than one available item are not supported in a CSV (comma-separated values) import. Use the Advanced Import feature or MTI (Maximizer Transfer Interface) as an alternative.



The Select Fields for Import dialog box opens.

**6** In the **Available Maximizer fields** column, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**.

Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

For example, if the first field in the right column is First Name, select First Name from the Available Maximizer fields.

For fields that contain more than one value such as non-single valued table user-defined fields, and full/read access fields, each

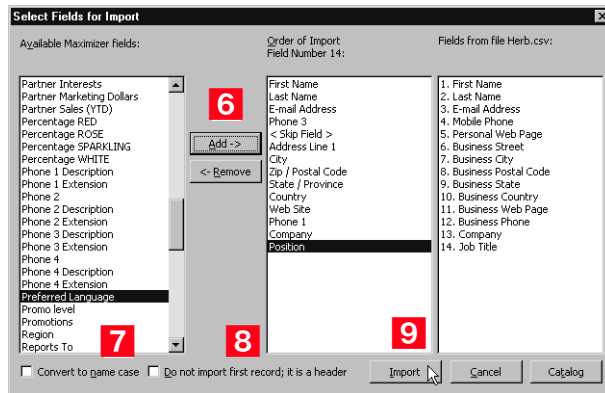
**i** To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

value must be its own column in the file and the same field must be mapped to each of those items.

The fields listed in the Available Maximizer Fields column is slightly different, depending on whether you selected **Companies / Individuals** or **Contacts** as the Type of Import in step 3.

- 7** To convert text that is in capital letters (uppercase) into mixed case, select the **Convert to name case** checkbox.
- 8** Many comma-delimited data files use the first line as a column header. To exclude the first line from being imported, select the **Do not import first record; it is a header** checkbox.
- 9** Click **Import**.

**i** You can save the field mapping for reuse by clicking the **Catalog** button.



The data from the source file now imports into Maximizer.

- 10** Repeat this procedure a second time to import the second tier, except select **Contacts** instead of **Companies / Individuals** as the Type of Import in step 3.

## Importing from Other Contact Managers

The instructions below describe importing data from a contact manager other than ACT! or GoldMine. For information about importing from ACT! or GoldMine, refer to “Importing Data from ACT! and GoldMine” on page 347.

### ► *To Import Contacts from another type of contact management database*

 Always back up the Address Book before importing.

- 1** Select **File > Import > Other Contact Manager Database**.

The Import Databases dialog box opens.

- 2** From the **List files of type** drop-down list, select the file format of the database you are importing.

- 3** Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** drop-down list to access the network drive.

- 4** In the **Import Options** group box, select the options you want to include. Depending on the type of database you are importing, some of these options may not be available.

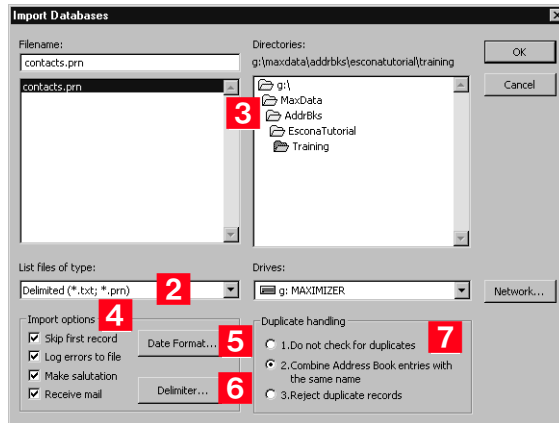
- 5** If you are importing a character delimited text file, you must specify a **Date Format**.

To do so, click the **Date Format** button, select the date format used in the source file, and click **OK**.

- 6** If you are importing a .txt or .prn file, you must also specify the character used as the field **Delimiter** in the import file.

Click the **Delimiter** button, select the delimiter type, and click **OK**.

- 7** In the **Duplicate handling** group box, select one of the options to specify what Maximizer should do when it encounters duplicate Address Book entries, and click **OK**.



The Select Fields for Import dialog box opens.

- 8** In the **Contact fields** or **Address Book entries fields** lists, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**. Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

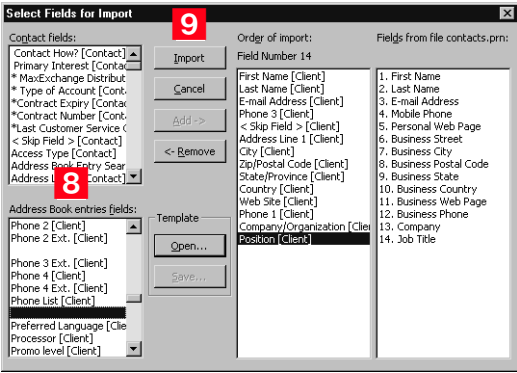
**i** To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

For example, if the first field in the right column is First Name, select First Name from the Contact fields or Address Book entries fields list.

Use **Contact fields** to create Contacts for Companies or Individuals.

Use **Address Book entries fields** to create Company or Individual Address Book entries.

**9** Click **Import** to begin the import process.



Once Maximizer imports the data from the import file, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings.

The Error Log appears next displaying the location of the import error message file. If you want to view this file, make a note of where it is located. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

## Importing Data from ACT! and GoldMine

**i** Duplicate Contacts are created on the second Import of the same ACT! or GoldMine database.

This section describes the procedure for importing data from ACT! or GoldMine, as well as the field mapping for data imported into Maximizer.

### Importing Contacts from ACT! 6.0, 2004, or Earlier, or from GoldMine 6.5 or Earlier

**i** Always back up your Maximizer Address Book before importing data.

➤ **To import contacts from ACT! 6.0, 2004, or earlier, or from GoldMine 6.5 or earlier**

**i** When importing GoldMine Contacts, GoldMine must be installed on the same machine as Maximizer; the Borland database engine is required during the import.

**1** From the **File** menu, select **Import > ACT! 6.0 or 2004 or earlier**.

– or –

Select **Import > GoldMine 6.5 or earlier**.

The Import Databases dialog box opens. The file type is selected for you automatically.

**2** Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** field drop-down list to access the folder.

**3** In the Import Options group box, select the **Log Errors to File** checkbox if you want to log any errors that occur during the import process to a text file.

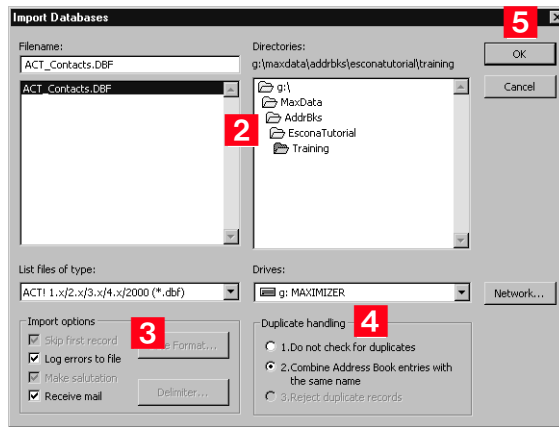
All other options in the Import Options group box are handled automatically by Maximizer.

**4** Specify how you want duplicate records handled, and click **OK**.

If duplicate records are found in the data, the option you select here determines whether or not duplicate records are combined. They will be added to the Address Book.

Maximizer requires that each Address Book entry be assigned a unique Address Book entry ID. If the import record contains an Address Book entry ID that is the same as an existing Maximizer Address Book entry or Contact, the Address Book entry ID of the imported entry is automatically changed when that entry is added to Maximizer and this action is recorded in the import error message file.

- 5** Click **OK** to begin the Import process.



During the import process, a status indicator appears on the screen. Click **Cancel** if you want to halt the import process.

**i** The Errorlog.txt file appears in the same folder as the import file. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

- 6** Once the data is imported, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, or merged, and the number of records with associated import warnings. Click **OK** to close the message box.

## Importing from ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012

There are two methods of importing from an ACT! 2005–2012 database. The first method explains how to import from ACT! when both ACT! and Administrator are installed on the same machine. The second method explains how to import from ACT! when ACT! and Administrator are on separate machines.

### ➤ *To import from ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012 – Primary Method*

- 1** Make sure you are logged into Windows as an administrator on the SQL Server machine. Also ensure no users are logged into the ACT! database.
- 2** In Administrator, log into the Address Book where you want to import the ACT! database.
- 3** In Administrator, select **File > Import > ACT! 2005-2012 and ACT! Premium for Workgroups 2005-2012**.



The Reattaching ACT! databases process may take several minutes.

- 4** Select the ACT! database to import from the drop-down list, and click **OK**.

Maximizer imports the database. When the import is complete, it displays the Import Statistics dialog box.

- 5** Click **OK** to close the dialog box.

The import is complete.

➤ ***To import from ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012 – Secondary Method***

**i** Always back up your Maximizer Address Book before importing data.

- 1** Back up your ACT! database in ACT!.

The Backup is typically saved to C:\Documents and Settings\<User Name>\My Documents\ACT\ACT for Win 7\Databases\

- 2** In the Backup folder, there should be a zip file. Open this zip file and extract the .BAK file that contains the name of your ACT! database in the filename.

- 3** The extracted file is a SQL backup. Restore this backup to a normal SQL 2005 (or later) server.

See your SQL Server documentation for details on how to restore backups.

- 4** Once the backup is restored, create a DSN to point to the database on the SQL Server. For instructions on creating a DSN, refer to the procedure below.

- 5** Start Administrator.

- 6** Open the Address Book to import the data into.

- 7** Select **File > Import > ACT! 2005-2012 and ACT! Premium for Workgroups 2005-2012**.

- 8** Click **OK** on the message box.

- 9** Click the **Machine Data Source** tab, select the DSN you created in step 4, and click **OK**.

You will be prompted for your sa password.

- 10** Enter the sa password, and click **OK**.

Maximizer begins importing the data.

➤ *To create a DSN to point to the database on the SQL Server*

- 1** Open *Control Panel > Administrative Tools > Data Sources (ODBC)*.
- 2** Click the *System DSN* tab, and click the *Add* button.
- 3** Select *SQL Server*, and click *Finish*.
- 4** Give a meaningful name and description, select the SQL server where you placed the restored backup, and click *Next*.
- 5** Select the *With SQL Server authentication* option, fill in the Login ID as *sa*, enter the sa password, and click *Next*.
- 6** Select *Change the default database to*, select the restored ACT! database from the drop-down list, and click *Next*.
- 7** Click *Finish*.
- 8** Click the *Test Data Source* button to make sure the DSN was configured correctly.
- 9** Click *OK* and then *OK* again to save the DSN.

## Importing from GoldMine 6.7 Corporate Edition (or Earlier) SQL Databases

➤ *To import from a GoldMine 6.7 Corporate Edition (or earlier) SQL database*

**i** Always back up your Maximizer Address Book before importing data.

- 1** Start Administrator.
- 2** Select *File > Import > GoldMine 6.7 Corporate Edition or earlier*.
- 3** Click *OK* on the message box.
- 4** Click the *Machine Data Source* tab, select the GoldMine DSN, and click *OK*.

You will be prompted for your sa password.

- 5** Enter the sa password, and click *OK*.

Maximizer begins importing the data.

## Importing from GoldMine 8.x Premium Edition SQL Databases

Maximizer supports importing data from GoldMine 8.x Premium Edition with MSSQL or Firebird SQL.

**i** Always back up your Maximizer Address Book before importing data.

### ➤ *To import from a GoldMine 8.x Premium Edition SQL database*

- 1** If you are importing from GoldMine 8.x with Firebird SQL, convert the Firebird SQL database to MSSQL. You can convert the database in GoldMine 8.02 or later. (In GoldMine, select **Tools > Database > New Databases**.) For more information, see the GoldMine documentation.
- 2** In Administrator, select **File > Import > GoldMine Premium Edition 8.x**.
- 3** Click **OK** in the message box.
- 4** Click the **Machine Data Source** tab, and select **GoldMine DSN**. Click **OK**.

You will be prompted for your sa password.

- 5** Enter the sa password, and click **OK**.

Maximizer begins importing the data.

## Setting User Passwords and Properties After Import

Note that if a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. After importing data, you can set each user's password, preferences, and properties manually.

### ➤ *To set user passwords, preferences, and properties after import*

- 1** In Administrator, select **File > Manage Users**.
- 2** Select the Maximizer user, and click **Administer User**.

The Administer User dialog box opens.

- 3** In the Administer User dialog box, set the user properties, preferences, password, and other settings.

For more information on these settings, see "User Administration" on page 89.

## ACT! Data Conversion

The following table describes field mapping between ACT! and Maximizer. Before importing data into Maximizer, export the data from ACT! to a DBF file and use the DBF file for the import.

| <b>ACT! 2000 (5.0), 6.0, or 2004–2012</b> | <b>Maximizer</b>       | <b>Imported?</b> | <b>Comments</b>  |
|---|------------------------|------------------|--|
| Company                                   | Company                | Yes              |  |
| Contact                                   | First Name & Last Name | Yes              | ACT! Contacts are imported as Contacts in Maximizer and the basic information about each Contact such as email address are imported into the Basic Info tab in the Address Book entry dialog box. If any of the information associated with the Contact cannot be mapped to a Maximizer field in this tab, the information is imported as user-defined fields. In ACT!, First and Last Name belong to the same single field. The correct names may not be properly imported into Maximizer. For example, a Contact 'Toni Spooner (female)' in ACT! is imported into Maximizer as "Toni Spooner" in the First name field and "(female)" in the Last name field. |
| Title                                     | Position               | Yes              |  |
| Department                                | Department, Position   | Yes              | In Maximizer, Department is populated with the Department information of the first Contact and the rest in the Position field separated by comma.  |
| Phone                                     | Phone 1                | Yes              | Adds "Business" to the Phone Description field in Maximizer.   |
| Fax                                       | Phone 2                | Yes              | Adds FAX to Extension field in Maximizer.  |
| Toll-Free                                 | Phone 3                | Yes              | Adds "Toll-Free" to the Phone Description field in Maximizer.  |
| Mobile                                    | Phone 4                | Yes              | Adds CELL to Extension field in Maximizer.   |
| Alt Phone                                 |                        | No               |  |
| Ticker                                    | UDF Ticker Symbol      | Yes              | Adds UDF to Company.   |
| ID/Status                                 | Category               | Yes              |  |

| <b>ACT! 2000 (5.0), 6.0, or 2004–2012</b>   | <b>Maximizer</b>   | <b>Imported?</b> | <b>Comments</b>  |
|---|--|------------------|--|
| Address   | Address  | Yes              | First address line in ACT! is imported as Address 1 in Maximizer. Second line goes to Address 2. Address comes from one of the Contacts for this Company and if there is no address, it may end up empty. Alternate addresses are added to Maximizer from different Contacts of the Company and alternate addresses are named by that Contact. The same address is not added but renamed by the other Contact. For some Contacts, the appropriate alternate address may not be selected. |
| Address   | Division   |                  | Division in Maximizer may be populated by the address line in ACT!.  |
| City  | City/Town  | Yes              | Imported correctly to main and alternate addresses.  |
| State   | St/Co/Prov   | Yes              | Imported correctly to main and alternate addresses.  |
| Zip   | Zip/Postcode   | Yes              | Imported correctly to main and alternate addresses.  |
| Country   | Country  | Yes              | Imported correctly to main and alternate addresses.  |
| Salutation  | Salutation   | Yes              |  |
| Referred By   | UDF Referred By  | Yes              | Adds UDF to Company.   |
| Web Site  | Website  | Yes              | Imported into the Company's website field.   |
| E-mail Address  | Email  | Yes              | Imported into the Contact's email field.   |
| Last Result   | Creates Table UDF named "Result"   | Yes              | Adds Company Table UDF with corresponding items selected for each Contact.   |
| Assistant   |  | No               |  |
| Asst. Title   |  | No               |  |
| Asst. Phone   |  | No               |  |
| User fields for Contacts and Companies (ACT! 2005–2012 & ACT! 2005–2012 Premium only) | Creates UDFs for Contacts and Companies with the same name as in the source database | Yes              | These fields can be renamed and can be changed to different field types. Any fields that are of MEMO type or are more than 120 Characters are converted to Notes in Maximizer.   |

| <b>ACT! 2000 (5.0), 6.0, or 2004–2012</b>   | <b>Maximizer</b>  | <b>Imported?</b> | <b>Comments</b>   |
|---|---|------------------|---|
| User 1...User 15<br>(ACT! 2000 (5.0), 6.0, or 2004 only)                              | Creates UDFs named<br>"Details Field 1" ...<br>"Details Field 15" | Yes              | Adds UDFs to Company. Some UDFs that belong to some different Contacts in ACT! may be lost.   |
| Users   | Users   | Yes              | ACT! users are imported into Maximizer as users. Passwords are set to "maximizer" if the import was done using a DBF file. Users are displayed in the Administrator's Manage Users dialog box which may be accessed by selecting File > Manage Users. If a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary.<br><br>By default, passwords for users are set to "maximizer". Passwords can be changed manually for each imported user. |
| Notes   | Notes   | Yes              |   |
| Schedule Call<br>Schedule To-do<br>Schedule Appointment<br>Schedule Personal Activity | Hotlist Task  | Yes              | The Company name of some conflicting tasks may not be preserved.<br><br>The Duration information in ACT! is not imported to Maximizer.  |
| Schedule Meeting  | Appointments  | Yes              | Recurring appointments are not imported.  |
| Notes Attachments   | Notes Attachments   | No               |   |
| Document  | Document  | No               |   |
| Groups  | Groups  | No               |   |
| Sales/<br>Opportunities   | Opportunities   | No               |   |
| History<br>(ACT! 2005-2012 &<br>ACT! 2005-2012<br>Premium only)                       | Notes   | Yes              | Each entry from the History tab in ACT! becomes a Note in Maximizer.  |

## GoldMine Data Conversion

The following table describes field mapping between GoldMine and Maximizer.

Note that Action, Call, and Appointment notes in GoldMine 6.x and 8.x may be in HTML format. When you import these notes into Maximizer, they contain HTML tags.

| <b>GoldMine 5.x,<br/>6.x, &amp; 8.x</b>    | <b>Maximizer</b>                | <b>Imported?</b> | <b>Comments</b>   |
|--|---------------------------------|------------------|---|
| Company                                    | Company                         | Yes              |   |
| Contact<br>First Name Initial<br>Last Name | First Name Initial<br>Last Name | Yes              | GoldMine's Contact field contains (First Name) (Initial) (Last Name) separated by spaces. In Maximizer, appropriate fields are populated accordingly.   |
| Title                                      | Position                        | Yes              |   |
| Dept                                       | Dept.                           | Yes              | In Maximizer, Dept. is populated with the department of the main Company's Contact.   |
| Asst                                       | Assistant (UDF)                 | Yes              | Adds UDF to Contact record.   |
| Source                                     | Contact type (UDF)              | Yes              | Adds UDF to Contact record.   |
| Address                                    | Address1 & Address2             | Yes              | Address from the main Contact becomes the main Company address. The first line in the Address field from GoldMine goes to Address1 in Maximizer. The second line goes to Address2. The third line from GoldMine is NOT imported.<br><br>Alternate Addresses in Maximizer are created from the addresses of the Contact from the Contacts tab in GoldMine. Appropriate Alternate Addresses are selected for imported Contacts. |
| City                                       | City/ Town                      | Yes              | Imported correctly to main and alternate addresses.   |
| State                                      | St/Co/Prov                      | Yes              | Imported correctly to main and alternate addresses.   |
| Zip  | Zip                             | Yes              | Imported correctly to main and alternate addresses.   |
| Country                                    | Country                         | Yes              | Imported correctly to main and alternate addresses.   |
| Phone 1-3                                  | Phone 1-3                       | Yes              | Appropriate extensions are imported.  |
| Fax  | Phone 4                         | Yes              | Adds FAX to Extension field in Maximizer.   |
| E-mail                                     | Email                           | Yes              | Email address of the main Contact is imported. Email addresses of Contacts from the Contacts tab in GoldMine are also imported.   |
| Web Site                                   | Website                         | Yes              | Imported to main Contact record.  |
| Contact Type                               | Contact Type                    | Yes              | Adds UDF to Contact record.   |


| <b>GoldMine 5.x,<br/>6.x, &amp; 8.x</b>  | <b>Maximizer</b>  | <b>Imported?</b> | <b>Comments</b>  |
|--|---|------------------|--|
| Business   | Business  | Yes              | Adds UDF to Contact record.  |
| Interest   | Interest  | Yes              | Adds UDF to Contact record.  |
| Accnt Mngr   | Accnt Mngr  | Yes              | Adds UDF to Contact record.  |
| Open   | Open  | Yes              | Adds UDF to Contact record.  |
| Summary  | Note  | Yes              | A note containing details from the Summary tab is created for the Company.   |
| Role<br>Status<br>Account Type<br>Account Size<br>No. of Users<br>Key Interest<br>Competitor<br>Platform | User role<br>Purchase Status<br>Account Type<br>Account Size<br>Users<br>Key Interest<br>Competitor<br>Platform | Yes              | Appropriate UDFs are created in Maximizer and populated with proper values.  |
| Notes  | Note  | Yes              | A note is created for the Contact in Maximizer and contains all the notes from the Notes tab in GoldMine.  |
| Documents  | Document  | No               |  |
| Users  | Users   | Yes              | <p>GoldMine's users are imported into Maximizer as users. Users are displayed in the Administrator's Manage Users dialog box, which is accessible through the File &gt; Manage Users menu.</p> <p>If spaces are included in a user name, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary.</p> <p>After import, users' Windows Access, Web Access, and Mobile Access are disabled in Maximizer and must be enabled by the administrator.</p> <p>By default, passwords for users are set to "maximizer". Passwords can be changed manually for each imported user.</p> |
| Details  | Notes   | Yes              | For every detail, a note is created. Details are referred to as Profiles in the notes.   |
| Pending  | Hotlist Task  | Yes              | Each entry from the Pending tab in GoldMine is imported as Hotlist task in Maximizer.  |
| Calendar   | Hotlist Tasks   | Yes              | Calls and Activities from GoldMine's Calendar are imported as Hotlist tasks in Maximizer.  |



| <b>GoldMine 5.x, 6.x, &amp; 8.x</b> | <b>Maximizer</b> | <b>Imported?</b> | <b>Comments</b>  |
|-------------------------------------|------------------|------------------|--|
| Referrals                           | Notes            | Yes              | A note is created for every Referral. Referrals are called References.                             |
| History                             | Notes            | Yes              | Each entry from the History tab in GoldMine becomes a Note in Maximizer.                           |
| Members                             |                  | No               |  |
| Tracks                              |                  | No               |  |
| Links                               |                  | No               |  |
| Opptys                              |                  | No               |  |
| Projects                            |                  | No               |  |
| Partner                             | Notes            | Yes              | Limited information is imported.   |
| Email text (email)                  | Documents        | Yes              | Imports email as documents in the Documents window. This feature is supported for GoldMine 8 only. |

## Field Mapping for Outlook

The following table describes the field mapping that is used in Outlook Synchronization.

 For more information on Outlook Synchronization, refer to "Configuring Microsoft Outlook Synchronization" on page 172.

| <b>Microsoft Outlook</b> | <b>Maximizer</b> |
|--------------------------|------------------|
| <b>Appointments</b>      |                  |
| Subject                  | Subject          |
| Start and End time date  | Date             |
| Start time               | Start time       |
| End time                 | End time         |
| Reminder                 | Alarm time       |
| Toggle alarm             | Toggle alarm     |
| Importance               | Priority         |
| Private                  | Private          |
| Location                 | Location         |
| Note (text box)          | Note (text box)  |
| <b>Tasks</b>             |                  |
| Due date                 | Date             |

| Microsoft Outlook | Maximizer |
|-------------------|-----------|
| Alarm time        | Time      |
| Subject           | Activity  |
| End time          | End time  |
| Reminder set      | Alarm set |
| Priority          | Priority  |
| Private           | Private   |

# Transferring Entries between Address Books

**i** Encrypted user-defined fields cannot be transferred or exported to another Address Book.

Importing refers to copying data from an external database into a Maximizer Address Book. However, transferring refers to copying data between Maximizer Address Books. Transferring data is ideal for merging Address Books together and sharing entries and setups.

Entries cannot be transferred using Administrator. You must use Maximizer.

Transfer rights can be set on a per-user basis, although some field transfer options apply to all users.

The following sections contain information on transferring entries between Address Books:

- “What Happens During a Transfer?” on page 359
- “Transfer Summary Reports and Logging” on page 360
- “Adjusting Address Book Transfer Settings” on page 360

## What Happens During a Transfer?

**i** You should never use Maximizer Email Transfer (MET) between two MaxExchange-synchronized computers. Using MET and MaxExchange in combination adds records twice on the destination computer—once through MET, and again through MaxExchange.

**i** Note that each Address Book entry has a unique ID.

Once you start a transfer, Maximizer uses the following rules to determine which records to copy from the source Address Book into the target Address Book:

- **Address Book entry IDs:** If an Address Book entry ID number from the source Address Book does not exist in the target Address Book, the Address Book entry is inserted into the target Address Book.
- **Address Book entry names:** If the Address Book entry ID number from the source exists in the target Address Book, Maximizer compares the source and target Address Book entry names.

If the names are different, Maximizer changes the ID number in the target Address Book and inserts the entry as a new Address Book entry.

If the Address Book entry names are the same, they are considered to be duplicate entries. In this case, Maximizer merges duplicate Address Book entries in the target Address Book.

- **Date and Time:** Maximizer also checks the date and time of the record. It will not overwrite data in the target Address Book that has been modified more recently than the data in the source Address Book.

## Transfer Summary Reports and Logging

Each time you transfer Address Book entries, Maximizer displays a transfer summary report. The report indicates the number of data items inserted, modified, bypassed, and deleted. It also displays the transfer setting used and other related information. You can print this report for your records.

As well, for each Address Book entry updated in the target Address Book, Maximizer can optionally add a note. The note summarizes the fields that have been added, changed, and deleted. This feature can also be used if you want to find the data that has been added or modified. After a transfer, simply do a search by notes.

## Adjusting Address Book Transfer Settings

 Only the MASTER user can modify protection on fields.

You can set the options for transferring information between the open Address Book and other Address Books. Some of these are system options, which apply to all users; others are user-specific options, which apply to the selected user only.

Regardless of a user's transfer settings, encrypted user-defined fields cannot be transferred or exported to another Address Book.

### ► *To adjust transfer settings for one user or all users*

- 1** Select **File > Manage Users**.
- 2** Select a Maximizer user, and click **Preferences**.
- 3** Select the **Transfer** tab.
- 4** In the **Protect fields from update** list, double-click any fields you don't want included in the transfer.
  - transfer options apply to all users.
  - **User specific** field options apply to the selected user only.
- 5** In the **Transfer options** group box, set your transfer preferences.
- 6** In the **Advanced options** group box, set your advanced transfer preferences, which are described below:
  - The **Overwrite duplicates** option overwrites the target Address Book entry with source Address Book entry information when duplicate records are found.
  - The **Use record modify flag** option sets a flag to "on" when an Address Book entry is added or modified. Maximizer uses it as an internal check to determine if the Address Book entry has been modified since the last transfer.

- The ***Reset record modify flag*** option resets the record modify flag back to null (not modified) for each transferred record.

**7** If you don't want Maximizer to add a note for every Address Book entry that is added or updated in the target Address Book, clear the ***Log transfer results to notes*** checkbox.

**8** Click ***OK*** to finish.

## Purging Outdated Notes and Documents

After a long period of activity, you may want to delete outdated notes and documents using Administrator's purge feature.

When you purge notes, you must specify the note types to delete.

| Note Type        | Creation Method  |
|------------------|--|
| Accounting       | Created from accounting transactions. Applicable only to previous versions of Maximizer.   |
| Customer Service | Notes created in the Address Book window when you add a case.  |
| Email            | Notes created in the Address Book window when you send an email to one or more Address Book entries. Email notes are also created when you launch a campaign.  |
| History          | Created when opportunities cases, or campaigns are added or changed. History notes can be printed or searched only from these windows.   |
| Incoming call    | Created when you receive a phone call.   |
| Mail-out         | Created when users print labels, envelopes, or letters using the Maximizer Word Processor's merge feature. Mail-out notes are also created when users send an email to more than one Address Book entry. |
| Manual           | Added manually to the Notes window.  |
| Opportunity      | Created in the Address Book window when opportunities are added or changed. Opportunity notes can be printed or searched only from the Address Book window.  |
| Other            | Third-party or custom notes created by the administrator.  |
| Outgoing call    | Created when phone an Address Book entry.  |
| Tasks            | Created when appointments or Hotlist tasks are scheduled or completed.   |
| Timed notes      | Created when the Timer is used while writing a note.   |
| Transfer log     | Notes logged when Address Book entries are transferred between Address Books.  |

The purge command deletes all notes, with the exception of other user's private notes (unless the user purging the notes has rights to delete other users' notes), in the specified date range for all Address Book entries in the open Address Book. You should back up the Address Book before purging notes.

➤ ***To purge notes***

- 1** In Administrator, open the Address Book you want to clean up.
- 2** Select **File > Purge > Notes**.
- 3** Specify a date range.  
Maximizer deletes notes dated between the specified dates.
- 4** Select the type(s) of notes to delete, and click **OK**.

➤ ***To purge documents***

- 1** In Administrator, open the Address Book you want to clean up.
- 2** Select **File > Purge > Documents**.
- 3** Specify a date range.  
Maximizer deletes documents dated between the specified dates.
- 4** If you want to purge private documents belonging to other users, select the **Delete other users' private documents** option.
- 5** Click **OK**.

## Using Log Files for Diagnosis

One of the most powerful tools in diagnosing a Maximizer installation is the automated logging feature. Maximizer supports logging for a number of server and client components.

You can control the amount of detail that is logged for various modules. The range of logging levels is 0 through 7:

- 0 = logging disabled
- 1 = least detailed
- 7 = most detailed

You can also control the frequency in which the log files are purged and if the information is sent to the Windows event log.

Logs are written into the default folder “\Program Files\Maximizer\Logs”. You can define logging preferences in Administrator and Maximizer. These preferences control the following registry keys.

|                            |  |  |
|----------------------------|--|--|
| Email Service (CMGR-Email) | HKEY_LOCAL_MACHINE\SOFTWARE\Maximizer\Software\Maximizer\Modules\AutoProgService\Email   | CMGR-Email_yyyymmdd.log<br>CMGR-Service_yyyymmdd.log |
| MaAccess (MACC)            | HKEY_LOCAL_MACHINE\SOFTWARE\Maximizer\Software\Maximizer\Modules\MACC\EVENTLOGS SETTINGS | MACC_yyyymmdd.log                                    |

### ➤ To set logging preference values

**1** In Maximizer, click the **Setup** tab and select **Preferences**. In Administrator, select **File > Preferences**.

**2** Select the **Diagnostic** tab.

If you want logs for all modules saved in one specific location, specify a default folder where your log files will be saved. If you don't specify a location in this field or a location per module, logs are saved in the Logs folder where Maximizer is installed (e.g., Program Files\Maximizer\Logs).

**3** Select a module from the **Preferences for this module** drop-down list.



- 4** If you want logs related to a module saved in a specific location, specify a folder in the ***Module log folder*** field.
- 5** Select a logging detail level from the ***Maximizer log level*** drop-down list.
- 6** Set your other logging preference values such as the frequency logs are purged. By default, logs are purged after 5 days.
- 7** Repeat the previous steps to configure logging for any other module(s).
- 8** Click ***OK***.
- 9** If you changed the log settings for the ***Email Service (CMGR-Email)***, you must restart the service(s) for the changes to take effect.

Restart these services from Windows Control Panel > Services.

For samples and explanations of Maximizer Email Service log files, see “Maximizer Email Service Log Files” on page 381.



# System Reports

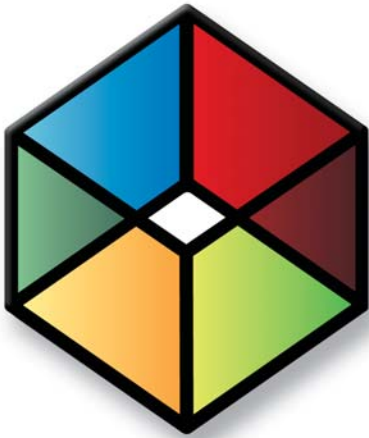
 HTML reports can be opened easily in Microsoft Excel, where you can edit the data as required.

The Reports menu in Administrator enables you to quickly create a number of reports about the open Address Book, as described below. Use the Reports tab in Maximizer to print other comprehensive reports. See the *Maximizer CRM User's Guide* for more information.

| Report              | Information Reported   |
|---------------------|--|
| User ID List        | <ul style="list-style-type: none"><li>• Total number of users in the Address Book</li><li>• Total number of security groups in the Address Book</li></ul> <p>For each user in the Address Book:</p> <ul style="list-style-type: none"><li>• User ID</li><li>• Display Name</li><li>• First and Last Name</li><li>• Phone number</li><li>• Email Address</li><li>• Maximizer Login Enabled/Disabled status</li><li>• User's Roles (Access Rights)</li></ul> <p>For each security group in the Address Book:</p> <ul style="list-style-type: none"><li>• Group Name</li><li>• Group ID</li><li>• Group members</li></ul> |
| User-Defined Fields | <ul style="list-style-type: none"><li>• Folder (if applicable) and field name</li><li>• Type of entry the field is applicable to (Company, Individual, Contact, Opportunity, Campaign, Case, or User)</li><li>• Full Access and Read Access</li><li>• Type (Table, Date, Alphanumeric, Numeric, Formula, Yes/No)</li><li>• Creator</li><li>• Requested by</li><li>• Description</li><li>• Attributes</li><li>• Items in table user-defined fields</li><li>• Usage count (only if Show Usage Count checkbox selected in Print Report dialog box)</li></ul>  |

| Report                | Information Reported  |
|-----------------------|---|
| Address Book Summary  | <p>Total number of each of the following types of entries in the current Address Book:</p> <ul style="list-style-type: none"> <li>• Users</li> <li>• Security groups</li> <li>• Companies and Individuals</li> <li>• Lowest, highest, average, and total number of contacts per Company and Individual</li> <li>• Opportunities (total and per status)</li> <li>• Automated campaigns (total and per status)</li> <li>• Traditional campaigns (total and per status)</li> <li>• User-defined fields (total and per type)</li> <li>• User-defined field entries (total and per type)</li> <li>• Notes</li> <li>• Documents</li> <li>• Knowledge base articles (total and per status)</li> <li>• Customer service cases (total and per status)</li> </ul> |
| Sales/Marketing Teams | <p>Details about teams and team members, sorted by Team Type (Sales or Marketing)</p> <ul style="list-style-type: none"> <li>• Team name</li> <li>• Member user ID</li> <li>• Member name</li> <li>• Member status (member or team leader)</li> <li>• Distribution sites</li> </ul>   |

| Report                 | Information Reported  |
|------------------------|---|
| Installed Workstations | <p>Details about any Maximizer workstation that has connected to the current Address Book on the current server:</p> <ul style="list-style-type: none"> <li>• Name of the Maximizer workstation machine</li> <li>• Module used to connect to the server (Administrator, Maximizer, etc.)</li> <li>• Date and time when the module connected to the server</li> <li>• Maximizer version, series, and build of the module</li> </ul> <p> This report displays on-screen rather than printing. To print the report, press Alt and Print Screen to capture the report window to the Windows clipboard, and then paste it into a word processor or graphics program.</p>  |
| Current Users          | <ul style="list-style-type: none"> <li>• Number of licenses in use</li> </ul> <p>For each user currently logged into the Address Book:</p> <ul style="list-style-type: none"> <li>• User name</li> <li>• Computer name</li> <li>• Date and time logged in</li> <li>• Maximizer module connected</li> </ul> <p>Licenses installed:</p> <ul style="list-style-type: none"> <li>• Product license number (PLN)</li> <li>• Computer name</li> <li>• Product</li> <li>• User count</li> <li>• Description</li> <li>• Total number of applied licenses</li> </ul> <p> This report displays on-screen rather than printing. To print the report, press Alt and Print Screen to capture the report window to the Windows clipboard, and then paste it into a word processor or graphics program.</p> |



# CHAPTER 14 **Troubleshooting**

## In this chapter...

- "Recreating the Maximizer\_Default User" on page 370
- "Troubleshooting Issues with Automated Campaigns" on page 372
- "Resolving Issues with Microsoft IIS" on page 374
- "Troubleshooting Web Access Sites" on page 378
- "Maximizer Email Service Log Files" on page 381

## Recreating the Maximizer\_Default User

The maximizer\_default security login is created during the initial installation of Maximizer.

The following are steps to recreate the Maximizer\_Default user if it is not in the list of security logins in SQL.

➤ ***To create the maximizer\_default security login***

- Select ***Utilities > Repair Database.***

## Windows Authentication with Maximizer and SQL Server

When Windows Authentication is specified as the means of user authentication during the installation, all new Address Books created use Windows Authentication. You can modify this setting on a per Address Book basis in the MaConfig table. You can also modify the global setting for Windows Authentication. In addition, you must change the Windows Authentication registry key in the Windows Registry on the computer where SQL Server is installed.

➤ ***To modify the Windows Authentication MaConfig setting for an Address Book***

- 1** In SQL Server Management Studio, open the MaConfig table.
- 2** For the Address Book, change the USE\_NT\_AUTHENTICATION key to Yes to use Windows Authentication and Null or No if you want to use SQL Server Authentication.

➤ ***To modify the Windows Authentication MaConfig setting globally***

- 1** In SQL Server Management Studio, open the MaConfig table.
- 2** Change the global USE\_NT\_AUTHENTICATION key to Yes to use Windows Authentication and Null or No if you want to use SQL Server Authentication.

➤ ***To modify the Windows Authentication registry key***

- 1** Click ***Start > Run.***
- 2** Type ***regedit*** and click ***OK.***
- 3** Navigate to ***HKEY\_LOCAL\_MACHINE\SOFTWARE\Maximizer Software\Maximizer\Common\Sys.***

- 4** Double-click *Windows Authentication*.
- 5** Enter *1* to use Windows Authentication, or enter *0* to use SQL Server Authentication. Click *OK*.
- 6** Close the Registry Editor.

## Troubleshooting Issues with Automated Campaigns

Use this section to troubleshoot potential issues with automated campaigns.

The following sections contain information on troubleshooting issues with automated campaigns:

- “SMTP Time-out Error” on page 372
- “Email Messages Use Wrong Character Set” on page 372
- “Campaigns Remain “In Progress” without Activity” on page 373

### SMTP Time-out Error

This issue describes SMTP time-out errors in automated campaigns.

|                          |  |
|--------------------------|--|
| <b><i>Problem</i></b>    | For some subscribers, an automated campaign fails due to Time_out, and you are sure the subscriber's email address is valid.   |
| <b><i>Symptom</i></b>    | A Time_out message displays in the notes of the affected campaign and Address Book entry.  |
| <b><i>Resolution</i></b> | Verify that the subscriber's email address is valid. If it is valid, then increase the SMTP_TIMEOUT value. You can find the SMTP_TIMEOUT value in the MaConfig table Global Settings section. The default value for SMTP_TIMEOUT is 100 (seconds). You can increase it to 500, 1000...n. |

### Email Messages Use Wrong Character Set

This issue affects email messages sent by automated campaigns using the wrong character set

|                          |  |
|--------------------------|--|
| <b><i>Problem</i></b>    | Email messages sent by Maximizer Email Service use the wrong character set, ignoring the regional settings on a user's computer.                     |
| <b><i>Symptom</i></b>    | Email messages sent by automated campaigns are illegible.  |
| <b><i>Resolution</i></b> | In Administrator, configure the Maximizer Email Service to use the correct character set. For more information, see “Configuring Email” on page 190. |



## Campaigns Remain “In Progress” without Activity

This issue is a problem with campaigns remaining “In Progress” without any activity.

|                   |  |
|-------------------|--|
| <b>Problem</b>    | If the password for EMAILUSER is not synchronized, automated campaigns do not function properly.                                     |
| <b>Symptom</b>    | A campaign's status is “In Progress” but it is inactive and does not send out emails, faxes, or print jobs.                          |
| <b>Resolution</b> | Change the EMAILUSER password to EMAILSYSTEM (which is the default), synchronize passwords, and restart the Maximizer Email Service. |

### ➤ *To change the EMAILUSER password*

- 1** In Administrator, select **File > Manage Users**.
- 2** Select **EMAILUSER**, and click **Password**.
- 3** Type **EMAILSYSTEM** in the **New Password** and **Confirm Password** fields, and click **OK**.

Maximizer prompts you to apply the new password across all databases.

- 4** Click **Yes** to synchronize passwords.

### ➤ *To restart the Maximizer Email*

- 1** Select **Start > Programs > Administrative Tools > Services** to open the Services window.
- 2** Double-click **Maximizer Email Service**.
- 3** Click **Stop**.
- 4** Click **Start** to restart the service.
- 5** Click **OK**.

## Resolving Issues with Microsoft IIS

The following sections contain information on troubleshooting potential issues with Microsoft IIS:

- “Configuring Maximizer Web Access on a 64-bit Operating System” on page 374
- “Using Microsoft IIS on Windows 2003 Server” on page 374
- “Maximizer Components for IIS and Windows 2008 Server” on page 376

### Configuring Maximizer Web Access on a 64-bit Operating System

This issue affects computers running Maximizer Web Access on a 64-bit Operating System.

|                          |  |
|--------------------------|--|
| <b><i>Problem</i></b>    | Maximizer Web Access requires the 32-bit version of ASP.NET 4.0 in order to run on a 64-bit operating system.  |
| <b><i>Symptoms</i></b>   | Maximizer Web Access does not work when installed on a 64-bit operating system.  |
| <b><i>Resolution</i></b> | Enable the 32-bit version of IIS on the machine that Maximizer Web Access is installed on. For more information, see “Microsoft IIS on 64-Bit Operating Systems” on page 21. |

### Using Microsoft IIS on Windows 2003 Server

This issue affects campaign merge fields and direct insert web forms on computers running Microsoft IIS on Windows 2003 Server.

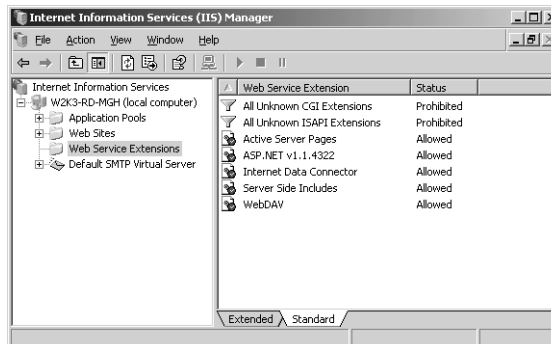
|                          |  |
|--------------------------|--|
| <b><i>Problem</i></b>    | ASP.NET v4.0 web service extension is not enabled in IIS running on Windows 2003 Server.   |
| <b><i>Symptoms</i></b>   | campaign tracking merge fields (Campaign Open Email Tracking URL, Campaign Redirect URL, and Campaign Remove Subscriber URL) do not function. Direct insert web forms do not function. |
| <b><i>Resolution</i></b> | Install and enable the ASP.NET v4.0 web service extension.   |

➤ **To create a web service extension**

- 1** Open the Internet Services Manager (*Control Panel > Administrative Tools*).
- 2** Select the *Web Services Extensions* folder.
- 3** In the *Extended* tab, select the *Add a New Web Service Extension* option.
- 4** Enter the name of the extension.
- 5** Browse to the location of the file and select the file.
- 6** Select the *Set Extension Status to Allowed* option and click *OK*.

If you are adding a web service extension for a web form, enter the name of the folder where the web form is stored as the name of the extension and select the winqcgi.exe file stored in the web form folder.

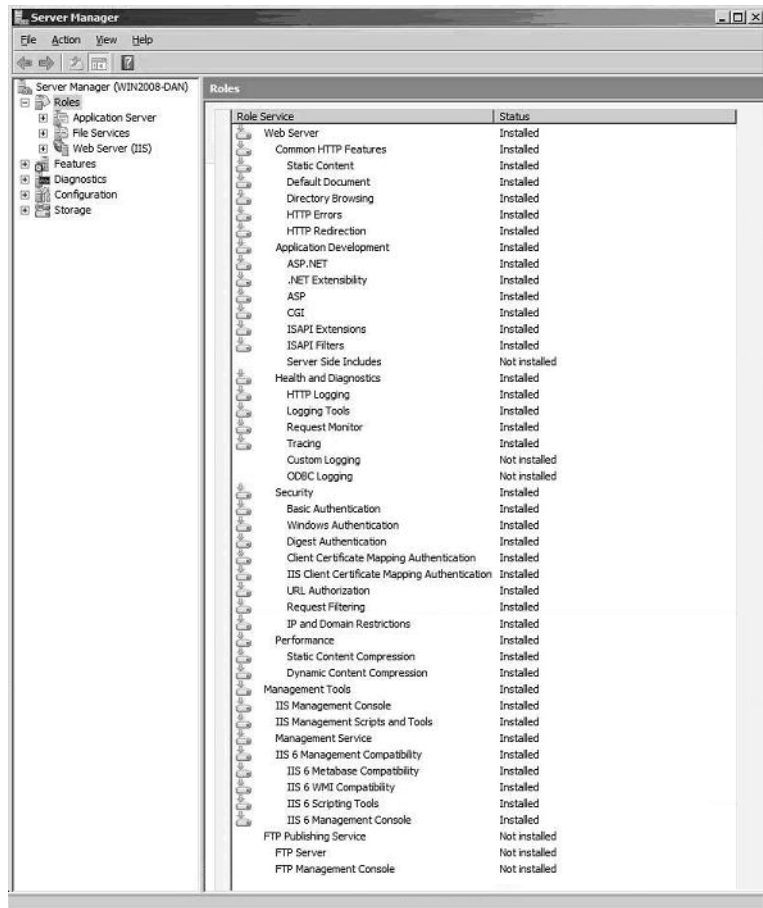
When web service extensions are enabled, their status is "Allowed".



## Maximizer Components for IIS and Windows 2008 Server

If you are using Windows 2008 Server, you may need to perform additional steps before installing Maximizer components for IIS. For more information, see “Microsoft IIS on Windows Server 2008” on page 19.

If you continue to have problems, you may need to install additional roles for Web Server (IIS). The roles should match the default settings.



## Resolving Problems with MaxSync

This issue affects group appointments synchronized from Maximizer to Microsoft Exchange using MaxSync for Microsoft Exchange.

|                          |  |
|--------------------------|--|
| <b><i>Problem</i></b>    | The Microsoft Exchange user name that has been mapped to the Maximizer user can be resolved on the Microsoft Exchange Server to more than one Microsoft Exchange account.  |
| <b><i>Symptom</i></b>    | After creating a group appointment in Maximizer and synchronization to Microsoft Exchange is complete, the appointment in Microsoft Exchange does not show all the recipients of the appointment. The missing recipients do have a copy of the appointment.  |
| <b><i>Resolution</i></b> | Any other accounts on the Microsoft Exchange Server that could be resolved to by the name of the desired account need to be updated to become more unique. The goal of this is to allow the correct account to be the only account the name could be resolved to. Please see the Microsoft Exchange documentation on how to accomplish this. |

## Troubleshooting Web Access Sites

The following sections contain information on troubleshooting potential issues with web access sites:

- “Maximizer Web Access Templates” on page 378
- “User-Defined Field Visibility” on page 378
- “Site Tree Control” on page 379
- “Blocked Files in Maximizer Web Access” on page 380

### Maximizer Web Access Templates

When the Sites (File > Web Access) dialog box is opened in Administrator (File > Web Access), a “master list” of templates is compared with the template list stored for the Address Book. If any of the templates differ, you are prompted to overwrite the Address Book templates with the master templates. If you have customized any of the templates used for Maximizer Web Access, you may wish to keep a backup copy or mark the templates as read-only so the files are not inadvertently overwritten.

The “master list” of templates is the list of files stored under:

\MxServer\Thinclients on the Maximizer application server

The list of templates available for publishing for an Address Book is stored under:

\MxData\<Address Book Name>\Html on the application server

If you have problems with an Address Book's site templates, delete the “Html” folder under MxData and open the Sites dialog box in Administrator—the Address Book's templates folder. The template files then regenerate from the master template list. Other files in the folder—such as the online site Help files—are also regenerated.

### User-Defined Field Visibility

Visibility of user-defined fields for Web visitors (external web access users) is based on what WEBUSER has security rights to view. To allow external visibility for a user-defined field, ensure WEBUSER has access to the field; if the user-defined fields belongs to a group, WEBUSER must be part of that group.

## Site Tree Control

This issue affects the tree view control in web access sites.

|                   |  |
|-------------------|--|
| <b>Problem</b>    | The sites use the Microsoft Internet Explorer TreeView WebControl to display tree structures. Maximizer CRM Server installs the graphical components of this tree control in the C:\INETPUB\wwwroot folder in a subfolder called webctrl_client. Since C:\INETPUB\wwwroot is the default location of the Internet Information Services (IIS) root folder, the control is assumed to be available from the root. However, if the location of the root folder (Default Web Site or other web site to which you may have moved the sites) has been changed, the graphical components of this control are no longer available and the control displays as simple text. |
| <b>Symptom</b>    | The tree view control in Maximizer Web Access, Partner Access, and Customer Access may display External Links, UDFs when in tree mode, and Company Library data as long strings of text rather than the expected graphical tree structure representation. No interaction is available.   |
| <b>Resolution</b> | To correct this issue, copy the C:\INETPUB\wwwroot\webctrl_client folder, and all its contents, to the new root folder designated as the Local Path of the new root under Properties for the Default Web Site in the IIS Manager. Detailed steps for this procedure are provided below.  |

### ► To resolve the site tree control display issue

- 1** Open the IIS Manager.
- 2** Right-click on the **Default Web Site**, or other web site to which you may have moved the sites, and click **Properties**.
- 3** Click the **Home Directory** tab.
- 4** Take note of the path in the Local Path field. This is the folder that you will copy the C:\INETPUB\wwwroot\webctrl\_client folder and its contents to.
- 5** Close the Default Web Site Properties dialog box.
- 6** Open Windows Explorer.

**7** Copy the *C:\INETPUB\wwwroot\webctrl\_client* folder and its contents to the Local Path identified in step 4 above.

The site tree structures should now display correctly.

## Blocked Files in Maximizer Web Access

This issue affects users after first logging in to Maximizer Web Access.

|                          |   |
|--------------------------|---|
| <b><i>Problem</i></b>    | The web server configuration includes a firewall or other software that is blocking the MaThinIEActiveX.ocx file.   |
| <b><i>Symptom</i></b>    | When a user logs in to Maximizer Web Access, the web browser displays a message that the MaThinIEActiveX.ocx file is blocked.                                 |
| <b><i>Resolution</i></b> | Configure the firewall to allow this file to be downloaded from the server. For more information, see “ActiveX Controls in Maximizer Web Access” on page 237. |




# Maximizer Email Service Log Files

The Maximizer Email Service log files store the following codes:


- 1 = Initialization or database connection problem
- 2 = Not used
- 3 = Exception (other error code)

Samples and explanations of both Maximizer Email Service log files are included below. For more information on log files, see “Using Log Files for Diagnosis” on page 364.

## Sample CMGR-Email\_yyyymmdd.log File

 Line numbers are not written into an actual log and are provided here for convenience.

```
17:50:14  ===== OPENING LOG =====
CURRENT DATE:2010/05/16
1. 17:50:14 INFO [Line 1506] [ini]
COMMON_SERVER_SETTING =
2. 17:50:14 INFO [Line 1516] [ini] COMMON_Address
BookS = Escona
3. 17:50:14 INFO [Line 1534] [***] current Address
Book = Escona
4. 17:50:14 INFO [Line 1552] [ini] AUTO_EMAIL_RUN = 1
5. 17:50:14 INFO [Line 1570] [ini] DB_NAME = Escona
6. 17:50:14 INFO [Line 1579] [ini] DB_SERVER =
Servername
7. 17:50:14 INFO [Line 1588] [ini] SERVICE_USERID =
EMAILUSER
8. 17:50:14 INFO [Line 1607] [ini] SERVICE_Address
Book_PATH = DSN:MAP_ESCONA
9. 17:50:14 INFO [Line 1637] [ini]
AUTO_EMAIL_TEMPLATES = C:\Program
Files\Maximizer\ServerShared\Email Templates\
10. 17:50:14 INFO [Line 1646] [ini]
AUTO_EMAIL_SMTP_SERVER = mail.maximizer.com
11. 17:50:15 WARNING [Line 512] email to
'devsupport@maximizer.com' failed (Reason: Load template
'.etf' failed)
12. 17:50:17 WARNING [Line 396] 0 email messages were
sent successfully, 1 email messages failed
17:50:17  ===== CLOSING LOG =====
```


 The test environment that produced this log had an invalid path for the email template directory, resulting in a detailed error in line 11.

## Description of Sample CMGR-Email\_yyyymmdd.log File

The following table describes some of the numbered lines from the previous example.

| Line # | Description   |
|--------|---|
| 1      | Confirmation as to whether the Common Server setting parameter is enabled in the MaConfig table.<br>NOTE: This setting controls whether passwords are encrypted or not encrypted. |
| 2      | A list of all of the Maximizer Address Books—read from the MaConfig table.  |
| 3      | The current Address Book that the service is using.   |
| 4      | Whether the Email Service is active or not.<br>1 = active; 0 = inactive   |
| 5      | The name of the database that the service is accessing.   |
| 6      | The name of the server that hosts the database; a generic name of servername is listed for demonstration purposes only.   |
| 7      | The name of the server account that will be used to log in to the database.   |
| 9      | The location of the email templates directory.  |
| 10     | The name of the SMTP Server that the service will send email through.   |
| 11     | Explanation why the email failed.   |
| 12     | Count of successful and unsuccessful emails sent.   |


## Sample CMGR-Service\_yyyymmdd.log File

 Line numbers are not written into an actual log and are provided here for convenience.

CURRENT DATE:2010/05/16

1. 17:49:12 INFO [Line 64] email service started
2. 17:49:12 INFO [Line 402] [ini]  
AUTO\_EMAIL\_CYCLE\_TIME = 1
3. 17:49:12 INFO [Line 410] [ini]  
AUTO\_EMAIL\_TIME\_UNIT = 0
4. 17:50:13 INFO [Line 402] [ini]  
AUTO\_EMAIL\_CYCLE\_TIME = 1
5. 17:50:13 INFO [Line 410] [ini]  
AUTO\_EMAIL\_TIME\_UNIT = 0
6. 17:50:17 INFO [Line 256] email service finished  
cycle with error code 2

 The error code #2 in line 6 identifies a problem locating the email template.

 The warning in line 7 confirms that the email message was not sent.

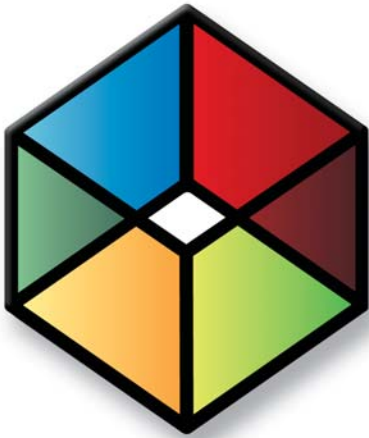
7. 17:50:17 WARNING [Line 396] 0 email messages were sent successfully, 1 email messages failed

## Description of the Sample CMGR-Service\_yyyymmdd.log File

The following table describes some of the numbered lines from the previous example. Due to the error in the configuration as stated above, the send attempt failed.

| Line # | Description  |
|--------|--|
| 1      | Launching of the send application.                       |
| 2      | The setting for the email send cycle; stated in minutes. |
| 6      | The status of the last send attempt.                     |
| 7      | Count of successful and unsuccessful emails sent.        |





# APPENDIX **Glossary** 15

## In this chapter...

"Maximizer and Administrator Terminology" on page 386

"MaxExchange Terminology" on page 392

## Maximizer and Administrator Terminology

**.NET** – See Microsoft .NET Framework.

**access rights** – Security settings for users. Access rights control each user's permissions to read, insert, modify, or delete various types of Maximizer entries. They also control general Maximizer privileges, user roles, and allowed printing destinations. Access rights determined by the user's access settings and the access settings of any security groups the user belongs to. For more information about access rights, refer to "User and Group Security" on page 92.

**access settings** – There are two types of access settings: user access settings and group access settings. Combined user and group access settings determine a user's access rights. For more information about access settings, refer to "User and Group Security" on page 92.

**Address Book** – A Maximizer database.

**Address Book entry** – A Company, Individual, or Contact in the Maximizer Address Book.

**Administrator** – A Maximizer module in which the Address Book administrator can perform configuration and maintenance of the Maximizer system and Address Books.

**advanced import** – Importing an MXI or XML file into an Address Book. For more information about advanced import, refer to "Importing Address Book Data from MXI or XML Files" on page 336.

**Application Server** – See Maximizer Application Server.

**automated campaign** – A series of automated emails, faxes, or printed documents that Maximizer sends on a predefined schedule. An automated campaign is based on an automated campaign template.

**automated services** – Maximizer Email Service. Used for automated campaigns, customer service case email notifications, and appointment reminders by email.

**Calendar** – A Maximizer window where you can manage your appointments.

**Campaign Manager Statistics** – A Maximizer component that tracks the number of emails opened by the recipients, the number of recipients who clicked web links within the email, and the number of recipients who chose to unsubscribe from future campaigns.

**campaign template** – A pre-defined strategy used by email and traditional marketing campaigns. See automated campaign and traditional campaign.

**catalog** – A product listing created using OrderDesk. You build your catalog by adding sections and catalog items, and publish the catalog on your web server.

**Company** – An Address Book entry used to record information for a company or organization.

**Company Library** – A shared library of company literature.

**COMPANY user** – A Maximizer system user account used for the company calendar to display company events in the Maximizer calendar.

**Contact** – An Address Book entry used to record information for an individual person associated with a Company or Individual type of Address Book entry.

**Controlling window** – A main Maximizer window, such as the Address Book window, that determines what tabbed following windows are displayed. The contents of the following window depend on which entry is selected in the main controlling window.

**Crystal Reports** – A tool for creating reports. Crystal reports are available for viewing and generation through the Reports menu in Maximizer.

**Customization Suite** – A Maximizer add-on enabling you to customize Maximizer's functionality and interface and to integrate it with other applications. For more information, refer to the Maximizer web site.

**Dashboards** – Component of Maximizer Web Access that display real-time information on your company using dashboard-style instrumentation.

**default entry** – An Address Book entry containing field values that are propagated to new Address Book entries by default.

**demilitarized zone (DMZ)** – A network area between the external router, which talks to the Internet, and the corporate firewall, which protects internal computers from Internet security breaches

**DSN** – A Data Source Name providing connectivity to a database through an ODBC driver.

**EMAILUSER** – A Maximizer system user account that gives Maximizer access to Address Book data when it performs automated email activities such as automated campaigns. It is also used by MaxSync for Microsoft Exchange.

**Escona Tutorial** – The Escona Tutorial Address Book is a sample Address Book included with a typical installation of Maximizer. Using the example of a fictitious vintner in the Sonoma Valley, this Address Book demonstrates many of Maximizer's possibilities.

**event notification** – Automatic email notification and logging when specific Maximizer and MaxExchange events occur. For more information, refer to "Enabling Event Notification" on page 164.

**Following window** – A tabbed sub-window of a controlling window. The contents of the following window depend on which entry is selected in the main controlling window. For example, the

Contacts window displays only those Contacts that belong to the selected entry in the Address Book window.

**global Address Book** – A shared Address Book residing on the server. When creating a global Address Book, it is recommended that you create the new Address Book on the Maximizer Server. If you create a new global Address Book from the workstation, you must have administrative rights to the server.

**Global Edit** – A Maximizer operation that enables you to apply the same change to multiple Maximizer entries simultaneously.

**group** – See security group.

**Holiday Editor** – A tool in Administrator for adding holidays to the Maximizer Calendar window.

**Hotlist** – A window in Maximizer used to display tasks and appointments in a specific date range.

**IIS** – See Microsoft Internet Information Server.

**IP address** – A number used to uniquely identify a specific computer on the Internet. Every Internet-connected computer has an IP address. In Maximizer, you use the IIS server's IP address when you preview or publish your online catalog.

**Java servlet engine** – A Java-based portion of the Payment Gateway Module that is used for online transaction processing.

**Key Fields** – Important user-defined fields that are highlighted on the Basic Information tab of Maximizer entries. For more information, refer to "Creating Key Fields Lists" on page 151.

**Knowledge base** – A database containing articles pertaining to solutions for customer service and/or technical issues.

**lead** – An Address Book entry (Company, Individual, or Contact) that has been flagged as a potential client or customer.

**list** – A listing of entries in Maximizer. You can create a list using a search or by selecting specific entries and reducing the list to the selection. Most activities are performed for the current list or the current entry.

**load balancing** – When a web server is running at capacity, new connections are to another web server for processing.

**local Address Book** – An Address Book residing on the local workstation.

**Macromedia JRun Java Servlet Engine** – A Java servlet engine used for online transaction processing. JRun is only one possible Java servlet engine that you may use.

**mandatory field** – Fields in Maximizer entries that must contain a value. Mandatory fields are designated through File > Preferences > Mandatory Fields in Administrator.



***mandatory user-defined field*** – User-defined fields in Maximizer entries that must contain a value. Mandatory user-defined fields are designated through File > Set Up User-Defined Fields in Administrator or Maximizer.

***marketing team*** – A group of users to support team-based work on marketing campaigns in Maximizer.

***MASTER user*** – The Address Book administrator's user ID. This user ID permits access to Administrator.

***MaxAlarm*** – A Maximizer companion application that automatically monitors appointments for one or more people in any number of Address Books and notifies them of appointments.

***MaxExchange*** – A Maximizer program used to synchronize an Address Book between a central server and remote distribution sites via FTP, email, or a direct network connection.

***MaxExchange Site Manager*** – A utility for creating and managing sales and marketing teams. MaxExchange Site Manager is accessed through Administrator.

***Maximizer*** – A Maximizer CRM module in which you can perform contact management and sales force automation activities.

***Maximizer Application Server*** – The principal Windows Server where Maximizer CRM Server is installed.

***Maximizer Email Service*** – A Maximizer automated service that provides automated email campaign activities, customer service case email notifications, and appointment reminders by email.

***Maximizer XML Interface (MXI)*** – An XML file format for importing entries into a Maximizer Address Book.

***MDAC*** – Microsoft Data Access Components. Provides ActiveX Data Objects (ADO), OLE DB, and Open Database Connectivity (ODBC) components for Maximizer to integrate information from multiple sources.

***merge field*** – Text inserted into a document or template that is replaced by Address Book information during a mail merge. For example, a merge field can be a Contact's name, so you can customize a letter's salutation with the recipient's name.

***Microsoft .NET Framework*** – A Microsoft operating system platform required for MaxExchange Synchronization Server, Maximizer Web Access, and Maximizer Campaign Manager Statistics.

***MaxSync for Microsoft Exchange*** – A Maximizer add-on for synchronizing some Maximizer entries, such as Address Book entries, between Maximizer and a Microsoft Exchange Server.

***Microsoft Internet Information Server (IIS)*** – Microsoft web server software. Internet Information Server, or IIS, is used for many of the Maximizer components.

**Microsoft SQL Server** – A database server used by Maximizer for the Address Book data.

**Microsoft Systems Management Server (SMS)** – A set of tools from Microsoft for managing computers in a local area network (LAN). Maximizer supports automated remote installation using SMS.

**MXI** – See Maximizer XML Interface.

**note** – A text document attached to Address Book entries, Contacts, opportunities, and campaigns.

**OLE** – Object linking and embedding (OLE) is a technology that allows you to insert files, portions of files, and links to files into a document or application. You can insert files in the Documents window and the Company Library. Double-clicking the file opens it in the associated (and installed) application.

**opportunity** – An entry in Maximizer used to record an opportunity to make a sale. Opportunities can organize a sales team using a structured sales strategy.

**OrderDesk** – A window in Maximizer used to manage orders and inquiries from your online catalog.

**Outlook Synchronization** – A Maximizer feature for synchronizing some Maximizer entries, such as Address Book entries, between Maximizer and a Microsoft Outlook.

**PLN** – Product License Number. A Maximizer license. For more information, refer to “Installing Licenses” on page 64.

**preferences** – A collection of program options that allow users to customize how Maximizer functions. Some preferences are set in Administrator

**PSN** – Product Serial Number. Entered during product installation.  
registry key – Configuration information stored in the Windows operating system.

**related entries** – An entry that records a relationship between two Address Book entries. For example, one Address Book entry might be an accountant for another Address Book entry, which could be recorded as a related entry in Maximizer.

**sales team** – A group of users to support team-based work on sales opportunities in Maximizer.

**sites** – Web-based interfaces (Maximizer Web Access) for Maximizer Address Books. This includes Maximizer Web Access, Customer Access, Partner Access, and Mobile Access.

**script file** – A file containing commands that can be executed without user interaction.

**security group** – A set of access settings for a subset of Maximizer users. For more information, refer to “User and Group Security” on page 92.

**SMS** – See Microsoft Systems Management Server.

**SMTP** – An SMTP server is a server used for outgoing Internet email.

**SQL** – See Microsoft SQL Server.

**strategy** – A structured, team-based approach to pursuing sales opportunities. Strategies define the steps, activities, and roles involved in successfully completing a sale.

**system field** – All Maximizer fields that are not user-defined fields are system fields. A few system fields have customizable value-selection lists, which can be defined through File > Preferences > System Fields in Administrator.

**system-defined field** – User-defined fields created by Maximizer rather than by users. Users can modify some properties of these fields but cannot delete them. In the Set Up User-Defined Fields dialog box, system-defined fields are displayed in bold.

**TAPI** – Telephony Application Programming Interface. An interface that can connect to telephone services from Maximizer.

**team** – See sales team or marketing team.

**template** – A file that outlines the design for a document, email, or web page. Maximizer uses templates for word processor documents, and for automated activities that belong to automated campaigns. Templates can contain merge fields for bulk mailings. Also, see campaign template.

**thin-client applications** – Allow you to remotely access Maximizer Address Book data using the web. “Maximizer on the Web” consists of Maximizer Web Access, Mobile Access, Partner Access, and Customer Access.

**traditional campaign** – Used to organize a marketing effort, including a marketing team’s steps, activities, and roles.

**two-tier import** – A procedure for importing Address Book entries where Companies are imported first followed by Contacts.

**UDF** – See user-defined field.

**UNC** – Universal Naming Convention. A kind of network path used to locate files and folders. An example of a UNC path is “\\Esconal\MxServer\”.

**user ID** – A name that uniquely identifies a Maximizer user. Users must enter their user ID and password to gain access to a Maximizer Address Book.

**user-defined field** – A custom field used to record additional “user-defined” information for Address Book entries, opportunities, campaigns, and users.

**virtual directory** – An IIS folder that points to a physical folder on the computer. The contents of the physical folder that the virtual directory refers to is accessible to the Internet or intranet via the IIS server.

***web access*** – Web access allows you to remotely access Maximizer Address Book data using the web. “Maximizer on the Web” consists of Maximizer Web Access, Mobile Access, Partner Access, and Customer Access.

***web.config*** – A configuration file for .NET applications. Each of the applications has its own web.config file.

***WEBUSER*** – A Maximizer system user account required for Customer Access and Partner Access.

***workflow automation*** – A tool that monitors your business systems and automatically assigns the appropriate people to take action.

***XML*** – Extensible Markup Language. A file format that can be displayed is XML-enabled web browsers.

## MaxExchange Terminology

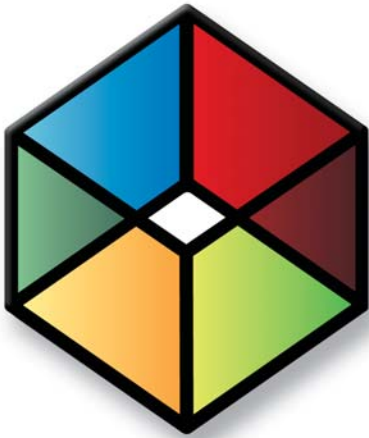
For more information about MaxExchange, refer to the *MaxExchange Administrator's Guide*.

***MaxExchange Distribution*** – A Maximizer system-defined field for defining MaxExchange distribution groups.

***MaxExchange*** – A Maximizer program used to synchronize an Address Book between a central server and remote distribution sites via FTP, email, or a direct network connection.

***Maximizer Remote Workstation (MaxExchange Remote)*** – A computer that has the Maximizer client components installed and connects to the Maximizer Application Server.

***MaxExchange Site Manager*** – A utility for creating and managing sales and marketing teams. MaxExchange Site Manager is accessible through Administrator.



# APPENDIX A **Administrator's Reference**

## In this chapter...

- "MaConfig Table (Server and Address Book Configuration)" on page 394
- "Maximizer File Types" on page 405
- "Virtual Directories" on page 406
- "Database Views for User-Defined Fields" on page 408
- "Maximizer XML Interface (MXI)" on page 164
- "Search String Language" on page 428

## MaConfig Table (Server and Address Book Configuration)

Maximizer uses a special SQL database called MaConfig to store the settings for the Address Books, global settings, and some IIS settings. During a Workstation installation, the Maximizer Workstation Setup program reads from the server's MaConfig table in the MaConfig database to obtain the correct registry settings for the workstation.

The following sections contain information on the MaConfig table:

- "Editing the MaConfig Settings" on page 394
- "Four-letter Module Codes" on page 394
- "MaConfig Table: Entries and their Meanings" on page 164

### Editing the MaConfig Settings

If you need to edit the MaConfig table directly, you can access it through Microsoft SQL Enterprise Manager.

➤ *To edit the Maximizer configuration settings in the MaConfig table using Microsoft SQL Enterprise Manager*

- 1 Open Microsoft SQL Enterprise Manager.
- 2 Browse to the SQL Server, and select the **MaConfig** database.
- 3 Under **Tables** locate and select the **MaConfig** table.
- 4 Right-click the table, and select **Open Table > Return All Rows**.  
Enterprise Manager displays the entire MaConfig table.
- 5 Edit the entries as needed, and close the table.

### Four-letter Module Codes

[Entries in the MaConfig table often contain a four-letter code to identify which component uses that particular entry.](#)

| Code | Module                       |
|------|------------------------------|
| ADMN | Administrator                |
| AMGR | Maximizer                    |
| AUTO | Maximizer Automated Services |
| CMGR | Campaign Manager             |
| DSGN | Portals (not used)           |

| Code | Module                             |
|------|------------------------------------|
| EMPP | Maximizer Web Access               |
| EXTP | Partner Access and Customer Access |
| EXCH | MaxExchange                        |

## MaConfig Table: Entries and their Meanings

The MaConfig table contains information about a set of Maximizer Address Books. The MaConfig table is stored in the MaConfig database in SQL Server. Some of the entries in the table may not apply depending on the edition of Maximizer you are using.

The following tables describe the keys in the MaConfig table.

**Table 1** Address Book Configuration Settings in the MaConfig Table

| Section        | Key                    | Value  |
|----------------|------------------------|--|
| <Address Book> | AUTO_EMAIL_TEMPLATES   | Path to the automated campaign email template files (*.etf).   |
| <Address Book> | DASHBOARD_DISABLED     | Determines if dashboards are disabled for the current Address Book:<br>yes = Dashboards are disabled<br>This key is not included by default in the MaConfig table. You must manually add a new entry to the table with this key for the specific Address Book. |
| <Address Book> | Dashboard_URL          | URL of dashboards.   |
| <Address Book> | DB_NAME                | Actual name of the Maximizer database. It can be different from display name.  |
| <Address Book> | DB_SERVER              | Network machine name of the computer that hosts the Maximizer configuration table (MaConfig table).  |
| <Address Book> | DB_SYS_TYPE            | Type of database used for the Maximizer Address Book.  |
| <Address Book> | DB_USERFRIENDLY_NAME   | Display name of Maximizer database in Address Book list.   |
| <Address Book> | DSGN_ISAPI_CUSTOMER    | URL of Customer Access.  |
| <Address Book> | DSGN_ISAPI_PARTNER     | URL of Partner Access.   |
| <Address Book> | DSGN_SSL_ISAPI         |  |
| <Address Book> | EADV_MASRCH_FILE       |  |
| <Address Book> | EADV_MASRCH_Update_URL |  |

**Table 1** *Address Book Configuration Settings in the MaConfig Table*

| Section        | Key                        | Value  |
|----------------|----------------------------|--|
| <Address Book> | HTML_TEMPLATES_PATH        | Path of the root HTML folder on the Maximizer Application Server.<br>(Maximizer\Address Books\<AddressBook>\Html).   |
| <Address Book> | HTML_TEMPLATES_URL         |  |
| <Address Book> | IN_MEMORY_RESPONSE_TABLE   |  |
| <Address Book> | LIST_LIMIT                 | Controls the maximum value of the Maximum entries field in the Search dialog boxes that can be carried forward to the next session. The value of the Maximum entries field in any of the Search dialog boxes will always be less than or equal to the LIST_LIMIT value the next time the Search dialog box is opened. If the user selects a value less than LIST_LIMIT, that value will be selected automatically the next time they open the dialog box. If the user selects a value greater than LIST_LIMIT, the value will be reset to LIST_LIMIT the next time they open the dialog box. This control helps avoid overloading the SQL server. By default, the value of LIST_LIMIT is 1000. Setting LIST_LIMIT to 0 allows the "All" option to be saved for the next session. |
| <Address Book> | Refresh ISAPI Details      |  |
| <Address Book> | RPTR_START_FINANCIAL_DAY   | Day of the month (specified in "RPTR_START_FINANCIAL_MONTH") in which the fiscal year begins.  |
| <Address Book> | RPTR_START_FINANCIAL_MONTH | Month (i.e., 1–12) in which the fiscal year begins.  |
| <Address Book> | SERVICE_CMGR_PASSWORD      | Default email service password for automated campaigns (emailsystem).  |
| <Address Book> | SERVICE_CMGR_USERID        | Default User ID for email service login user. (EMAILUSER).   |
| <Address Book> | SERVICE_DSGN_PASSWORD      | Default WEBUSER password. (websystem).   |
| <Address Book> | SERVICE_DSGN_USERID        | Default User ID for ISAPI login user. (WEBUSER).   |
| <Address Book> | SERVICE_PASSWORD           |  |
| <Address Book> | SERVICE_SMTP_SERVER        |  |
| <Address Book> | SERVICE_USERID             |  |



**Table 1 Address Book Configuration Settings in the MaConfig Table**

| Section        | Key                    | Value                    |
|----------------|------------------------|--------------------------|
| <Address Book> | SERVICE_WORKSPACE_PATH | DSN of the Address Book. |
| <Address Book> | PUBLISHED_PROJECTS     |                          |

**Table 2 Global Address Book Server Configuration Settings in the MaConfig Table**

| Section         | Key                          | Value   |
|-----------------|------------------------------|---|
| Global Settings | AcntQB                       |   |
| Global Settings | AcntQB0                      |   |
| Global Settings | AcntQBDesc0                  |   |
| Global Settings | AUTO_EMAIL_BATCH_CYCLE       |   |
| Global Settings | AUTO_EMAIL_BATCH_SIZE        | Number of emails sent in the specified interval of time for the batch.  |
| Global Settings | AUTO_EMAIL_CYCLE_TIME        | Number of polls in the time unit specified under "AUTO_EMAIL_TIME_UNIT" in which the SQL Server is checked for outgoing automated emails. |
| Global Settings | AUTO_EMAIL_JOB_PER_THREAD    | Length of prepared messages sent to queue per thread. The default is 20.  |
| Global Settings | AUTO_EMAIL_REDIRECT_URL_BASE | Specifies the URL of the script that redirects the email recipients to the Landing page URL in automated email campaign activities.       |
| Global Settings | AUTO_EMAIL_REQUIRES_AUTH     | Specifies if SMTP server requires authentication:<br>0 = Authentication not required<br>1 = Authentication required                       |
| Global Settings | AUTO_EMAIL_SERVICE           | Default server that hosts the Email Service.  |
| Global Settings | AUTO_EMAIL_SMTP_PORT         | Port number of the SMTP server. The default is 25.  |
| Global Settings | AUTO_EMAIL_THREAD_COUNT      | Number of email threads. This value cannot be higher than 31 and the default is 20.   |
| Global Settings | AUTO_EMAIL_TIME_UNIT         | Time unit used for AUTO_EMAIL_CYCLE_TIME:<br>0 = Minutes<br>1 = Hours<br>2 = Days<br>3 = Months   |
| Global Settings | AUTO_PRINTFAX_BATCH_CYCLE    |   |
| Global Settings | AUTO_PRINTFAX_BATCH_SIZE     | Number of print jobs for each batch.  |

**Table 2**    *Global Address Book Server Configuration Settings in the MaConfig Table*

| Section         | Key                       | Value  |
|-----------------|---------------------------|--|
| Global Settings | AUTO_PRINTFAX_CYCLE_TIME  | Number of polls in the time unit specified in AUTO_PRINTFAX_TIME_UNIT, in which the SQL Server is checked for outgoing automated print jobs and faxes.   |
| Global Settings | AUTO_PRINTFAX_TIME_UNIT   | Time unit used for AUTO_PRINTFAX_CYCLE_TIME:<br>0 = Minutes<br>1 = Hours<br>2 = Days<br>3 = Months   |
| Global Settings | BTI_PATH                  | Defines the UNC location of the "Maximizer\Address Books" folder on the Maximizer Main Server. The "Address Books" folder is usually shared as "EAddress Books", so that in a typical installation the UNC path would be "\\<servername>\ EAddress Books".   |
| Global Settings | CAMPAIGN_PRINTFAX_DEVICES | List of printers and fax software used by the Maximizer Print/Fax Service.   |
| Global Settings | COMMON_WORKSPACES         | Defines the Maximizer Address Books that are to appear in the Address Books list when you open an Address Book. The Address Book names should be separated by a comma, as in "COMMON_ Address Books=Address Book1,Address Book2,Address Book3". Each Address Book listed here should have a corresponding section in the MaConfig table. For example "Address Book1" would have a "[Address Book1]" section. |
| Global Settings | Dashboard_URL             | URL of dashboards.   |
| Global Settings | DB_SERVER                 | Name of database server.   |
| Global Settings | DB_SYS_TYPE               | Type of database (SQL).  |
| Global Settings | EMPLOYEE_PORTAL_URL       | URL of Maximizer Web Access.   |
| Global Settings | ENCRYPTION_TYPE           | Type of encryption:<br>0 = Standard<br>1 = No encryption<br>2 = BLOWFISH40   |
| Global Settings | IIS                       | Name of the IIS Server.  |
| Global Settings | IIS External Server       | Network machine name of the IIS Server that you have set up for external Internet access.  |

**Table 2**    *Global Address Book Server Configuration Settings in the MaConfig Table*

| Section         | Key                             | Value   |
|-----------------|---------------------------------|---|
| Global Settings | IIS Internal Server             | Network machine name of the IIS Server that you have set up for internal access.  |
| Global Settings | Install Path                    | Local path of the Maximizer program folder on the Maximizer Application Server.   |
| Global Settings | License_MAXIMIZER               | Number of installed Maximizer PLNs (Product License Numbers).   |
| Global Settings | License_MAXIMIZER_DESC <i>n</i> | Description of <i>n</i> th Maximizer PLN.   |
| Global Settings | License_MAXIMIZER <i>n</i>      | <i>n</i> th Maximizer PLN.  |
| Global Settings | License_PORTAL                  | Number of installed Web Access Site PLNs (Product License Numbers).   |
| Global Settings | License_PORTAL_DESC <i>n</i>    | Description of <i>n</i> th Web Access Site PLN.   |
| Global Settings | License_PORTAL <i>n</i>         | <i>n</i> th Web Access Site PLN.  |
| Global Settings | Maximizer Server                | Network machine name of the Maximizer Server.   |
| Global Settings | Maximizer Server Setup          | Maximizer series number installed on the Maximizer Application Server. This value is set by the installation program.   |
| Global Settings | NONTESTED_COLLATION_LIST        |   |
| Global Settings | ONETOONE_REQUIRES_AUTH          |   |
| Global Settings | ONETOONE_SMTP_SERVER            |   |
| Global Settings | ONETOONE_SMTP_SERVER_PORT       |   |
| Global Settings | Server Path UNC                 | Refers to the UNC path of the "Maximizer\ServerShared" folder. The "ServerShared" folder is shared as "MaximizerServer" during a Maximizer installation. For example, a typical installation would have the entry "Server Path UNC=\\<servername>\MaximizerServer". |
| Global Settings | SMTP Server                     | Specifies the name of the outgoing mail server used for automated campaigns.  |
| Global Settings | SMTP_TIMEOUT                    | Duration that the email service waits for the SMTP server's response for each email. The unit of measurement is in seconds.   |
| Global Settings | SQL_SERVER                      |   |
| Global Settings | <IIS Server>_Domain Name        | HTTP server name.   |
| Global Settings | TESTED_COLLATION_LIST           | Comma-delimited list of SQL database collations supported by Maximizer.   |

**Table 2** *Global Address Book Server Configuration Settings in the MaConfig Table*

| Section         | Key                       | Value   |
|-----------------|---------------------------|---|
| Global Settings | Thin_Clients_Installation |   |
| Global Settings | USE_UNIFIED_LOGIN         | “Trusted Connection” login security:<br>0 = Disabled<br>1 = Enabled   |
| Global Settings | AUTO_TRANSLATE            | This key must be created manually.<br>Create this key when a workstation that uses non-English regional settings must access a database that uses an English database collation. It affects the “Perform translation for character data” flag in the database DSN.<br>Set the value of this key to 0 or 1.<br>0 = Turn “Perform translation for character data” flag OFF<br>1 = Turn “Perform translation for character data” flag ON |

**Table 3** *ISS Server Configuration Settings in the MaConfig Table*

| Section          | Key            | Value  |
|------------------|----------------|--|
| IIS_<IIS Server> | BASE_HREF      |  |
| IIS_<IIS Server> | IIS_URL        | Virtual directory path of the “Scriptpub.dll”. |
| IIS_<IIS Server> | WORKSPACE      |  |
| IIS_<IIS Server> | WORKSPACE_PATH | Installation path of the Address Books folder. |

**Table 4** *Live Update Configuration Settings in the MaConfig Table*

| Section     | Key             | Value |
|-------------|-----------------|-------|
| Live Update | Enable          |       |
| Live Update | Enable Auto     |       |
| Live Update | Server Base URL |       |

**Table 5**    *Workstation Configuration Settings in the MaConfig Table*

| Section              | Key                   | Value |
|----------------------|-----------------------|-------|
| Workstation_<Server> | Installed_Series      |       |
| Workstation_<Server> | Setup_Completion_Date |       |

The ADMN\_Config table in your Maximizer Address Book database contains Address Book-specific settings.

| AppCode | KeyCode                       | SubKeyCode      | Comment  |
|---------|-------------------------------|-----------------|--|
|         | ALLOW_COPY_CLIENTS_TO_OUTLOOK |                 | Controls Address Book synchronization between Maximizer and Outlook.<br>0 = Disable (default)<br>1 = Enable            |
|         | AUTO_EMAIL_PASSWORD           |                 | Maximizer Email Service outgoing SMTP server account password  |
|         | AUTO_EMAIL_REQUIRES_AUTH      |                 | Enable/disable Maximizer Email Service outgoing SMTP server authentication<br>0 = Disable<br>1 = Enable                |
|         | AUTO_EMAIL_RUN                |                 | Automated services activation<br>0 = Inactive<br>1 = Active (but not yet used by any automated services)<br>2 = Active |
|         | AUTO_EMAIL_SERVICE            |                 | The name of server which hosts the automated services  |
|         | AUTO_EMAIL_SMTP_PORT          |                 | Maximizer Email Service outgoing SMTP server port number   |
|         | AUTO_EMAIL_SMTP_SERVER        |                 | Maximizer Email Service outgoing SMTP server name  |
|         | AUTO_EMAIL_TEMPLATES          |                 | Automated services templates path  |
|         | AUTO_EMAIL_USERNAME           |                 | Maximizer Email Service outgoing SMTP server account name  |
|         | ClientUdfInfo                 | CustomerService |  |
|         | ClientUdfInfo                 | EssentialUDFs   | Essential UDFs   |

| AppCode | KeyCode                         | SubKeyCode                     | Comment   |
|---------|---------------------------------|--------------------------------|---|
|         | ClientUdfInfo                   | EssentialUDFs_Caption          | Essential UDFs group box caption  |
|         | Mandatory Basic Fields          | Company, Contact or Individual | Marks basic field as mandatory for specific entry type                            |
|         | NotifyAction ("CustomerNotify") | CustomerService                | Notify Address Book entry when a customer service case is created for them        |
|         | ResponseTime                    | CustomerService                | Default case response time  |
|         | Address Format                  | 0                              | Custom address format, accessible from Preferences > Format                       |
|         | MyWorkDay                       | MyWorkDayCaption               | Caption text for Overview page, set in Administrator preferences                  |
|         | Calendar                        | Appt_iCal_Attachment           | Preference for including an iCal attachment in an appointment notification email. |
|         | Calendar                        | CarryForward                   | CarryForward for Hotlist in Calendar window                                       |
|         | Calendar                        | HideLegend                     | Hide/Show user and location/resources legend                                      |
|         | Calendar                        | HideTask                       | Hide/Show Hotlist tasks in Calendar   |
|         | Calendar                        | Legend                         | Users, resources, and locations visible in legend                                 |
|         | EMAIL_DEFAULT_TEMPLATE          | 0                              | DataMachineID, SequenceNumber of the email template in the AMGR_Letters table.    |
|         | RecentEntries                   | 0                              | Client_id of a recent entry   |
|         | RecentEntries                   | bVisible                       | Hide/Show recent entries on Icon bar  |
|         | DefaultAbTab                    |                                |   |
|         | Format(User)                    | ShowDisabled                   | Show/Hide disabled users  |
|         | Format(User)                    | Name                           | User format   |
|         | RecentEntries                   | NumToShow                      | Number of recent entries to show  |
|         | LastCatalogSearches             |                                |   |
|         | MWD_LAYOUT                      |                                | What is shown in MWD  |
|         | MWD_STARTUP                     |                                | Whether or not MWD opens on startup   |
|         | PRINTER<n>                      | NAME                           | Printer name or UNC path  |

| AppCode      | KeyCode              | SubKeyCode                    | Comment   |
|--------------|----------------------|-------------------------------|---|
|              | Printing Rights      | Rights                        | Allow printing to specified output  |
|              | Quick Access Entries | bVisible                      | Show/Hide quick access list on Icon bar   |
|              | Quick Access Entries | Selected Commands             | Action listed in quick access   |
|              | User_Colors          | Resource                      | Resource colors   |
|              | User_Colors          | User                          | User Colors   |
|              | Column Setup         | Address Book<br>Campaigns     |   |
|              | Column Setup         | Campaigns                     |   |
|              | IconBarButtonOrder   |                               | The order of the buttons in the icon bar.   |
|              | IconBarButtonHide    |                               | The icons that are hidden on the icon bar.  |
| NOTIFICATION | AutoEmail            | EVENT_MAX_AUTO_EMAIL_FATAL    | Event notification for Maximizer Email Service fatal error  |
| NOTIFICATION | AutoPrintFax         | EVENT_MAX_AUTO_PRINTFAX_FATAL | Event notification for Maximizer Print/Fax Service fatal error  |
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_DATABASE_INUSE  | Event notification when a remote attempts to apply a refresh packet to the database while another application has it open |
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_FATAL_DATABASE  | Event notification when MaxExchange encounters a fatal database error   |
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_FTP_PASS_ERROR  | Event notification when a Remote is connected to a server using FTP with wrong password                                   |
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_INCOME_PACKET   | Event notification when a MaxExchange Remote has received a refresh packet  |
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_JOURNAL_OFF     | Event notification when MaxExchange has turned on transaction journaling in the database                                  |
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_LOW_HD_SPACE    | Event notification when there is not enough free disk space available to MaxExchange                                      |
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_MIA             | Event notification when MaxExchange detects a missing packet  |
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_PACKET          | Event notification when MaxExchange receives a packet that has already been processed                                     |

| AppCode      | KeyCode              | SubKeyCode                      | Comment  |
|--------------|----------------------|---------------------------------|--|
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_PERVASIVE_GATEWAY | Event notification when MaxExchange is running on a different computer then the Pervasive gateway                    |
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_REMOTE_NOT_SYN    | Event notification when a MaxExchange Remote has not synchronized for 'n' days                                       |
| NOTIFICATION | MaxExchange          | EVENT_MAXEXCH_START_RECOVERY    | Event notification when MaxExchange needs to run a recovery process due to errors from a previous processing session |
| NOTIFICATION | NOTIFICATION_SETTING | Notification CFG Version        | Event notification version number. Used to synchronize the EventNotification.cfg file with these table entries.      |
| NOTIFICATION | NOTIFICATION_SETTING | NOTIFICATION_ENABLE             | Event notification activation<br>0 = Inactive<br>1 = Active  |
| NOTIFICATION | NOTIFICATION_SETTING | NOTIFICATION_REQUIRE_AUTH       | Enable/disable events notification outgoing SMTP server authentication<br>0 = Disable<br>1 = Enable                  |
| NOTIFICATION | NOTIFICATION_SETTING | NOTIFICATION_SENDER_ADDRESS     | Event notification sender email address  |
| NOTIFICATION | NOTIFICATION_SETTING | NOTIFICATION_SENDER_NAME        | Event notification sender name (email)   |
| NOTIFICATION | NOTIFICATION_SETTING | NOTIFICATION_SMTP_AUTH_NAME     | Event notification outgoing SMTP server account name   |
| NOTIFICATION | NOTIFICATION_SETTING | NOTIFICATION_SMTP_AUTH_PASSWORD | Event notification outgoing SMTP server account password   |
| NOTIFICATION | NOTIFICATION_SETTING | NOTIFICATION_SMTP_PORT          | Event notification outgoing SMTP server port number  |
| NOTIFICATION | NOTIFICATION_SETTING | NOTIFICATION_SMTP_SERVER        | Event notification outgoing SMTP server name   |



## Maximizer File Types

The following table lists the extensions of file types created in the registry during the Maximizer installation.

| Extension | Application | Comment  |
|-----------|-------------|--|
| .MDE      | MaxWin.exe  | Maximizer Data Exchange file used by email transfer (prior to version 7 – now .MET)                                  |
| .MEC      | ecMeclm.exe | OrderDesk's order data file  |
| .MET      | MaxWin.exe  | Maximizer Email Transfer files (version 7 and higher)  |
| .MXD      | MaxWord.ter | Maximizer Document extension   |
| .MXI      | MaxWin.exe  | Maximizer XML format data file   |
| .MTI      | MaxWin.exe  | Maximizer Transfer Interface (CSV format data file – elaborate or skip CSV altogether; manual says EDI, flags, etc.) |

The following table lists the extensions of file types used by Maximizer. These file types have no association in the registry.

| Extension | Application | Comment  |
|-----------|-------------|--|
| .ETF      | MaxWord.ter | Template files used for automated campaigns, customer service emails, and by MaxWord |

The following table lists the extensions of file types created in the registry during the MaxExchange installation.

| Extension | Application | Comment               |
|-----------|-------------|-----------------------|
| .MEX      |             | MaxExchange lock file |

The following table lists the extensions of file types used by MaxExchange. These file types have no association in the registry.

| Extension | Application | Comment   |
|-----------|-------------|---|
| .HDR      |             | Packet header file  |
| .ATT      |             | Data packet file  |
| .MA       |             | Internally used by MaxExchange to store information about email data packets (as in DId_q.ma) |

# Virtual Directories

The following table describes the virtual directories created by the Maximizer installation.

By default, [Install Directory] is C:\Program Files\Maximizer\.

| Virtual Directory     | Description                    | Directory                                       |
|-----------------------|--------------------------------|---|
| MaximizerWebAccess    | Maximizer Web Access           | [Install Directory]\Portals\Employee            |
| MaximizerMobileAccess | Mobile Access                  | [Install Directory]\Portals\Wireless            |
| MaximizerPartner      | Partner Access                 | [Install Directory]\Portals\Partner             |
| MaximizerCustomer     | Customer Access                | [Install Directory]\Portals\Customer            |
| Dashboard             | Dashboards                     | [Install Directory]\Portals\Dashboard           |
| Campaigns             | Statistics for email campaigns | [Install Directory]\Campaign Manager\Statistics |

## Virtual Directory Permissions

The following sections list the default permissions for the virtual directories created by the Maximizer installation.

### Maximizer Web Access, Partner Access, and Customer Access Virtual Directories

The following table lists the default permissions for the MaximizerWebAccess, MaximizerPartner, and MaximizerCustomer virtual directories:

| Permission           | Setting |
|----------------------|---------|
| Read Access          | True    |
| Write Access         | False   |
| Script Source Access | False   |
| Directory Browsing   | False   |
| Indexing             | True    |
| Log Visits           | True    |

| Permission              | Setting                        |
|-------------------------|--------------------------------|
| Default Document        | Default.aspx                   |
| Delete During Uninstall | True                           |
| Execute Permissions     | Scripts Only                   |
| Application Protection  | Medium                         |
| Application Mappings    | Default mappings               |
| Session Timeout         | 20                             |
| ASP Script Timeout      | 90                             |
| Authentication Methods  | Anonymous + Integrated Windows |

## Campaigns Virtual Directory

The following table lists the default permissions on the Campaigns virtual directory:

| Permission              | Setting                        |
|-------------------------|--------------------------------|
| Read Access             | True                           |
| Write Access            | False                          |
| Script Source Access    | False                          |
| Directory Browsing      | False                          |
| Indexing                | True                           |
| Log Visits              | True                           |
| Default Document        | Default.asp                    |
| Delete During Uninstall | True                           |
| Execute Permissions     | Scripts Only                   |
| Application Protection  | Medium                         |
| Application Mappings    | Default mappings               |
| Session Timeout         | 20                             |
| ASP Script Timeout      | 90                             |
| Authentication Methods  | Anonymous + Integrated Windows |

## Dashboard Virtual Directory

The following table lists the default permissions for the Dashboard virtual directory:

| Permission              | Setting                        |
|-------------------------|--------------------------------|
| Read Access             | True                           |
| Write Access            | False                          |
| Script Source Access    | False                          |
| Directory Browsing      | False                          |
| Indexing                | True                           |
| Log Visits              | True                           |
| Default Document        | Default.asp                    |
| Delete During Uninstall | True                           |
| Execute Permissions     | Scripts and Executables        |
| Application Protection  | High                           |
| Application Mappings    | Default mappings               |
| Session Timeout         | 20                             |
| ASP Script Timeout      | 90                             |
| Authentication Methods  | Anonymous + Integrated Windows |

## Database Views for User-Defined Fields

When you create a user-defined field, a database view for that user-defined field is also created. You can use these views to report on user-defined fields in Crystal Reports. For example, when a new Address Book user-defined field called "Salary" is created, a new view named "A\_Salary" is dynamically created. Based on the type of user-defined field, the view name is prefixed by a designated letter. The following table identifies the table or view name prefixes for each type of user-defined field.

Maximizer uses the Microsoft SQL database driver (MAS\_ DSN).

## Microsoft SQL View Prefixes

The Microsoft SQL driver creates database views for user-defined fields, using the following prefixes.

| Prefix | Type of user-defined field |
|--------|----------------------------|
| A_     | Address Book               |
| BP_    | Third-Party Integration    |
| C_     | Campaign                   |
| CS_    | Customer Service           |
| O_     | Opportunity                |
| U_     | Users                      |
| S_     | System                     |

## Maximizer XML Interface (MXI)

Maximizer enables you to import Address Book entries, customer service cases, and knowledge base articles from Maximizer or other applications using XML. If the records were exported from Maximizer in MXI (Maximizer XML Interface) or XML format, you can import them back into Maximizer directly. However, to import records from other applications in XML format, you must ensure that the XML file conforms to the Maximizer XML schema.

After you have converted your data to XML format, you can use the Import command to import this data into an Address Book.

The names of and relationships between the elements in the Maximizer XML schema correspond to the Maximizer Address Book fields, with a few exceptions. Several elements are named "Detail...". These elements correspond to user-defined fields:

- ***DetailDef*** – Definition of a user-defined field.
- ***DetailDate*** – Date user-defined field.
- ***DetailNumber*** – Numeric user-defined field.
- ***DetailString*** – Alphanumeric user-defined field.
- ***DetailList*** – Single-value table user-defined field.
- ***DetailListMulti*** – Multiple-value table user-defined field.
- ***DetailFormula*** – Formula user-defined field.
- ***DetailBoolean*** – Yes/no user-defined field.

The following sections outline the tree-structure hierarchy of Maximizer XML elements. The first section outlines just the top-level elements, and the following sections outline the elements below the top-level. Mandatory elements are shown in bold, and are mandatory only if their parent element is used.

### Top-Level Elements

The <AllData> element is the root element, which contains the following elements, which contain all other elements. For specific information about each of the elements, refer to the appropriate section.

#### <AllData>

<ImportOptions>

See ImportOptions Element.

</ImportOptions>

<DetailDef>

See DetailDef Element for sub-elements.

```
</DetailDef>
<Individual>
    See Individual Element for sub-elements.
</Individual>
<Company>
    See Company Element for sub-elements.
</Company>
<KnowledgeBaseArticle>
    See KnowledgeBaseArticle Element for sub-elements.
</KnowledgeBaseArticle>
<Case>
    See Case Element for sub-elements.
</Case>
</AllData>
```

## ImportOptions Element

The <ImportOptions> element and its sub-elements describe how Address Book entries and customer service cases should be imported.

```
<ImportOptions>
    <LeadHandling></LeadHandling>
    <ClientIdGeneration></ClientIdGeneration>
    <LogFile></LogFile>
    <LogLevel></LogLevel>
    <ClientOptions>
        <MatchMode></MatchMode>
        <MatchDetail></MatchDetail>
    </ClientOptions>
    <ContactOptions>
        <MatchMode></MatchMode>
        <MatchDetail></MatchDetail>
    </ContactOptions>
</ImportOptions>
```

The following table describes the values of each of the <ImportOptions> elements. The valid values for each element are listed in the Value column. The Equivalent Field column identifies the field in the import dialog boxes that sets the same import option.

| Element Name       | Valid Values | Equivalent Field(s) in Maximizer | Description  |
|--------------------|--------------|----------------------------------|--|
| LeadHandling       | Lead         | Import all entries as leads      | Imports all Address Book entries in the import file as sales leads, regardless of any sales lead values specified in the file.   |
|                    | Normal       | Import all entries as non-leads  | Imports all Address Book entries in the import file as non-sales leads, regardless of any sales lead values specified in the file.   |
|                    | File         | Use values from the import file  | Imports Address Book entries as either sales leads or non-sales leads, as specified in the values of the import file. This is the default option.<br><br>If the file was exported from Maximizer, the sales lead status of each Address Book entry was automatically included in the exported file. This option simply carries those values forward to the imported records. |
| ClientIdGeneration | Setting      | n/a                              | If the imported Address Book entry contains a Client ID, it uses the Client ID of the imported entry.<br><br>If the imported Address Book entry does not contain a Client ID, it creates a new Client ID for the imported Address Book entry.  |
|                    | System       | n/a                              | Creates a new Client ID for each imported Address Book entry.  |
|                    | File         | n/a                              | Uses the Client IDs of the Address Book entries being imported.  |
| LogFile            |              | n/a                              | Path and filename where the log file should be saved (e.g., c:\folder\file.log).   |
| LogLevel           | 0            | n/a                              | Do not log (leaving this element value blank has same result).   |
|                    | 1            | n/a                              | Log errors only.   |
|                    | 5            | n/a                              | Log record additions and field changes.  |
|                    | 7            | n/a                              | Record all details (very large log file size).   |
| ClientOptions      | n/a          | n/a                              | Client Options apply to Company and Individual Address Book entries; Contact Options apply to Contact Address Book entries. Client Options and Contact Options are defined in the nested <MatchMode> and <MatchDetail> elements.   |
| ContactOptions     | n/a          | n/a                              |  |



| Element Name | Valid Values | Equivalent Field(s) in Maximizer | Description  |
|--------------|--------------|----------------------------------|--|
| MatchMode    | AlwaysInsert | n/a                              | Inserts all Company, Individual, and Contact records from the import file and does not match imported records to existing records. Duplicate entries may result.   |
|              | Id           | n/a                              | Uses Address Book identification values as the criteria for matching records. For Company and Individual records, this option uses the Client ID field to match entries. For Contact records, this option uses the Client ID and Contact Number fields to match entries. |
|              | Name         | n/a                              | Company records will use the Company field, and Individual and Contact records will use the Last Name field as the criteria for matching records.  |
|              | Detail       | n/a                              | Specifies an alphanumeric user-defined field to use as the criterion for matching records. Only Address Book entry user-defined fields that apply to the applicable record type appear in this list.   |
| MatchDetail  |              | n/a                              | Name of the alphanumeric user-defined field to use to match entries when MatchMode is set to Detail.   |

## DetailDef Element

The <DetailDef> element and its sub-elements describe the user-defined field definitions. If the user-defined field includes a description, it appears in the <Description> element. If it is a table user-defined field, the table items each appear in the <ListItem> elements.

```
<DetailDef Name="" Type="">
  <Description></Description>
  <ListItem></ListItem>
</DetailDef>
```

Much of the information about the user-defined field is stored in the element's attributes, which are described in the following table.

| Attribute   | Data Type | Valid Values                                   | Description   |
|-------------|-----------|--|---|
| Name        | string    |  | Name of the user-defined field.   |
| Type        | string    | Multiple<br>Single<br>Date<br>String<br>Number | <p>Indicates the type of user-defined field:</p> <ul style="list-style-type: none"> <li>Multiple = Table user-defined field that allows selection of multiple items.</li> <li>Single = Table user-defined field that allows selection of single item only.</li> <li>Date = Date user-defined field.</li> <li>String = Alphanumeric user-defined field.</li> <li>Number = Numeric user-defined field.</li> <li>Formula = Formula user-defined field.</li> <li>Boolean = Yes/No user-defined field.</li> </ul> <p>This attribute also applies to the &lt;Detail&gt; elements within other elements.</p> <p>The maximum length of the Type attribute is 80 characters.</p> |
| Cases       | string    | No<br>Yes                                      | Indicates whether the user-defined field can be assigned to Cases.  |
| Companies   | string    | No<br>Yes                                      | Indicates whether the user-defined field can be assigned to Company, Individual, or Contact Address Book entries.   |
| Individuals | string    | No<br>Yes                                      |   |
| Contacts    | string    | No<br>Yes                                      |   |
| DateAnnual  | string    | Yes  | Applies to Date user-defined fields only.<br>Yes = Annually recurring event.  |
| RetainYear  | string    | Yes  | Applies to Annually Recurring Date user-defined fields only.<br>Yes = Retain year in annually recurring dates.  |
| Hotlist     | integer   | 1  | Applies to Date user-defined fields only.<br>1 = Create Hotlist task.   |
| Length      | integer   |  | Applies to Alphanumeric user-defined fields only.<br>Indicates the maximum length of the field value.   |

## Individual Element

The <Individual> element describes an Address Book entry for an Individual. Mandatory sub-elements are shown in bold.

<Individual>

<ContactNo></ContactNo>

<FirstName></FirstName>

**<LastName></LastName>**

<Initial></Initial>

```

<MrMs></MrMs>
<Title></Title>
<Salutation></Salutation>
<Phone>
    <Number></Number>
    <Extension></Extension>
    <Description></Description>
</Phone>
<Email>
    <Address></Address>
    <Description></Description>
</Email>
<Department></Department>
<Division></Division>
<ReportsTo></ReportsTo>
<AssignedTo></AssignedTo>
<Category></Category>
<DoNotSolicitBy></DoNotSolicitBy>
<Website></Website>
<Created></Created>
<LastModified></LastModified>
<SalesLead></SalesLead>
<Address>
    See Address Element.
</Address>
<DetailDate Name=""></DetailDate>
<DetailNumber Name=""></DetailNumber>
<DetailString Name=""></DetailString>
<DetailList Name=""></DetailList>
<DetailListMulti Name="">
    <Value></Value>
</DetailListMulti>
<Note>
    See Note Element.
</Note>
<Document>

```

See Document Element.

</Document>

**<Id></Id>**

<Firm></Firm>

<Contact>

See Contact Element.

</Contact>

</Individual>

## Company Element

The <Company> element describes an Address Book entry for a Company. Mandatory sub-elements are shown in bold.

<Company>

**<Id></Id>**

**<Name></Name>**

<Department></Department>

<Division></Division>

<Phone>

**<Number></Number>**

<Extension></Extension>

<Description></Description>

</Phone>

<Email>

**<Address></Address>**

<Description></Description>

</Email>

<Website></Website>

<AssignedTo></AssignedTo>

<Category></Category>

<DoNotSolicitBy></DoNotSolicitBy>

<Created></Created>

<LastModified></LastModified>

<SalesLead></SalesLead>

<Address>

See Address Element.

</Address>

```

<DetailDate Name=""></DetailDate>
<DetailNumber Name=""></DetailNumber>
<DetailString Name=""></DetailString>
<DetailList Name=""></DetailList>
<DetailListMulti Name="">
    <Value></Value>
</DetailListMulti>
<Note>
    See Note Element.
</Note>
<Document>
    See Document Element.
</Document>
<Contact>
    See Contact Element.
</Contact>
</Company>

```

## KnowledgeBaseArticle Element

The <KnowledgeBaseArticle> element describes a Knowledge Base Article. The contents of the article itself are stored in the <Data> sub-element.

Note: To import your own knowledge base articles that were not exported from Maximizer, you must encode the text in Base64 for the Data field in the MXI/XML file.

```

<KnowledgeBaseArticle>
    <Machine></Machine>
    <Sequence></Sequence>
    <Status></Status>
    <Creator></Creator>
    <Owner></Owner>
    <LastModified></LastModified>
    <Created></Created>
    <FileName></FileName>
    <FileExt></FileExt>
    <Title></Title>
    <KeyWords></KeyWords>

```

```
<Product></Product>  
<Category></Category>  
<Data></Data>  
</KnowledgeBaseArticle>
```

## Case Element

The <Case> element describes a Customer Service Case. Mandatory sub-elements are shown in bold.

```
<Case>  
  <CaseNumber></CaseNumber>  
  <CaseId></CaseId>  
  <Subject></Subject>  
  <CaseCompanyIndividual>  
    <Id></Id>  
    <ContactNo></ContactNo>  
  </CaseCompanyIndividual>  
  <CaseContact>  
    <Id></Id>  
    <ContactNo></ContactNo>  
  </CaseContact>  
  <Solution>  
    <Id></Id>  
    <ContactNo></ContactNo>  
  </Solution>  
  <ArticleId></ArticleId>  
  <Priority></Priority>  
  <Severity></Severity>  
  <Fee></Fee>  
  <BillRate></BillRate>  
  <BillableTime></BillableTime>  
  <Owner></Owner>  
  <AssignedTo></AssignedTo>  
  <CreatedBy></CreatedBy>  
  <ModifiedBy></ModifiedBy>  
  <ResolvedBy></ResolvedBy>  
  <CaseOwner></CaseOwner>
```

```

<Type></Type>
<Reason></Reason>
<Origin></Origin>
<Category></Category>
<BillingType></BillingType>
<Queue></Queue>
<Status></Status>
<ModifyDate></ModifyDate>
<DeadlineDate></DeadlineDate>
<CreateDate></CreateDate>
<ResolveDate></ResolveDate>
<Description></Description>
<DetailDate Name=" " ></DetailDate>
<DetailNumber Name=" " ></DetailNumber>
<DetailString Name=" " ></DetailString>
<DetailList Name=" " ></DetailList>
<DetailListMulti Name=" " >
    <Value></Value>
</DetailListMulti>
<Note>
    See Note Element.
</Note>
<Document>
    See Document Element.
</Document>
</Case>

```

## Contact Element

The <Contact> element describes an Address Book entry for a Contact. This element is nested within the <Individual> and <Company> elements. Mandatory sub-elements are shown in bold.

```

<Contact>
    <ContactNo></ContactNo>
    <FirstName></FirstName>
    <LastName></LastName>
    <Initial></Initial>

```

```
<MrMs></MrMs>
<Title></Title>
<Salutation></Salutation>
<Phone>
    <Number></Number>
    <Extension></Extension>
    <Description></Description>
</Phone>
<Email>
    <Address></Address>
    <Description></Description>
</Email>
<Department></Department>
<Division></Division>
<ReportsTo></ReportsTo>
<AssignedTo></AssignedTo>
<Category></Category>
<DoNotSolicitBy></DoNotSolicitBy>
<Website></Website>
<Created></Created>
<LastModified></LastModified>
<SalesLead></SalesLead>
<Address>
    See Address Element.
</Address>
<DetailDate Name=""></DetailDate>
<DetailNumber Name=""></DetailNumber>
<DetailString Name=""></DetailString>
<DetailList Name=""></DetailList>
<DetailListMulti Name="">
    <Value></Value>
</DetailListMulti>
<Note>
    See Note Element.
</Note>
<Document>
```



See Document Element.

</Document>

</Contact>

## Address Element

The <Address> element describes the address of an Address Book entry. This element is nested within the <Individual>, <Company>, and <Contact> elements.

<Address>

<Description></Description>

<AddressLine1></AddressLine1>

<AddressLine2></AddressLine2>

<City></City>

<StateProvince></StateProvince>

<Country></Country>

<ZipCode></ZipCode>

</Address>

## Note Element

The <Note> element describes any notes for Address Book entries or customer service cases. This element is nested within the <Individual>, <Company>, and <Contact>, and <Case> elements. Mandatory sub-elements are shown in bold. The body of the note is stored in the <Text> element.

<Note>

**<Date></Date>**

<Creator></Creator>

<Owner></Owner>

<Type></Type>

**<Text></Text>**

</Note>

## Document Element

The <Document> element describes any Documents for Address Book entries or customer service cases. This element is nested within the <Individual>, <Company>, and <Contact>, and <Case> elements. Mandatory sub-elements are shown in bold. The body of the document is stored in the <DocData> element in Base64 format.

```
<Document>
  <DocumentId></DocumentId>
  <Name></Name>
  <Date></Date>
  <Creator></Creator>
  <Owner></Owner>
  <Extension></Extension>
  <DocData></DocData>
</Document>
```

## Element Details

The following table lists all the elements in the Maximizer XML schema in alphabetical order and describes the following properties of each:

- **Element Name** – The name of the XML element. An element name may be listed more than once if it has different properties depending on its parent element. Most of the element names correspond to Maximizer field names.
- **Parent Element(s)** – The name of the XML element(s) within which the element is nested. If an element with the same name and same properties may exist within more than one parent element, all parent elements are listed.
- **Min. Occur.** – The minimum number of times the element must occur within its parent element. A value of 1 indicates that the element is mandatory, and a value of 0 indicates it is not.
- **Max. Occur.** – The maximum number of times the element may occur within its parent element.
- **Data Type** – The type of data that may be stored in the element.
- **Max. Length** – The maximum length of the element contents. If this value is blank, there is no maximum length.

| Element Name         | Parent Element(s)                | Min. Occur. | Max. Occur. | Data Type         | Max. Length |
|----------------------|----------------------------------|-------------|-------------|-------------------|-------------|
| Address <sup>a</sup> | Email                            | 1           | 1           | string            | 120         |
| Address <sup>a</sup> | Individual<br>Company<br>Contact | 0           | 1           | none <sup>b</sup> |             |
| AddressLine1         | Address                          | 0           | 1           | string            | 80          |
| AddressLine2         | Address                          | 0           | 1           | string            | 80          |
| AllData              | none                             | 1           | 1           | none <sup>b</sup> |             |
| ArticleId            | Case                             | 0           | 1           | string            | 80          |

| Element Name           | Parent Element(s)  | Min. Occur. | Max. Occur. | Data Type         | Max. Length |
|------------------------|--|-------------|-------------|-------------------|-------------|
| AssignedTo             | Individual<br>Company<br>Contact<br>Case                 | 0           | 1           | string            | 11          |
| BillableTime           | Case   | 0           | 1           | double            |             |
| BillingType            | Case   | 0           | 1           | string            | 80          |
| BillRate               | Case   | 0           | 1           | double            |             |
| Case                   | AllData  | 0           |             | none <sup>b</sup> |             |
| CaseCompanyIndividual  | Case   | 0           | 1           | none <sup>b</sup> |             |
| CaseContact            | Case   | 0           | 1           | none <sup>b</sup> |             |
| Caseld                 | Case   | 0           | 1           | string            | 80          |
| CaseNumber             | Case   | 0           | 1           | string            | 80          |
| CaseOwner              | Case   | 0           | 1           | string            | 80          |
| Category <sup>a</sup>  | Individual<br>Company<br>Contact                         | 0           | 1           | string            |             |
| Category <sup>a</sup>  | KnowledgeBaseArticle<br>Case                             | 0           | 1           | string            | 80          |
| City                   | Address  | 0           | 1           | string            | 80          |
| ClientIdGeneration     | ImportOptions  | 0           | 1           | string            |             |
| ClientOptions          | ImportOptions  | 0           | 1           | none <sup>b</sup> |             |
| Company                | AllData  | 0           | unlimited   | none <sup>b</sup> |             |
| Contact                | Individual<br>Company                                    | 0           | unlimited   | none <sup>b</sup> |             |
| ContactNo <sup>a</sup> | Individual<br>Contact                                    | 0           | 1           | integer           |             |
| ContactNo <sup>a</sup> | CaseCompanyIndividual<br>CaseContact<br>Solution         | 1           | 1           | integer           |             |
| ContactOptions         | ImportOptions  | 0           | 1           | none <sup>b</sup> |             |
| Country                | Address  | 0           | 1           | string            | 80          |
| Created                | Individual<br>Company<br>Contact<br>KnowledgeBaseArticle | 0           | 1           | dateTime          |             |
| CreateDate             | Case   | 0           | 1           | dateTime          |             |
| CreatedBy              | Case   | 0           | 1           | string            | 80          |

| Element Name             | Parent Element(s)                        | Min. Occur. | Max. Occur. | Data Type         | Max. Length |
|--------------------------|--|-------------|-------------|-------------------|-------------|
| Creator                  | Note<br>Document<br>KnowledgeBaseArticle | 0           | 1           | string            | 80          |
| Data <sup>c</sup>        | KnowledgeBaseArticle                     | 0           | 1           | string            |             |
| Date                     | Note<br>Document                         | 1           | 1           | dateTime          |             |
| DeadlineDate             | Case                                     | 0           | 1           | dateTime          |             |
| Department               | Individual<br>Company<br>Contact         | 0           | 1           | string            | 80          |
| Description <sup>a</sup> | Phone<br>Email                           | 0           | 1           | string            | 22          |
| Description <sup>a</sup> | Address                                  | 0           | 1           | string            | 80          |
| Description <sup>a</sup> | DetailDef<br>Case                        | 0           | 1           | string            |             |
| DetailDate               | Individual<br>Company<br>Contact<br>Case | 0           | unlimited   | date              |             |
| DetailDef                | AllData                                  | 0           | unlimited   | none <sup>b</sup> |             |
| DetailList               | Individual<br>Company<br>Contact<br>Case | 0           | unlimited   | string            | 80          |
| DetailListMulti          | Individual<br>Company<br>Contact<br>Case | 0           | unlimited   | none <sup>b</sup> |             |
| DetailNumber             | Individual<br>Company<br>Contact<br>Case | 0           | unlimited   | double            |             |
| DetailString             | Individual<br>Company<br>Contact<br>Case | 0           | unlimited   | string            | 120         |
| Division                 | Individual<br>Contact<br>Company         | 0           | 1           | string            | 80          |
| DocData                  | Document                                 | 0           | 1           | string            |             |

| Element Name         | Parent Element(s)   | Min. Occur. | Max. Occur. | Data Type         | Max. Length |
|----------------------|---|-------------|-------------|-------------------|-------------|
| Document             | Individual<br>Company<br>Contact<br>Case                                  | 0           | unlimited   | none <sup>b</sup> |             |
| DocumentId           | Document  | 0           | 1           | integer           |             |
| DoNotSolicitBy       | Individual<br>Company<br>Contact  | 0           | 1           | string            |             |
| Email                | Individual<br>Company<br>Contact  | 0           | 3           | none <sup>b</sup> |             |
| Extension            | Phone<br>Document   | 0           | 1           | string            | 22          |
| Fee                  | Case  | 0           | 1           | double            |             |
| FileExt              | KnowledgeBaseArticle  | 0           | 1           | string            | 22          |
| FileName             | KnowledgeBaseArticle  | 0           | 1           | string            | 120         |
| Firm                 | Individual  | 0           | 1           | string            | 80          |
| FirstName            | Individual<br>Contact   | 0           | 1           | string            | 80          |
| Id                   | Individual<br>Company<br>CaseCompanyIndividual<br>CaseContact<br>Solution | 1           | 1           | string            | 23          |
| ImportOptions        | AllData   | 0           | 1           | none <sup>b</sup> |             |
| Individual           | AllData   | 0           | unlimited   | none <sup>b</sup> |             |
| Initial              | Individual<br>Contact   | 0           | 1           | string            | 80          |
| KeyWords             | KnowledgeBaseArticle  | 0           | 1           | string            | 120         |
| KnowledgeBaseArticle | AllData   | 0           | unlimited   | none <sup>b</sup> |             |
| LastModified         | Individual<br>Company<br>Contact<br>KnowledgeBaseArticle                  | 0           | 1           | dateTime          |             |
| LastName             | Individual<br>Contact   | 1           | 1           | string            | 80          |
| LeadHandling         | ImportOptions   | 0           | 1           | string            |             |
| ListItem             | DetailDef   | 0           | unlimited   | string            | 80          |
| LogFile              | ImportOptions   | 0           | 1           | string            |             |
| LogLevel             | ImportOptions   | 0           | 1           | integer           |             |

| Element Name | Parent Element(s)                                | Min. Occur. | Max. Occur. | Data Type         | Max. Length |
|--------------|--|-------------|-------------|-------------------|-------------|
| Machine      | KnowledgeBaseArticle                             | 0           | 1           | integer           |             |
| MatchDetail  | ClientOptions<br>ContactOptions                  | 0           | 1           | string            |             |
| MatchMode    | ClientOptions<br>ContactOptions                  | 1           | 1           | string            |             |
| ModifiedBy   | Case   | 0           | 1           | string            | 80          |
| ModifyDate   | Case   | 0           | 1           | dateTime          |             |
| MrMs         | Individual<br>Contact                            | 0           | 1           | string            | 80          |
| Name         | Company<br>Document                              | 1           | 1           | string            | 80          |
| Note         | Individual<br>Company<br>Contact<br>Case         | 0           | unlimited   | none <sup>b</sup> |             |
| Number       | Phone  | 1           | 1           | string            | 22          |
| Origin       | Case   | 0           | 1           | string            | 80          |
| Owner        | Note<br>Document<br>KnowledgeBaseArticle<br>Case | 0           | 1           | string            | 80          |
| Phone        | Individual<br>Company<br>Contact                 | 0           | 4           | none <sup>b</sup> |             |
| Priority     | Case   | 0           | 1           | string            | 80          |
| Product      | KnowledgeBaseArticle                             | 0           | 1           | string            | 80          |
| Queue        | Case   | 0           | 1           | string            | 80          |
| Reason       | Case   | 0           | 1           | string            | 80          |
| ReportsTo    | Individual<br>Contact                            | 0           | 1           | string            | 80          |
| ResolveDate  | Case   | 0           | 1           | dateTime          |             |
| ResolvedBy   | Case   | 0           | 1           | string            | 80          |
| SalesLead    | Individual<br>Company<br>Contact                 | 0           | 1           | boolean           |             |
| Salutation   | Individual<br>Contact                            | 0           | 1           | string            | 80          |
| Sequence     | KnowledgeBaseArticle                             | 0           | 1           | integer           |             |
| Severity     | Case   | 0           | 1           | string            | 80          |

| Element Name        | Parent Element(s)                | Min. Occur. | Max. Occur. | Data Type         | Max. Length |
|---------------------|----------------------------------|-------------|-------------|-------------------|-------------|
| Solution            | Case                             | 0           | 1           | none <sup>b</sup> |             |
| StateProvince       | Address                          | 0           | 1           | string            | 80          |
| Status <sup>a</sup> | KnowledgeBaseArticle             | 0           | 1           | integer           |             |
| Status <sup>a</sup> | Case                             | 0           | 1           | string            | 80          |
| Subject             | Case                             | 0           | 1           | string            |             |
| Text                | Note                             | 1           | 1           | string            |             |
| Title <sup>a</sup>  | Individual<br>Contact            | 0           | 1           | string            | 80          |
| Title <sup>a</sup>  | KnowledgeBaseArticle             | 0           | 1           | string            | 120         |
| Type                | Note<br>Case                     | 0           | 1           | string            | 80          |
| Value               | DetailListMulti                  | 1           | unlimited   | string            | 80          |
| Website             | Individual<br>Company<br>Contact | 0           | 1           | string            | 120         |
| ZipCode             | Address                          | 0           | 1           | string            | 80          |

- This element is listed more than once because of differing properties depending on which element is the parent element.
- This element cannot contain a value. It can contain only other elements.
- To import your own knowledge base articles that were not exported from Maximizer, you must encode the text in Base64 for the Data field in the MXI/XML file.

## Search String Language

Each access object in `Maximizer.Data` has a method called `ReadList()` which returns a .NET collection of the associated objects. This method may be called with no parameters to return everything in the Address Book or with a search string.

The `ReadList()` method generally searches fields contained within the calling object. However, Address Book entry fields and methods are also available for searching in the Opportunity and CSCase access objects. To call an Address Book field from the Opportunity or CSCase access object, add "ABENTRY\_" before the field name. For example, to call the City field for an Address Book entry in the Opportunity object, the syntax for the field search should be "ABENTRY\_City".

### Search Syntax

The syntax for the search string is a functional or prefix operator notation. Expressions are of the form `<Operator>([ "<Parameter1>" ][ "<Parameter>" ])`. This syntax was chosen because it's well suited to a search tree interface. Double-quotes are always optional, although, you need them if a search parameter includes commas, spaces, or parentheses. In most programming languages, you should ensure you escape double-quote characters when specifying them as a string.

#### Example

```
AND(EQ(City,Vancouver) , OR(LIKE(Phone1,604%) ,
LIKE(Phone2,604%) ) )
```

#### Result

This search string would return all Address Book entries where the city is Vancouver and at least one of the first two phone numbers starts with 604.

### Search Operators

Each object supports a subset of the total search string syntax, and each operator supported by the object supports its use on a subset of the object's fields. Deviation from what is supported will result in an exception being thrown as described later. As a minimum, the KEY operator is supported by every object as a means of selecting a single record in the set.



The following tables describe the operators available to the search string language.

### Object-level Search Operators

The following search operators apply to the object. The documentation of each object lists which search operators are available for that object. However, the KEY operator is available for all objects.

| Operator | Description   | Parameters  |
|----------|---|---|
| AND      | All sub-expressions must evaluate to true to return an object in the result set.                                  | Each parameter is a sub-expression to be AND/OR together. A minimum of one parameter is required.   |
| OR       | At least one sub-expression must evaluate to true to return an object in the result set.                          |   |
| KEY      | An object must have the given key or derive from a supported foreign key for it to be returned in the result set. | The parameter is a supported key for this object. Exactly one parameter is required.<br>IMPORTANT NOTE:<br>Maximizer.Data keys are encrypted. A key may include letters, numbers and special printable characters, but will NEVER include double quote characters. It is recommended that when using this operator, you surround your key with double quotes. |

The following search operators apply to the AbEntryAccess object only.

| Operator | Description  | Parameters  |
|----------|--|---|
| WNOTE    | An object must have an associated note as described to be returned in the result set.                      | Up to eight parameters may be specified. Only the first parameter is mandatory, and those left unspecified will not be included in the search. The first parameter is the search text. The search text may occur anywhere in a note. "_" is a single character wildcard. The second and third parameters are the start and end dates expressed as YYYY-MM-DD. The fourth parameter is the set of note types to return (e.g. "1,2,4"). The fifth parameter is the Creator. The sixth parameter is the Owner. If you want to return only public notes, put "PUBLIC" here. The seventh parameter is the note category. The eighth parameter is the option to use full text search. If you want to use the full text search, put "FULLTEXT" here. |
| NWNOTE   | An object cannot have an associated note as described to be returned in the result set.                    |   |
| FLIST    | An object (generally an Address Book entry) must be in the favorite list to be returned in the result set. | The only parameter is the FavoriteList key. Exactly 1 parameter is supported. Ensure to enclose the keys in double quotes.  |
| LIST     | An object (generally an Address Book entry) must be explicitly listed to be returned in the result set.    | List the AbEntry keys corresponding to the objects you want to return. Any number of parameters is supported. Ensure to enclose the key in double quotes.   |

| Operator | Description   | Parameters   |
|----------|---|--|
| WDOC     | An object must have an associated document as described to be returned in the result set.   | Up to eight parameters may be specified. Only the first parameter is mandatory, and those left unspecified will not be included in the search. The first parameter is the search text. The search text may occur anywhere in a document. " _ " is a single character wildcard. The second and third parameters are the start and end dates expressed as YYYY-MM-DD. The fourth parameter is the document name. The fifth parameter is the minimum size of the document. The sixth parameter is the Creator. The seventh parameter is the Owner of the document. The eighth parameter is the document category. |
| NWDOC    | An object cannot have an associated document as described to be returned in the result set. |  |

### Field-level Search Operators

The following search operators apply to the fields within each object. The documentation of each field lists which operators are available for each field.

| Operator | Description   | Parameters  |
|----------|---|---|
| EQ       | A given field must be equal to the search criteria to return an object in the result set.     | The first parameter is the field name. The second parameter is the search criteria. No wildcards are supported. See LIKE/NLIKE. Exactly two parameters are required.          |
| NEQ      | A given field cannot be equal to the search criteria to return an object in the result set.   |   |
| LIKE     | A given field must be similar to the search criteria to return an object in the result set.   | The first parameter is the field name. The second parameter is the search criteria. Standard SQL wildcards " _ " and "% " are supported. Exactly two parameters are required. |
| NLIKE    | A given field cannot be similar to the search criteria to return an object in the result set. |   |

| Operator | Description  | Parameters  |
|----------|--|---|
| RANGE    | A given folder must be in the range provided to return an object in the result set.  | The first parameter is the field name. The second and third parameters define the range. Exactly 3 parameters are required. |
| NRANGE   | A given field cannot be in the range provided to return an object in the result set. |   |

## Exceptions

Syntax errors in supplied search strings are reported with the throwing of an exception from the ReadList() method. All exceptions thrown from the Maximizer.Data assembly are derived from MxException, so they may be caught and handled collectively.

### Example (C#)

```
try
{
    oAbEntryAccess.ReadList("EQ(City,Vancouver)");
}
catch
(Maximizer.Data.MxSupportedKeywordSearchStringException
exKeyword)
{
    // A custom message for this particular error type.
    MessageBox.Show("AbEntry doesn't support " +
        exKeyword.ErrorDetail);
}
catch (Maximizer.Data.MxException exGeneric)
{
    // Generically pop-up a message box explaining the
    error.
    MessageBox.Show(exGeneric.ToString());
}
```

The following table contains the exceptions that may be thrown when parsing a search string. It also contains the error message that is displayed for each exception if you use the ToString() function.

| <i>Exception</i>                  | <i>Error Message</i>   |
|-----------------------------------|--|
| MxPreProcessSearchStringException | Unable to pre-process the given search string. It may be missing or have extraneous parentheses or double quotes.  |
| MxProcessSearchStringException    | Unable to process the given search string. It contains an unsupported operator.  |
| MxListSearchStringException       | Unable to process the given search string. The LIST expression should take at least one parameter.   |
| MxFlistSearchStringException      | Unable to process the given search string. The FLIST expression should take exactly one parameter. The parameter should be the key of the desired favorite list to retrieve. |
| MxEqSearchStringException         | Unable to process the given search string. The EQ expression should take exactly two parameters.   |
| MxNeqSearchStringException        | Unable to process the given search string. The NEQ expression should take exactly two parameters.  |
| MxLikeSearchStringException       | Unable to process the given search string. The LIKE expression should take exactly two parameters.   |
| MxRangeSearchStringException      | Unable to process the given search string. The RANGE expression should take exactly three parameters.  |
| MxNrangeSearchStringException     | Unable to process the given search string. The NRANGE expression should take exactly three parameters.   |
| MxNlikeSearchStringException      | Unable to process the given search string. The NLIKE expression should take exactly two parameters.  |
| MxWnoteSearchStringException      | Unable to process the given search string. The WNOTE expression should take between one and six parameters.  |
| MxWdocSearchStringException       | Unable to process the given search string. The WDOC expression should take between one and six parameters.   |
| MxNwnoteSearchStringException     | Unable to process the given search string. The NWNNOTE expression should take between one and six parameters.  |
| MxNwdocSearchStringException      | Unable to process the given search string. The NWDDOC expression should take between one and six parameters.   |
| MxKeySearchStringException        | Unable to process the given search string. The KEY expression should take exactly one parameter.   |

| Exception                               | Error Message   |
|---|---|
| MxVerifyFieldSearchStringException      | Unable to process the given search string. The field specified is not supported with the given operator for this object.    |
| MxSupportedKeywordSearchStringException | Unable to process the given search string. It includes a keyword unsupported by this object.                                |
| MxDatetimeOrderSearchStringException    | Unable to process the given search string. When searching by a date range the start date must be earlier than the end date. |







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