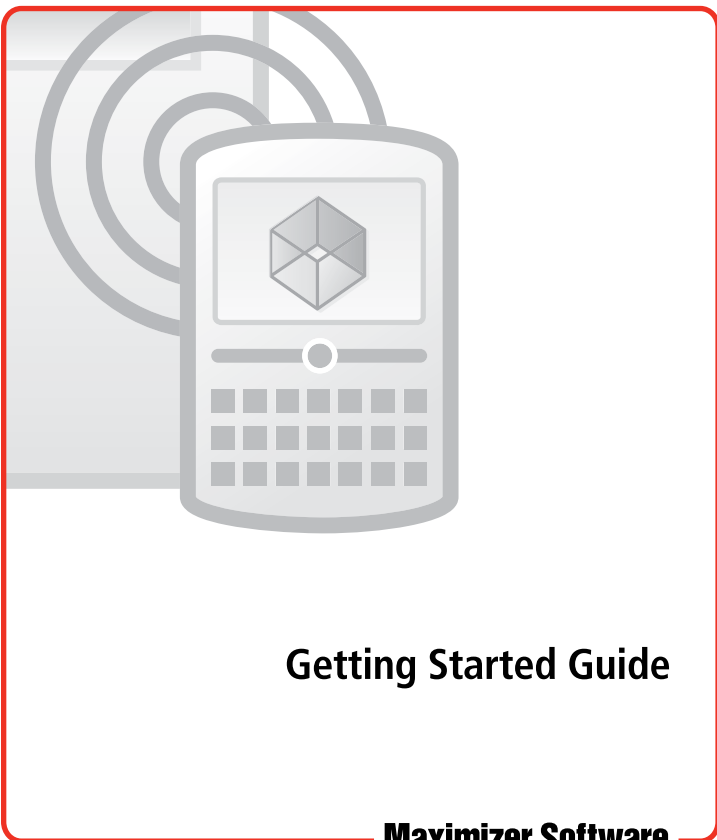




Maximizer[®] CRM 12

MaxMobile *Wireless Server*



Getting Started Guide

Maximizer Software
Simply Successful CRM

Welcome to MaxMobile Wireless Server

Introduction

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

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

System Requirements

- Maximizer CRM 12 Enterprise or Group Edition (Workstation or Server)
- Processor Speed - 1.6 GHz (minimum) and 3 GHz (recommended)
- Available RAM - 1 GB (minimum) and 2 GB (recommended)
- Operating system - Microsoft Windows XP, Vista, 7, or 8, Windows Server 2003, 2003 R2, 2008, 2008 R2, or 2012 (32-bit or 64-bit updated to their latest service packs) with Microsoft Internet Information Services (IIS)

Installing MaxMobile Wireless Server

You can install MaxMobile Wireless Server on a Maximizer workstation or a server. Typically, the software would be installed on a workstation.

➤ To install MaxMobile Wireless Server

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

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

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

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

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

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

Applying Licensing

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

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

MaxMobile Interface Customizations

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

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

Configuring MaxMobile Wireless Server

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

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

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

➤ To configure the wireless server

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

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

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

- Open port 1434 to expose the SQL Server Browser service.
- Create an exception for sqlservr.exe and sqlbrowser.exe to allow the MAXIMIZER instance of SQL Server access through the firewall.

3. If the MaxMobile Wireless Server is behind a router, configure the router to direct to the MaxMobile Wireless Server computer.
4. If the SQL server is running under Windows Authentication, you must set up the MaxMobile Wireless Server as described in this step.

Note that users must enter the network domain followed by the User ID to log in to MaxMobile. For example, network_domain\jnapoli.

Scenario I - This configuration applies when MaxMobile Wireless Server and Microsoft SQL Server are installed on the same computer.

In SQL Server, add a **Network Service** user to Security Logins and grant the **Public** and **dbowner** rights on the MaConfig database.

In addition, grant each **MaxMobile** user **Public** and **CRM Group** rights on the Maximizer database, as well as **Public** and **dbowner** rights on the MaConfig database.

Scenario II - This configuration applies when MaxMobile Wireless Server and Microsoft SQL Server are installed on different computers.

In SQL Server, grant each **MaxMobile** user **Public** and **CRM Group** rights on the Maximizer database, as well as **Public** and **dbowner** rights on the MaConfig database.

In addition, set the Windows Authentication application setting in the web.config file to true as follows:

```
<add key = "WindowsAuthenticationRequired" value = "true" />
```

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

...\Maximizer\WebServices\MaxMobileServer

5. If the server is a Windows 2003/2003 R2 server, ensure **.NET v4.0.xxx** is allowed in IIS **Web Service Extensions**.
6. If the server is a Windows 2008/2008 R2 server, enable the **.NET Framework** and activate the **WCF** (Windows Communication Foundation) component by doing the following:
 - In the **Control Panel**, open **Programs and Features** and click on the **Turn Windows features on or off** option.
 - Click on **Features**, click **Add Features**, and select the **Microsoft .NET Framework** feature.
 - In the **WCF Activation** section, select the **HTTP Activation** and **Non-HTTP Activation** options.
 - Click **OK**.

If the server is running Windows 2003, this step is done automatically by the installation and you can move to step 7.

7. If you are installing MaxMobile on a 64-bit operating system, you must perform some additional steps. Refer to the *Maximizer CRM Administrator's Guide* for more information.
8. Ensure MaxMobile Wireless Server is configured properly by going to the following URL:

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

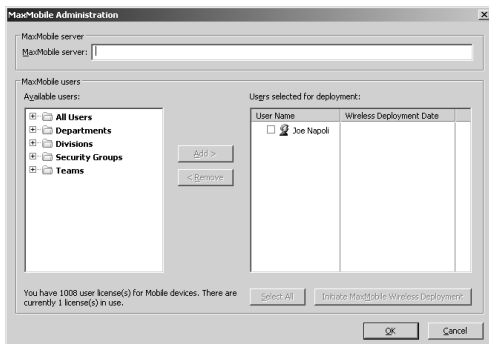
`https://[server_name]:[port_number]/MaxMobileService/mobile.svc`

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

Metadata publishing for this service is disabled.

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

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



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

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

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

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

<security mode="Transport"/>

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

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

11. If you are using Dashboards or Company Library in MaxMobile, ensure the Mobile Access URL is specified in Administrator. Once the URL is specified, the Dashboards and Company Library icons are accessible from the MaxMobile home screen. See the *Maximizer CRM Administrator's Guide* for more information.

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

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

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

- Name and position:** Includes fields for User ID (JNAPOLI), Mr/Ms (Mr.), First name (Joe), Initial (N), Last name (Napoli), and Salutation (Dear < >:). Below these are fields for Display name (Joe Napoli), Position (President), and Reports to (a dropdown menu).
- Company and main address:** Includes fields for Company (Escona Estate Wines), Dept. (Executive), Division (CAN - East), Address 1 (1344 Eastside Road), Address 2, City/Town (Petaluma), St/Co/Prov (CA), Zip/Postcode (94954), and Country (USA).
- Phone numbers and phone extensions:** Includes four rows for phone numbers and extensions, with the first two rows populated: 1: (555) 775-0902 and 2: (555) 775-0900.
- Security:** Includes radio buttons for Public (selected) and Private.
- Module Login:** A table showing login status for Windows Access (Enabled), Web Access (Disabled), and Mobile (Enabled).
- Internet information:** Includes fields for Email (jnapoli@maxmizer.com) and Website (http://www.escona.com).

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

Configuring MaxMobile for Deployment

Before you deploy MaxMobile, IIS must be configured properly.

Although the MaxMobile Wireless Server installation should do this automatically, these settings may be verified for installing/downloading MaxMobile.

> To configure IIS

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

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

3. Add the following registered file extension types:

Extension: **cod**

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

Extension: **jad**

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

Deploying the MaxMobile Installation

You can deploy MaxMobile by email or through the web.

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

Deploying MaxMobile by Email

The Maximizer Email Service must be set up and running to deploy MaxMobile by email. Refer to the *Maximizer CRM Administrator's Guide* for more information on setting up the Maximizer Email Service.

➤ To deploy the MaxMobile installation by email

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

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

To customize the email, you must modify the **MaxMobileOTADeploymentTemplate.txt** file found in the MaData6 folder where you installed Maximizer. If you are using Maximizer Web Access Administrator, the file is in the **\\Maximizer\\Portals\\MaximizerAdmin\\App_Data** folder.

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

Deploying MaxMobile Through a Web Browser

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

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

> To deploy MaxMobile through a web browser

1. On the device web browser, browse to the following URL:

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

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

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

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

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

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

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

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

Granting Permissions for MaxMobile

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

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

Connecting to the MaxMobile Wireless Server

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

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

Application Settings for MaxMobile

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

...\Maximizer\WebServices\MaxMobileServer

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

<add key="WindowsAuthenticationRequired" value="false" /> determines if the connection allowed from the SQL server is Windows Authentication. By default, this is set to false; to use Windows Authentication the value must be set to true.

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

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

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

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

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

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

**maxBufferSize, maxReceivedMessageSize,
MaxStringContentLength**

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

<security mode="Transport"/>

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Applicability

This document applies to MaxMobile Wireless Server 12 and Maximizer CRM 12 Enterprise/Group Editions.

Printing History

First printing - October 2011

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