Maximizer® CRM 12

MaxExchange *Synchronization Server*

Administrator's Guide

Maximizer Software

Simply Successful CRM

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Applicability

This document applies to MaxExchange Synchronization Server 12 Winter 2012 software.

Maximizer Software Address Information

Corporate Headquarters
Americas

Maximizer Software Inc.
208 West 1st Avenue
Vancouver, BC, Canada V5Y 3T2

+1 604 601 8000 phone
+1 604 601 8001 fax
+1 888 745 4645 support

info@maximizer.com
www.maximizer.com
Knowledge Base: www.maximizer.com/knowledgebase

Europe, Middle East, and Africa

Maximizer Software Ltd
2nd Floor, Apex House, London Road
Bracknell, Berkshire
RG12 2XH United Kingdom

+44 (0) 845 555 99 55 phone
+44 (0) 845 555 99 66 fax

info@max.co.uk
www.max.co.uk

Asia

Maximizer Asia Limited
17/F, Regent Centre
88 Queen's Road
Central, Hong Kong

+(852) 2598 2888 phone
+(852) 2598 2000 fax

info@maximizer.com.hk
www.maximizer.com.hk

Australia/New Zealand

Maximizer Software Solutions Pty. Ltd.
Level 10, 815 Pacific Highway
Chatswood, New South Wales
2067, Australia

+61 (0)2 9957 2011 phone
+61 (0)2 9957 2711 fax

info@maximizer.com.au
www.maximizer.com.au

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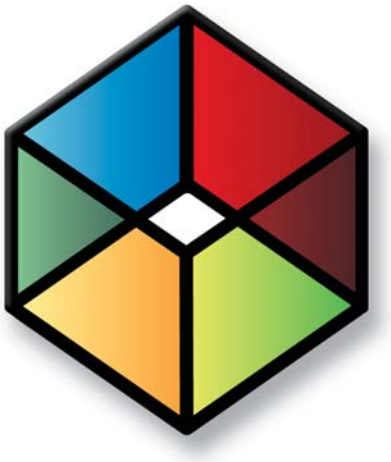


CHAPTER 1

Introduction

Introducing MaxExchange

In this chapter...

"About MaxExchange" on page 2
"How MaxExchange Programs Work Together" on page 2
"Glossary" on page 5
"Related Information" on page 7

About MaxExchange

Welcome to MaxExchange—a tool that keeps Maximizer Address Books synchronized between a server and remote offices or remote users. MaxExchange allows you to transfer data between the server and remotes using HTTP, FTP, folder-to-folder network direct transport, email, or by transferring files on disk. Now your mobile sales force can keep current with the latest changes to your entire central Address Book or a subset of the Address Book, and your home office can benefit from the latest data from the field, quickly, easily, and automatically.

How MaxExchange Programs Work Together

Throughout this document, the MaxExchange Synchronization Server is referred to as the MaxExchange Server or server. The MaxExchange Remote Synchronization Server is referred to as the MaxExchange Remote Server or remote server.

MaxExchange consists of the following applications:

- MaxExchange Synchronization Server
- MaxExchange Remote Synchronization Server
- MaxExchange Server Manager
- MaxExchange Remote
- MaxExchange Site Manager

MaxExchange Synchronization Server

One person is usually in charge of setting up and administering the central Address Book. This MASTER user, or a user with Maximizer Administrator privileges, acts as an administrator for the MaxExchange Server, designates a Maximizer Address Book as the central Address Book—or central Address Books if you are using multiple databases—and schedules updates.

There is only one server for any given Address Book, but one server can have many remotes. These sites are either remote servers or remotes, which can be connected by LAN, WAN, dial-up access, or through the Internet. The central Address Book is maintained on the MaxExchange server, while the remote computers have different replications of the central Address Book.

MaxExchange Server can also be installed as a service on Windows Server 2003, Windows XP, and Windows Server 2008. The service runs in the background, as any other Windows service, and typical processing is done automatically. Manual control of processing or any other server tasks are then done through the MaxExchange Server Manager from another machine or on the server.

MaxExchange Remote Synchronization Server

MaxExchange Remote Synchronization Server acts as a middle tier in a multi-tiered synchronization tree. Remotes run MaxExchange Remote Synchronization Server to synchronize their remote changes with those on the site's parent server, which is either the MaxExchange Synchronization Server or a MaxExchange Remote Synchronization Server.

MaxExchange Remote Synchronization Server has the following two basic functions:

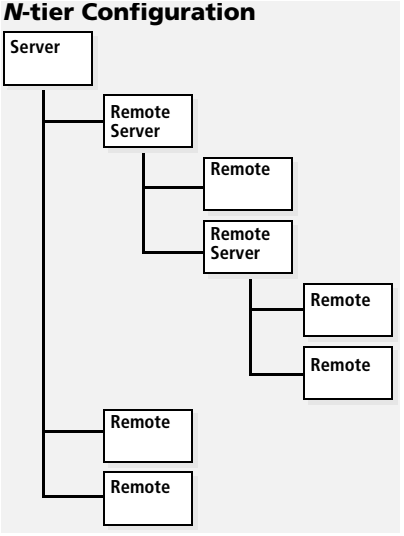
- It synchronizes changes from its remotes with the server and receives updates from the server.
- It generates and sends its own updates to its remotes.

MaxExchange Remote Server acts in the capacity of a server and as a remote. It may be installed as an application and service or as a service only. For information on server tasks, refer to "MaxExchange Synchronization Server" on page 107. For information on remote tasks, refer to the Using MaxExchange Remote chapter in the *Maximizer CRM User's Guide*.

N-tier Synchronization

An n-tier configuration is an unlimited number of remotes and/or remote servers.

The *n*-tier configuration distributes much of the processing load to the remote servers, which dramatically decreases synchronization time across the entire tree structure. This decentralized approach to synchronization allows for a much greater total number of remotes and faster synchronization.



MaxExchange Server Manager

MaxExchange Server Manager is a utility used to access the server from another computer. When you install MaxExchange Server as a service, this utility is used to perform manual tasks on the server.

MaxExchange Remote

MaxExchange Remote users synchronize the entire image or a subset image of the central Address Book on their remote computers. Remote users also update the central Address Book with changes made on the remotes.

For detailed instructions on using MaxExchange Remote, refer to the *Maximizer CRM User's Guide*.

MaxExchange Site Manager

To determine which portions of the central Address Book go to each remote, using MaxExchange Site Manager, the MASTER user, or a user with Maximizer Administrator privileges, defines remotes/ remote servers and the distribution groups to which the remote sites belong. Other important functions of Site Manager are to perform Address Book maintenance on remotes, send refreshes to remotes, set up event notifications, and generate reports. Site Manager is also used to set up teams for campaign and opportunity synchronization.

Glossary

Use this list of terms to help familiarize yourself with the terminology of MaxExchange.

Central Address Book – A Maximizer Address Book that you specify for the MaxExchange server to synchronize with its distribution sites. The server maintains the central, master image of this Address Book (often at the head office of a company), while the remote computers maintain either partial or complete images of the same Address Book on the distribution sites. Note that you can synchronize more than one central Address Book at a time and multiple Address Books can be hosted on one server.

Although different images of the Address Book are kept on separate computers, together, the server and its remotes effectively work on a single central Address Book, which is periodically updated by the MaxExchange synchronization process.

Distribution Group – A Distribution Group comprises several distribution sites that maintain a particular image of the central Address Book. The MASTER user of the central Address Book, or a user with Maximizer Administrator privileges, uses the MaxExchange Site Manager program to determine which distribution sites belong to each distribution group.

The MaxExchange Distribution user-defined field, which you create in Administrator, determines which companies and individuals in your central Address Book are distributed to the various remotes. The field is created in Administrator's System Options preferences by clicking the associated button. This field then appears within your User-Defined Fields list and you add values for your distribution groups as necessary.

Distribution Site – A computer where MaxExchange Remote or Remote Synchronization Server is installed. See the Remote and Remote Server definitions for more information.

DRB Table – A file table that is used by MaxExchange to track the distribution list of Address Book entries and opportunities for each distribution site. This list is created based on the Distribution Group value associated with an Address Book entry for the MaxExchange Distribution field.

Remote – A computer where a MaxExchange Remote is installed, and on which a partial or complete image of the central Address Book is stored. Remotes are set up and maintained by the MASTER user, or a user with Maximizer Administrator privileges, using the MaxExchange Site Manager program.

Typically, several distribution sites belong to a distribution group. These distribution groups are associated with Address Book entries. You assign default distribution groups to Address Book entries based on the creator of the entry; each user can be assigned a set of

distribution groups and when the user creates an entry, the default distribution groups are automatically assigned. User setup for distribution groups is done in the Access Rights tab of user properties in Administrator (File > Users) or Maximizer (in the Setup tab, select Manage Users from the User Management group).

Remote Server – A distribution site that also acts as a MaxExchange server for other distributions sites in an n-tier configuration. The remote server synchronizes with the server (or with another remote server) and passes along data packets to other remotes on the distribution tier below it.

MASTER User – The MASTER user is the owner or the administrator of a Maximizer Address Book. For MaxExchange, the MASTER user administers the central Address Book from the server. The MASTER user grants users access to the Address Book and, if required, restricts their ability to view, add, or delete data or to perform certain functions. The MASTER user is also the only user authorized to use the MaxExchange Site Manager application to set up remotes and distribution groups or use MaxExchange Server Manager. Note that you can have users with Maximizer Administrator privileges equivalent to the MASTER user.

Transaction Journaling – Transaction Journaling is the process by which Maximizer maintains a record of changes made by users to an Address Book.

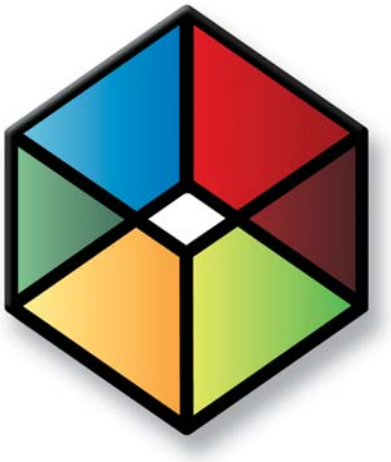
Transaction Journaling is enabled in Administrator in the System Options preferences. This functionality should not be enabled until you are ready to process data so that unnecessary transactions do not occur.

User-defined field – User-defined fields (UDFs) are customizable fields in Maximizer that you can use to categorize the Address Book entries and opportunities in your Address Books. You can use UDFs to group Companies, Individuals, Contacts, and opportunities in many different ways such as by occupation, hobby, income level, revenue, or any other criteria you want to use.

Related Information

The *MaxExchange Administrator's Guide* is part of a suite of documents (paper and online) for Maximizer products, including the following:

- Online help with indexed and context-sensitive help for MaxExchange tasks, commands, and dialog boxes. Online help is available in all MaxExchange applications.
- The *Maximizer CRM Administrator's Guide* and Administrator online help include information about setting up and maintaining Address Books.
- The *Maximizer CRM User's Guide* and Maximizer CRM online help include information on managing Address Book entries, working with sales opportunities and campaigns, and managing teams and strategies.
- Information about the latest product updates and releases can be obtained by visiting www.maximizer.com. You can also access our knowledge base by going to www.maximizer.com/knowledgebase.



CHAPTER 2

Installing MaxExchange

Installing the MaxExchange Components

In this chapter...

"System Requirements" on page 10
"Transport Method Requirements" on page 11
"Installing MaxExchange Synchronization Server" on page 13
"Installing MaxExchange Remote Synchronization Server" on page 19
"Installing MaxExchange Site Manager" on page 25
"Installing MaxExchange Remote" on page 25
"Installing MaxExchange Licenses" on page 25
"Upgrading from Previous Versions of MaxExchange" on page 26

System Requirements

To run MaxExchange, Windows users must be given the rights of a "Power User".

Please ensure that you have met the following minimum system requirements before installing MaxExchange.

Note that the Microsoft SQL Native Client is required by MaxExchange and is installed with Maximizer on both the server and the remote.

	MaxExchange Synchronization Server	**MaxExchange Remote**
Minimum Processor Speed	1.6 GHz (minimum) 3 GHz or faster processor (recommended)	1 GHz (minimum) 2.0 GHz or faster processor (recommended)
Available RAM	1 GB (minimum) 2 GB (recommended) 4 to 1 ratio of virtual memory to physical memory.	1 GB (minimum) 2 GB (recommended) 4 to 1 ratio of virtual memory to physical memory.
Available hard disk space	4 GB (minimum) 6 to 8 GB (recommended)	2 GB (minimum) 4 to 6 GB (recommended)
Operating system	Microsoft Windows XP Microsoft Windows Server 2003 Microsoft Windows Server 2008 Microsoft Windows Server 2008 R2 (updated to their latest service packs)	Microsoft Windows XP Microsoft Windows Vista Microsoft Windows 7 Microsoft Windows Server 2003 Microsoft Windows Server 2008 Microsoft Windows Server 2008 R2 (updated to their latest service packs)
Hard disk format[a]		NTFS-formatted file system

a 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.

Transport Method Requirements

Depending on the selected transport method, both the server and remote computers must have the required software and hardware requirements. Following is a description of those requirements for each available transport method.

HTTP Transport

- An ISP (Internet Service Provider) to facilitate the physical transport of MaxExchange data packets.
- TCP/IP networking must be enabled on all MaxExchange computers.
- A designated web server.

FTP Transport

- An ISP (Internet Service Provider) to facilitate the physical transport of MaxExchange data packets.

  MaxExchange FTP will also work without the use of the Internet should remote users want to direct dial to the MaxExchange FTP server.
- TCP/IP networking must be enabled on all MaxExchange computers.

Network Direct Transport

- A 10 MB per second or better Network Interface Card.
- A dial-up telephone connection with modem(s) as required.

While a dial-up WAN configuration will work with MaxExchange, we recommend an ADSL line service.

Email Transport

- A MAPI (Messaging Application Programming Interface) email system for both the server and remote computers. Refer to the Maximizer website for product and version-specific information.
- If you are using Microsoft Outlook, the Collaboration Data Objects component is installed with the email application on the computer running MaxExchange Server.

  If you are using Outlook 2007, you must download Collaboration Data Objects from the Microsoft website.

If you are using a previous version of Outlook, you can install the component from your email application's disk.

- If you are running MaxExchange as a service, the service is logged in as the user who is configured for the email client, and the user has administrator rights.
- If you are using Outlook Express for email transport, the following security option is set: Go to Tools > Options in Outlook Express, click the Security tab, and clear the "Warn me when other applications try to send mail as me" option.

Installing MaxExchange Synchronization Server

There are two ways to install MaxExchange Synchronization Server—as a service or as a desktop application. In either case, the MaxExchange server is always manually controlled and configured through the MaxExchange Server Manager. If you install MaxExchange on one computer, it can be controlled by another computer by installing the MaxExchange Server Manager application.

You have the option of choosing to use individual MaxExchange servers for each Address Book or you can host multiple Address Books on one server. This decision should be made based on some of the same factors such as performance, scheduling flexibility, and the complexity of your installation.

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

➤ To install MaxExchange Synchronization Server

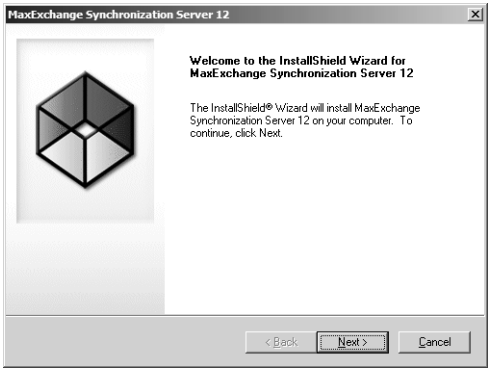
You must be logged in as an administrator to install MaxExchange. After installation, you will be prompted to restart the computer, and then you must log in as an administrator again to complete the installation.

1. Close all programs running on the server.
2. Insert the MaxExchange Synchronization Server disk in the server's disk drive. (The server and remote versions are on separate disks.). The setup starts automatically.

3. Select **Install MaxExchange Synchronization Server**.

   The installation wizard starts.

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

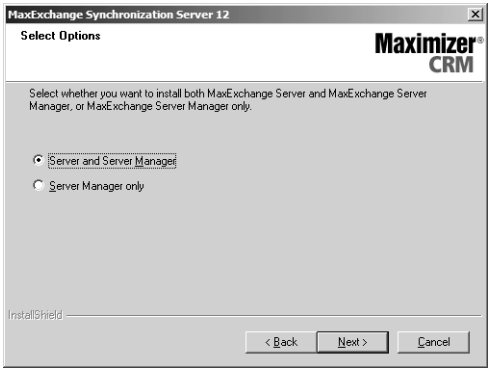


5 Read the license agreement and click **Next** to continue.

6 Select a setup type:

- **Server and Server Manager** installs both MaxExchange Server and MaxExchange Server Manager. Select this option if this machine will be used as a MaxExchange Server.
- **Server Manager only** installs MaxExchange Server Manager only, not MaxExchange Server. Select this option if this machine will not be used as a MaxExchange Server. Note that for this option to be a valid choice, "Server and Server Manager" must be installed already on another machine.

For more information on the "Server Manager only" setup, see "Running Only MaxExchange Server Manager" on page 137.



If you selected "Server Manager only", go on to step 11.

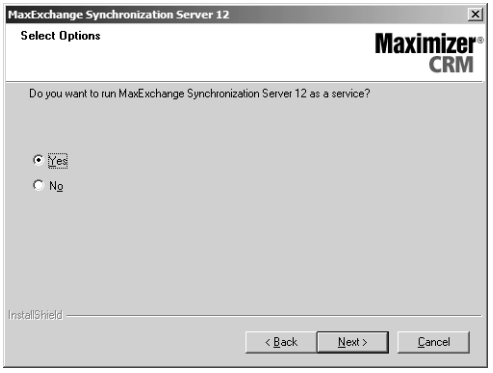
7 (This step applies to the "Server and Server Manager" setup type only.) If the "IIS Admin Service" or "World Wide Web Publishing Service" are not installed, or if they are disabled, you are prompted by a message. Take one of the following actions:

IIS Admin Service is Microsoft Internet Information Services (IIS) administrative service. For more information about Microsoft IIS, refer to the *Maximizer CRM Administrator's Guide*.

- If you will not be using the HTTP transport method, click **Ignore** and continue with the rest of the installation.
- If you will be using the HTTP transport method, and Microsoft IIS is already installed on this machine but the IIS Admin Service or World Wide Web Publishing Service are currently disabled, go to Windows Services (available through the Windows Control Panel), and enable both services. Then, click **Retry**.
- If you will be using the HTTP transport method, and Microsoft IIS is not installed, click **Abort**. Install Microsoft IIS before installing MaxExchange Server. For more information about Microsoft IIS in a Maximizer environment, refer to the *Maximizer CRM Administrator's Guide*.

8 (This step applies to the "Server and Server Manager" setup type only.) Select Yes to install MaxExchange Synchronization Server as a Windows service, or select No to install it as an application. If you are unsure, select Yes.

If you install it as a service, you can use the MaxExchange Server Manager on the server, or from another machine running MaxExchange Server Manager, to control processing and other server tasks.

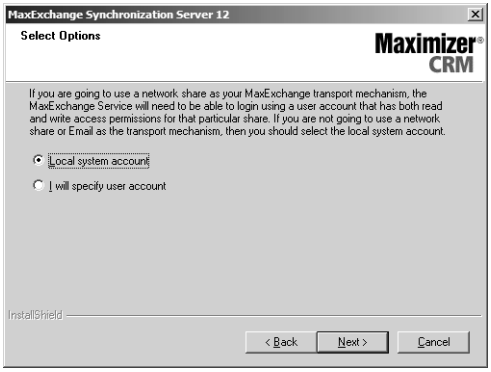


The user configured to run the MaxExchange service must have the proper rights for Microsoft SQL Server. For more information, see "Server Database Rights" on page 108.

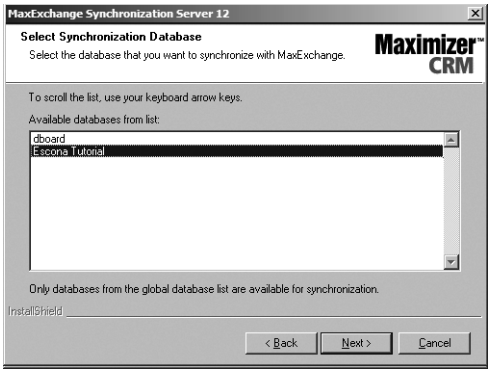
9 **(This step applies to installing MaxExchange Server as a service only.)** Specify which type of Windows account to use for MaxExchange transport:

- Select **Local system account** if you will be using either the HTTP transport method or FTP transport method for synchronization.

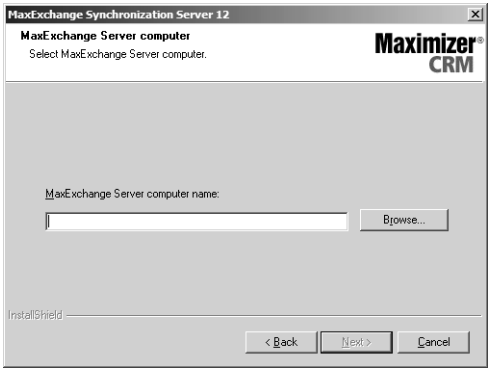
- Select **I will specify user account** if you will be using either the network direct transport method or email transport method for synchronization.



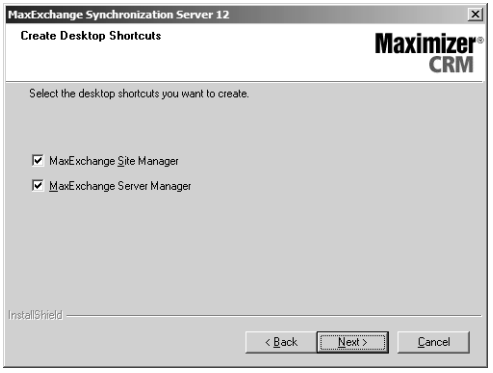
10 Select the Maximizer Address Book to synchronize, and click **Next**.



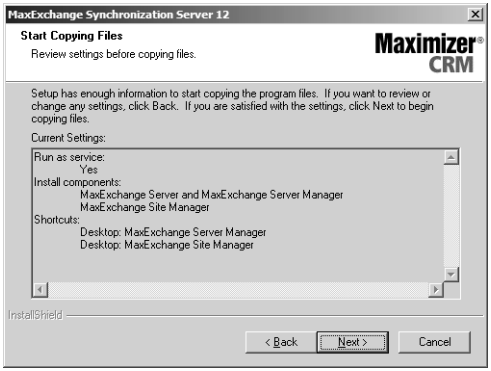
11 (This step applies to the "Server Manager only" setup type.) If you selected the "Server Manager only" option in step 6, the installation wizard prompts you to identify the MaxExchange Server computer to connect to. Browse to the MaxExchange Server computer to select it, and then click Next to continue.



12 MaxExchange Site Manager is also installed with the server software. Select the corresponding options to create desktop icons for MaxExchange Site Manager and MaxExchange Server Manager.



13 The installation provides you with a summary of your settings. Review the settings and click **Next** to begin installing the software.



When the installation is complete, it prompts you to restart the computer.

14 Click **Finish** to close the wizard and restart the computer.

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

MaxExchange Synchronization Server is now installed.

Installing MaxExchange Remote Synchronization Server

The installation of a remote server is similar to a server installation.

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

➤ To install MaxExchange Remote Synchronization Server

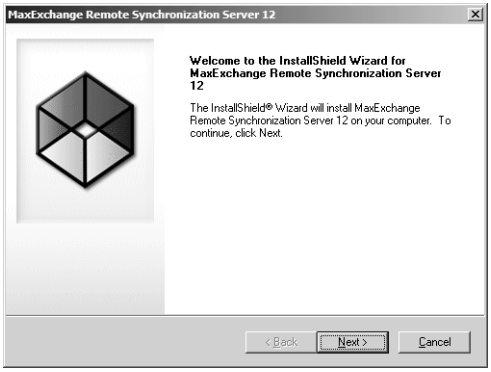
You must be logged in as an administrator to install MaxExchange. After installation, you will be prompted to restart the computer, and then you must log in as an administrator again to complete the installation.

1. Close all programs running on the remote server.
2. Insert the MaxExchange Synchronization Server disk in the server's disk drive. (The server and remote versions are on separate disks.). The setup starts automatically.

3. Select **Install MaxExchange Remote Synchronization Server**.

   The installation wizard starts.

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

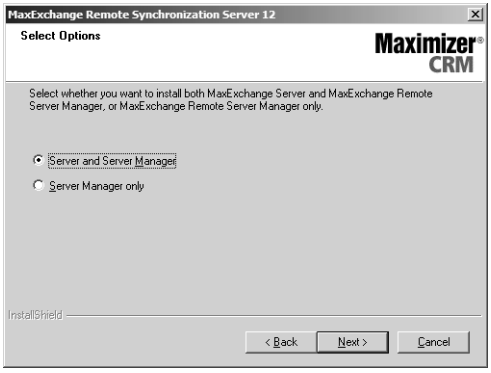


5 Read the license agreement and click **Next** to continue.

6 Select a setup type:

- **Server and Server Manager** installs both MaxExchange Server and MaxExchange Remote Server Manager. Select this option if this machine will be used as a MaxExchange Remote Server.
- **Server Manager only** installs MaxExchange Remote Server Manager only, not MaxExchange Server. Select this option if this machine will not be used as a MaxExchange Remote Server. Note that for this option to be a valid choice, "Server and Server Manager" must be installed already on another machine.

For more information on the "Server Manager only" setup, see "Running Only MaxExchange Server Manager" on page 137.



If you selected "Server Manager only", go on to step 11.

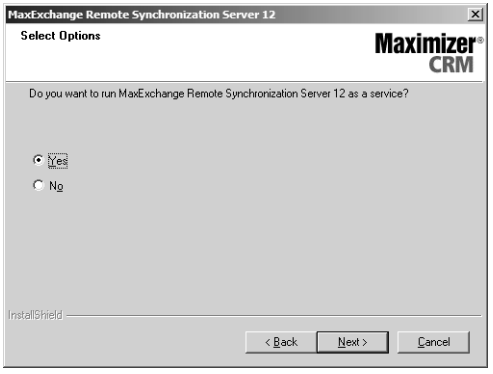
IIS Admin Service is Microsoft Internet Information Services (IIS) administrative service. For more information about Microsoft IIS, refer to the *Maximizer CRM Administrator's Guide*.

7 (This step applies to the "Server and Server Manager" setup type only.) If the "IIS Admin Service" or "World Wide Web Publishing Service" are not installed, or if they are disabled, you will be prompted by a message. Take one of the following actions:

- If you will not be using the HTTP transport method, click **Ignore** and continue with the rest of the installation.
- If you will be using the HTTP transport method, and Microsoft IIS is already installed on this machine but the IIS Admin Service or World Wide Web Publishing Service are currently disabled, go to Windows Services (available through the Windows Control Panel), and enable both services. Then, click **Retry**.
- If you will be using the HTTP transport method, and Microsoft IIS is not installed, click **Abort**. Install Microsoft IIS before installing MaxExchange Remote Server. For more information about Microsoft IIS in a Maximizer environment, refer to the *Maximizer CRM Administrator's Guide*.

8 (This step applies to the "Server and Server Manager" setup type only.) Select Yes to install MaxExchange Remote Synchronization Server as a Windows service, or select No to install it as an application. If you are unsure, select Yes.

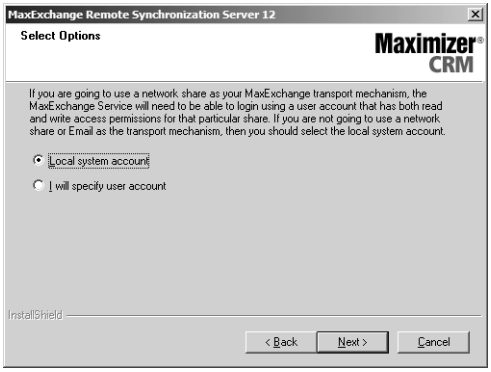
If you install it as a service, you can use the MaxExchange Remote Server Manager on the server, or from another machine running MaxExchange Server Manager, to control processing and other server tasks.



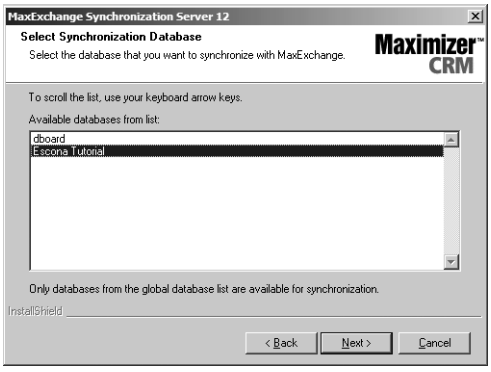
9 **(This step applies to installing MaxExchange Server as a service only.)** Specify which type of Windows account to use for MaxExchange transport:

- Select **Local system account** if you will be using either the HTTP transport method or FTP transport method for synchronization.

- Select **I will specify user account** if you will be using either the network direct transport method or email transport method for synchronization.

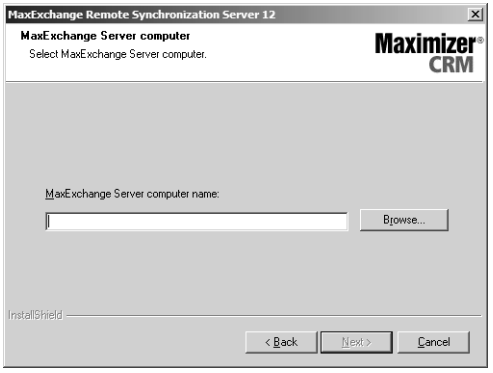


10 Select the Maximizer Address Book to synchronize, and click **Next**.

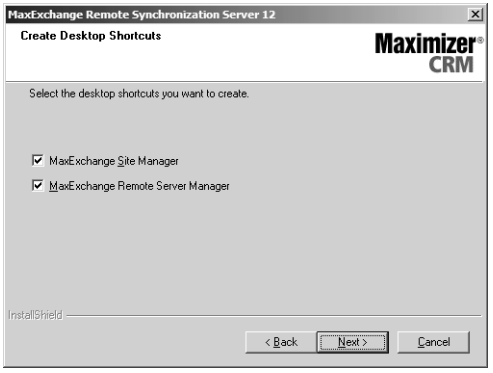


11 **(This step applies to the "Server Manager only" setup type.)** If you selected the "Server Manager only" option in step 6, the installation wizard prompts you to identify the MaxExchange Server computer to connect to. **Browse** to the

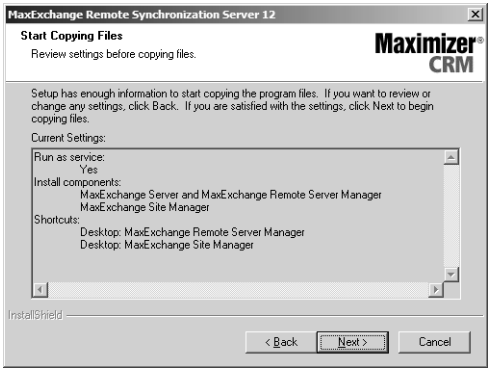
MaxExchange Server computer to select it, and then click **Next** to continue.



1 2 MaxExchange Site Manager is also installed with the remote server software. Select the corresponding options to create desktop icons for MaxExchange Site Manager and MaxExchange Remote Server Manager.



13 The installation provides you with a summary of your settings. Review the settings and click **Next** to begin installing the software.



When the installation is complete, it prompts you to restart the computer.

14 Click **Finish** to close the wizard and restart the computer.

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

MaxExchange Remote Synchronization Server is now installed.

Installing MaxExchange Site Manager

MaxExchange Site Manager is automatically installed with both MaxExchange Synchronization Server and MaxExchange Remote Synchronization Server. When prompted during the installation of both of these server applications, you can choose to create a desktop icon for the utility. MaxExchange Site Manager is available through the icon and also through the Utilities menu in Administrator when either of the server applications are installed.

Installing MaxExchange Remote

A mobile sales force can use MaxExchange to synchronize their computers with the central Maximizer Address Book(s). Remote offices can also keep their Maximizer Address Book up to date with a central office.

To perform a MaxExchange Remote installation, follow the instructions in the *Maximizer CRM Administrator's Guide* for Installing Maximizer Workstation making sure you choose "Yes" when asked if you are using the computer as a Remote Workstation. To install MaxExchange Remote on a Maximizer server, refer to Installing Maximizer Server. During the Maximizer server installation process, select Custom installation and select the MaxExchange Remote as an installation option.

Upgrading from Previous Versions of MaxExchange

Older versions of MaxExchange should be uninstalled before installing the new version.

When upgrading from a previous version of MaxExchange, take special note of these critical issues:

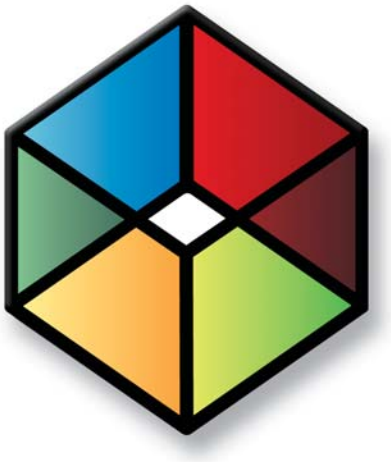
- Process packets in the MaxExchange server before upgrading. Any transactions remaining from the previous version will not be processed by the upgraded version.
- The MaxExchange server must be upgraded first, after which the remotes may be upgraded gradually (mixed-mode environment). Synchronization will continue operating even though some remotes are running Maximizer CRM 10 or Maximizer CRM 10.5. We recommend that the time frame between the upgrade of the server and all remotes not be longer than 2 weeks. If you do not upgrade a distribution site immediately, synchronization with Outlook and Maximizer and synchronization with MaxSync and Maximizer could cause duplicates.
- The processing in a mixed-mode environment is done by the server creating packets and saving them in a folder called Upgrade (under the Outbox>[HEX Address Book ID] folder). Only updates and deletions from a remote that hasn't upgraded are processed by the server; additions are discarded. When the remote upgrades, a packet is sent to the server and the server detects the upgrade. The server then sends the data packets in the upgrade folder, which is then deleted from the server, and also sends a special packet asking for all data that was added from the time the server (not upgraded yet) last processed a packet with the distribution site until the time the distribution site creates its first packet after upgrading. The remote then sends the added data packets, which is distributed to all other remotes.
- If you are running multiple servers, you have the option of migrating all Address Books to one server or keeping the existing setup. When evaluating what option is most suitable, keep the following points in mind:

  - multiple servers may process faster unless you are using one server that is equivalent to multiple machines in terms of hardware.

  - you can schedule only one automated processing schedule per MaxExchange server so if you need different scheduled processing times, you must have separate MaxExchange servers.
- If you are upgrading from a previous version, the email address must be re-entered in the Server Settings dialog box in MaxExchange Site Manager after you install the new version. Other transport method settings are maintained.
- If you are upgrading Maximizer Enterprise 7.5 or earlier, you must perform Address Book Maintenance with the "Do not

create maintenance packets" option enabled (in MaxExchange Server Manager or MaxExchange Remote Server, select File > Address Book Maintenance).

- Address Book entries with no assigned MaxExchange distribution groups will not be synchronized between the server and the remote. After running Address Book Maintenance, and a remote is sent a refresh, Address Book entries without distribution groups assigned to them are removed from the remote. It is recommended that distribution groups are assigned to all Address Book entries on a server before performing Address Book Maintenance.
- If you are upgrading to Maximizer CRM from Maximizer Enterprise 6 - Pervasive or earlier, the Upgrade utility in Maximizer Administrator does not upgrade the MaxExchange distribution groups. To perform the upgrade, choose File > Upgrade Distribution Groups in MaxExchange Site Manager.



CHAPTER 3

MaxExchange Process Flow

How the MaxExchange Process Works

In this chapter...

"Central Address Book" on page 30
"What Data is Synchronized?" on page 30
"Process Flow" on page 32
"Transport Method Details" on page 37

Central Address Book

When using MaxExchange, the Address Book has the following basic forms:

- a single, master image of the central Address Book(s) on the server
- subset images of the same Address Book(s) stored on computers at remotes

What Data is Synchronized?

MaxExchange synchronizes all data in an Address Book with the exception of the following:

- Automated campaigns (traditional campaigns are synchronized)
- Email templates for automated campaigns
- Journals
- Expenses
- Graphs
- Import catalogues
- Linked documents
- Printer settings
- Window layouts
- Email settings
- Windows authentication settings
- External third-party tables (non-Maximizer)
- Dashboard settings
- Holiday Editor information

Synchronizing Third-Party Data

There are two custom tables available through the use of the Maximizer Customization Suite (listed below) that allow you to integrate third-party data. The data contained in these tables is synchronized by MaxExchange as follows:

For both the Custom_Independent and Custom_Child tables, the Custom_ID and Custom_Number fields (whether generated automatically or manually entered) on the server and each remote must be unique in a MaxExchange environment. This is to prevent duplicate ID issues from occurring.

- **Custom_Independent** is a top-level data storage table, similar to the Clients table. It is created at database-creation time and contains a number of pre-defined columns. It is always synchronized by MaxExchange, and it synchronizes associated notes, documents, and user-defined fields.
- **Custom_Child** is a mid-level data storage table and is a child of a Custom_Independent record, an Address Book entry, an Opportunity, etc. It is created at database-creation time and contains a number of pre-defined columns, including Client_Id/ Client_Number of the parent record. It is always synchronized by MaxExchange, except on a refresh, in which case child records are synchronized only when the parent record is synchronized. It also synchronizes associated notes, documents, and user-defined fields when the parent record is synchronized.

For more information on using custom third-party tables, refer to the Customization Suite documentation.

Synchronizing Opportunities and Campaigns

Address Book entries with opportunities assigned to sales team members are synchronized to remotes, even when corresponding companies are not normally synchronized to those particular remotes (i.e., the Address Book entries are not assigned to the corresponding distribution group). Synchronization of Address Book entries also occurs when a competitor or partner of an opportunity is assigned to a Address Book entry other than the Address Book entry with which the opportunity is associated.

When a Contact is assigned to an opportunity (on the Basic Information tab of an opportunity), the Contact is not synchronized unless the Contact's Company or Individual entry is assigned to a distribution group.

Single-user opportunities are synchronized with only the remotes that created the opportunities. For example, if Remote A creates a single-user opportunity, it is synchronized with only Remote A. The opportunity will not be synchronized with Remote B. Single-user opportunities created on the server are not synchronized.

This works the same way for traditional campaigns in that traditional campaigns associated with a member of a marketing team, are also synchronized. Automated campaigns are not synchronized to any distribution sites.

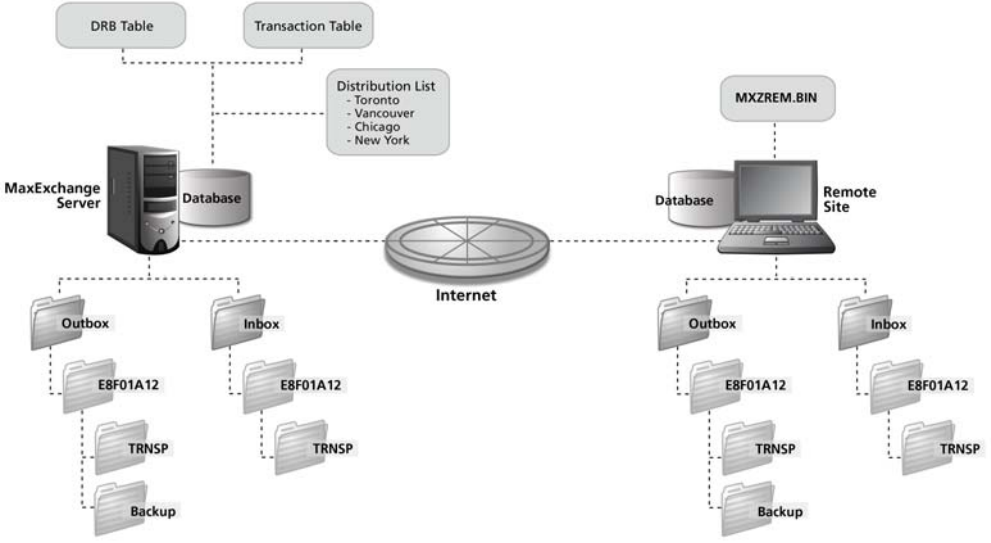
Microsoft Outlook Synchronization and MaxExchange Synchronization

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.

Process Flow

The following diagram illustrates the basic process flow between a MaxExchange server and a remote. Note that a MaxExchange Remote Synchronization Server configuration is very similar. It can include multiple tiers of remote servers and remotes as well as the parent server.



MaxExchange Basic Synchronization Cycle

The following steps describe the basic process that takes place during a synchronization cycle between a MaxExchange server and a remote.

1. A central Address Book is created on the designated MaxExchange parent server.
2. Address Book entries are marked for synchronization by assigning a Distribution Group value for the MaxExchange Distribution system field (defined in Administrator preferences).
3. In MaxExchange Site Manager, remotes and remote servers are created for the entire distribution chain. During the creation process, distribution groups are assigned to remotes and remote servers.

You can add a remote or remote server to the distribution chain at any time.

4. For each remote and remote server created in Site Manager, the MaxExchange server generates a refresh transaction. When the server processes, a refresh packet is built for each site. The refresh includes all data that is marked to be distributed to each individual site. When using the FTP method of transport, the remote/remote server pulls the refresh packet from the server. With email and network direct transport, the server sends the refresh packet.
5. After the MaxExchange server processes the data, its transaction table is cleared and the server is ready for the next synchronization cycle.
6. Changes from remotes and remote servers are written to a transaction file/table. These changes are processed by each site according to the site's designated synchronization cycle and transport method.
7. The server receives updates from the remotes and remote servers and the central Address Book is updated with the changes. The next synchronization cycle is ready to take place.

Key MaxExchange Files and Folders

Following is a list of the **key files** and **folders** on the **MaxExchange Server** or **Remote Server**.

Reference in documentation	File/folder name	File or folder description
DRB file/table	EXCH_DistributionList table	Used by MaxExchange to track the distribution list of Address Book entries and opportunities for each remote. This list is created based on the Distribution Group value associated with an Address Book entry for the MaxExchange Distribution system field.
Transaction file	EXCH_Transactions	Used by MaxExchange to track changes to the central Address Book and Address Books on the remotes. There are 5 transaction tables.
Distribution list file	EXCH_Sites	A list of assigned transport methods for all remotes. MaxExchange identifies each distribution site with a unique ID.
Inbox	Inbox	Contains all incoming packets for remotes. Packets include all changes in the form of transactions and are stored—before processing—in the TRNSP folder under the remote's folder identified with a HEX ID number.

Reference in documentation	File/folder name	File or folder description
Outbox	Outbox	Contains all outgoing packets for remotes. Packets include all changes from the central Address Book in the form of transactions and are stored—after processing incoming packets—in the TRNSP folder under the remote's folder identified with a HEX ID number. A copy of these transactions are stored in a BACKUP subfolder for each remote.
.HDR file	.HDR file	.HDR files (ASCII text files) contain the database ID and server ID information for the remote.
.ATT file	.ATT file	.ATT files (compressed binary files) contain Address Book entry and opportunity data. A typical file name format is edi0000XX.ATT.
.MEX file	.MEX file	.MEX files are used to lock the .HDR and .ATT files when MaxExchange is processing or performing specific operations.

Following is a list of the **key files** and **folders** on the **MaxExchange Remote**.

Reference in documentation	SQL file/folder name	File or folder description
REM file	MXZREM.BIN	Contains information from incoming .HDR files including the database ID, the MaxExchange server's address, the transport method, local database location, and a reference to the current packet count.
Inbox	Inbox	Contains all incoming packets from the server. Packets include all changes from the server in the form of transactions and are stored in the TRNSP folder under the remote's folder identified with a HEX ID number.
Outbox	Outbox	Contains all outgoing packets for the server. Packets include all changes from the remote's Address Book in the form of transactions and are stored in the TRNSP folder under the remote's folder identified with a HEX ID number. A copy of these transactions are stored in a BACKUP subfolder for each remote.

Transport Method Details

MaxExchange works with various types of transport mechanisms—email, network direct, FTP, and HTTP. Each remote and remote server can be configured to use any of the transport mechanisms independently of the other sites.

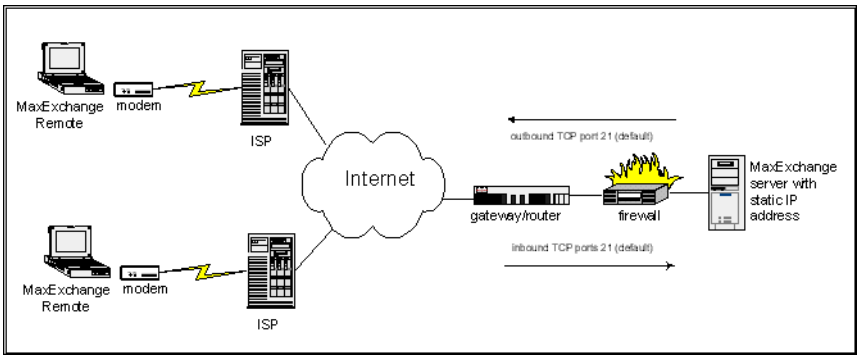
The following table outlines the basic differences between the various transport methods.

Transport method	Server requirements	Remote requirements	Supported protocols	Server identifier	Remote identifier
HTTP/HTTPS	Web service	MaxExchange Remote connection to MaxExchange Server	TCP/IP	URL of the MaxExchange web service	Not applicable – the remote always initiates the connection to the server
FTP	Internet security router/ firewall server	MaxExchange Remote connection to MaxExchange Server	TCP/IP	IP address or fully qualified domain name of the MaxExchange Server	Not applicable – the remote always initiates the connection to the server
Network direct	Dial-up server or WAN gateway server/router	WAN gateway server/router (office to office WAN configuration only)	TCP/IP IPX SPX NetBEUI	Name of the MaxExchange shared program folder in UNC format	UNC or bindery listing for the shared MaxExchange network folder
Email	MAPI-compliant email program	MAPI-compliant email client	Any protocol supported by the email program	Address of the MaxExchange Server's email account	Address of the MaxExchange Remote's email account

FTP Transport Process Flow Example

With FTP, data packets are exchanged through the Internet using File Transfer Protocol.

The following diagram represents a MaxExchange Internet FTP configuration using both a security router and a firewall server.



If remotes and/or remote servers are connecting to the server at the same time, you need to open a port for each concurrent connection.

If a firewall or security router is used in a MaxExchange configuration and the MaxExchange Server is placed inside the firewall or security router, a port must remain open for each remote or remote site that is connecting concurrently to the server. The values for inbound and outbound ports are as follows:

Inbound: 21 is the default value—this may be changed to any other available value **with the exception** of the values within the range of
10035 – 11315; these values are used for MaxExchange file transfer

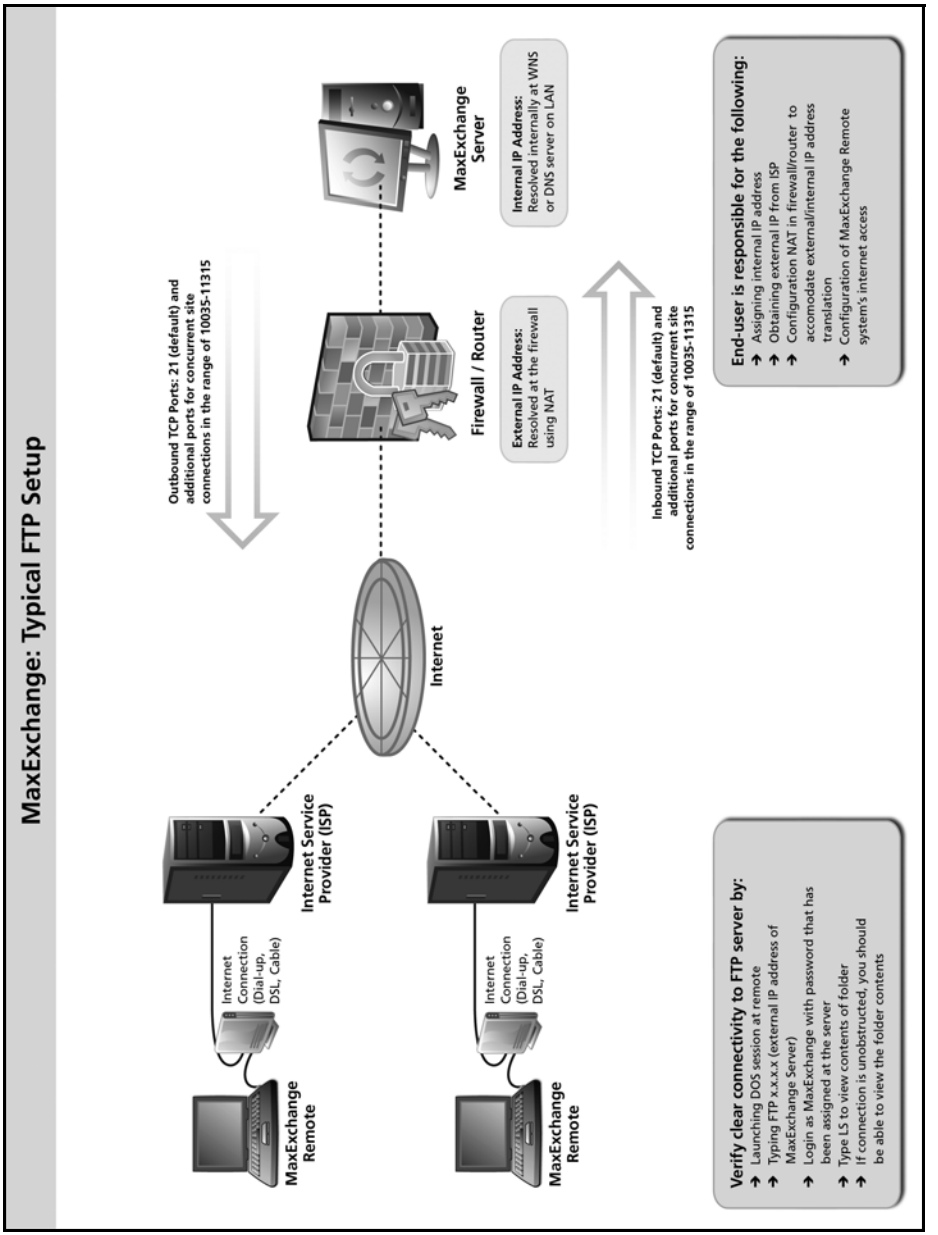
Outbound: 21 is the default value—this may be changed to any other available value **with the exception** of the values within the range of 10035 – 11315; these values are used for MaxExchange file transfer

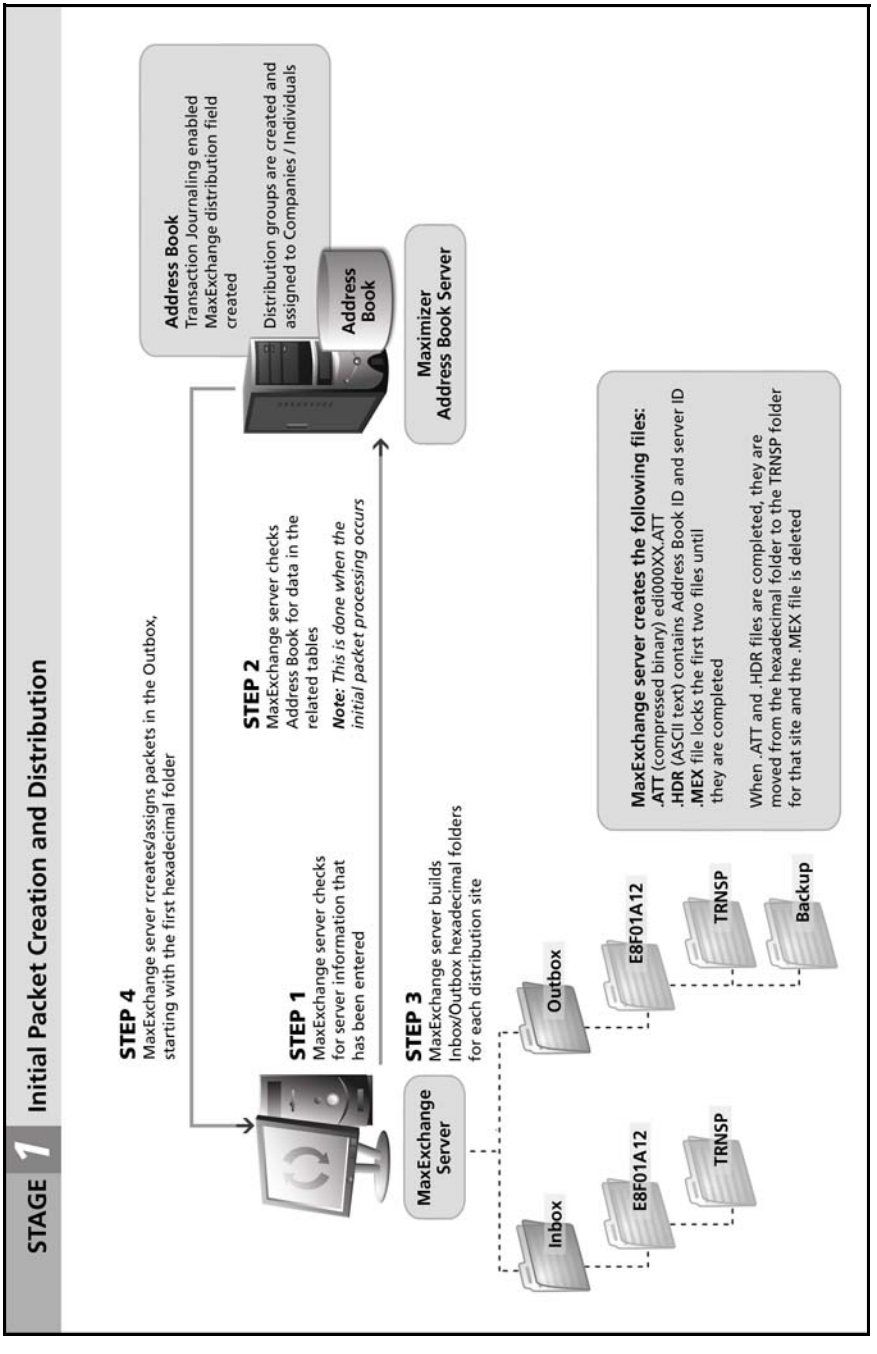
- An alternative to opening ports is to place the MaxExchange Server on the Internet side of the firewall. This computer could be a multi-homed system containing two network cards. One network card would have a static external IP address connecting to the Internet and the other network card would have an internal IP address (specified as the primary FTP address and the secondary FTP address).

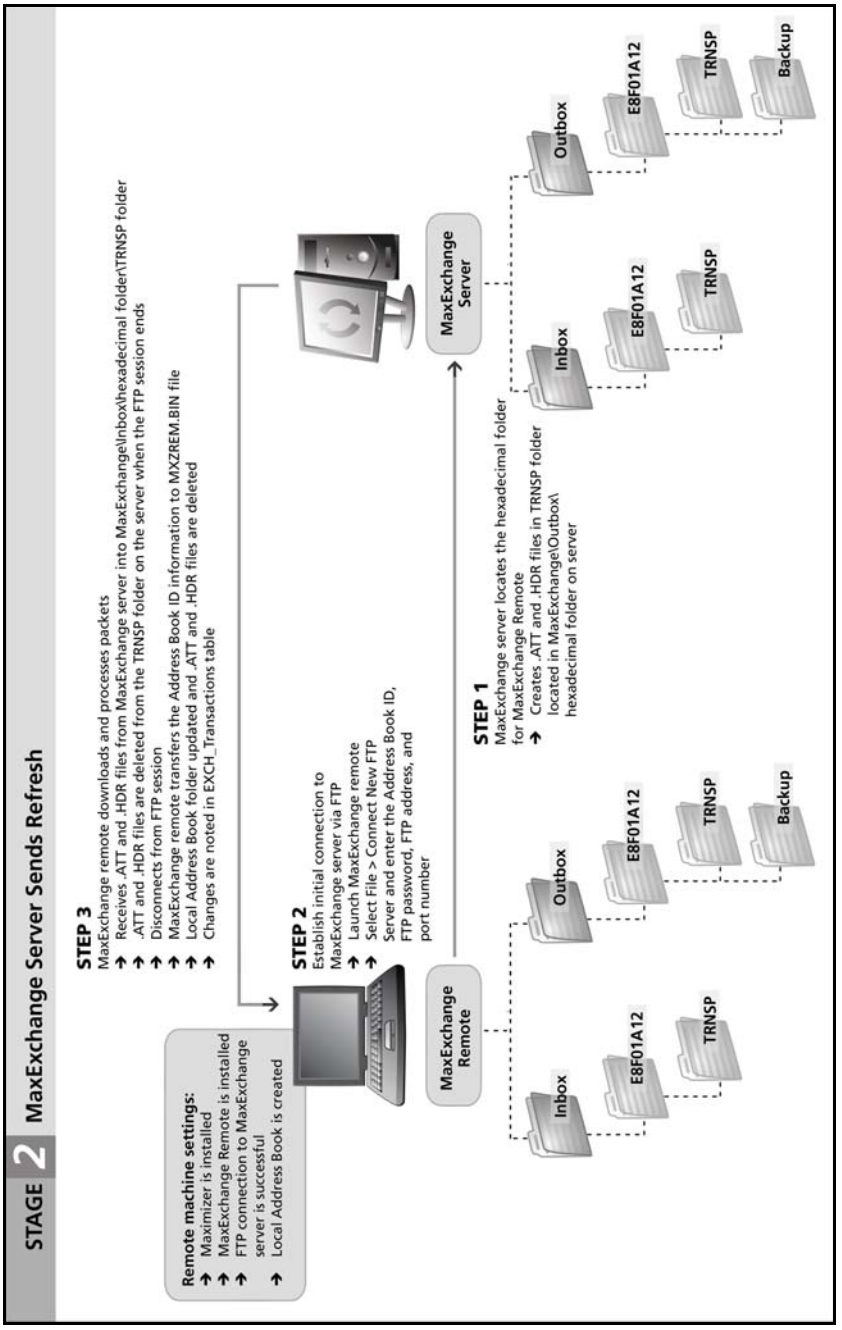
When you are using FTP, the connection between the server and remote is always initiated from the remote computer. This can be done through a LAN or a dial-up connection. If a remote is not connected to a LAN, a Windows Dial-up Connection dialog box appears when a processing session is initiated. This includes when a processing session is automated.

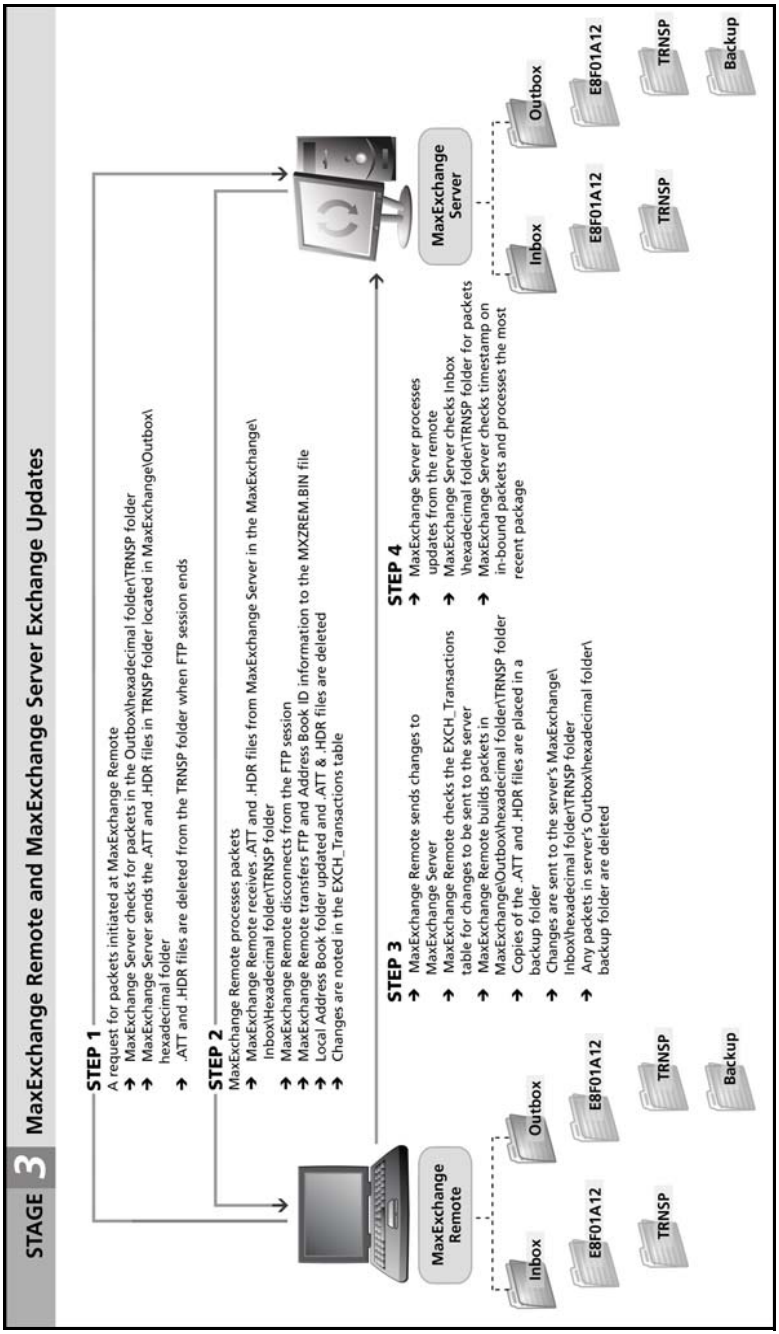
Typical FTP Setup and Process

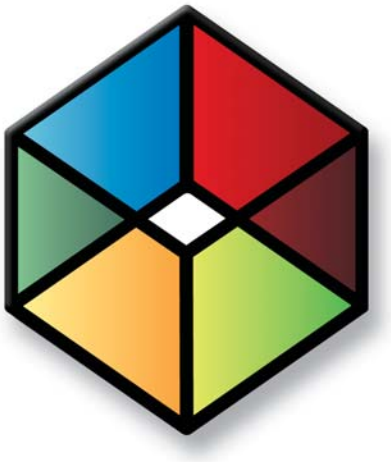
The following diagrams illustrate a typical FTP setup.




STAGE 1 Initial Packet Creation and Distribution
STEP 4
MaxExchange server rcreates/assigns packets in the Outbox, starting with the first hexadecimal folder
STEP 1
MaxExchange server checks for server information that has been entered
STEP 2
MaxExchange server checks Address Book for data in the related tables
Note: This is done when the initial packet processing occurs
STEP 3
MaxExchange server builds Inbox/Outbox hexadecimal folders for each distribution site
Address Book
Transaction Journaling enabled
MaxExchange distribution field created
Distribution groups are created and assigned to Companies / Individuals
Address Book
Maximizer Address Book Server
MaxExchange Server
Inbox
E8F01A12
TRNSP
Outbox
E8F01A12
TRNSP
Backup
MaxExchange server creates the following files:
.ATT (compressed binary) edi000XX.ATT
.HDR (ASCII text) contains Address Book ID and server ID
.MEX file locks the first two files until they are completed
When .ATT and .HDR files are completed, they are moved from the hexadecimal folder to the TRNSP folder for that site and the .MEX file is deleted


STAGE 2 MaxExchange Server Sends Refresh
Remote machine settings:
→ Maximizer is installed
→ MaxExchange Remote is installed
→ FTP connection to MaxExchange server is successful
→ Local Address Book is created
STEP 3
MaxExchange remote downloads and processes packets
→ Receives .ATT and .HDR files from MaxExchange server into MaxExchange\Inbox\hexadecimal folder\TRNSP folder
→ .ATT and .HDR files are deleted from the TRNSP folder on the server when the FTP session ends
→ Disconnects from FTP session
→ MaxExchange remote transfers the Address Book ID information to MXZREM.BIN file
→ Local Address Book folder updated and .ATT and .HDR files are deleted
→ Changes are noted in EXCH_Transactions table
STEP 2
Establish initial connection to MaxExchange server via FTP
→ Launch MaxExchange remote
→ Select File > Connect New FTP Server and enter the Address Book ID, FTP password, FTP address, and port number
STEP 1
MaxExchange server locates the hexadecimal folder for MaxExchange Remote
→ Creates .ATT and .HDR files in TRNSP folder located in MaxExchange\Outbox\ hexadecimal folder on server
MaxExchange Remote
MaxExchange Server
Inbox
Outbox
E8F01A12
TRNSP
Backup


STAGE 3 MaxExchange Remote and MaxExchange Server Exchange Updates
STEP 1
A request for packets initiated at MaxExchange Remote
MaxExchange Server checks for packets in the Outbox\hexadecimal folder\TRNSP folder
MaxExchange Server sends the .ATT and .HDR files in TRNSP folder located in MaxExchange\Outbox\hexadecimal folder
.ATT and .HDR files are deleted from the TRNSP folder when FTP session ends
STEP 2
MaxExchange Remote processes packets
MaxExchange Remote receives .ATT and .HDR files from MaxExchange Server in the MaxExchange\Inbox\Hexadecimal folder\TRNSP folder
MaxExchange Remote disconnects from the FTP session
MaxExchange Remote transfers FTP and Address Book ID information to the MXZREM.BIN file
Local Address Book folder updated and .ATT & .HDR files are deleted
Changes are noted in the EXCH_Transactions table
STEP 3
MaxExchange Remote sends changes to MaxExchange Server
MaxExchange Remote checks the EXCH_Transactions table for changes to be sent to the server
MaxExchange Remote builds packets in MaxExchange\Outbox\hexadecimal folder\TRNSP folder
Copies of the .ATT and .HDR files are placed in a backup folder
Changes are sent to the server's MaxExchange\Inbox\hexadecimal folder\TRNSP folder
Any packets in server's Outbox\hexadecimal folder\backup folder are deleted
STEP 4
MaxExchange Server processes updates from the remote
MaxExchange Server checks Inbox \hexadecimal folder\TRNSP folder for packets
MaxExchange Server checks timestamp on in-bound packets and processes the most recent package
MaxExchange Remote
Inbox
Outbox
E8F01A12
E8F01A12
TRNSP
TRNSP
Backup
MaxExchange Server
Inbox
Outbox
E8F01A12
E8F01A12
TRNSP
TRNSP
Backup



CHAPTER 4

Setting Up MaxExchange

Setting Up MaxExchange and Configuring the Central Address Book

In this chapter...

"Configuring MaxExchange" on page 44

"Enabling Synchronization for an Address Book" on page 46

"Setting Up the Central Address Book" on page 49

"Quick Start – Setting Up a MaxExchange Server and Remote" on page 51

Configuring MaxExchange

Configuring MaxExchange for the first time is a highly order-dependent process that can prove to be time-consuming if steps are not followed in a particular order.

The following section provides a high-level description of the steps required to configure MaxExchange. Each of these steps is explained in detail in the references sections.

➤ To configure MaxExchange

1. **Prepare the computers**. Make sure all computers have Maximizer and MaxExchange installed. See "Installing MaxExchange Synchronization Server" on page 13 for more information.
2. **Enable synchronization options**. At the Maximizer application server, enable the synchronization options and set up distribution groups in Administrator. See "Enabling Synchronization for an Address Book" on page 46.
3. **Prepare the Address Book(s)**. Assign Address Book entries to distribution groups on any computer with access to the database. See "Setting Up the Central Address Book" on page 49. Note that you can synchronize multiple Address Books on a MaxExchange server.
4. **Set up transport and distribution options**. Using MaxExchange Site Manager, specify your chosen transport method and distribution options. See "MaxExchange Site Manager" on page 55. This utility is available in MaxExchange Server Manager or can be accessed from the Utilities menu in Administrator on the Maximizer application server. If you have chosen to create an application icon during installation, you can also access it through the icon.
5. **Set up remotes**. Remotes are set up in MaxExchange Site Manager. See "Adding Synchronized Address Books" on page 70. Part of setting up remotes involves setting site restrictions. See "Restricting What Distribution Sites Can Do" on page 82.

6. **Assign groups to remotes**. After Address Book entries are assigned to distribution groups and your remotes are created, you then need to assign the distribution groups to the remotes. This controls which entries go to which sites. See "Assigning Distribution Groups to Distribution Sites" on page 79.

7. **Set the MaxExchange server, remote server, and remote preferences.** You can now set up your MaxExchange server(s) and remote preferences. These include options for MaxExchange logging and notification events. See "MaxExchange Synchronization Server" on page 107 and the *Maximizer CRM User's Guide* for more information.

8. **Send the initial data packet**. To properly configure the MaxExchange server, you should initiate a processing session when the data packet will contain the remote's initialization information. This completes the configuration of the server and sends the necessary settings to the remote. At the MaxExchange server, run MaxExchange Server Manager and process the data packets. See "Processing Updates from the Server" on page 111.

If you are setting up an n-tier configuration (as described under "MaxExchange Synchronization Server" on page 2), you should repeat step 8 for each remote server and step 9 for each remote.

9. **Receive the initial data packet**. To complete the configuration between the MaxExchange server and its remotes, you should receive the initial data packet that was sent in the above step on one remote. At the remote, run MaxExchange and receive the initial data packet from the server.

Your next step is to complete the configuration all of your remotes and remote servers with the server.

Maximizer Setup Tips

- Before you may start synchronization, you need to turn on transaction journaling in Administrator on the System Options preferences tab (File > Preferences). Turning on transaction journaling before you are ready to start synchronizing will result in unnecessary transactions synchronized with your remotes.
- A MaxExchange distribution group should not be confused with a Maximizer security group. A distribution group is set up using the "MaxExchange Distribution" system field and represents a group of Address Book entries that can be sent to a remote.
- When you are using Microsoft SQL Express, you are limited to a 10 GB packet size. Typically, SQL Express is used for MaxExchange Remotes, but the software can be used for a MaxExchange server in a workgroup environment. If a remote or server is to receive larger packets, you must upgrade to Microsoft SQL Server.
- You can synchronize multiple Address Books with a single MaxExchange server. Each Address Book must be added to the Distribution Sites screen in MaxExchange Site Manager. Each synchronized Address Book has its own remotes/remote servers.

Enabling Synchronization for an Address Book

You must be the MASTER user, or a user with Maximizer Administrator privileges, in order to set it up as the central Address Book for MaxExchange. The MASTER user's default password is "control".

When you install MaxExchange Site Manager and MaxExchange Server, you must choose an Address Book that is accessible from the server to become the central Address Book. The following section outlines the procedures involved in enabling your Address Book for synchronization:

- "Creating the MaxExchange Distribution System Field" on page 46
- "Creating Distribution Groups" on page 47

Creating the MaxExchange Distribution System Field

You can make the MaxExchange Distribution field mandatory for Companies and Individuals. If the field is made mandatory, each time a Company or an Individual is created, the value for MaxExchange Distribution field must be set.

The MaxExchange Distribution system field determines which companies and individuals in your central Address Book are distributed to the various remotes. Once created in Administrator, the field then appears within the System Fields preferences tab in Administrator and you add values for your distribution groups as necessary.

➤ To create the MaxExchange distribution field

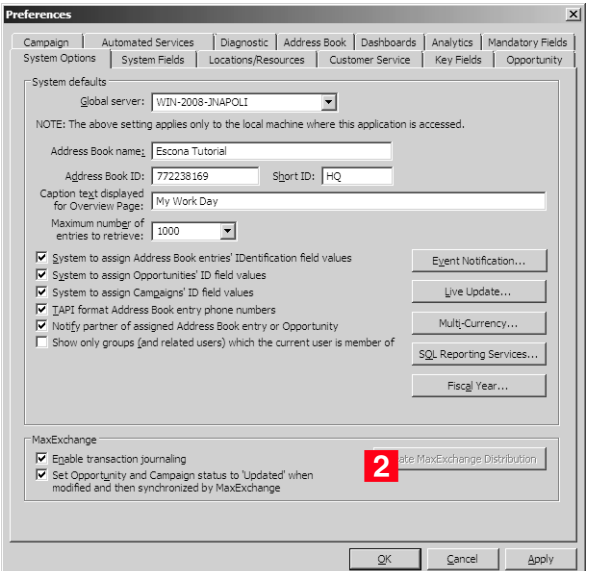
1. In Administrator, select **File > Preferences**.
2. In the **MaxExchange** section of the **System Options** tab, click **Create MaxExchange Distribution**.

   Maximizer creates a system field called "MaxExchange Distribution".

   The items you create for this system field are your distribution groups.

When you are ready to start synchronizing, you must go back to this dialog and select the Enable Transaction Journaling checkbox. Selecting the option before you are ready to synchronize data creates unnecessary transactions.

3 Click **OK** to save your settings and close the Preferences dialog box.



Creating Distribution Groups

Now that you've created the MaxExchange Distribution system field, you create distribution groups by adding new items to the field.

A Distribution Group is a collection of one or more remotes that are designated to send and receive updates to specific Address Book entries. The MaxExchange Distribution system field value determines which Address Book entries synchronize with a distribution group.

For example, you could have functional groups such as Inside Sales, Channel Sales, and Marketing. Or, for example, you could have regional groups such as East Coast, North, South, or Australia.

If an Address Book entry for ABC Wine Shop Inc. is assigned to four distribution groups—East Coast, North, South, and Australia, the entry synchronizes with remotes belonging to any of those four distribution groups.

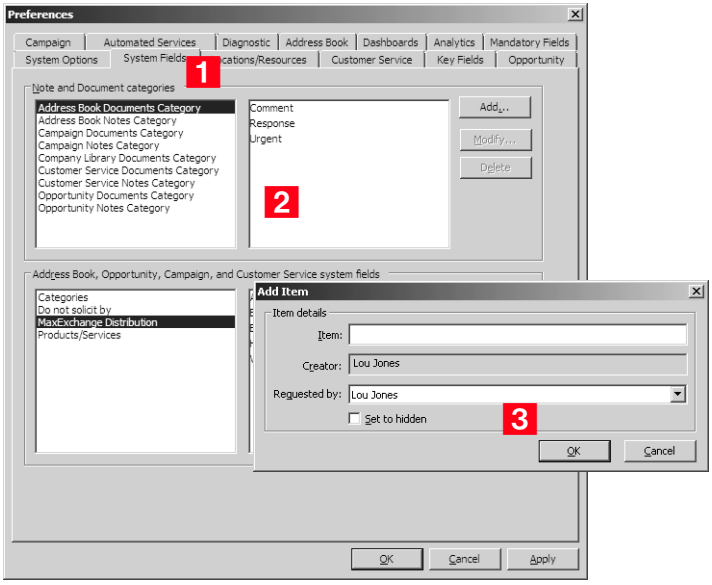
➤ To create Distribution Groups

1 After you've created the MaxExchange Distribution field (as outlined in the previous procedure), in Administrator, select **File > Preferences** and click on the **System Fields** tab.

2 Select the **MaxExchange Distribution** system field and click the **Add** button.

To ensure Address Book entries are marked with the proper distribution group when entries are created, set up a default entry for users with the appropriate distribution group assignment. You can also make the MaxExchange Distribution field mandatory on the Mandatory Fields tab in the Administrator preferences.

3 In the **Add Item** dialog box, type the name of your first distribution group (e.g., Western) and choose the user who requested that the distribution group be added if necessary. Click **OK**.



Repeat the procedure for each distribution group you need. You can always add groups later. The next step is to assign Address Book entries to the distribution groups.

Setting Up the Central Address Book

You can maintain your central Address Books on any computer that has access to the MaxExchange server via MaxExchange Server Manager. Entries in Address Books are assigned to distribution groups, which in turn, are assigned to remotes. These steps must be performed for each synchronized Address Book.

The following sections contain information on setting up the central Address Book:

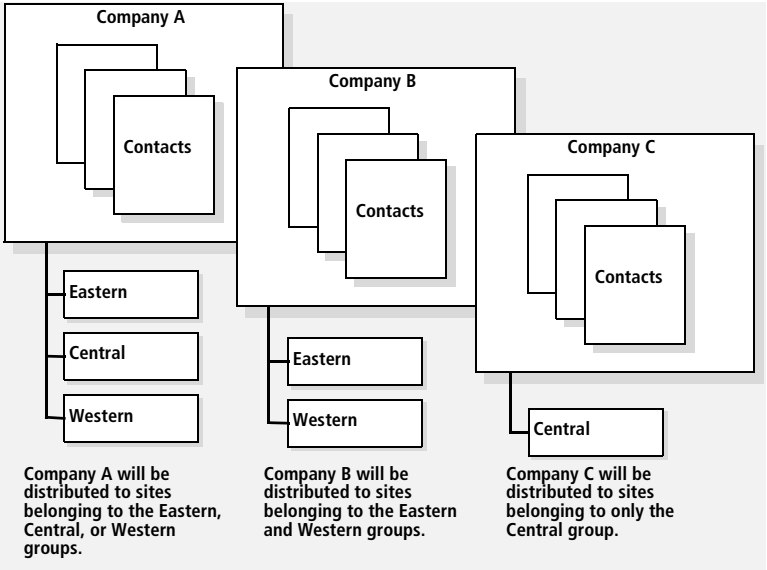
- "Assigning Address Book Entries to Distribution Groups" on page 49
- "Enabling Transaction Journaling" on page 51

Assigning Address Book Entries to Distribution Groups

Once you have created the "MaxExchange Distribution" system field, you need to assign your Address Book entries to the values (items) of this field, which are distribution groups. This process determines which Companies, Individuals, and Contacts are sent to each remote.

In the example below, there are three distribution groups—Eastern, Central, and Western and each of these groups has an assigned Address Book entry.

Distribution Groups – this example shows how three Address Book entries are assigned to different distribution groups. Each group is an item for the "MaxExchange Distribution" system field.



There are different ways to assign a distribution group to an Address Book entry. They are described as follows:

- Distribution groups are assigned to Address Book entries on the Basic Information tab as the entries are created.
- Default distribution groups are assigned to users as part of the user security properties (Access Rights tab) so that each time a particular user creates an Address Book entry, the specified distribution groups are automatically assigned.
- Default entries can be set up for users specifying distribution groups.
- Global edits can be performed on a selected group of Address Book entries.

See the Maximizer documentation for more information on default entries and global edits.

➤ To assign Address Book entries to groups

1. When you are creating a Company or an Individual, select the **Basic Information** tab.
2. Double-click on the **MaxExchange Distribution** field in the **Details** area of the tab and select the distribution groups to which you would like this entry to be synchronized.

You can assign distribution groups to only Companies and Individuals. Associated Contacts automatically belong to the same groups.

3. Click **OK** to close the Address Book entry.

   The entry is now assigned to the group(s) you selected.

➤ To assign distribution groups to users

1. In Administrator, select **File > Users**. To create a new user, click **Add**. To modify a user's properties, select the user and click **Properties**.
2. Select the **Access Rights** tab and click the **Default MaxExchange Distribution** button.
3. Choose the groups for the selected user and click **OK**.

   Each time the affected user creates a Company or an Individual, these distribution groups are assigned to the entry.

The next step is create your remotes in MaxExchange Site Manager. Refer to "MaxExchange Site Manager" on page 55 for detailed instructions.

Enabling Transaction Journaling

You must turn on transaction journaling so that MaxExchange can track the changes that are made to the central Address Book(s).

Although it doesn't cause any specific problems, you may want to turn this option on after you're completely configured MaxExchange for synchronization. Tracking changes in the database too early results in an unnecessary backlog of transactions that MaxExchange will synchronize with your remotes. However, if you are following the steps in this guide in order, turning this option on now will not result in any transactions since you have not yet created your remotes.

➤ To enable transaction journaling in the Address Book

1. From Administrator, select **File > Preferences**.
2. In the System Options tab, select the **Enable Transaction Journaling** checkbox. Click **OK** to close the Preferences dialog box.

Quick Start – Setting Up a MaxExchange Server and Remote

Accordingly, the steps outlined below are intended for experienced Windows users with sufficient knowledge in networking as well as MaxExchange data transport methods.

The Quick Start steps below set up synchronization using the FTP transport method. Because of the variety of transport methods MaxExchange offers, your configuration may vary depending on the transport method employed.

You can begin your MaxExchange implementation with synchronizing only two computers—the server and one remote. Once successful synchronization occurs to and from each of these computers, you can use the remote machine as a template to set up additional remotes. Accordingly, the process described below will use the above-mentioned, two-machine implementation case.

Step 1 – Prepare the Computers

Before you can install MaxExchange, you need to prepare two computers.

1. **Have two computers ready.** Prepare a computer for the MaxExchange server and another machine a remote. Make sure the computers match or exceed the system requirements.
2. **Verify the server's FTP address.** Determine if the network/Internet connection is functioning correctly by choosing File > FTP Test on the remote or by "pinging" the server (i.e., at the command prompt, type "ping" followed by the computer's IP address or qualified domain name).
3. **Install MaxExchange.** Install MaxExchange server on one machine and MaxExchange remote on the other. Note that MaxExchange remote is part of the Maximizer CRM installation.

You can quickly test your server's FTP address by using the File > FTP Test option on the remote.

Step 2 – Prepare the Address Book

Maximizer and MaxExchange are now installed, and the FTP transport method should be working correctly. In this step, you will prepare your Maximizer Address Book.

1. **At the MaxExchange server** decide which Address Book will be designated as the synchronized, central Address Book.
2. **Open the Address Book** in Administrator and enable Transaction Journaling and create the "MaxExchange Distribution" system field. These options are available in **File > Preferences > System Options** tab.
3. **Prepare the Address Book** (i.e., set up "MaxExchange Distribution" system field items, group/user security, etc.). See "Assigning Address Book Entries to Distribution Groups" on page 49.

Step 3 – Start MaxExchange Server

Now that your Address Book is prepared, you can start MaxExchange Server for the first time.

1. **Start MaxExchange Server Manager**

Step 4 – Configure MaxExchange Site Manager

In this step, you use MaxExchange Site Manager to set up the transport method and add the remote as a remote.

1. **At the MaxExchange server, start the MaxExchange Site Manager.** Take note of the Address Book it opens by default. If the Address Book does not appear in the list, select File > Open Address Book in Administrator and choose the Address Book you prepared above.

2. **Specify the server transport method.** Select View > Server Settings. See "Setting Up Synchronization with MaxExchange Site Manager" on page 65.

   For FTP transport, you must enter a static IP address or a fully qualified domain name and the port number for the MaxExchange server.

   You must also enter FTP Passwords. FTP remote users will login using the MAXEXCHANGE password. A secondary GUEST password is also required.

3. **Add the remote.** Add the second computer as a remote. See "Setting Up Distribution Sites" on page 72.

   When the site has been added correctly, a message is shown indicating that a refresh will be sent to the Site. Click OK.

Make a note of the remote's ID displayed in the remotes list. You will need it later.

Step 5 – Send Initial Data

Now that your remote is set up as a remote in MaxExchange Site Manager, you can use MaxExchange server to send the first data packet.

1. **At the server, send the first data packet.** Start MaxExchange Server and select File > Process Data Packets.

2. **Check to see if the data packet was transported.** Evidence of this will vary for each transport Method.

   For FTP transport, the data packet files should be in the "MaxExchange\Outbox\<hexadecimal number>" folder, awaiting pickup from the remote computer.

The "hexadecimal" folder is a folder labelled by a hexadecimal number that corresponds to the Address Folder ID. This ID is displayed in the Distribution List dialog box in MaxExchange Site Manager.

Step 6 – Receive an Initial Refresh Packet at the Remote

1. **Start MaxExchange Remote on the second computer.**
2. **Initiate a communication session with the server.** Select File > Connect New FTP Server. Enter the server IP address or fully qualified domain name, FTP port number, password (the MAXEXCHANGE password entered at the server), and Address Book ID for this remote. Click OK when finished.

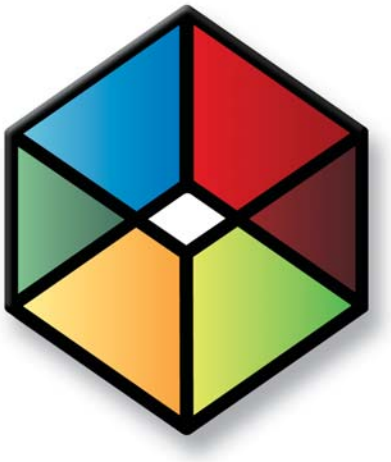
   MaxExchange initiates an FTP session with the server and transports the refresh data packet from the server.

   You can also provide values for a secondary IP address and port number.
3. **Select an Address Book.** MaxExchange asks for the Address Book you want to designate as your synchronized MaxExchange folder. You may select an existing Address Book from the drop-down list or create a new Address Book.

   If selecting an existing Address Book from the drop-down list, verify that it is not the central Address Book.
4. **Process the data packet.** Select File > Process Packet. MaxExchange will only process data packets if there is sufficient disk space remaining on your hard drive.
5. Following the previous instructions, the refresh you receive at the remote should contain no Address Book data.
6. **Check the Address Book in Maximizer.** When packet processing has ended, open the synchronized Address Book in Maximizer. No Address Book data should exist. Compare other data structures such as user-defined fields and document templates with the server Address Book to verify that the synchronization was successful.

You have now successfully synchronized a MaxExchange data packet. The next step will be to associate the MaxExchange Distribution system field items to the Address Book entries you want to send out to the remotes and then associate the MaxExchange Distribution items to remotes in the MaxExchange Site Manager. This will result in Address Book records being assigned to the next data packet for the later transport to the remote.

Once you have synchronized all data successfully between both computers, you can repeat these procedures to roll out other remote computers using your original MaxExchange server.



CHAPTER 5

MaxExchange Site Manager

In this chapter...

"Role of MaxExchange Site Manager" on page 56
"Starting MaxExchange Site Manager" on page 57
"Configuration Settings" on page 58
"Setting Up Synchronization with MaxExchange Site Manager" on page 65
"Configuring Server Settings" on page 67
"Adding Synchronized Address Books" on page 70
"Setting Up Distribution Sites" on page 72
"Sales and Marketing Teams" on page 91
"MaxExchange Notifications" on page 96
"Address Book Diagnostic Tools" on page 99
"MaxExchange Site Manager Reports" on page 103

Role of MaxExchange Site Manager

MaxExchange Site Manager coordinates the communication between the server and its remotes. Use MaxExchange Site Manager for the following tasks:

- define and maintain remotes and the transport addresses of users who are responsible for them
- assign remotes to distribution groups
- create and maintain sales and marketing teams and their members (if applicable)
- limit a remote's image of the central Address Book by permitting the selective distribution (partial image) of specific types of Address Book entries only
- assign users to remotes
- set up distribution preferences for each remote
- set up remote distribution filters
- perform Address Book diagnostics
- define server settings
- add or remove synchronized Address Books (the central database)

Starting MaxExchange Site Manager

To access MaxExchange Site Manager, you must have installed MaxExchange Server or Remote Server on the computer where you are accessing the utility. You must also have access to the central Address Book as the MASTER user, or a user with Maximizer Administrator privileges.

Note that if you are using Windows authentication for Maximizer, you are not prompted for a Maximizer user name and password when you start MaxExchange Site Manager. You must map the Maximizer user to your Windows account before starting MaxExchange Site Manager. For more information on setting up Windows authentication for Maximizer, see the *Maximizer CRM Administrator's Guide*.

➤ To start MaxExchange Site Manager

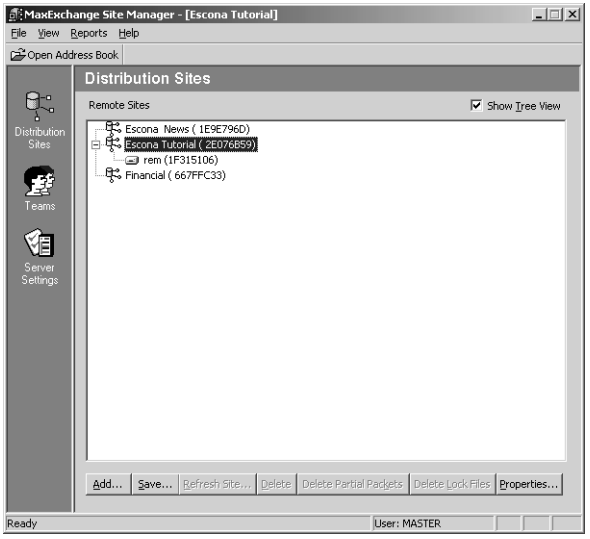
- Double-click the **MaxExchange Site Manager** icon on the desktop.

  – or –

- Select **MaxExchange Site Manager** from the **Utilities** menu in Administrator.

In order for the MaxExchange Site Manager menu item to appear on the Utilities menu, you must have first installed MaxExchange Server.

The Site Manager window opens. The first view allows you to set up your remotes. To set up teams and additional server properties, click the associated icon.

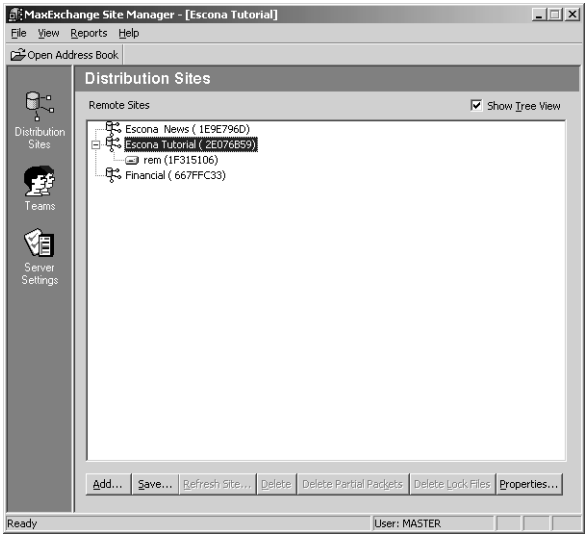


Configuration Settings

The following tables provide an overview of the various configuration settings available in Site Manager. Step-by-step configuration instructions are provided in the subsequent section.

"Distribution Site" is another term for a remote.

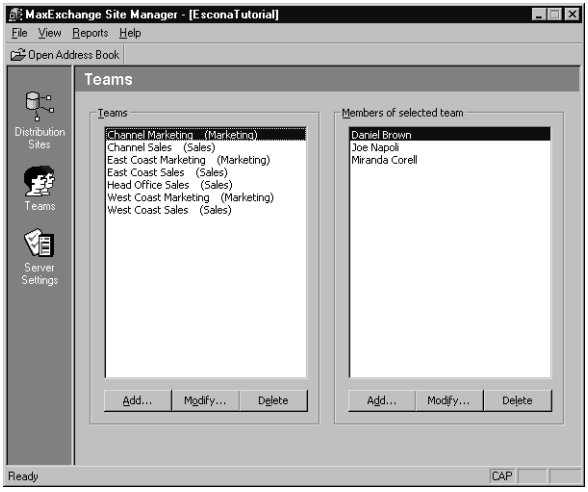
Distribution Sites Screen



Field, Option, or Button	Purpose and Use
Show Tree View	You can view the remotes either in tree view or in column view, depending on whether this checkbox is selected. You must be in Tree View to add the first remote to a server.
Remote Sites	Displays the synchronized Address Book(s), remote server(s), and remote(s). • Tree view displays the names and Address Book IDs in a hierarchical format. • Column view displays additional configuration information about the remote.

Field, Option, or Button	Purpose and Use
Add	Adds a remote or a remote server. See "Setting Up Distribution Sites" on page 72.
Save	Enables you to save information about remotes to a tab-delimited text file. The text file contains the following columns: • Name: Name of the remote • DBID: Address Book ID of the remote • LSP: ID of the last packet sent to the remote • LRP: ID of the last packet received from the remote • Date: Date when the last packet was received from the remote • Time: Time when the last packet was received from the remote • Last Packet Sent: Date and time when the last packet was sent to the remote
Refresh Site	See "Sending a Remote Refresh" on page 86.
Delete	Removes the selected distribution site from the Remote Sites list. See "Removing a Remote" on page 90
Delete Partial Packets	Deletes incomplete packets (ATT files without headers) from all remotes in the current Address Book.
Delete Lock Files	Deletes lock files (MEX files) that are created during processing sessions for all remotes in the current Address Book. MaxExchange typically deletes this file automatically. However, there may be instances, such as if a machine is inadvertently shut down, that this file is not deleted.
Properties	Opens the Properties dialog box for the selected server or remote. You can also open the Properties dialog box by double-clicking on the server or remote in the tree or column view.

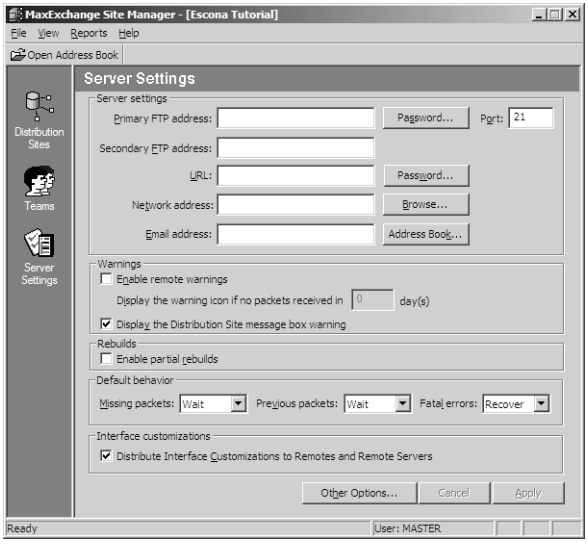
Teams Screen



Field, Option, or Button	Purpose and Use
Teams	Displays a list of sales (Opportunities) and marketing (Campaigns) teams for the current Address Book. The right column displays the members of the currently selected team. You can create new teams and change settings for existing teams using the Add and Modify buttons.

Field, Option, or Button	Purpose and Use
Members of the selected team	Displays the members of the sales or marketing team selected in the Teams column. You can add new team members or modify settings for existing members using the Add and Modify buttons. Properties for team members include the following settings: • **Name**: Team member's name. • **User ID**: Team member's Address Book user ID. • **Status**: Indicator whether the member is a team leader. A team may have only one leader. • **Campaign/Opportunity rights**: Indicates whether the member has read-only (audit), read/write (edit), or partial read/write (standard) rights. • **Reassign Campaign/Opportunity** (modify dialog box only): Enables you to assign the selected member's Opportunity or Campaign item(s) to another member of the team. • **Current distribution sites**: Identifies the Name and Address Book ID of the remote(s) to which the selected team member belongs.

Server Settings Screen



Field, Option, or Button	Purpose and Use
Primary FTP address/ Secondary FTP address	Contains the FTP address of the server, which must be a static IP address or a fully qualified domain name. If you are using a NAT-enabled firewall and an IP address, it must be the externally assigned IP address. You can specify a second FTP address if necessary.
Password	Sets the FTP passwords. There are two passwords: • **MaxExchange password**: Password for synchronization using FTP transport method. This password must be entered at the remote for the FTP connection to occur. • **Guest password**: Second password that has the same function as the MaxExchange password. Use this password when a remote needs to connect using FTP, but you don't want to give out the main MaxExchange password. This password is typically used in testing and troubleshooting situations.

Field, Option, or Button	Purpose and Use
Port	Displays the server's listening port used for FTP transport. You can adjust this setting if necessary. By default, port 21 is selected. You must also open other ports equal to the number of remotes that are connected concurrently. These additional ports must be within the range of 10035 – 11315 and are used for data transfer.
URL	If you are using HTTP, this field displays the URL of the server. Note the URL must be entered in one of the following formats: http://[server name]:[port number]/ MaxExchangeTransport https://[server name]:[port number]/ MaxExchangeTransport
Password	Sets the HTTP password. • **MaxExchange password**: Password for synchronization using HTTP transport method. This password must be entered at the remote for the HTTP connection to occur.
Network address	Use this field for the Network Direct transport method. The MaxExchange spdm.exe program folder (e.g., C:\Program Files\Maximizer\MaxExchange) on the server must be shared with full access (Full Control/ Change/Read) to use Network Direct. Specify the UNC address of the MaxExchange program folder (e.g., \\TEST-SERVER\MaxExchange). The application looks for the presence of the spdm.exe file and does not allow itself to be mapped to any other folder.
Browse	Enables you to navigate to the shared MaxExchange program folder on the server.
Email address	Email address that the email client on the server is configured to use.
Address Book	Opens the list of contacts for the local email client.
Enable remote warnings	Alerts the server to flag remotes that have not synchronized over the specified number of days.

Field, Option, or Button	Purpose and Use
Display the warning icon if no packets received in *n* day(s)	Available only if Enable remote warnings option is selected. Specify how many days a remote may go without synchronizing before sending an alert message.
Display the Distribution Site message warning	Displays a warning message each time you start MaxExchange Site Manager if you have sites that have no assigned users. This checkbox is enabled by default.
Enable partial rebuilds	Rebuilds only a portion of the DRB file pertaining to the site being refreshed (remaps Address Book entries to that particular site). Unlike the Address Book Maintenance function, which rebuilds the entire Address Book folder, this option allows for Address Book distribution information to be rebuilt for individual remotes.
Missing packets	Indicates which action to take when a packet is missing. This setting applies when MaxExchange is running as an application and the dialog box prompting action on a missing packet has passed the two-minute time-out period. The following actions are available: • Wait (default) • Resend • Process
Previous packets	Indicates which action to take when a packet is received that should have been received earlier. For example, when packet 13 arrives after packet 15. The following actions are available: • Delete • Process • Wait (default)
Fatal errors	Indicates which action to take when a fatal error occurs. • Ignore • Recover (default)

Setting Up Synchronization with MaxExchange Site Manager

The MASTER user, or a user with Maximizer Administrator privileges, uses Site Manager to set up and maintain remotes for a particular Address Book. Each remote belongs to one or more distribution groups.

Only the MASTER user, or a user with Maximizer Administrator privileges, can log in to MaxExchange Site Manager.

The first time you run Site Manager, you must specify the server's initial transport method. This is the transport method that will be most commonly used by remotes. You must set up at least one of the following transport methods:

- HTTP
- FTP
- network direct
- email

HTTP Transport

To use HTTP transport, all MaxExchange computers must have TCP/IP networking enabled. The HTTP address is the URL of the server. By default, HTTP transport uses port 80. If you change this port, you must specify the port number as part of the URL.

You must specify a password for HTTP transport.

FTP Transport

To use FTP transport, all MaxExchange computers must have TCP/IP networking enabled. The FTP address is the IP address or fully qualified domain name of the MaxExchange server. If your network uses a NAT-enabled firewall and an IP address, it must be the externally assigned IP. By default, FTP transport uses port 21. You must also open other ports equal to the number of remotes that are connected concurrently. These additional ports must be within the range of 10035 – 11315.

When you set up FTP transport, you must enter two passwords—one for MaxExchange, and one for Guest.

Network Direct Transport

To use Network Direct transport, MaxExchange must be installed on all remote computers before adding them as remotes in Site Manager. As well, the remote's MaxExchange folder (..\Program Files\Maximizer\MaxExchange) must be shared on the network with full access rights for the server to access it.

Email Transport

To use email transport, remotes must have a functioning MAPI-compliant email client.

Setting the Initial Transport Method

For more information on the requirements for each transport method, see "Transport Method Requirements" on page 11.

When you first run Site Manager at the server, you must choose and set up the initial transport method, which determines how remotes communicate with the server.

➤ To set the initial transport method

1. If you plan to use email data transport, start your email program, and minimize it so that it is running in the background.
2. Open **MaxExchange Site Manager**.
3. Select **View > Server Settings** or click the **Server Settings** icon. Choose a transport method and specify the server address for each method you plan to use for synchronization:
   - **HTTP** – Enter the server's URL. The URL must be entered in one of the following formats:

     http://[server name]:[port number]/MaxExchangeTransport

     https://[server name]:[port number]/MaxExchangeTransport

     Also, enter a password for the MaxExchange user.

     Note that the port number must be part of the URL only if you are using a port number other than the default port number of 80.
   - **FTP** – Type the server's FTP address (IP address or fully qualified domain name) and port number. When prompted, supply a password for the MaxExchange and Guest users. Make a note of these passwords, as they will be needed at the remotes.
   - **Network Direct** – Enter or browse for the network path to the server's "MaxExchange" program folder. This path must be a UNC path (e.g., "\\<server name>\MaxExchange") and accessible from the remotes over the network.

     To locate the Network Direct folder under Network Neighborhood, share the folder, then click the Address button.
   - **Email** – Type the server's email address or click the Address Book button to select the address from a list.
4. If you previously used MaxExchange with email transport and are now switching to the FTP or Network Direct transport mode, select the **MaxExchange has previously been run...** option. This option ensures you will still receive any data packets sent by email.
5. Click **OK** to confirm your Initial Server Setup settings.

Configuring Server Settings

➤ To configure MaxExchange server settings

1. Start MaxExchange Site Manager.
2. Click the **Server Settings** icon.
3. In the **Server settings** group, enter the address for any transport methods supported by this server.

If you make a change to the server settings such as a change to the FTP address, the MaxExchange Server and the MaxExchange Service must be restarted before the change will take effect. Note that server settings apply to all Address Books.

- **Primary FTP address/Secondary FTP address –** Enter the network IP addresses or the fully qualified domain name of the server. You must also enter the main password used for FTP synchronization and a guest password to be used by the remote in the case where you do not want to give out the main password.

  If required, change the **port** number. By default, it is set to 21. This port is the server's listening port.

  You can enter a second FTP address for the server if necessary. This allows remotes to connect to an internal IP address when inside the network and an external IP address when outside of the network. By default, the remote connection is first attempted through the primary IP address. If this connection fails, the remote is connected through the secondary IP address.

- **URL –** The URL must be entered in one of the following formats:

  http://[server name]:[port number]/MaxExchangeTransport

  https://[server name]:[port number]/MaxExchangeTransport

  Also, enter a password for HTTP synchronization.

Note that the port number must be part of the URL only if you are using a port number other than the default port number of 80.

- **Network address –** Enter the UNC network path to the MaxExchange program folder on the server. (e.g., \\TEST-SERVER\MaxExchange)

The MaxExchange program folder on the server must be shared on the network.

- **Email address –** Enter the email address that the email client on the server is configured to use or click the Address Book button to select an address.

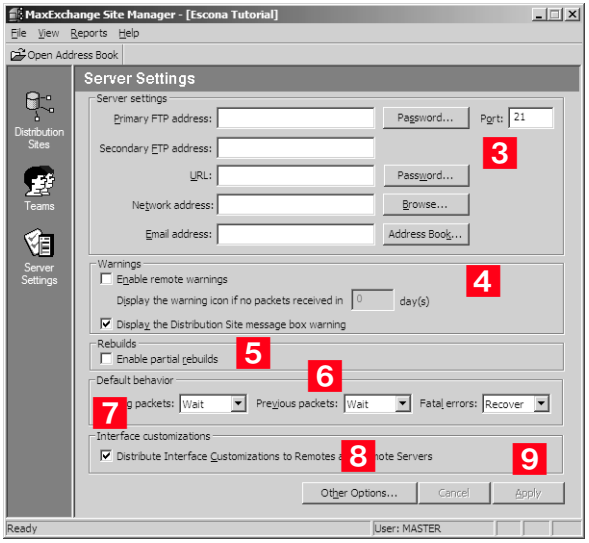
4 Select the **Enable remote warnings** option to display a warning when remotes haven't received packets. Also specify the **number of days** to wait before applying the warning functionality (Display the warning icon if no packets received in [x] day(s) option).

The **Display the Distribution Site message box warning** displays a warning message each time you start MaxExchange Site Manager if you have sites that have no assigned users. This checkbox is enabled by default.

5 Select the **Enable partial rebuilds** option to check the MaxExchange DRB file for a remote to see if there are missing files to be sent out. This functionality only partially rebuilds a database, unlike the Address Book Maintenance feature, which rebuilds the entire database. The option applies to Refreshes only.

6 Select the **default behavior** options for synchronization issues.

7 If you want to distribute any interface customizations to remotes and remote servers, select the **Distribute Interface Customizations to Remotes and Remote Servers** option.

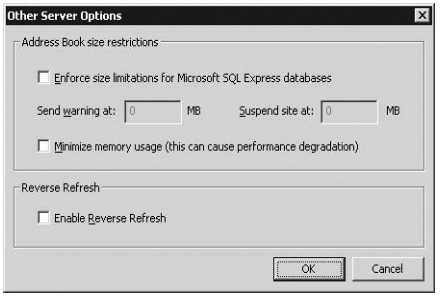


8 If applicable, click the **Other Options** button and set the **Microsoft SQL Express database size restrictions**. This option applies only if you are using SQL Server Express for remote sites. The limit of this type of Address Book is 10 GB. Note that if you are enforcing size restrictions, you must set up the corresponding notifications for these events in Administrator or Site Manager.

- Select the **Minimize memory usage** checkbox to limit the number of records that are loaded into memory during a processing session. This option applies to all remotes and the server.

Note that the Minimize memory usage checkbox may cause performance degradation. This option should be used only when the affected computers can process a limited number of records due to memory restrictions.

- Select the **Enable Reverse Refresh** checkbox to expose the Reverse Refresh option when sending a refresh.



9 Click **Apply**.

The server now supports synchronization using the configured transport methods.

Adding Synchronized Address Books

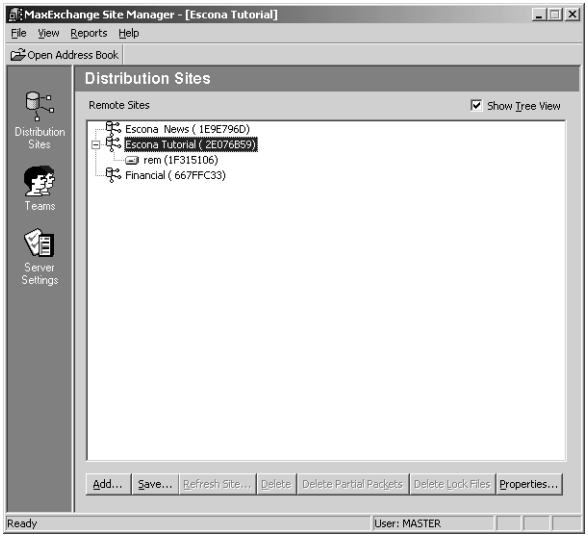
MaxExchange Server allows you to synchronize multiple Address Books, which are added in MaxExchange Site Manager.

In order to manage synchronized Address Books, you must have Maximizer Administrator privileges. Only the Address Books to which you have access rights are displayed in MaxExchange Site Manager.

➤ To add a synchronized Address Book

1. In MaxExchange Site Manager, select **File > Add Synchronized Address Book**. The **Select Synchronized Address Book** dialog box opens.
2. Select the Address Book for synchronization and click **OK**.

   The Synchronized Address Book Properties dialog box opens displaying the name of the Address Book and the MaxExchange synchronization server.



3. Click **OK**. The Address Book appears in the Distribution Sites tree view. You can now add remotes and remote servers to synchronize with each Address Book.
4. Restart MaxExchange Server Manager and the MaxExchange Service if applicable.

The new Address Book will not be synchronized until the MaxExchange Server Manager and MaxExchange Service (if applicable) have been restarted.

Setting Up Distribution Sites

Distribution sites are computers where MaxExchange Remote or MaxExchange Remote Synchronization Server is installed. You can keep track of your distribution sites in MaxExchange Site Manager.

When you create distribution sites, a wizard takes you through the following steps:

1. Set up the remote's general properties, including the initial transport method, and the server the remote connects with—the MaxExchange synchronization Server or a Remote Synchronization Server. For more information, see "Adding Remotes" on page 73 and "Adding Remote Servers" on page 76.

Remote Synchronization Servers are used only in n-tier situations. A Remote Synchronization Server is a remote with more remotes attached to it.

2. Specify the distribution groups that apply to the remote. For more information, see "Assigning Distribution Groups to Distribution Sites" on page 78.
3. Assign users to the remotes. For more information, see "Assigning Users to Distribution Sites" on page 79.
4. Specify the remote's redistribution filters. For more information, see "Restricting What Distribution Sites Can Do" on page 81.
5. Set the remote's distribution restrictions. For more information, see "Setting and Viewing the Distribution Preferences for a Remote" on page 82.
6. Complete the setup. For more information, see "Completing the Remote Setup" on page 85.

The following sections contain additional information on setting up distribution sites:

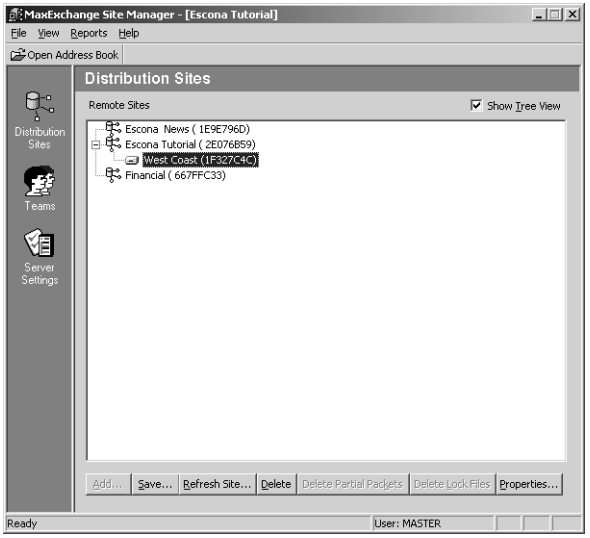
- "Changing the Active Transport Method for a Remote" on page 86
- "Sending a Remote Refresh" on page 86
- "Changing a Remote's Email Address" on page 88
- "Suspending Synchronization with a Remote" on page 89
- "Removing a Remote" on page 90

Adding Remotes

You can synchronize more than one Address Book on a single MaxExchange server. Before adding your distribution site, ensure you select the correct Address Book.

➤ To add a remote

1. Open MaxExchange Site Manager.



Note that only those Address Books for which you have Maximizer Administrator privileges appear in MaxExchange Site Manager.

2. If you are synchronizing multiple Address Books, select the Address Book.
3. In the "Distribution sites" tree view, select the server that the new remote should connect to if you are using an n-tier configuration.
4. Click **Add** to add a remote. In the **Remote type** dialog box, select **Remote** and click **OK**.
5. Enter a descriptive name in the **Name** field (e.g., "New York Office").
6. If the remote connects directly to the server, select the server from the **Parent** drop-down list.

   – or –

   If the remote connects to a remote server, select the name of the remote server from the **Parent** drop-down list.

7 To synchronize all Address Book entries and opportunities to this site, select **Address Book Mirror**.

– or –

To synchronize only entries associated with specific distribution groups, clear the **Address Book Mirror** checkbox.

The settings for Address Book Mirror sites are found in View > Address Book Mirror Properties.

To avoid excessive transaction volumes at remote sites, Address Book Mirror sites are best suited for central Address Books under 10 GB. If you want to set up an Address Book Mirror for a larger database, you can exclude large documents and old entries from synchronization in the Address Book Mirror Properties.

8 Select **Include site log files with synchronization** to synchronize the remote's packet summary log and remote activity log back to the server. For more information on log files, see "Log Files" on page 133.

9 Choose a transport method for this remote and specify the remote address.

- **FTP/HTTP** – No address is necessary for a distribution site if you select FTP/HTTP. You are prompted to specify the server's address settings if you have not done this in the Server Setting dialog box.
- **Network Direct** – Enter or browse for the network path to the remote's "MaxExchange" program folder. This path must be a UNC path (e.g., \\<computer name>\MaxExchange) and accessible with read/write access from the server over the network.
- **Email** – Type the remote's email address or click the Address button to select the address from a list.

10 Specify the synchronization characteristics. These settings control how the packet transmission is initiated between this remote and its parent server and how synchronization is processed.

- **Synchronize clock with server** – Uses the server's time settings for the remote. This setting works with FTP and HTTP only. Note that this adjustment does change the time on the affected computer.
- **Remote initially performs FTP active connections** – If enabled, the remote initiates synchronization sessions using Active mode. If the connection is unsuccessful, the remote attempts connection again using Passive mode. This is useful for situations when the server may be restricted by a firewall.
- **Save to Disk** – This option enables data packets to be saved on removable media (such as a diskette or Zip disk), or to a hard disk directory. This option is useful when physical transport of data packets is either halted or impractical for some reason. For instance, due to poor telephone line integrity in some parts of the world, large initial refresh packets might be sent more reliably by disk. After this refresh

data packet is loaded on the remote computer, all further data packets can be sent using the typical transport method.

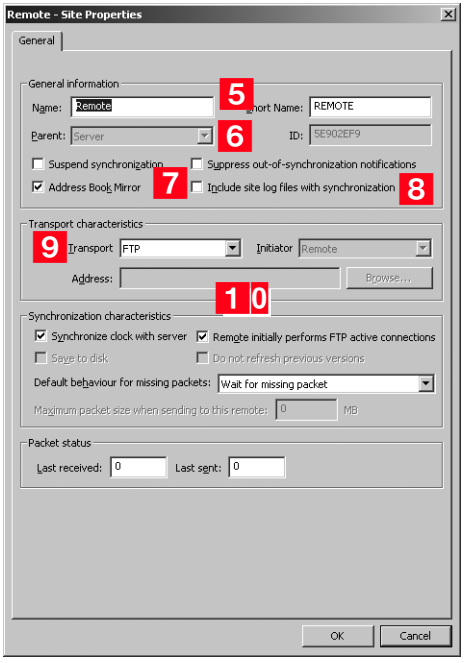
When you want packets sent again by the typical transport method, clear this checkbox.

- **Do not refresh previous version** – This field is used only when upgrading remotes. It enables an administrator to upgrade all machines before any processing takes place. Once all remotes are upgraded, the selection should be unchecked.
- **Default behaviour for missing packets** – Determines how the remote handles missing packets after the 2-minute time-out period has elapsed.

This setting applies to the selected remote only. The value for the maximum packet size must be entered in megabytes.

- **Maximum Uncompressed Packet Size** – Controls outgoing packet size. If you leave this value as 0, no packet size limits are applied. The minimum value for packet size is 300 KB (enter this value as .3 MB) and the maximum value is 2 GB (enter this value as 2000 MB).

11 Click **Next** or **Finish** depending on the type of site you are adding.



If the remote is an Address Book Mirror, the setup is complete. To specify distribution preferences for Address Book Mirror sites, select View > Address Book Mirror Properties.

Otherwise, you next assign the appropriate distribution groups and users to the remote. For more information, see "Assigning Distribution Groups to Distribution Sites" on page 78.

Distribution Groups are created by adding a new table item to the **MaxExchange Distribution** system field. See "Creating Distribution Groups" on page 47.

Adding Remote Servers

See "MaxExchange Synchronization Server" on page 2 for more information on the use of remote servers for distributed packet processing.

You can add remote servers the same way that you add remotes. After specifying the general properties of the remote server, you must specify the transport method that the remote server uses to connect with its remotes.

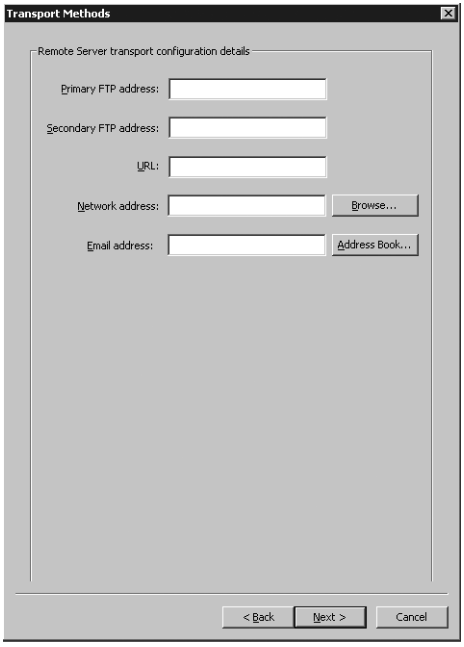
➤ To add a remote server

1. Follow the procedure for adding a remote with the following exception:
   - In the **Remote type** dialog box, select **Remote Server**.

   See Steps 1 through 11 in "Adding Remotes" on page 73.

   The Transport Methods dialog box opens.
2. Specify properties for the transport methods that the remote server will use to connect to its remotes.
   - **Primary FTP address/Secondary FTP address** – Specify a primary and secondary (if necessary) IP address or domain name for remotes using FTP transport method.
   - **URL** – Specify the URL of the Web Server where MaxExchange Web Service is installed for remotes using HTTP transport method.
   - **Network Address** – Specify the path to the shared MaxExchange program folder for remotes using network direct transport method.
   - **Email Address** – Specify the email address through which remotes connect using email transport method.

3 Click **Next** or **Finish** depending on the type of site you are adding.

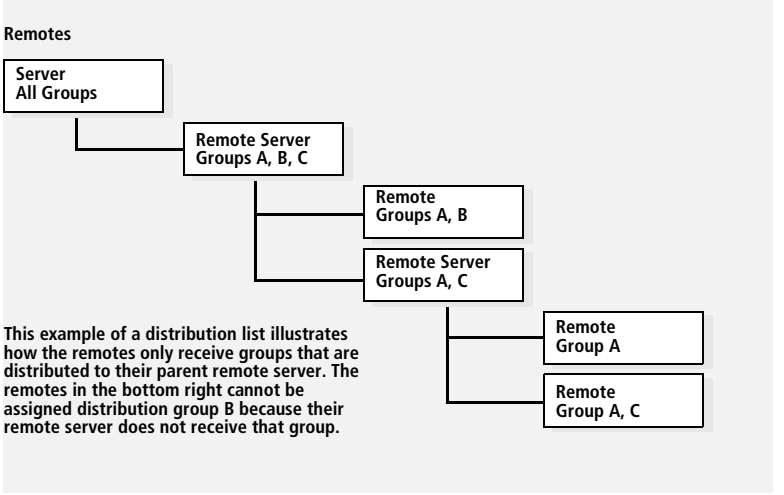


If the remote server is an Address Book Mirror, the setup is complete. To specify distribution preferences for Address Book Mirror sites, select View > Address Book Mirror Properties.

Otherwise, you next assign the appropriate distribution groups and users to the remote server. For more information, see “Assigning Distribution Groups to Distribution Sites”.

Assigning Distribution Groups to Distribution Sites

When you set up your Address Book for synchronization, you put the Address Book entries into Distribution Groups. You now assign these groups of entries to each distribution site. This procedure determines which entries go to which sites.



A distribution site can only receive distribution groups that are available at the parent server. In an *n*-tier configuration, a remote server's distribution groups must also include the distribution groups for the related site. For example, if a remote requires distribution groups A and B, the remote server must also be set up with groups A and B, as well as any other groups required by remotes attached to the remote server; otherwise, the remote will not receive group A or B Address Book entries.

All Address Book entries and opportunities from the parent server or remote server are synchronized to a remote site that is designated as an Address Book Mirror.

Group distribution is based on the MaxExchange Distribution system field items. This field is created automatically when you click the "Create MaxExchange Distribution" button in the System Options preferences tab in Administrator. You then create the items for the field in the System Fields preferences tab, which become "distribution allocations" for specific users. Values of the MaxExchange Distribution field are assigned to users on the Access Rights security tab. Each time the user creates an Address Book entry, the information is synchronized to the user's assigned distribution groups.

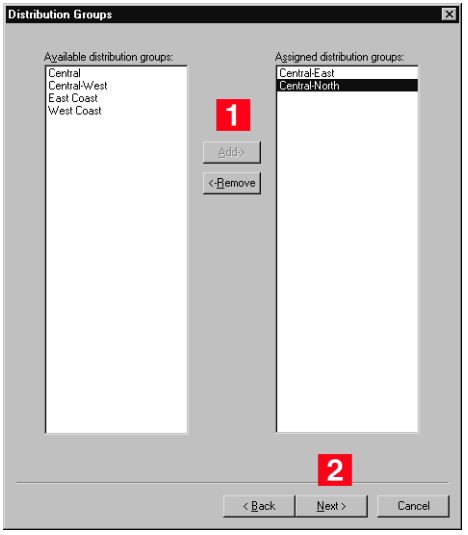
Important note - If a Company or an Individual is created on the remote and no distribution group is assigned to it, it is synchronized to the server. However, it is removed from the distribution site the next time packets are received from the server.

➤ To assign distribution groups to a site

1. After setting the general properties of a distribution site, assign the appropriate distribution groups to the site by selecting one or more **groups** and then clicking **Add** in the Distribution Groups tab.

   The distribution sites with the assigned group(s) will receive only those Company and Individual entries that have that group name (or names) in their MaxExchange Distribution system field. Distribution for Contacts follows the parent Company or Individual MaxExchange Distribution assignment.

2. Click **Next** to continue adding the distribution site and proceeding with adding the site's user distribution.



Assigning Users to Distribution Sites

User distribution is based on user visibility of the following items:

- Knowledge base articles
- Company Library documents
- Maximizer Word Processor Templates
- Favorite Lists
- Column setups

For more information about the visibility of items and security rights, see the *Maximizer CRM Administrator's Guide*.

When a user has visibility of an item, it is synchronized to the current remote.

➤ To assign a user to a distribution site

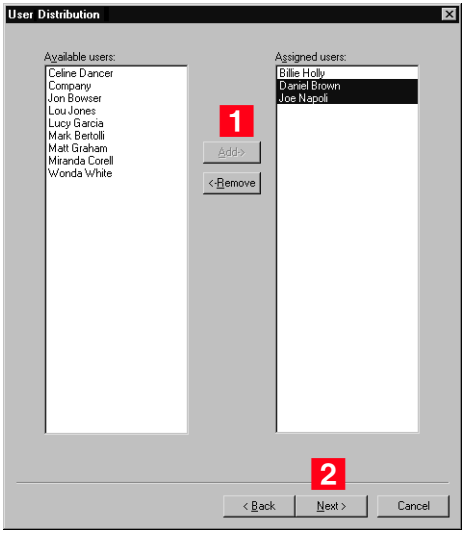
If you do not assign at least one user to a distribution site, column setups, Favorite Lists, knowledge base articles, Company Library documents/ notes, and document templates are distributed only if all users have visibility of these items.

By default, all users are assigned to Address Book Mirror distribution sites. To change the user distribution for Address Book Mirror distribution sites, select View > Address Book Mirror Properties.

1. Select one or more **users** for the site and click the **Add** button in the User Distribution tab.

   Knowledge base articles, Company Library documents, Maximizer Word Processor templates, Favorite Lists, and Column Setups that are visible to the assigned users, are synchronized to the remote.

2. Click **Next** to continue adding the distribution site and proceeding with setting the site's restrictions.



Initiating Synchronization

In some cases a refresh must be sent to the related user's distribution site in order for the items to be synchronized. From that point on, items are synchronized automatically. Refreshes are necessary in the following situations:

- When a user is granted the **"Modify other users' private entries"** security right, all items are synchronized to the distribution sites the user is assigned to after a refresh.
- If a user is granted the **Knowledge Base Approver** security right, all knowledge base articles are synchronized to the distribution sites the user is assigned to after a refresh.
- When a user is added to a **security group**, items that are visible to that group are synchronized to the distribution sites the user is assigned to after a refresh.

For information on sending refreshes, see “Sending a Remote Refresh” on page 86.

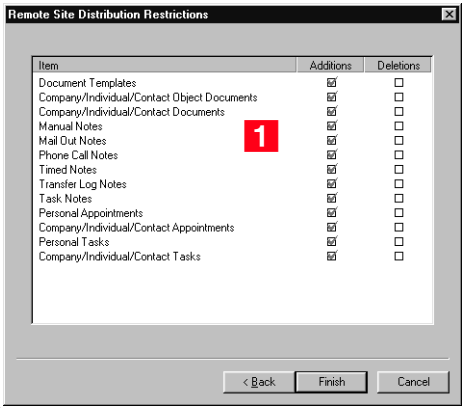
Restricting What Distribution Sites Can Do

You can place restrictions on what kind of modifications a remote can redistribute to the other remotes through the server.

For example, if one remote often sends out large bulk mailings from the central Address Book, you may not want other remotes cluttered with hundreds or thousands of automatic Mail-type notes from that remote. You can specify that new Mail notes from this specific remote not be distributed elsewhere. Or if you don’t want another remote to be able to delete Address Book entries, you can prevent that from happening. You can also restrict many types of updates from being redistributed during MaxExchange synchronizations.

➤ To restrict redistribution of a remote’s changes

1 After assigning distribution groups and users to the remote, set the remote’s restrictions by selecting the appropriate checkboxes for the restrictions you want



Each checkbox works as follows:

- To prevent new information added by this remote from being redistributed to other remotes during synchronization, select the appropriate Additions. These additions are still sent to the server, but they are not redistributed to other remotes.
- To prevent deletions made by this remote from causing the same information to be deleted at other remotes during synchronization, select the appropriate Deletions. Items

deleted at this remote are not deleted anywhere else in the distribution group, including the server.

2 Click **Next** to proceed with setting up distribution preferences for the remote.

Setting and Viewing the Distribution Preferences for a Remote

You can set distribution preferences of Company Library documents, knowledge base articles, general documents, notes, opportunities, and customer service cases based on age and size. You can also apply a set of preferences to all existing sites and/or sites you create in the future.

➤ To set distribution preferences

1 Set the **Distribution** option for each item in the Distribution Preferences dialog box.

Distribution preferences for Address Book Mirror sites are configured in View > Address Book Mirror Properties.

2 If you would like to limit the age of the items distributed to this site, select the **Do not distribute documents/notes/ opportunities/cases older than** option and set the time frame to which the option applies. For example, if you don't want to synchronize documents older than 1 year, set the counter to **1** and select **year(s)** from the drop-down list.

3 If you would like to limit the size of the items distributed to this site, select the **Do not distribute documents/notes larger than** option and set the size of the item. For example, if you don't want to synchronize documents larger than 2 MB, set the counter to **2**.

4 To include Favorite Lists in refreshes, select the **Distribute Favorite Lists on refresh** option.

Note that Favorite Lists are synchronized at all times during a regular synchronization session. The **Distribute Favorite Lists on refresh** option allows an administrator to restrict the distribution of Favorite Lists during a refresh as a time-saving process. If you choose to not distribute Favorite Lists, the Favorite Lists on the remotes are preserved.

5 To include saved searches in refreshes, select the **Distribute Saved Searches on refresh** option.

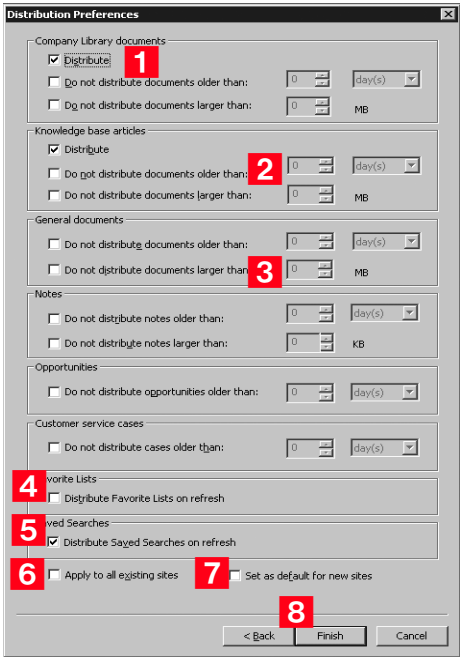
Note that saved searches are synchronized at all times during a regular synchronization session. The **Distribute Saved Searches on refresh** option allows an administrator to restrict the distribution of saved searches during a refresh as a time-saving process. If you choose to not distribute saved searches, the saved searches on the remotes are preserved.

For MaxExchange Remote Server, the **Apply to all existing sites** and **Set as default for new sites** options apply to only its remotes. If the parent server applies different distribution preferences, its settings are used. Also, to modify a Remote Server's distribution preferences, the changes must be done on the server.

6 To apply the current distribution preferences to all existing remotes, select the **Apply to all existing sites** option.

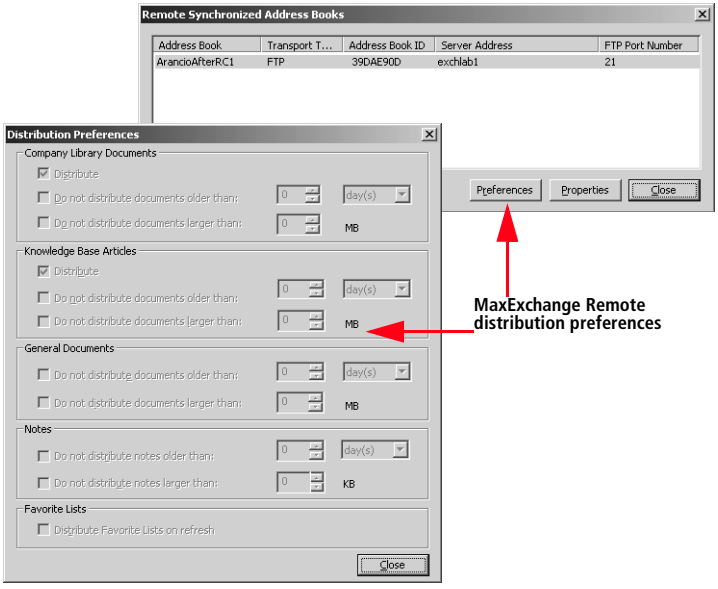
7 To apply the current distribution preferences to all remotes you create in the future, select the **Set as default for new sites** option.

8 Click **Finish** to complete the process of creating the remote. See "Completing the Remote Setup" on page 85 to complete the remote setup.



➤ To view distribution properties in MaxExchange Site Manager and MaxExchange Remote

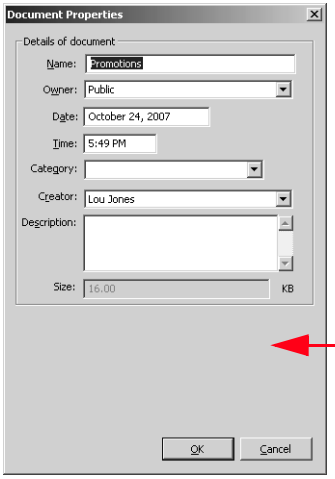
- The distribution preferences can be viewed as part of a distribution site's properties in MaxExchange Site Manager. The distribution preferences may also be viewed in MaxExchange Remote by clicking the Preferences button while viewing the synchronized Address Book properties.



➤ To view distribution properties in Maximizer

Note that these Distribution attributes (other than the default preferences option) override the preferences set in MaxExchange Site Manager.

- Distribution preferences appear as part of the properties for Company Library documents, knowledge base articles, general documents, and notes (right-click on one of these items and choose **Properties**).



Distribution preferences for a general document

Completing the Remote Setup

➤ To complete the remote setup

1. In the main dialog box for Distribution Sites, clear the **Show Tree View** option or click the remote's **Properties** button.
2. Make a note of the new remote's **Address Book ID**. You need this ID later when you receive the initial data packet at the remote.

CAUTION: If you later modify a remote, be careful not to change the Packet Status values unless you are absolutely sure that the status shown is not correct. Setting the Packet Status values incorrectly can cause you to lose data.

The list view provides you with detailed information about a remote such as the warning column (indicates if a remote has not synchronized in a specified number of days provided remote warnings are enabled in Server Settings), while the tree view may be more efficient while you are adding remotes and remote servers. You may toggle between the two types of views to suit your preference.

MaxExchange creates an initial data packet—called a *refresh*—for this remote during the next MaxExchange processing session. Its transport depends on the transport method the remote employs.

Changing the Active Transport Method for a Remote

You can change the Active Transport Method for a remote after data synchronization has been established using another transport method. Plan the changeover before beginning the procedure, and coordinate the actions with all remotes.

Before changing the Active Transport Method, ensure that all relevant system requirements are in place and the Active Transport Method operates successfully on the remote and the server.

If you have changed the Active Transport Method in Site Manager, the following events occur:

- A dialog appears informing you of the change in transport.
- Site Manager instructs the server or remote server to send out the transport change to the remote in the form of a special data packet. This packet is transported using the previous transport method.
- The server or remote server continues to check for packets using the previous transport method from each remote until it receives a packet back from the remote confirming the receipt of the transport change. MaxExchange confirms the change of transport automatically at the remote with no user involvement.

Sending a Remote Refresh

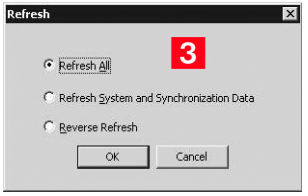
When you add a new remote, an image of the central Address Book is automatically prepared and transported to the remote. All subsequent exchanges update the Address Book. You can manually send a refresh of the central Address Book at any time. The refresh completely overwrites the remote's image of the Address Book with a fresh copy.

Before sending a refresh, contact the remote users to indicate that they should send an immediate update of their work. Otherwise, they will have to get another refresh after they send their update.

If a remote is restricted from adding items to the central Address Book using the Restrict Additions filter, the server stores those added items, but does not normally redistribute them to other remotes during synchronization. Refreshes are treated differently. When sending refreshes to any remote, items that would normally be blocked from redistribution are also sent. Refreshed remotes therefore receive all items for their images of the central Address Book, regardless of whether additions are restricted. (Items marked Restrict Deletions are not affected.) This filtering is ignored when a selected Address Book entry or opportunity is sent a refresh in the Sites tab of the Address Book Diagnostic Tools.

➤ To refresh a remote

1. Open MaxExchange Site Manager.
2. Select the remote that will receive a refresh, and click **Refresh Site**.
3. If your remote is not an Address Book Mirror, a dialog box appears with 3 options—**Refresh all**, **Refresh system and synchronization data**, and **Reverse Refresh**. If your remote is an Address Book Mirror, the Refresh system and synchronization data option is disabled. Choose one of the options.



The **Refresh all** command sends data packets, which includes all data synchronized in a typical MaxExchange synchronization cycle. See “What Data is Synchronized?” on page 30 for more information.

The **Refresh system and synchronization data** command sends data packets, which include the same data types as the Refresh all command with the exception of the following:

- Address Book entries, opportunities, customer service cases, and traditional campaigns. Also not included in this type of refresh are related notes, user-defined field values, documents, and OrderDesk orders.
- Examples of data types synchronized using a system refresh (Refresh System and Synchronization Data) are as follows:
- User-defined field definitions and related table-type field items, user data, column setups, Favorite Lists, knowledge base articles, Company Library notes/documents, macros, licenses, document templates, Strategy Library templates, and traditional campaign templates.

The **Reverse Refresh** command sends all data inserted during the specified date range at the remote to the server. Records sent by the remote will only add new records that do not exist on the server and will not overwrite or update any records that already exist.

The Reverse Refresh option must be enabled in Server Settings > Other Options before it is displayed as an option when sending a refresh to a remote.

When Remotes or Remote Servers process a refresh packet of any type, the associated data types included in packet are removed from the Remote or Remote Server and then replaced by the data in packet. As a result, if Remotes and/or Remote Servers have data that is not synchronized to the Server before a refresh is processed, the data is lost. It is strongly recommended that the MaxExchange administrator ensures Remotes and Remote Servers synchronize their most recent data to the Server before processing a refresh.

4. Confirm the refresh by clicking **Yes**.
5. Click **Close**.

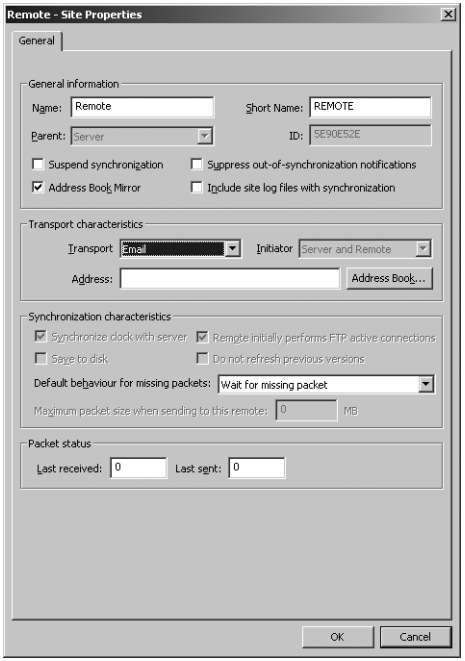
Changing a Remote's Email Address

If the email address of the person responsible for a remote changes, you must update the distribution list with the new address.

➤ To change the email address of an existing remote

1. Open MaxExchange Site Manager.
2. Select the remote for which the email address needs to be updated.

3 Click **Properties**.



4 Type the new email address or click **Address Book** to select it from the address list.

5 Click **OK**.

Suspending Synchronization with a Remote

After a distribution site has been created, you can temporarily suspend synchronization with this remote. When synchronization is suspended, the server processes all outstanding incoming packets for the remote and stops creating its outgoing packets. When the site is enabled again, a refresh is created for the remote when the server processes. If updates were made on the remote when synchronization was suspended, the updates are never synchronized with the server.

This option is meant to be used when a remote is not active. The remote should process all packets before the suspension takes place.

➤ To suspend synchronization with a remote

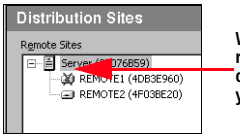
1 In MaxExchange Site Manager, select the remote.

2 Click **Properties**.

3 Select the **Suspend synchronization** checkbox.

4 Click **OK**.

Synchronization with the remote is suspended.



When synchronization with a remote is suspended, an X is displayed as part of its icon when you are using the tree view.

Removing a Remote

You can remove a remote from the distribution list if it is no longer required.

Before you remove a remote, you should first receive all packets from the remote to ensure that no data is lost.

➤ To remove a remote

1 Open Site Manager.

2 Select the remote and click **Delete**.

Sales and Marketing Teams

For more information on the use of opportunities and traditional campaigns, see the *Maximizer CRM User's Guide*.

Maximizer's opportunity and traditional campaign management helps you pursue sales opportunities and marketing campaigns in a team environment. By setting up one or more teams, you can delegate opportunity or campaign tasks to individual team members.

You can also set up teams in Site Manager. If you use MaxExchange to synchronize data with a remote, you can also use Site Manager to ensure that team members receive the entries they need.

The following sections contain information on setting up sales and marketing teams for MaxExchange:

- "Adding a Team" on page 91
- "Adding New Team Members" on page 92
- "Renaming a Team" on page 93
- "Removing a Team or a Team Member" on page 94
- "Modifying Information about a Team Member" on page 94
- "Reassigning Opportunity or Campaign Tasks" on page 95

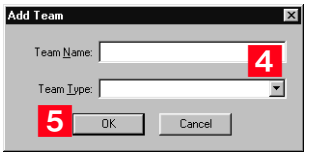
Adding a Team

You can create as many teams as required for the distribution of opportunity or traditional campaign information.

➤ To add a new team

1. Open MaxExchange Site Manager.
2. Click the **Teams** icon.
3. In the Teams pane of the window, click the **Add** button.
4. Enter the team name and choose the team type—Sales or Marketing.
5. Click **OK**.

Marketing teams are available for remotes because traditional campaigns may be synchronized. However, automated campaigns may not be synchronized.



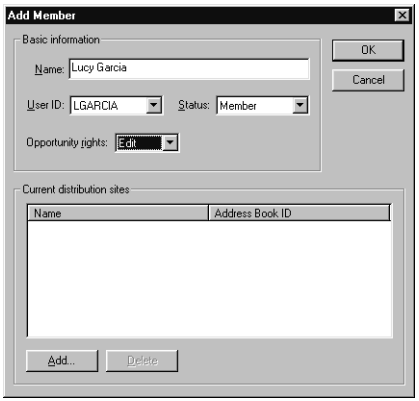
6. Add members to the new team, as described in the following procedure.

Adding New Team Members

You can add as many members to a sales or marketing team as are required. A member can belong to one or more teams.

➤ To add a new member

1. With Site Manager open and the Teams window active, select the team to which you are adding a member.
2. Click the **Add** button.



3. Type the name of the member in the **Name** field.
4. Select the User ID for this member.
5. Select the member's status—Team Leader or Member.

A team can have only one Team Leader.

6. Select the opportunity/campaign rights for the member.

   Audit – allows a member to view all traditional campaigns and opportunities assigned to them.

   Edit – allows a member full access to all traditional 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.

   Standard – allows for basic rights to "work" (apply steps) opportunities and traditional campaigns. These rights do not allow the member to change a status of an opportunity or campaign.

7 Choose this member's remote by clicking the Add button and selecting from the list. If multiple remotes should receive this member's opportunity information, select additional remotes.

8 Click **OK**, and **OK** again to close the Add Member dialog box.

Renaming a Team

If the name of a team changes, rename the team for the distribution of opportunity or traditional campaign information.

➤ To rename a team

1 Open Site Manager.

2 Click the **Teams** icon.

3 Select the team you want to rename.

4 Click the **Modify** button.

5 In the **Team** field, type the new name for the team.

6 Click **OK**.

Removing a Team or a Team Member

You can remove a team or a team member from the distribution list if it is no longer required. However, you cannot delete a team if opportunities are associated with it, including opportunities that are won, lost, or abandoned. You can, however, reassign opportunities to another team member. For more information, see "Reassigning Opportunity or Campaign Tasks" on page 95.

➤ To remove a team

1. Open Site Manager.
2. Click the **Teams** icon.
3. Select the team you want to remove.
4. If you are removing a member, also select the appropriate member.
5. Click the **Delete** button.

Modifying Information about a Team Member

When information about a team member changes, modify the member's information.

➤ To modify information about a team member

1. Open Site Manager.
2. Click the **Teams** icon.
3. Select the team to which this member belongs.
4. Select the name of the member whose information you want to modify.
5. Click the **Modify** button.
6. In the Modify Member dialog box, change the information as required.

   To change the member's remote:

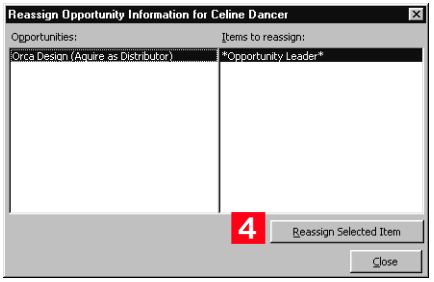
   - Select the remote you wish to remove and click **Delete**.
   - Click **Add** to select a new remote(s).
7. Click **OK**, and **OK** again to close the Modify Member dialog box.

Reassigning Opportunity or Campaign Tasks

If a member is no longer part of the team, you can reassign their opportunity or traditional campaign responsibilities to other members of the team. Responsibilities include all opportunity or campaign activities and the member's leader role.

➤ To reassign opportunities

1. In Site Manager, click the **Teams** icon.
2. Select the team whose opportunity or campaign tasks are to be reassigned.
3. Select the name of the member whose responsibilities are to be reassigned.
4. Click the **Modify** button and then click the **Reassign Opportunity** or **Reassign Campaign** button.



5. Select one or more activities or the leader role to be reassigned to another team member.
6. Click on the **Reassign Selected** Item button.
7. In the Team Members dialog box, select the member of the team for reassignment of the task(s).

8 Repeat the preceding steps until all required items are reassigned, as required.

9 When you are finished, click **OK**, and **OK** again to close the reassignment dialog boxes.

MaxExchange Notifications

MaxExchange enables you to send email notifications to a definable list of recipients when specific events occur and to log these events to a file.

You set up Event Notification on the Preferences > System Options tab in Administrator.

Most often these events are significant error conditions requiring human intervention. 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 event occurred
- Action resulting from event (for example, activity suspended due to fatal error)
- Additional information about the event, such as error codes, suggested resolutions, etc.

The following table describes the events for which notification is available, as well as probable causes and suggested resolutions for each.

Event description	Cause	Resolution
Start recovery	MaxExchange Synchronization Server has halted.	Restart the server. You will be prompted to start the recovery process.
SQL password policy failure	A user has entered a password that does not meet the requirements for Windows and the password was synchronized to a server or remote that is running SQL Server 2005 and Windows 2003.	The user must enter a password that meets Windows requirements and then synchronize again. See "Password Expiration Under Microsoft SQL Server 2005 or Later" on page 135 for more information.

Event description	Cause	Resolution
Remote not synchronized	MaxExchange Site Manager includes a threshold setting for the maximum number of days between remote synchronizations. A remote has exceeded that threshold.	Contact the remote and request that they synchronize.
Previously processed packet received	A packet has arrived that has already been processed.	Decide if you want to process the packet.
MaxExchange missing packet	MaxExchange has received a packet that should have been preceded by another packet, meaning that a packet has been missed.	Process the packet, or request a packet resend, or wait for the missing packet.
Low hard disk space	The amount of available hard drive space is less than the required 500 MB.	Clear some space on the hard drive until at least 500 MB is free.
Transaction Journaling off	Transaction journaling is turned off.	Turn transaction journaling on.
Incoming refresh packet received	A remote has received a refresh packet.	No action required. The remote has processed a refresh.
HTTP password error	The HTTP password is incorrect.	Enter the correct password in the dialog box.
FTP password error	The FTP password is incorrect.	Enter the correct password in the dialog box.
Fatal database error	There are multiple causes of this error. The email notification will contain the specific error code.	Database recovery may be required.
Database is in use	Another application has an exclusive lock on the database and MaxExchange cannot access it.	Determine which application has locked the database and remove the exclusive lock.

➤ To enable event notification

1. In Site Manager, select **File** > **MaxExchange Notifications**.
2. Select the **Enable event notification** checkbox.
3. Select an event from the **Events** list, and click **Properties**.
4. Select the notification options to enable for this event.
5. If you selected **Via email** as one of the notification options, click **Add** to specify names and email addresses of notification recipients.

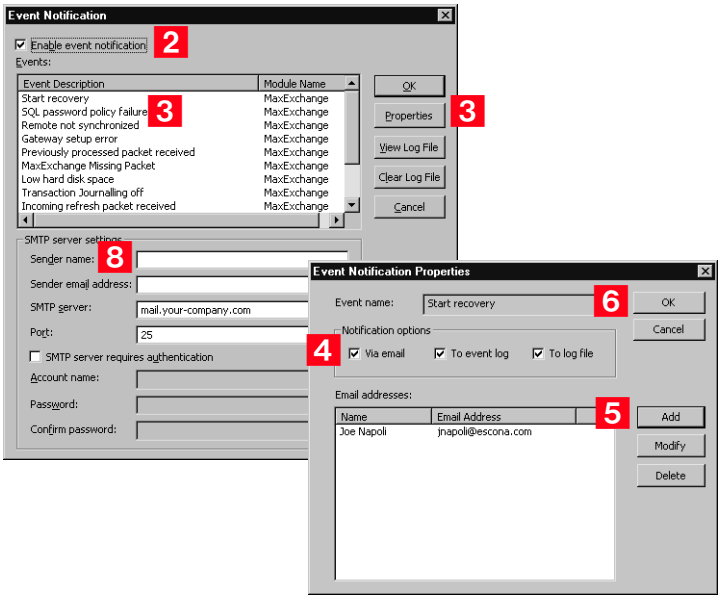
On the Event Notification Properties dialog box, press F1 to open online help and read descriptions of the available notification options.

6 Click **OK** to close the Event Notification Properties.

7 Repeat steps 3 through 6 for each event for which you want to enable notification or logging.

8 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 Site Manager, select **File** > **MaxExchange Notifications**.

2 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**.

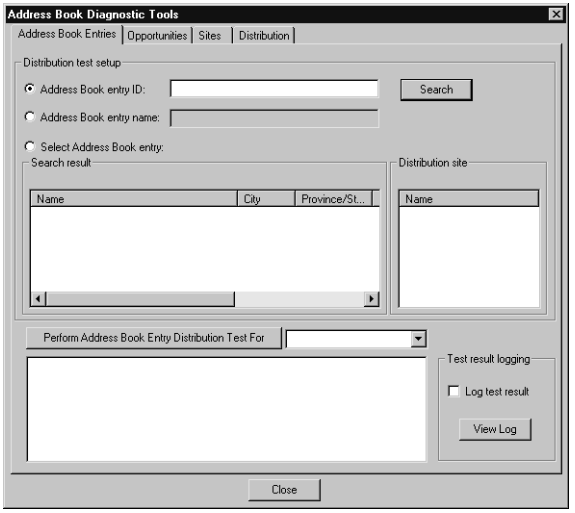
Maximizer event notifications appear in the right pane of the Event Viewer.

Address Book Diagnostic Tools

The Address Book Diagnostic Tools screen is available from the File menu in Site Manager. It enables you to run diagnostic tests on synchronization of Address Book entries and Opportunities.

Address Book Entries and Opportunities

These two tabs allow you to check a specific Address Book entry or Opportunity to determine which remote(s) it synchronizes with, which is useful when an Address Book entry or Opportunity is missing from a remote.

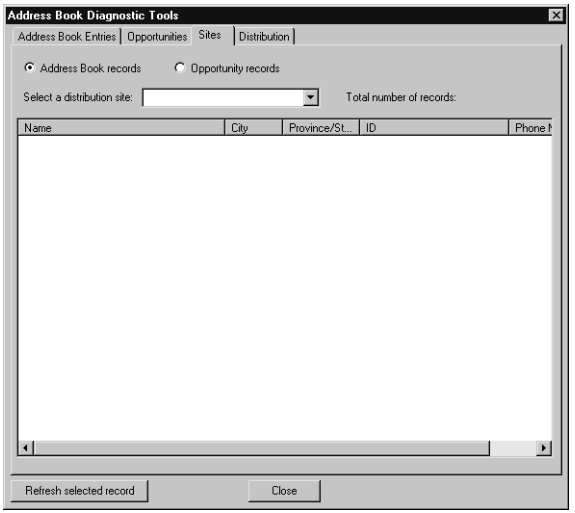


Field, Option, or Button	Purpose and Use
Address Book entry ID	Enables you to search by the ID of the Address Book entry or Opportunity. Enter part or all of the Address Book entry or Opportunity ID for which to verify synchronization information.
Opportunity ID	
Address Book entry name	Enables you to search by the name of the Address Book entry or Opportunity. Enter part or all of the Address Book entry or Opportunity name for which to verify synchronization information.
Opportunity name	

Field, Option, or Button	Purpose and Use
Search	After entering the search criteria in the ID or name field, click the Search button. It returns a list of matching Address Book entries or Opportunities. If you leave the ID and Name field blank, it returns all entries.
Select Address Book entry	Displays an alphabetical list of all records. Select the first letter of the Address Book entry or Opportunity name to jump to that section of the list. For large Address Books, this operation could take quite some time to retrieve all entries.
Select Opportunity	
Search result	Displays the results of a search by ID or name, or displays a complete list of records in alphabetical order if you selected the Select Address Book entry option.
Distribution site	Displays which remote(s) the selected record is associated with.
Perform Address Book entry Distribution Test for	Identifies the remote for which to perform a distribution test. A distribution test verifies that Address Book/Opportunity information is being synchronized with a remote. The results identify issues such as membership problems or corrupt DRB files. The results are displayed in the dialog box
Perform Opportunity Distribution Test for	
Log test result	Saves the results of the distribution test to a log file.
View Log	Opens the saved log file in a text editor.

Sites

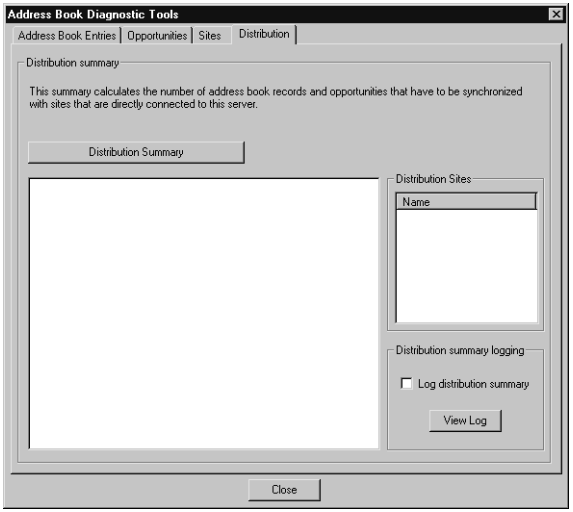
This tab enables you to count and view the Address Book entries and Opportunities synchronized to each remote.



Field, Option, or Button	Purpose and Use
Address Book records	Identifies which type of records to display.
Opportunity records	
Select a distribution site	Identifies the remote for which to display records.
Total number of records	Displays the total number of records of the selected type for the selected remote.
Name, City, etc.	Displays the record details.
Refresh selected record	Sends a copy of the server's version of the selected record to the selected remote on the next synchronization. If the remote has an outdated or incomplete version of the selected record, this information will be replaced by the correct server version of the selected Address Book or opportunity record.

Distribution

This tab calculates the number Address Book entries and Opportunities that are to be synchronized with remotes that access this server directly (i.e., first-tier only).



Field, Option, or Button	Purpose and Use
Distribution Summary	Queries the Address Book for information about the Address Book entries and Opportunities. The distribution summary returns the following details: • Total Address Book records distributed • Marked Address Book records • Unmarked Address Book records • Address Book distribution caused by marked Opportunities • Address Book distribution caused by roles in distributed Opportunities • Total Opportunity records distributed • Marked Opportunity records • Unmarked Opportunity records
Distribution Sites	Identifies all distribution sites in the distribution tier.

Field, Option, or Button	Purpose and Use
Log distribution summary	Saves the results of the distribution summary to a text file. The file is saved at the root of the MaxExchange program folder on the server (typically C:\Program Files\Maximizer\MaxExchange). The file is called DSTRBLG.TXT.
View Log	Displays the DSTRBLG.TXT file in a text editor.

MaxExchange Site Manager Reports

MaxExchange Site Manager includes the following reports:

- **Server Settings –** This report provides an overview of each server's settings.
- **Distribution sites –** This report displays an overview of information about remotes, which is useful for troubleshooting. You may wish to use this report in conjunction with the Transaction Report to determine which remotes are synchronizing and which are not.
- **Transaction –** This report provides information about the current synchronization status of remotes. You may wish to use this report in conjunction with the Distribution List Report. The output of this report depends on the current view in MaxExchange Site Manager. If the display is in Tree View, then only the selected remote is included in the report. If the display is in table view, then any selected remotes are included in the report.
- **Teams –** This report is useful for determining which remote each sales and marketing team belongs to. The same report is also available from the Reports menu in Administrator.
- **Remote Packet Summary –** This report displays the packet summary log of the selected remote. The log contains the time and date that packets were received by the remote.
- **Remote Activity –** This report displays the activity log of the selected remote. The log contains information including the number of packets that are sent and received, as well as the additions, deletions, and updates to the Address Book.

All of these reports are available for servers and remote servers.

These reports are accessible from the Reports menu. Selecting a report from the menu opens the Report Options dialog box, where you can specify the report format:

- **HTML format –** Creates the report in HTML format and displays it in a browser window.
- **CSV format –** Saves the report to a .CSV (comma-separated values) file, which you can open in a spreadsheet, such as Microsoft Excel.

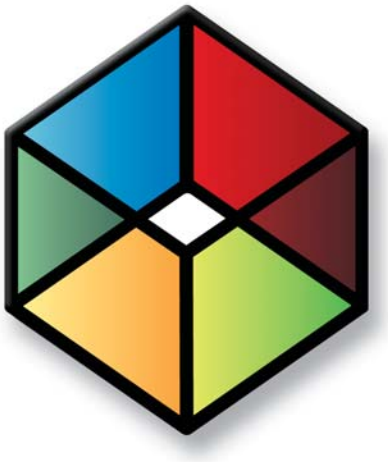
➤ To Print a MaxExchange Site Manager Report

1. In MaxExchange Site Manager, click the **Reports** menu.
2. Select a report from the menu.
3. In the Report Options dialog box, select either **HTML Format** or **CSV Format**.
4. Click **OK**.

   If you selected HTML Format, the report opens in a browser window.

   – or –

   If you selected CSV Format, the Save As dialog box opens, so you can select a folder and filename for the report.



CHAPTER 6

MaxExchange Synchronization Server

Working with MaxExchange Synchronization Server

In this chapter...

"The Role of MaxExchange Server and Remote Server" on page 108
"Setting Up MaxExchange Server" on page 109
"Starting and Exiting MaxExchange Server" on page 110
"Processing Updates from the Server" on page 111
"Setting Your MaxExchange Server Preferences" on page 119
"Maintaining MaxExchange" on page 122

The Role of MaxExchange Server and Remote Server

As discussed in the introduction chapter, the role of the MaxExchange Server is to keep data synchronized between the central Address Book, located on the server, with its remotes and remote servers. The combination of MaxExchange Server and the other MaxExchange programs—MaxExchange Site Manager, Remote Server, and Remote—ensures that users always have the most up-to-date information, no matter where they are located—at the office, at home, or on the road.

A MaxExchange Remote Server serves the same purpose in terms of data synchronization with the additional function of synchronizing data with the central Address Book on the parent server. All functionality described in this chapter pertains to a Remote Server when acting in that role. Refer to the *Maximizer CRM User's Guide* for information about Remote Server acting in the capacity of a remote.

Server Database Rights

You must ensure that the MaxExchange Server user has the proper rights for Microsoft SQL Server (dbcreator and securityadmin server roles and also the db_owner role for the Address Book) for MaxExchange synchronization. This is also true if you are using Windows Authentication.

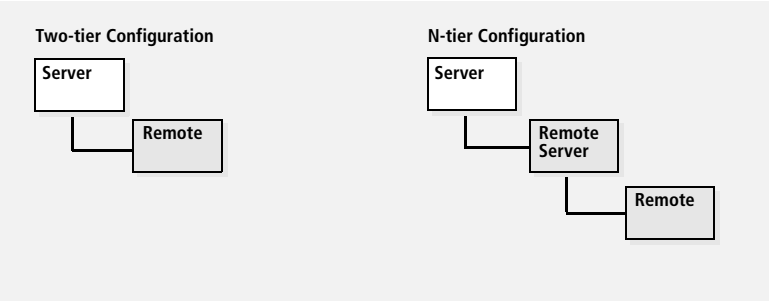
Setting Up MaxExchange Server

The MaxExchange server is the top level in the MaxExchange hierarchy. The server manages the Distribution List for the entire MaxExchange network, and processes and sends data packets to remotes and remote servers immediately below it in the structure.

Setting up MaxExchange is a very order-dependent process. Although much of the configuration of MaxExchange takes places at the server, you must ensure that you perform these steps in the correct order.

You can add additional Address Books for synchronization in MaxExchange Site Manager at any time.

During the installation, you designate a single Address Book as your organization's central synchronization repository. At the server, you can then schedule how frequently to synchronize the server with its various Distribution Sites in order to keep the central Address Book up to date and set other synchronization options. Some tasks are performed manually when needed.



Before the Server can be configured to send data packets to Distribution Sites, the MaxExchange Site Manager must be installed and configured. Please refer to "Configuring Server Settings" on page 67 and "Setting Up Distribution Sites" on page 72.

How MaxExchange Server Works

Distribution Sites run MaxExchange Remote or Remote Server to synchronize their Distribution Site changes with those on the Server. The changes are then stored on the MaxExchange Server, making the Server's image of the central Address Book the most complete copy of the synchronized Address Book. Distribution Sites can either have an exact image or a subset of the MaxExchange Server central Address Book. For more information about the processes involved in MaxExchange data synchronization, see "MaxExchange Process Flow" on page 29.

Starting and Exiting MaxExchange Server

You can start MaxExchange Site Manager by choosing Open Site Manager from the File menu in MaxExchange Server Manager.

When you install MaxExchange Server as a service, MaxExchange Server Manager does not have to be running for synchronization to take place. If you install MaxExchange Server as a desktop application, the program must be running during synchronization.

When you start MaxExchange Server, you are prompted for your Maximizer user name and password. Note that to log into MaxExchange Server, you must have Maximizer Administrator privileges.

MaxExchange Server always prompts for a user name and password, even if you are using Windows authentication for Maximizer.

➤ To start MaxExchange Server Manager

- If you have installed MaxExchange Server as a desktop application, select Programs from the Start menu and from the folder in which you installed MaxExchange, select **MaxExchange Server Manager**. By default, MaxExchange Server is installed in the Maximizer CRM folder. If you have created an icon during the installation of MaxExchange Server, you can also double-click on the icon to start the application.

  – or –

- If you have installed MaxExchange Server as a service, the service starts automatically when the server is started. You can open MaxExchange Server Manager by clicking its icon or choosing it from the Start menu as described above.

Processing Updates from the Server

You can schedule when to process updates of the central Address Book and you can also perform immediate updates. MaxExchange Server automatically checks for incoming changes from its remotes and then makes changes to the central Address Book.

MaxExchange will only process data packets if there is enough free disk space.

After incoming changes have been processed, MaxExchange Server prepares and distributes data packets to all designated remotes. Once the synchronization is complete, the server and its remotes have the most possible up-to-date information. Changes that occur after processing has been done at a remote are processed during the next synchronization cycle.

When MaxExchange Server processes updates automatically, it will do so for all synchronized Address Books on the server. When the server processes updates manually, if there are multiple synchronized Address Books, you are prompted to specify if you want to process all synchronized Address Books or just a specific Address Book.

The following sections contain additional information on processing updates from the server:

- "Processing Immediate Updates" on page 111
- "Setting Automatic Processing Timing Preferences" on page 112
- "Pausing and Resuming Processing Sessions" on page 113
- "Automatic Processing Interruptions" on page 114
- "Importing Data Packets from a Remote or Remote Server" on page 115
- "Using the Import List Initial Distribution Functionality" on page 116
- "Processing Refreshes Only for Remotes" on page 117

Processing Immediate Updates

You can manually process immediate updates from the server. Manual processing allows you, as an administrator, to check for processing errors throughout the entire distribution chain. If a synchronization problem occurs at a remote, an error message appears for that particular site and is visible until the synchronization process moves to the next remote. Errors are also written to the processing log file (named [AddressBookName]_log.txt on the server or Spdmlog.txt on a remote server). As good practice, manual processing should be done on a regular basis.

For MaxExchange Server to process updates using email transport, the MaxExchange Server and the email program must be running (though the email program can be minimized).

➤ To process immediate updates

1. In MaxExchange Server Manager or MaxExchange Remote Server Manager, click the **Process Data Packets** button or select **File > Process Data** Packets

2. If you have installed MaxExchange Server Manager as a desktop application rather than a service, you can minimize MaxExchange Server Manager while it processes data packets, however, the program must remain running.

Setting Automatic Processing Timing Preferences

In addition to regular manually processing of updates, you set your automatic processing preferences on the server. These preferences set the time and frequency in which the server checks for updates from remotes and also set scheduling for transporting updates to the remotes.

➤ To set automatic processing timing preferences

1. In MaxExchange Server Manager or MaxExchange Remote Server, click the **Timing Preferences** button or select **Edit > Timing Preferences**.

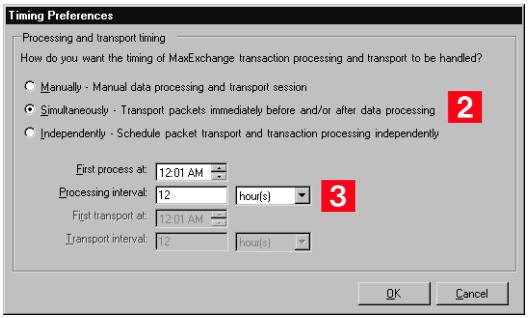
2. Choose the Simultaneously or Independently option. Depending on the method of transport you are using, one option is preferable to the other. You can choose **Manually** to always use manual processing by clicking the Process Data Packets button.

   Simultaneous processing – this method is the most commonly used method for HTTP, FTP, and Network Direct modes of transport. Using Network Direct transport, outgoing data packets are transported immediately before and after processing. Using FTP, incoming data packets are processed immediately and outgoing packets are left in the server's outbox awaiting pickup from the remote sites.

Independently – this method is most commonly used for the email mode of transport. You can set processing times and transport times independently. Packets can then be processed at the server or remote during times when the remote/server is not active.

If you are using HTTP or FTP, transport times cannot be automatic—remotes initiate the transport process; servers cannot initiate the process.

3 Set your **processing time** and the **interval** at which processing takes place. If you have chosen to process and transport data at independent times, set the transport time and interval as well.



4 Processing automatically takes place when the server or remote initiates the action.

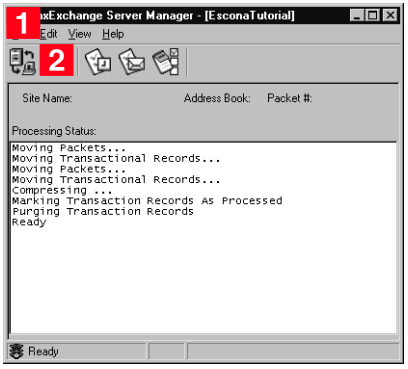
Pausing and Resuming Processing Sessions

You can pause a processing session and then later resume the session. MaxExchange automatically starts processing the data from the point where the session was paused.

You can also shut down the MaxExchange Service completely in Windows Services. In the case of shutting the service down, MaxExchange will also start processing data at the point where the processing session was interrupted.

➤ To pause and resume a processing session

1. In MaxExchange Server Manager, click the Pause button. (The Process Data Packets button becomes a Pause button after a processing session is initiated.)
2. To resume the processing session, click the Resume button. (The Pause button becomes a Resume button after a processing session is paused.)



Automatic Processing Interruptions

Once timing preferences are set for automatic processing, the server processes data packets without user intervention, provided the server is running. If for some reason, processing is interrupted at a remote site, a messages will appear on the server.

The "hexadecimal" folder is actually a folder named with a hexadecimal number that corresponds to the Address Folder ID. This ID is displayed in the Distribution List dialog box in MaxExchange Site Manager.

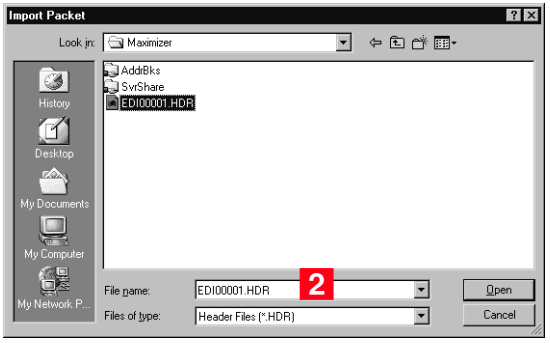
If the Disk space is insufficient, Missing in Action or Previous Packet Processed message appears, the message box remains active on the server for approximately two minutes. If no user intervention occurs after two minutes has elapsed, the server initiates the action of waiting for the packet, then resumes processing, and the message box is closed. Use the Site Properties dialog box in MaxExchange Site Manager to set the default behavior.

Importing Data Packets from a Remote or Remote Server

There may be times when you import update packets from a Distribution Site that were saved to disk or a folder using MaxExchange Remote or Remote Server. For example, you could use this functionality when recovering data from a computer failure or when a remote cannot process through its regular transport method.

➤ To import a Remote packet

1. In MaxExchange Server Manager or MaxExchange Remote Server Manager, select **File > Import Packet**.
2. Specify the **location** and **filename** of the Remote data packet. The file must have an **.HDR** extension. Use the browse button to locate the file.



3. Click **OK**.

   The data packet is copied to a processing queue (the Inbox folder) and will be applied to the central Address Book during the next processing session.

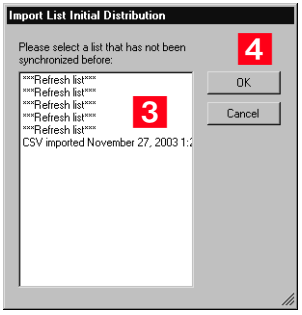
Using the Import List Initial Distribution Functionality

The Import List Initial Distribution command provides a fast way to synchronize a large amount of data that was created by an import to the central Address Book. It uses the Favorite List, which is automatically created during the import to filter distribution of only the data that was imported. Other information is not processed when using this command—you need to process packets.

This feature should be used only when all the entries in the list are to be distributed to all remotes, regardless of the assigned Distribution Groups.

➤ To distribute data from an import to all remotes

1. In Maximizer, use a Global Edit to assign the appropriate Distribution Groups to all imported Address Book entries.
2. In MaxExchange Server Manager or MaxExchange Remote Server Manager, choose **File > Import List Initial Distribution**. A dialog box appears displaying all of your saved Favorite Lists. When you import data, a list is automatically created.
3. Choose the **list** for distribution. It is marked with the date and time when you imported the list.
4. Click **OK**. You are prompted with a message verifying the distribution of the list. Click **OK** again.



5. The processing status is shown in the main window. Once the task is complete, the processing status will show as "ready".

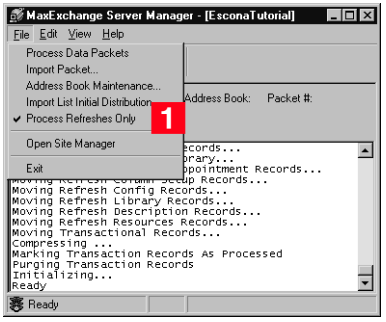
Processing Refreshes Only for Remotes

MaxExchange Server and Remote Server allow you to temporarily disable normal synchronization transactions with Distribution Sites. When the "Process Refreshes Only" option is turned on, only refreshes of a Distribution Site will be processed. This is a useful tool if you need to send a refresh to a Distribution Site and the Server is already occupied with many other transactions. You can turn on the Process Refreshes Only option, send the refresh to the Distribution Site, then turn off the option.

The refresh process sends the entire or a partial image of the central Address Book to a remote. Regular processing synchronizes only new transactions.

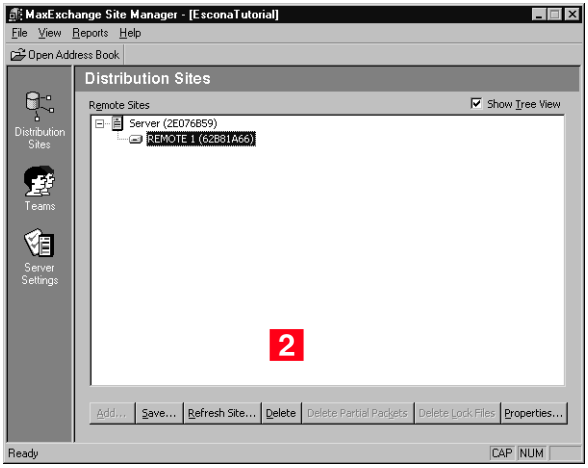
➤ To process refreshes only for remotes

1 In MaxExchange Server Manager or MaxExchange Remote Server Manager, choose **File > Process Refreshes Only**.



2 In MaxExchange Site Manager, select the **remote** you wish to send the refresh to and click the **Refresh Site** button. MaxExchange Server ignores all other pending transactions

while the Process Refreshes Only option is enabled and processes only refreshes for the selected remote.



3 Repeat step 2 for each remote to which you would like a refresh sent.

Setting Your MaxExchange Server Preferences

The following sections describe how to set preferences for the MaxExchange Server.

- "Setting Timing Preferences" on page 119
- "Setting Email Preferences" on page 119
- "Logging Preferences" on page 120

Setting Timing Preferences

Since timing preferences for a MaxExchange Server are part of automatic processing, this topic is addressed in the Processing Updates from the Server section. See "Setting Automatic Processing Timing Preferences" on page 112 for more information.

Setting Email Preferences

To optimize MaxExchange Server operations when using email for data transport, specify the email system you plan to use in the Email Preferences dialog box.

➤ To set your email preferences

1. Select **Edit > Email Preferences**.
2. Specify the **email system** on the server. Note that the email system used for data transport must be the same on the server and the remote(s).
3. Specify the allowable **maximum packet size** in kilobytes (KB). This applies to the outgoing packet size on the server. Email packets are then limited to this size. If a packet is larger than this limit, the packet is spanned into smaller packets within the limit. If the limit is set to 0, the packet size is unlimited.

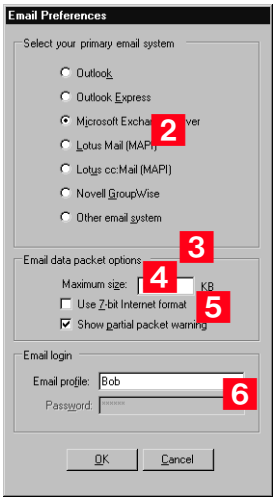
You can also control packet size in MaxExchange Site Manager on a per remote level. While the setting in email preferences applies to only email, the setting in Site Manager applies to all methods of transport. Regardless of the setting in Site Manager, when you are using email transport, packet sizes are set at the maximum packet size specified in email preferences.

4. To ensure that changes in email attachments do not occur through transport over the Internet, select the **Use 7-bit Internet format** option.
5. Enable the **partial packet warning** if necessary. This warns you if all parts of a packet have not been received.

   For instance, take an example where a system administrator sets the limit on packets to 2 MB (or 2000 KB). Assume that the Server creates a large data packet that is 3.5 MB or 3500 KB. MaxExchange will break this packet into 2 partial packets. If only one of these data packets arrives, but the other is still in transit,

the data from the first partial data packet cannot be processed until the second partial data packet is received as well.

6 Enter your email account **Email profile/User name** and **password** (if required). The available options vary depending on what type of email application you are using.



Logging Preferences

If you are experiencing problems during a MaxExchange synchronization session or suspect that MaxExchange Server is not sending updates or receiving updates from its remotes you can log MaxExchange activity in troubleshooting logs. MaxExchange Server creates two types of logs. Both types are text files located in the same folder as your MaxExchange programs.

➤ To create logs

1 In MaxExchange Server Manager or MaxExchange Remote Server, select **Edit > Logging Preferences**.

2 To log the date and time when data packets are received by the server, select **Maintain Packet Summary**. Log information is saved in text files named **[AddressBookName]_packlog.txt** on the MaxExchange Server, MaxExchange Remote Server, and MaxExchange Remote.

To view the log, choose **View > Packet Summary Log**.

3 To log detailed information from the server including the number of data packets that are sent and received, as well as the additions, deletions, and updates to the central Address Book,

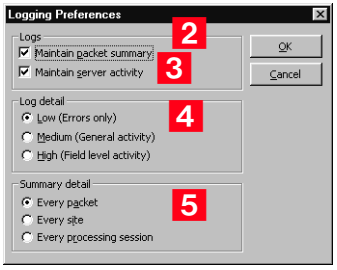
select **Maintain Server Activity**. Log information is saved in text files named **[AddressBookName]_log.txt** on the server or **Spdmlog.txt** on remote servers.

To view the log, choose **View > Server Activity Log**.

4 Indicate the level of log detail you want to see in the log files by selecting one of the following options:

- To log errors only, select **Low**.
- To log record-level updates (additions, changes, and deletions of Maximizer entries), select **Medium**.
- To log field-level updates (details of changes within Maximizer entries), select **High**.

5 Indicate how often you would like a summary of the transaction information logged. The **Every Packet** option is the most detailed logging, while **Every Processing Session** the least detailed logging.



6 Click **OK**.

Maintaining MaxExchange

The following sections explain specific tasks in MaxExchange Server that are used to monitor and maintain the MaxExchange system.

- "Viewing Synchronized Address Books" on page 122
- "Changing the HTTP or FTP Password on a Remote Server" on page 122
- "Address Book Maintenance" on page 123
- "Verifying and Recovering an Address Book" on page 124

Viewing Synchronized Address Books

You may view certain transport information for the synchronized Address Book on a server such as the number of remotes that are synchronizing using the various methods of transportation.

Note that there can be multiple synchronized Address Books on a MaxExchange server, while there can be only one synchronized Address Book on a remote server.

➤ To view synchronized Address Books on a server

1. In Server Manager, select **View > Synchronized Address Book**.
2. If you are synchronizing multiple Address Books on the server, you are prompted by a dialog box to choose an Address Book.
3. The Address Book name, its DSN, Address Book ID, server address, and the number of synchronized remotes are shown.
4. When finished viewing, click **OK** to exit the dialog.

Changing the HTTP or FTP Password on a Remote Server

If you are using HTTP or FTP transport on a remote server, and the administrator changes the HTTP or FTP transport password on the server, you must update the password manually on the remote server.

➤ To set the HTTP or FTP transport password

1. In Remote Server Manager, select **View** > **Remote Synchronized Address Book**.

   The Remote Synchronized Address Book dialog box opens.

2. Select the Address Book.
3. Click **Properties**.

   The Properties dialog box opens.
4. Enter the HTTP or FTP server **Password**, and click **OK**.
5. Close the Remote Synchronized Address Book dialog box.

Address Book Maintenance

The Address Book Maintenance feature checks for discrepancies in the distribution data set between the server and its remotes. Essentially, when this utility is run, a snapshot of the DRB file/table is taken, then the DRB file/table is rebuilt, and if discrepancies exist, the missing data is sent out to the remote(s). You can, however, use this utility to compare and repair discrepancies in the DRB file/table without sending any data out to the remote(s). For more information on the DRB file/table, see the "Glossary" on page 5.

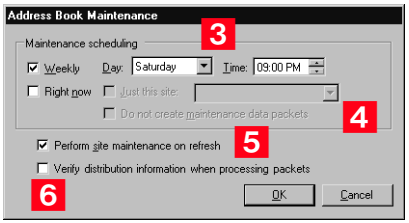
You can run Address Book Maintenance immediately, or schedule it to run at a specific time. You also have the choice of performing maintenance on all of your remotes or only a selected remote.

➤ To perform Address Book maintenance

1. In MaxExchange Server Manager or MaxExchange Remote Server, select **File > Address Book Maintenance**.
2. If you are synchronizing multiple Address Books on the server, you are prompted by a dialog box to choose an Address Book.
3. Set the **frequency** in which you would like maintenance to run. You can choose to perform the maintenance immediately for all or just one of your sites. To perform immediate maintenance, choose **Right Now**. Then, select **Just this Site** and the corresponding site to perform maintenance on only the selected site.

   It's good practice to have a **regular maintenance program**—running maintenance on the weekend or sometime during your company's downtime reduces chances of synchronization issues arising, while not interfering with your routine schedule.
4. Choose **Do Not Create Maintenance Data Packets** if you want to ensure the DRB file/table is rebuilt for your remotes, or your selected remote, but missing data is not sent.
5. Select **Perform Site Maintenance on Refresh** option to rebuild the DRB file/table when performing a Refresh on a remote serving as an integrity check for correct data distribution. Note that this option applies only when you have initiated a

refresh for a remote using MaxExchange Site Manager; you **select a remote** and click the **Refresh** button.



This option works the same way as the **Enable Partial Rebuilds** option in the **Server Settings** in MaxExchange Site Manager.

6 Click **OK** to close the dialog box.

Verifying and Recovering an Address Book

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, opportunity, campaign, or customer service case.
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

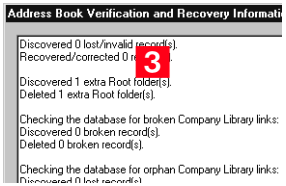
Address Book Item	Description
Broken Company Library links	Company Library links that try to connect to a missing document (link exists but the document is missing).
Orphan Company Library links	Company Library links that link to a missing Company Library folder (document exists, link exists, but the 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).
Invalid Opportunity records	Opportunities whose start date does not match the earliest Sales Step start date (applies only to opportunities with an assigned strategy).
Invalid Address book records	Company records containing personal information about an Individual or Contact.
Invalid Document records	Documents whose Owner field contains invalid characters or values.
Misplaced Document records	Documents whose Owner field contains an incorrect value.
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.
Orphan Link Records	Opportunities that do not have a related Address Book entry.

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.

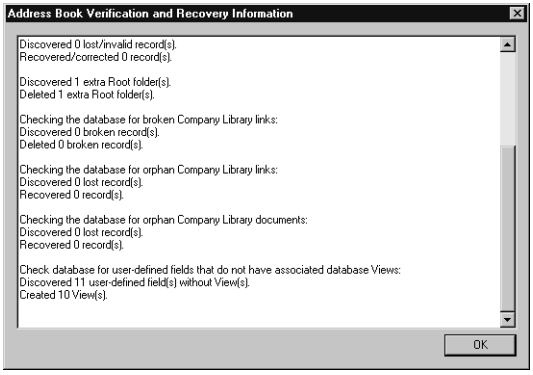
➤ To verify an Address Book

1. In MaxExchange Server Manager or MaxExchange Remote Server Manager, select **File** > **Address Book Verification**.
2. If you are synchronizing multiple Address Books on the server, you are prompted by a dialog box to choose an Address Book.
3. Choose either the **Verify Only** or **Verify and Recover** option, and click **OK**.

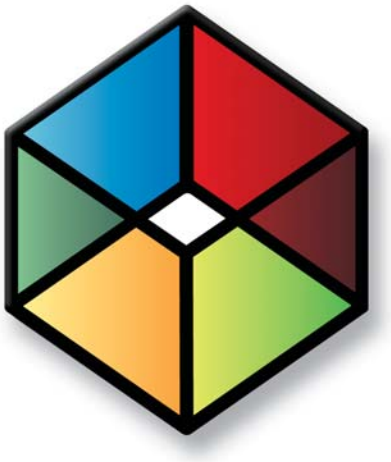


If you select Verify Only and Maximizer detects invalid records, it prompts you to recover them.

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.



CHAPTER 7

Maintenance and Troubleshooting

In this chapter...

"Maximizer Email Transfer Issues" on page 128
"Date and Time" on page 128
"Converting Embedded Documents to Linked Documents" on page 129
"Transport methods" on page 129
"Distribution Groups" on page 130
"SQL Server Database Rights" on page 130
"Transaction Journaling" on page 131
"Removal of Records from Synchronization Cycle" on page 131
"Routine Maintenance" on page 131
"Changes in Employees and Remote Sites" on page 132
"FTP Password Change" on page 132
"FTP Address" on page 133
"Log Files" on page 133
"HTTP Transport and Microsoft IIS" on page 134
"Password Expiration Under Microsoft SQL Server 2005 or Later" on page 135
"Queuing Up for Processing Message" on page 136
"Running Only MaxExchange Server Manager" on page 137

Maximizer Email Transfer Issues

In Maximizer, you can transfer Address Book information by email (click the Maximizer button, and in the Import/Export/Transfer sub-menu, select Address Book entries from the Transfer section). If you are using MaxExchange for data synchronization, the **email transfer process must never be used**—if these processes are used in combination, duplicate records are created in the Address Book.

Date and Time

An important issue that affects synchronization accuracy is the date and time setting on the server.

All data that MaxExchange synchronizes is stamped with the date and time the changes were made. The date and time is stored in Coordinated Universal Time (UTC), so the server processes the transactions at the correct time, regardless of the time zone they were created in.

Selecting "Synchronize clock with server" uses the server's UTC time settings for the remote. This setting works with FTP only. Note that this adjustment does change the time on the affected remote computer. If using other transport methods, clock settings on each of the computers should be periodically checked for inconsistencies.

You should check the date and time of all computers that are part of the synchronization, including the MaxExchange server and the database server, before installing the software.

Converting Embedded Documents to Linked Documents

In a MaxExchange environment, converting embedded documents to linked documents with the document conversion utility in Administrator (File > Document Administration > Convert Embedded Documents) affects the distribution of documents. If the conversion is done on the server, documents are removed from all its remotes. If the conversion is done on a remote, documents are removed from all remotes except the remote that performed the conversion. In either case, documents remain on the server.

As an alternative to converting embedded documents to linked documents, you can manage the size of remote synchronized Address Books by controlling document distribution through a remote's distribution preferences. See "Setting and Viewing the Distribution Preferences for a Remote" on page 83 for more information.

Transport methods

HTTP

You must have an ISP (Internet Service Provider) to facilitate the physical transport of MaxExchange data packets. Also, TCP/IP networking must be enabled on all MaxExchange computers.

FTP

A static IP address or a fully qualified domain name is required for the MaxExchange Server and MaxExchange Remote Servers.

No other FTP services can be enabled on the MaxExchange Server.

If port 21 does not seem to work with MaxExchange Server, this may be changed to any other value **with the exception** of the values within the range of 10035 – 11315; these values are used for MaxExchange file transfer

Email

All computers synchronizing using Email must have the same email client (version and configuration) as the MaxExchange Server.

The email client on the server and remotes must be installed and configured prior to installing MaxExchange.

Network Direct

Users must always have access to the network when they need to synchronize.

The MaxExchange folder on the server must be shared to the remotes, and the remote users must have read and write permission on the folder. Similarly, the MaxExchange folder on each remote must be shared to the server, and the server user must have read and write permission on the folder. Read and write permission should extend to Sharing and Security.

If the MaxExchange Server is run as a service, the MaxExchange Service should run under a user with read and write permission on the MaxExchange folder on each remote.

By default, the MaxExchange folder is **C:\Program Files\Maximizer\MaxExchange**.

Distribution Groups

To keep the synchronization flow simple, you can create a distribution group which is assigned to all entries in an Address Book. This ensures that all the necessary data is sent to all remote sites. In doing so, access to the entire address book folder is provided for all remote sites. Keep in mind that the necessary bandwidth and hardware infrastructure must be in place to synchronize all the data in an Address Book to all remote sites.

SQL Server Database Rights

You must ensure that the MaxExchange Server user has the proper rights for Microsoft SQL Server (dbcreator and securityadmin server roles and also the db_owner role for the Address Book) for MaxExchange synchronization. This is also true if you are using Windows Authentication.

Database for Packet Processing

A SQL database is created to store the incoming data packets for each Address Book you are synchronizing with MaxExchange in Microsoft SQL Server. The name of the database corresponds with the name of the Maximizer Address Book followed by an underscore and MaxExData. For example, if an Address Book has the name Escona Tutorial, the database created in SQL Server for the storage of MaxExchange packets is called EsconaTutorial_MaxExData.

Transaction Journaling

Do not enable the Transaction Journaling in a new Address Book until just before adding your first remote.

Once this field is enabled, each change to Address Book entries marked for distribution (MaxExchange Distribution field) is written to the transaction file/table. This could result in a large number of necessary transactions that will later be processed.

Removal of Records from Synchronization Cycle

If an Address Book entry is no longer being used by any remote site, the record should be unmarked for synchronization. While no changes would need to be synchronized to the remote, refreshes to remote would cause unnecessary processing time.

Routine Maintenance

To prevent synchronization issues, regular maintenance should be performed. MaxExchange Server Manager and MaxExchange Server include a tool called Address Book Maintenance used to perform regular maintenance. For more information, see “Address Book Maintenance” on page 123.

You should also do periodic searches for Address Book entries that are not marked for synchronization. This ensures that all the entries have been properly added to the Address Book. To avoid incorrect entries being created, you can set up a default entry including the proper distribution group for a user or groups of users. You can also perform a global edit on a selected group of Address Book entries or default entries to change the distribution group selection.

Verifying and Recovering an Address Book

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. This is an important function to perform after upgrading an Address Book. See "Verifying and Recovering an Address Book" on page 124 for more information.

Changes in Employees and Remote Sites

The following sections describe issues that come up when there are changes in MaxExchange teams and distribution sites.

- "Reassigning of Opportunities" on page 132
- "Removal of a Distribution Site in MaxExchange Site Manager" on page 132

Reassigning of Opportunities

If a team member is removed, opportunities should be assigned to another team member.

Removal of a Distribution Site in MaxExchange Site Manager

The deletion of a remote site in Site Manager causes synchronization with the distribution site to cease. Any packets in transit will not be processed by the server. Before deleting a distribution site, packets from the distribution site should be processed.

FTP Password Change

If a change of the FTP password is required, all users are prompted with a message. The new password must be distributed to all remote sites.

FTP Address

If you are using an IP address for the FTP address, ensure it is accessible by the remote machines (external IP address that is not behind a firewall). Depending on the network security model used, if the IP address entered for the MaxExchange Server is an internal IP address, it may not be accessible by the remote machines.

Log Files

The following log files should be used as a reference when troubleshooting MaxExchange:

- Server Activity Log – [AddressBookName]_log.txt (MaxExchange Server) or Spdmlog.txt (MaxExchange Remote Server)
- Distribution List Log – Dstrblog.txt (Address Book Diagnostic Tools log - MaxExchange Site Manager)
- Packet Summary Log – [AddressBookName]_packlog.txt (MaxExchange Server, MaxExchange Remote Server, and MaxExchange Remote)
- Remote Activity Log – [AddressBookName]_log.txt (MaxExchange Remote)
- Remote Processing Packets Log - Statlog.txt (MaxExchange Remote)

HTTP Transport and Microsoft IIS

For more information about using Microsoft IIS with Maximizer CRM, refer to the *Maximizer CRM Administrator's Guide*.

If you are using the HTTP transport method, you must grant the following required permissions to the anonymous web access account in IIS on all MaxExchange server and remote server machines:

- full control permissions to the MaxExchange Inbox and Outbox folders, and any subfolders (these folders are located in ...\Program Files\Maximizer\MaxExchange)
- full control permissions to the MaxExchange DataSynch registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Maximizer Software\MaxExchange\CurrentVersion\DataSynch)

By default, the anonymous web access account is IUSR_[ComputerName].

Refer to the following procedures for detailed instructions for granting these permissions.

➤ To grant full control permissions to MaxExchange folders

1. Open Windows Explorer.
2. Browse to the folder.
3. Right-click the folder, and select **Properties** from the shortcut menu.
4. Click the **Security** tab.
5. Click **Add**.
6. Select the anonymous web access account, and click **Add**.
7. Click **OK**.
8. Select the **Full Control** checkbox in the **Allow** column, so it is checked.
9. Click **OK** to close the Properties dialog box and save your changes.

➤ To grant full control permissions to MaxExchange DataSynch registry key

Use caution when modifying the Windows registry. Using the Windows Registry Editor incorrectly can cause serious problems that may require you to reinstall Windows. If you are uncertain about using the Registry Editor, please ask your system administrator for assistance.

1. Open the Windows registry editor. (Click **Start** > **Run**, type **regedit**, and click **OK**.)
2. Navigate to the **DataSynch** registry key and select it.

   HKEY_LOCAL_MACHINE\SOFTWARE\
   Maximizer Software\MaxExchange\CurrentVersion\DataSynch
3. Select **Edit** > **Permissions** from the menu.
4. Select the anonymous web access user account.
5. Select the **Full Control** checkbox in the **Allow** column, so it is checked.
6. Click **OK**.

Password Expiration Under Microsoft SQL Server 2005 or Later

If your synchronized MaxExchange database is running on a machine with Windows Server 2003 or later, with Microsoft SQL Server 2005 or later, SQL passwords for the “sa” user, or any user with the “System Administrators” server role, may expire periodically, according to the domain password policy or local password policy.

When you attempt to start MaxExchange Server Manager or Remote Server Manager after the system administrator password has expired, it will prompt you to log into the database through MaxExchange Site Manager. Site Manager then prompts you to provide the old, expired password and the new password.

When you attempt to start MaxExchange Remote after the system administrator password has expired, it will prompt you to provide the old, expired password and the new password.

Depending on the password policy configuration, new passwords may be required to be of sufficient complexity. For example, it may have requirements for minimum length, alphanumeric or special characters, etc.

Queuing Up for Processing Message

When attempting two or more of the following processes, a lock file prevents certain processes from occurring at the same time. Users receive a "Queuing up for processing" message because the lock file is preventing the following processes from occurring at the same time.

- processing with MaxExchange
- adding a distribution site

You must ensure all users have full security rights to the MaxExchange flag file. Otherwise, you will receive the message even though two processes are not occurring at the same time. The flag file format is dbid.flg (2E076B59.flg). On a MaxExchange server, the file is found in the SvrShare folder (...All Users\Application Data\Maximizer\SvrShare) and on a MaxExchange remote the file is found at the root of the Maximizer program folder.

Running Only MaxExchange Server Manager

If you are running MaxExchange Server Manager on a different computer than the MaxExchange Server, you must ensure the following:

- MaxExchange applications are allowed through the firewall on both the computer running MaxExchange Server and the computer running MaxExchange Server Manager.
- The user running MaxExchange Server Manager is in either the Administrators group or the Distributed Com Users group on the computer where MaxExchange Server is installed.
- The anonymous logon user is allowed remote access to Component Services on the computer where MaxExchange Server is installed.

➤ To grant remote access to the anonymous logon user

1. Open Component Services. (Click **Start > Run**, type **dcomcnfg**, and click **OK**.)
2. Select **Component Services > Computers > My Computer**.
3. Right-click and select **Properties**.
4. Select the **COM Security** tab.
5. Under **Access Permissions**, click **Edit Limits**.
6. Select the **anonymous logon** user account.
7. Under **Permissions**, select the **Remote Access** checkbox in the **Allow** column.

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