Maximizer CRM 2017

Administrator's Guide

for Group Edition

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Applicability

This document applies to Maximizer CRM 2017 software.

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Maximizer System Requirements

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

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

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

Maximizer Group Edition System Requirements

The following table lists the system requirements for Maximizer CRM Group Edition server. For the latest list of supported software, go to www.maximizer.com.

	CRM Server
Minimum Processor Speed	1.6 GHz (minimum) Quad Core 2.0 GHz or faster processor (recommended)
Available RAM[a]	4 GB (minimum) 8 GB (recommended)
Available hard disk space	10 GB or more
Hard disk format	It's recommended that you install Maximizer on a drive formatted as an NTFS file system. 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 systems, visit the Maximizer Knowledge Base at www.maximizer.com/knowledgebase. * Maximizer CRM Group Edition should not be installed on a compressed hard drive.
Minimum video resolution	SVGA (1024x768) or higher-resolution video adapter and monitor

	CRM Server
Operating system	Microsoft Windows Server 2008, 2008 R2, 2012, 2012 R2, or 2016 (32-bit and 64-bit editions) * It is recommended to update to the latest service packs.
Email system	32-bit MAPI-compliant SMTP (for Maximizer Email Service)
Software on the server where Maximizer components for Microsoft IIS are installed	Microsoft Internet Information Server 7.0 (Windows Server 2008), or 7.5 (Windows Server 2008 R2), 8.0 (Windows Server 2012), 8.5 (Windows Server 2012 R2), or 10 (Windows Server 2016)
Internet speed	1.5 Mbps (minimum) 2.5 Mbps or higher (recommended) * For a large number of users you will want to increase Internet speed.

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

Maximizer CRM Modules and Components

- **Maximizer CRM** is a robust contact, campaign, opportunity, and order management tool. It provides invaluable assistance in tracking customer interaction and purchase history, planning and management of sales opportunities using customizable sales strategies and automatically calculating the probability of close at every stage. With the creation of meaningful graphs and charts, companies benefit from complete, detailed intelligence to fully understand their audience and evaluate the performance of their business.

- **Administrator** is used by a system administrator or IT staff to configure the entire Maximizer system and manage users and security. From Administrator, you can create and manage Maximizer databases (called "Address Books"), back up your data, import and export Address Book information, produce system reports, and perform other administrative tasks.

Modules and Components

- **Customer Access** is a browser-based application providing a two-way flow of information between your organization and its customers.

- **Dashboards** are a component of Maximizer Web Access that can be used for monitoring activities in your company. The information you see in dashboards is generated in real-time, so you have an up-to-date view of the activities taking place in Sales and Marketing. Information, such as how many opportunities are in the funnel and your daily revenue from online purchases, are accessible instantaneously.

- **Maximizer Web Access** is a browser-based application providing your organization's employees with the functionality of Maximizer from anywhere in the world.

- **Mobile Access** provides access to Maximizer through mobile web browsers. When users go to Start > Programs > Maximizer CRM > Web Access > Mobile Access, a URL displays. They can enter this URL into a mobile device to access Mobile Access.

- **Partner Access** is a browser-based application providing two-way flow of information between your organization and its business partners. A multi-tier distribution group can effectively distribute sales opportunities and keep all involved parties informed about the latest discussion topics and customer service cases.

Sample Address Books

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

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

You can access the sample Address Book for all components of Maximizer with the following user ID:

User ID: **MASTER**

Password: **control**

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

Network Configuration

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

In this example, remote employees, partners, and customers can connect through the Internet using Maximizer Web Access or a mobile device with Mobile Access. Employees can also connect through your intranet. The Maximizer database and Microsoft SQL Server Reporting Services (SSRS) can reside on a single server or on different servers.

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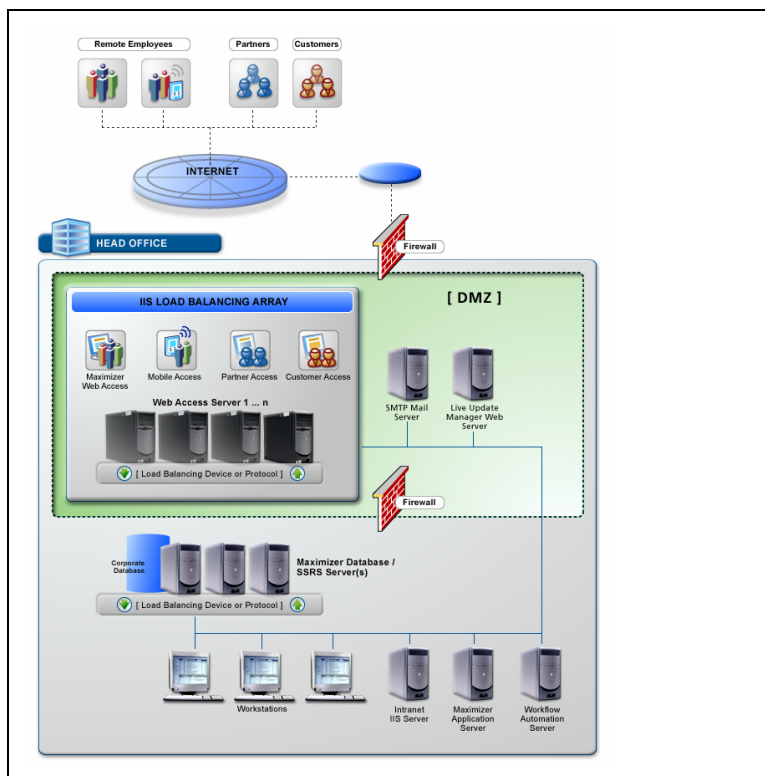
Related Documentation

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

- **Online Help** (Help > Online Help) provides additional information about using Maximizer and Administrator.

- The **Maximizer CRM Web Access User's Guide** is your reference guide to using Maximizer. This guide is available in PDF format from the Help menu in Maximizer Web Access.

- The **Maximizer CRM Customization Suite** includes additional guides for integrators. When the Customization Suite is installed, these guides are available in PDF format from the Maximizer Customization Suite folder in the Windows Start menu. The Customization Suite enables customers and business partners to customize the Maximizer interface and to integrate with other front-office and back-office solutions.

- The Maximizer website (**www.maximizer.com**) provides the latest product information. It also includes a searchable Knowledge Base at www.maximizer.com/knowledgebase.

Configuring Microsoft Internet Information Server (IIS)

In this chapter...

Maximizer Components Requiring Microsoft IIS

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

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

• Maximizer Web Access sites

• Automated campaigns, for statistics in email activities

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

Virtual Directories

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

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

Maximizer Components	Virtual Directory Name
Maximizer Web Access	MaximizerWebAccess
Maximizer Web Access Administrator	MaximizerAdmin
Mobile Access	MaximizerMobileAccess
Partner Access	MaximizerPartner
Customer Access	MaximizerCustomer
Automated campaigns	Campaigns
Maximizer.Web.Data	MaximizerWebData

Web Server Permissions

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

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

Changing the Anonymous Web Access Account

To change the anonymous web access account, first create a new user account, then enable anonymous access for the account.

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

1 Start Windows User Manager.

2 Select the local domain by selecting **Users** > **Select Domain**.

3 Create a new user account.

4 Make the account a member of the **Guests** group.

5 Confirm that the Guests group only has the right to **log on locally** by performing the procedure outlined in "Standalone Servers" on page 16.

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

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

2 Select the default website or another website if more than one is available.

3 Double-click **Authentication**.

4 Select **Anonymous Access** and click **enable**.

5 Click **edit**.

The Edit Anonymous Authentication Credentials dialog box opens.

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

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

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

Setting Up the Maximizer IIS Production Environment

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

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

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

The following sections contain information on IIS production environments:

- "Load Balancing" on page 13
- "Demilitarized Zone (DMZ)" on page 15

Load Balancing

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

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

- A single IIS server is running at high CPU usage levels and performance of Maximizer Web Access is poor only when many users are using the system.
- The SQL server serving the Maximizer Address Books is not running at high CPU usage levels.
- A set of servers of similar capacity are available to deploy Maximizer Web Access.
- The available IIS servers are all running Windows Server 2008 or later or a hardware load balancer is available.

Configuring Load Balancing

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

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

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

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

Benefits of Load Balancing

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

Drawbacks of Load Balancing

Network load balancing has the following drawbacks:

- The system is scaled to a larger number of users only if the SQL server can handle the load.

- Multiple IIS servers must be maintained with the same settings and version of the software. Otherwise, some users may be able to use the system while other users are not able to use the system.

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

Demilitarized Zone (DMZ)

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

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

Microsoft IIS Account Configuration

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

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

- "Standalone Servers" on page 16

Standalone Servers

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

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

1 Open **Local Security Policy** (available through Windows Administrative Tools).

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

2 Expand the **Local Policies** branch, and select **User Rights Assignment**.

3 Right-click **Allow log on locally,** and select **Properties** from the shortcut menu.

4 Add the **<server_name>\Guest** account to the list of allowed users. Click **OK**.

5 Right-click **Deny log on locally**, and select **Properties** from the shortcut menu.

6 Add the **<server_name>\Guest** account to the list of denied users. Click **OK**.

Microsoft IIS on Windows Server 2008 or 2012

If your Microsoft IIS server is a Windows Server 2008 or 2012 computer, you may need to perform the following steps before installing the Maximizer components for IIS:

• Enable the .NET framework.

• Install the required role services.

> *These procedures are written for Windows Server 2008. Steps may vary on Windows Server 2012 computers.*

➤ **To enable the .NET framework**

1 Open Server Manager.

2 Select **Features**, and select **Add Features**.

3 Select **Microsoft .NET Framework**.

The following features are required:

• On Windows 2008, under **.NET Framework 3.0 Features**, **.NET Framework 3.0** and **WCF Activation**.

• On Windows 2008 R2, under **.NET Framework 3.5.1 Features**, **.NET Framework 3.5.1** and **WCF Activation**.

• On Windows 2012, under **.NET Framework 3.5 Features**,**.NET Framework 3.5**, and under **.NET Framework 4.5 Features**, all items.

4 Click **OK**.

➤ **To install the required role services**

1 Open Server Manager.

2 Click **Roles**.

> *The Maximizer components for IIS require that the Web Server (IIS) role be installed. If it is not already installed, use the Add Role wizard to install it.*

3 Under **Web Server (IIS)**, select **Add Role Services**.

The Add Role Services dialog box opens. The following role services are required:

• Under **Common HTTP Features**, **Static Content**.

• Under **Application Development**, **ASP.NET** and **.NET Extensibility**.

• Under **Security**, **Basic Authentication** and **Windows Authentication**.

• Under **Management Tools**, all items.

4 Click **Next**.

5 If you are prompted, include additional components.

6 Click **Install**.

7 When the installation is finished, click **Close** to close Server
Manager.

Microsoft IIS on 64-Bit Operating Systems

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

Enabling 32-Bit Applications in Windows Server 2008 or 2012

In Windows Server 2008 or 2012, the Maximizer web applications should run under an application pool that has 32-bit applications enabled and that uses ASP.NET v4.0. If you do not need to run other applications on a 64-bit web server, you can specify these settings for the default application pool.

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

ⓘ This procedure is written for Windows Server 2008. Steps may vary on Windows Server 2012 computers.

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

1 In IIS Manager, select **Application Pools**.

2 Select the **ASP .NET v4.0** application pool.

3 Click **Advanced Settings**.

4 Next to **Enable 32-bit Applications**, select **True**.

5 Click **OK**.

Setting File and Directory Permissions

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

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

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

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

➤ **To remove the "Everyone" group**

1 Start Windows Explorer and browse to the **...\Inetpub\scripts** directory (typically, C:\InetPub\scripts).

2 Select the **scripts** directory, and select **File** > **Properties**.

3 Select the **Security** tab.

4 Highlight the **Everyone** group in the **Name** list box, and click **Remove**.

The Everyone group is removed from the list.

5 Click **Add**.

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

6 Select the **Guest** or **Domain Guest** group, and click **Add**.

7 Click **OK**.

8 In the Permissions list box, select the **Read** checkbox from the **Allow** column.

9 Click **OK**.

Adding Support for File Types

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

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

• To add to the list of supported document types in Maximizer Web Access.

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

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

1 On the Maximizer IIS server machine, open the **IIS Manager**.

2 Open the **Default Web Site**.

3 Double-click the **MIME Types** icon.

4 Click **Add**.

5 Enter the file extension and MIME type to be supported.

6 Click **OK** to add the specified MIME type.

Installing Maximizer

In this chapter...

Installation Checklist

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

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

- Step 1: Identify the Key Server(s)
- Step 2: Ensure the Servers Meet System Requirements
- Step 3: Install Maximizer
- Step 4: Install Additional User Licenses
- Step 5: Activate the Software

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

Step 1: Identify the Key Server(s)

Identify the Maximizer Application Server, IIS Server and Email Server. For information on the role of each server, see "Servers Required for Maximizer Installations" on page 25.

Step 2: Ensure the Servers Meet System Requirements

After identifying the key servers, you should ensure that they meet the minimum system requirements. See "Maximizer System Requirements" on page 2.

Step 3: Install Maximizer

Install Maximizer components on all applicable computers.

For more information see the following sections:

- "Installation Order of Maximizer Components" on page 33
- "Installing Maximizer CRM Server" on page 34
- "Installing Maximizer Companion Applications" on page 43

Step 4: Install Additional User Licenses

Install licenses for any additional Maximizer users. This step is required only if you are installing Maximizer in a multiple-user

environment. For more information, see "Installing Licenses" on page 51.

Step 5: Activate the Software

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

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

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

Servers Required for Maximizer Installations

- **Maximizer Application Server:** The Maximizer Application Server is the machine where the Maximizer CRM Server application is installed, and it acts as a file server. Additionally, the Maximizer Server machine contains the Maximizer Email Service. The Maximizer Server machine must be capable of sharing folders. These folders store template and configuration information specific for each Address Book. It is advisable to back up the Maximizer Server on a consistent basis.

- **IIS Server:** The IIS Server hosts the web server components, including web access sites. To run these components, the IIS Server must have SQL connectivity with the SQL Server machine. Typically, the web server is separated from the rest of the network by a firewall. Even if a firewall exists between the IIS Server and SQL Server, SQL connectivity must exist to run Maximizer Web Access.

- **Email Server:** The Email Server supports marketing campaigns, appointment reminders, and customer service case notifications. It must be capable of sending SMTP.
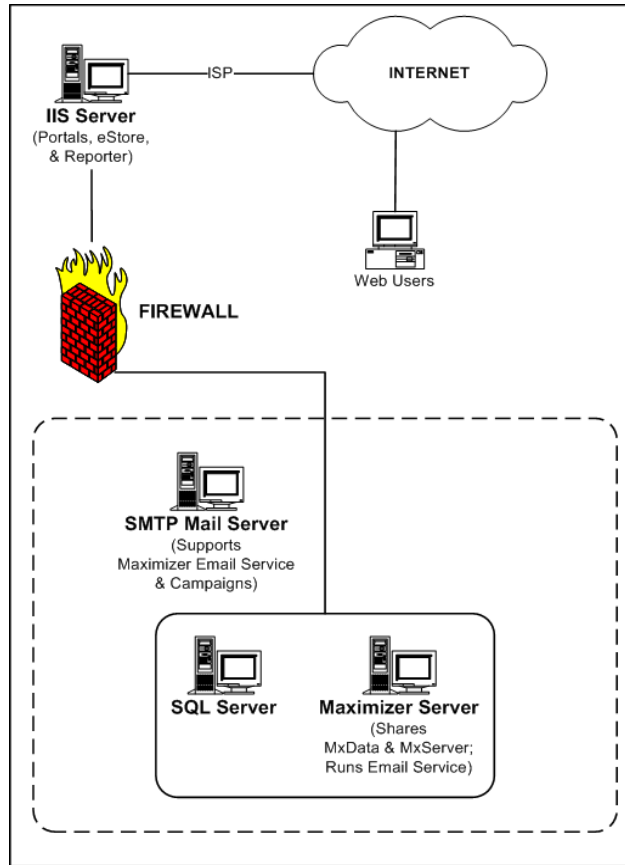
Verifying Network Connectivity

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

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

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

A Windows command prompt window opens.

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

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

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

- "Reply from ..." = success
- "Request timed out" = failure

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

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

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

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

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

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

A Windows command prompt window opens.

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

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

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

Third-Party Components Installed with Maximizer

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

• Microsoft SQL Server Express Database Engine

• Microsoft .NET Framework

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

Microsoft SQL Server Express Database Engine

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

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

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

• email transfer

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

• upgrading an existing Pervasive or Btrieve Address Book

If you are upgrading from Maximizer CRM 10.x, you must uninstall the Maximizer instance of SQL Server 2005 Express before installing the Maximizer instance of SQL Server 2014 Express. Refer to the Maximizer knowledge base for detailed information.

Microsoft SQL Server Management Studio Express

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

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

• MaxCRM\3RDPARTY\SQLExpr

Microsoft SQL Server Reporting Services

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

enable SQL Server Reporting Services Integration in the System
Options preferences in Maximizer Web Access Administrator.

Microsoft .NET Framework

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

Windows Login Account Rights Required for Installation

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

Shared Folders and Permissions

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

Folder name	Shared name	Description
AddrBks	MxData	Contains Address Books and Sample Address Books. Share Permissions of Everyone with Change and Read (not Full Control).
SvrShare	MxServer	Share Permissions of Everyone with Change and Read (not Full Control).

Upgrading from a Previous Version of Maximizer

ⓘ ALWAYS back up the Address Book before upgrading Maximizer. For instructions on backing up, refer to "Backing Up and Restoring Address Book Data" on page 248. If you have customized the dictionary and holidays, also back up those files separately before upgrading.

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

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

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

1 Back up your Maximizer Address Book. Refer to "Backing Up and Restoring Address Book Data" on page 248 for instructions.

2 If you have customized the dictionary and holidays, also back up those files separately before upgrading. For instructions, refer to "Backing Up the Dictionary and Holiday Files" on page 253.

3 Uninstall Maximizer CRM, and any additional Maximizer components on all computers.

For instructions on uninstalling Maximizer, see "Removing Maximizer" on page 31.

4 Install the new version of Maximizer.

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

For more information, see "Installing Licenses" on page 51.

6 Activate the software.

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

7 Upgrade your Maximizer Address Book database to the new version, as described in "Upgrading or Converting an Address Book" on page 64.

Removing Maximizer

You can uninstall Maximizer to remove it from your computer. When you uninstall Maximizer CRM, you have the option of removing or

keeping registry settings and program files. If you want to completely remove the program, you should select this option. If you want to reinstall Maximizer, you may want to keep these settings. Any settings stored in the database are not removed when you uninstall Maximizer.

➤ **To uninstall Maximizer**

1 Click **Start** > **Settings** > **Control Panel** > **Add/Remove Programs**.

2 In the list of currently installed programs, select **Maximizer CRM**.

3 Click **Change/Remove**.

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

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

5 Click **Yes** to confirm.

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

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

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

8 Reboot the computer.

Installation Order of Maximizer Components

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

1 **Maximizer Server –** Refer to "Installing Maximizer CRM Server" on page 34.

2 **Maximizer Components for Microsoft IIS –** Refer to "Installing Maximizer Components for Microsoft IIS" on page 40.

Installing Maximizer CRM Server

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

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

Note that Maximizer Web Access, Customer Access, Partner Access, and Mobile Access are installed automatically with Maximizer CRM Server when the Maximizer Components for Microsoft IIS option is selected. You can enable the sites while installing Maximizer CRM Server or later. For information on enabling sites, see "Enabling Web Access Sites" on page 161.

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

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

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

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

➤ **To install Maximizer**

1 Close all programs running on the computer.

2 Insert the Maximizer CRM disc.

The setup starts automatically.

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

3 Select **Install Maximizer CRM Server**.

The InstallShield Wizard starts.

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

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

6 Enter your **Customer Number**, **Product Serial Number**, and your contact information, and click **Next**.

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

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

To install Maximizer components for IIS, select **Maximizer Components for Microsoft IIS**.
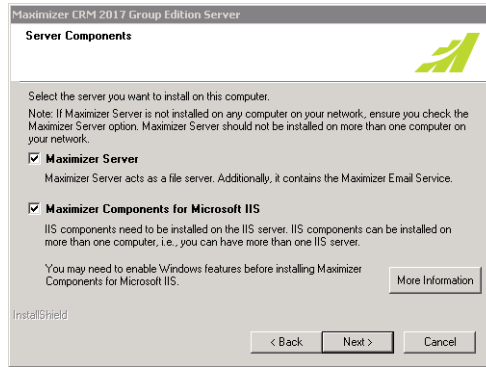
8 Click **Next** to install Maximizer Server components to the default location.

– or –

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

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

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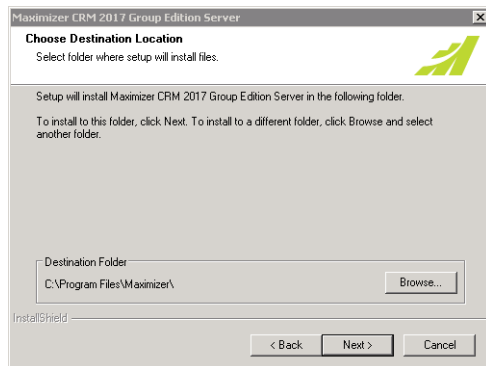
Do not change any default share names, file names, file locations, folder names, or folder locations after installing Maximizer. If you want to use names and locations other than the defaults, change them during the installation.

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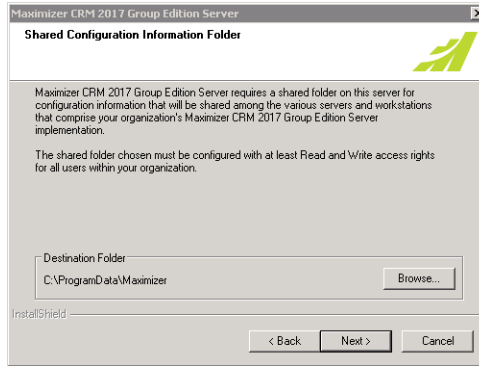
By default, Maximizer setup creates the folder **...\All Users\
Application Data\Maximizer** on the server, and it creates two
shared subfolders called **AddrBks** and **SvrShare**. These folders
must be shared on the network so other PCs can access to
resources installed to this location. The default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

10 Select a setup type, and click **Next**.
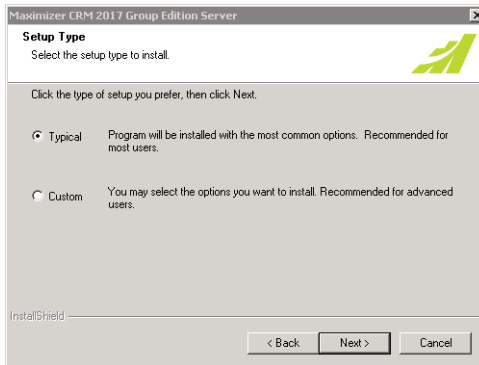
- **Typical –** installs a default set of server software, such as
  Windows services, server-side software, and drivers. It also
  installs a default set of Maximizer user applications on the
  server. Maximizer recommends that you select the Typical
  installation, unless you have a specific reason not to.

- **Custom –** enables you to select specific Maximizer modules
  to install. You can select virtually any combination of server
  software and user applications you want. Select this option

only if you have a specific reason to alter the default
Maximizer installation provided by the Typical installation.

1 1 **(This step applies only to Typical installations)** Select
which sample Address Books to install.
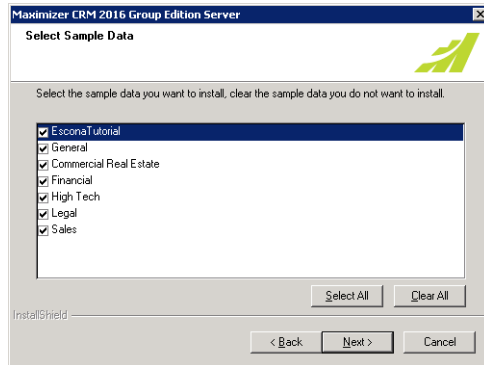
1 2 **(This step applies to Custom Installations only.)** Select
which features to install on the server, and click **Next**.

If you would like to select additional components, click the **+** to
expand the selection.
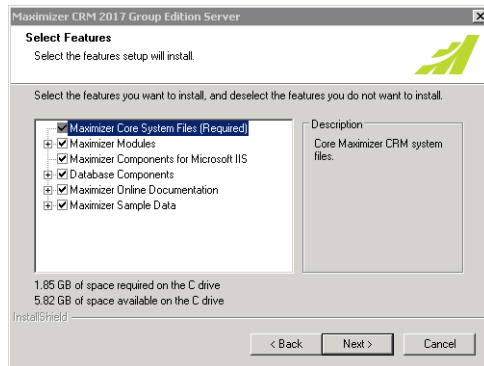
1 3 **(The next 3 steps apply only if you selected Maximizer
Components for Microsoft IIS in step 7.)** The installation

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

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

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

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

1 5 Specify the name of the virtual directory for each of the web access sites, select **Enabled** for each site you want to enable, and click **Next**.

1 6 Specify your SMTP Server settings, and click **Next**.

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

1 7 S   en click **Next**:

- ·   – This option
                                                       ndows Start menu.

1 8   Review the installation settings, and click **Next**.

1 9 Select a location to install the database components or use the default location, and click **Next**.The wizard displays an

installation progress indicator. After the installation is complete, click **OK** to close the message box.

The installation may prompt you to restart your computer.

2 0 Click **Finish** to close the wizard and restart the computer (if necessary).

2 1 If your computer needed to restart, log in to Windows using an administrator account. This step is required to complete the installation.

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

Installing Maximizer Components for Microsoft IIS

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

The Maximizer Components for Microsoft IIS installation is required to install the web access sites. Microsoft IIS must already be installed. To install Dashboard components for IIS, you must complete a custom installation of the Maximizer server and select the Dashboard Components for IIS option in the Select Features screen. For information on installing Maximizer server, see "Installing Maximizer CRM Server" on page 34.

NOTE: The following procedure is to install Maximizer Components for Microsoft IIS only on a machine that is not the Maximizer application server. To add the Maximizer Components for Microsoft IIS to an existing Maximizer application server, ensure the installation media is accessible from the application server. For example, if you installed the Maximizer application server from the disc, the disc must be in the drive. If you installed the Maximizer application server from another machine on the network, the other machine must be accessible. Then, modify the Maximizer installation via the Add/ Remove Programs module in the Control Panel, and enable the Maximizer Components for Microsoft IIS option.

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

1 Close all programs running on the server.

2 Insert the Maximizer CRM Server disc. (The server and workstation versions are on separate discs.)

The setup starts automatically.

3 Select **Install Maximizer CRM Server**.

The InstallShield Wizard starts.

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

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

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

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

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

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

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

– or –

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

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

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

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

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

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

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

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

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

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

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

The wizard displays an installation progress indicator.

When the installation is complete, the final step of the wizard appears, as shown below.

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

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

Maximizer Components for Microsoft IIS are now installed.

Setting Full Permissions to the Maximizer Web Access Temp Folder

After installing Maximizer and setting more secure permissions on the Maximizer directory (as described in "Setting File and Directory Permissions" on page 20), give the IIS/ASP.NET account full permissions to the following folder to allow documents to be downloaded from the Maximizer Web Access:

...\Program Files\Maximizer\Portals\Employee\Temp

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

1 On the IIS server, locate the following folder:

...\Program Files Maximizer\Portal\Employee\Temp

2 Open the **Security Properties** for the **Temp** folder.

Right-click the **Temp** folder and select **Security.** Click **Properties**, then select the **Security** tab. Click Edit.

3 Click **Add**.

4 Click **Locations**

5 Select the local machine.

6 Enter **IIS_USRS** and click **OK**.

7 Check **Full Control**.

8 Click **OK**.

Installing Maximizer Companion Applications

The following table explains how to install each of the Maximizer companion applications. For information about each of these applications, refer to "Maximizer CRM Modules and Components" on page 4.

Application	Installation Instructions
Workflow Automation Powered by KnowledgeSync	On the Maximizer CRM Server Setup disc, select Install Workflow Automation Powered by KnowledgeSync and follow the on-screen instructions.

Installing Microsoft Office Integration for Maximizer Web Access

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

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

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

1 Insert the Maximizer CRM Server disc.

The setup starts automatically.

2 Select **Browse this Disc**.

3 Open the **Office_Integration** folder.

4 Double-click one of the following files:

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

The InstallShield Wizard starts.

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

Adding and Removing Maximizer CRM Components

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

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

1 Close all programs running on the computer

2 Insert the Maximizer disc.

3 On the Setup disc Autorun screen, select **Install Maximizer CRM Server**.

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

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

Checkboxes are automatically selected for any currently installed components.

ⓘ Expand the branches to add or remove sub-components.

5 Select the checkbox beside any components to add.

6 Clear the checkbox beside any components to remove.

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

7 Click **Next**.

Maximizer begins the update.

Full-Text Search Component of SQL Server

The Full-Text Search component of Microsoft SQL Server applies to Search by Notes, Search by Documents, and Knowledge Base searches in Maximizer.

Th Microsoft SQL Server Full-Text Search component is installed with the Maximizer instance of SQL Server Express. You may need to start the Full-Text Search service before you can use Full-Text Search in Maximizer.

To learn more about Full-Text Search in Microsoft SQL Server, refer to your Microsoft SQL Server documentation.

The following sections contain information on the full-text search component in SQL Server:

Using Full-Text Search in Maximizer

The full-text search option is enabled if the Microsoft Search service is running and the full-text search indexes have been created. Otherwise, the option is disabled. Full-text search indexes are created during database creation or upgrade. However, you can also force creation of the indexes by executing the EnableFTIndexes.sql script.

When you run a search using full-text searching in Maximizer, the search returns only entries containing full words specified in the search text. If users search for text that is included in part of a word, the search does not return entries that contain that word. For example, if you search for "hedge", only entries containing the word "hedge" are returned. Entries containing the word "hedgehog" are not returned.

Full-Text Search for Documents and Notes

The Search by Documents and Search by Notes functions in Maximizer include an option to "Perform search using Full-Text

Indexing". This option performs queries using the "contains" keyword.
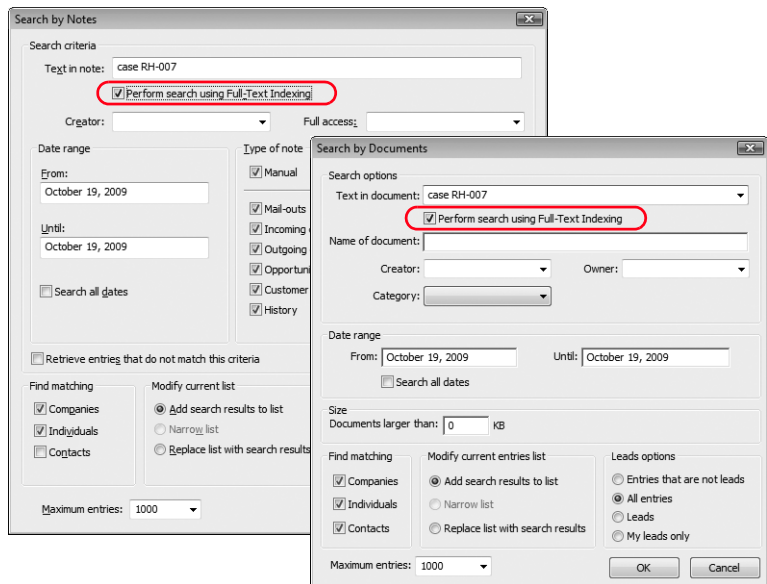
Note that when using full-text search to search by notes or documents, the search returns all notes or documents associated with the entry containing the matching note or document. The search does not return only the note or document matching the search text.

For more information about full-text search, refer to the Microsoft SQL Server documentation.

Full-Text Search in the Knowledge Base

Full-text search is required for full-text searches in the Maximizer Knowledge Base. If full-text search is not enabled, the option for full-text searching in the Knowledge Base is inaccessible.

File Types Available for Full-Text Search

ⓘ Full-text search results are dependent on the full-text search filter for the document type. For specific information about the full-text search behavior, refer to the full-text search filter provider's documentation.

Using full-text search when searching by documents enables you to conduct full-text searches on the following file types: .DOC, .XLS, .PPT, .TXT, and .HTM.

Full-text searching does not search through Maximizer documents (.ETF files) and email messages saved as documents.

You can also download and install additional full-text search filters to enable full-text searching of other document types, such as .XML, .RTF, and .PDF:

- Filters for .XML and .RTF files are available from Microsoft. For more information, visit the Microsoft website (www.microsoft.com), and search for "xml iFilter" or "rtf iFilter".

  You could use the .RTF IFilter for full-text searching of Maximizer Word Processor documents. In the Maximizer Word Processor, save the your documents as .RTF files to search for the files using the .RTF IFilter.

- A filter for .PDF files is available from Adobe. For more information, visit the Adobe website (www.adobe.com), and search for "pdf iFilter".

To use full-text search, the document being searched must be less than 16 MB in size, and it must not contain more than 256 KB of filtered text.

Starting the Full-Text Search Service

Full-Text Search uses the SQL Full-text Filter Daemon Launcher service. This service is installed with the Maximizer instance of SQL Server Express. You should check that the service is started and if necessary start the service for the Maximizer instance of SQL server.

➤ **To start the Full-Text Search service**

1 Open the Windows Services snap-in.

   Select **Start > Administrative Tools > Services** or **Start > Control Panel > Administrative Tools > Services**.

2 Locate the **SQL Full-text Filter Daemon Launcher (MAXIMIZER)** service.

   In the Status column, you can see if the service is started or not.

3 If necessary, right-click and select **Start** to start the service.

Enabling Full-Text Search in Existing Address Books

If you created Address Books in previous versions of Maximizer, the Address Book will not have Full-Text search enabled. You must enable full-text search in the Address Book to use the functionality.

By default, the Escona Tutorial sample Address Book does not have full-text search enabled. This is to keep the Address Book compatible with SQL installations that do not have the Full-Text Search component.

➤ **To enable full-text search in an existing Address Book**

1 Open the SQL Server Management Studio (**Start** > **Programs** > **Microsoft SQL Server 2008 R2> SQL Server Management Studio**).

2 Select the SQL Server where the Address Book resides.

3 Log in to the server, and click **OK**
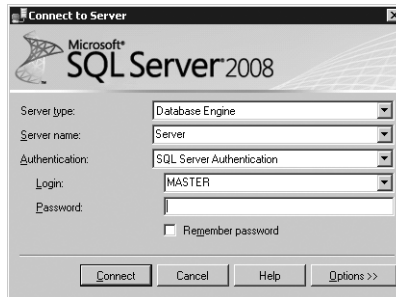
4 Select **New Query**.

5 Change the database to the database that you want to enable full-text searching on in the drop down.

6 Navigate to the SQL script file to run (these script files are located in C:\Program Files\Maximizer\DbScripts\SqlServer):

- To enable full-text search for notes, documents, and the Knowledge Base, run the **EnableFTindexes.sql** script.

7 Select **Execute**
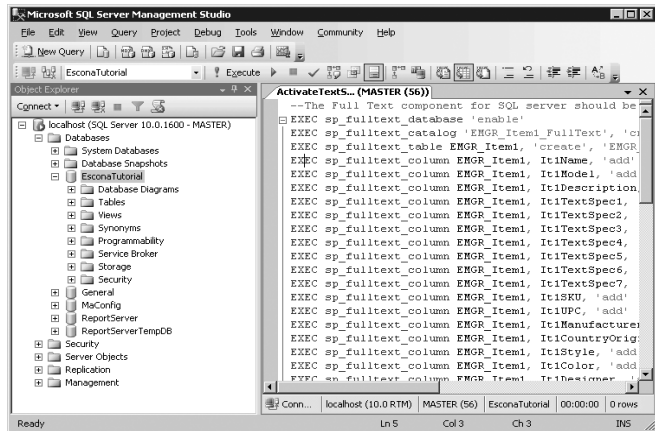
When the script is complete, the Full-Text Search component will be enabled in the Address Book.

➤ **To verify that full-text search is enabled in an Address Book**

1 Open SQL Server Management Studio.

2 Expand the **Console Root** tree until you can see the Address Book (inside the Databases folder).

3 Expand the Address Book node, and select **Full-Text Catalogs**.

If Full-Text Search is enabled, the following Full-Text Catalogs appear in the list.

Notes, documents, and Knowledge Base full-text catalogs:

- DocumentsCatalog
- KnowledgeBaseCatalog
- NotesCatalog

ⓘ This procedure applies only to SQL Servers where Maximizer has already been installed.

Removing Full-Text Search Catalogs from Address Books

If you have problems with full-text searching, you can remove the full-text search catalogs from your Address Books. This procedure may fix problems that arise after moving an Address Book to a different server. After removing a full-text search catalog, you can re-enable full-text search to regenerate the catalog for the Address Book.

➤ **To disable full-text search in an Address Book**

• Use SQL Server Query Analyzer to run the
  Drop_FTS_Indexes_script.sql script file on the Address Book.
  The script is located in the ...Maximizer\DBScripts\SqlServer
  folder.

  For details on running script files on Address Books, refer to the
  procedure in "Enabling Full-Text Search in Existing Address
  Books" on page 47.

Installing Licenses

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

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

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

The following sections contain information on installing Maximizer licenses:

Installing a License

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

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

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

1 Run Administrator.

2 Select **Utilities** > **Install Multi-User License**.

3 Enter the PLN.

4 Click **Install License**.

5 Repeat steps 3 and 4 to install any additional licenses.

6 To activate the licenses, click **Activate**. And in the Activation dialog box, click **Activate** again.

7 Click **Close**.

Administrator closes automatically.

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

Applying a License

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

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

1 After installing a PLN, start Administrator.

2 Open and close each Address Book that you are applying licenses to.

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

Viewing Applied and In-Use Licenses

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

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

Activating Maximizer

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

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

- If you install additional multi-user licenses after activating Maximizer, you must activate the licenses before you can use them to create new users.

- In order to activate your software and licenses, you must have a current maintenance account.

- If you upgrade from a version of Maximizer that has already been activated, there will be no grace period and you will need to activate the Maximizer software immediately before you can use it.

➤ **To activate your software and licenses**

1 Run Administrator.

2 Select **Utilities** > **Install Multi-User License**.

3 Click **Activate**.

4 Click **Install License**.

5 Verify that your **Customer No.** and **Product serial number (PSN)** are correct, and click **Activate**.

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

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

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

Where to Go from Here...

- Create a new Address Book or upgrade an existing Address Book to the latest version of Maximizer, as described in chapter 4 "Creating or Upgrading Address Books" on page 55.

- Create login accounts for Maximizer users and assign users to security groups and sales and marketing teams, as described in chapter 5 "Setting Up Users, Groups, and Teams" on page 68.

- Configure Address Book preferences, including duplicate Address Book entry handling, user-defined fields, key fields, customer service and opportunity email notification templates, and event notification, as described in chapter 7 "Configuring an Address Book" on page 141.

- Configure the Address Book for access through Maximizer Web Access

  Maximizer Web Access permit users to access the Maximizer Address Book data from any Internet-connected computer using a browser such as Internet Explorer. You can enable Maximizer Web Access by making certain modifications to the Address Book. See "Configuring Web Access" on page 157.

- For more information on converting a database, please refer to chapter 12 "Managing Address Book Data" on page 247.

Creating or Upgrading Address Books

In this chapter...

What is Administrator?

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

• Create and configure Address Books.

• Set up user-defined fields for different types of entries.

• Manage Maximizer application settings.

• Customize Maximizer fields and settings.

• Manage users, sales/marketing teams, and security groups.

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

➤ **To log in to Administrator**

1 Click **Start** > **Programs** > **Maximizer CRM** > **Administrator**.

2 Select an Address Book, and click **Open**.
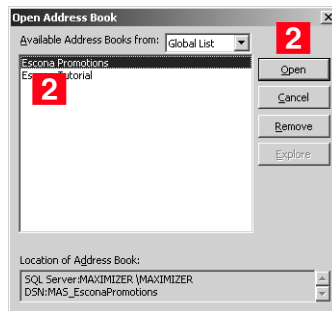
The default MASTER user password is "control", unless it has already been changed to another password in any Maximizer Address Book on the server.

3 Enter the User ID and password of an administrator, and click **OK**.
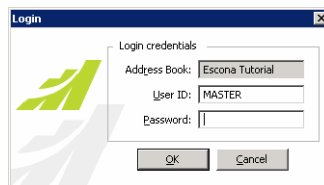
The Address Book opens in Administrator.

➤ **To open an Address Book**

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

2 Select an Address Book, and click **Open**.

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

Creating Address Books

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

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

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

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

Checklist: Setting Up an Address Book

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

1 **Create the new Address Book.** Refer to "Creating an Address Book" on page 60.

2 **Change the MASTER user password.** Refer to "Changing the MASTER User Password" on page 63.

3 **Enable security for an Address Book**. This applies only if there are multiple users in your Address Book. To enable security, select the **Enable security** option on the **System Options** tab in Administrator preferences. Refer to "Address Book Preferences" on page 142.

4 **Add users to the Address Book.** When a new Address Book is created, it contains only the MASTER user accounts. Create an account for each Maximizer user. Refer to "Adding a User to an Address Book" on page 69.

5 **Set up security for users and security groups.** You may want some users to have more access to your Address Book data than other users. Administrator lets you restrict access to specific users and groups of users. Refer to "User and Group Security" on page 76.

6 **Test the Address Book.** In Maximizer, log in to the Address Book with one or more of the new user accounts.

Creating an Address Book

➤ e new Address Books. **To create a**

[1] e > **New Address Book**.

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

[3] Click **OK**.

Maximizer prompts you to copy defaults from an existing Address Book to the new Address Book.
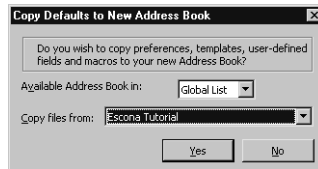
[4] Click **Yes** to copy the default settings, or click **No** to create a blank Address Book.

Maximizer creates the new Address Book.

Deleting Address Books

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

➤ **To remove an Address Book**

1 Select **File > Open Address Book**.

2 Select the Address Book, and click **Remove**.

3 At the prompt, click **OK**.

4 Enter the user ID and password of an administrator for the Address Book.

5 Click **OK**.

Maximizer System Login Accounts

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

- **MASTER** is required to log in to the Administrator module of Maximizer. This account consumes a license only if it's used to log in to Maximizer.

- **EMAILUSER** gives Maximizer access to Address Book data when it performs automated email activities such as automated campaigns. This account does not consume a Maximizer license.

- **WEBUSER** is required for Customer Access and Partner Access. This account does not consume a Maximizer license.

- **COMPANY** is used for the company calendar, which displays company events in the Maximizer calendar. Company calendar events are created under the COMPANY user account. This user account provides read-only access of its calendar to all users. This account is disabled by default. However, if the account is enabled and used to log in to Maximizer, it consumes a Maximizer license.

- **maximizer_default** is a system login created in the Maximizer instance of Microsoft SQL. It is used only by Maximizer and cannot be used to log in to Maximizer or Microsoft SQL. If this user is missing see "Recreating the Maximizer_Default User" on page 290.

It is important to leave the MASTER, EMAILUSER, and WEBUSER accounts enabled. Maximizer requires these accounts in order to function correctly.

It is important to change the password for the system login accounts from the default immediately after creating an Address Book. For instructions on changing the account passwords, refer to "Changing the MASTER User Password" on page 63.

Changing the MASTER User Password

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

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

➤ **To change the MASTER user password**

1 In Administrator, log in to the Address Book as MASTER.

2 Select **File** > **Manage Users**.

3 Select **MASTER** from the user list and click **Password**.
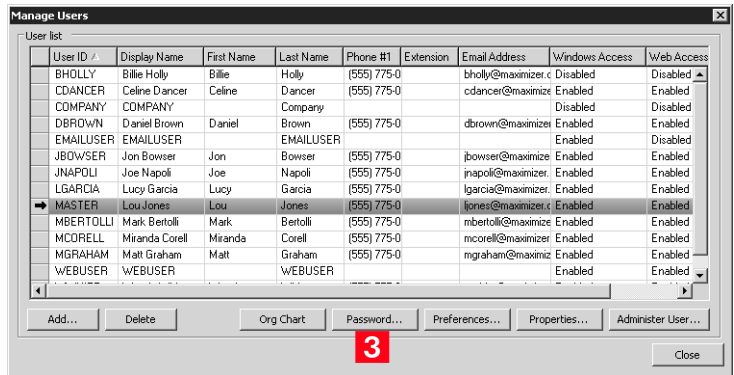
4 In the **Old password** field, type **control** (or the current password if you have changed the MASTER password before).

5 In the **New password** and **Confirm password** fields, type the new MASTER user password, and click **OK**.
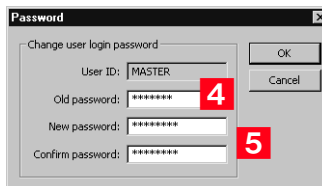
The MASTER user password is updated.

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

Upgrading or Converting an Address Book

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

You should always back up the Address Book before upgrading. For instructions on backing up, refer to "Backing Up and Restoring Address Book Data" on page 248. For older databases, refer to the User's Guide for your previous version of the software. If you have customized the dictionary and holidays, also back up those files separately before upgrading.

After upgrading a database, you should always perform an Address Book validation and recovery. For further information, refer to "Verifying and Recovering Address Book Data" on page 256.

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

➤ **To upgrade a Maximizer Address Book**

1 Ensure Maximizer is closed on all machines before proceeding with the upgrade.

2 If you have an Address Book open in Administrator, select **File > Close Address Book**.

3 Select **Utilities > Upgrade Maximizer Address Book**.

4 Select **Yes** when prompted to continue.

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

5 If the Address Book does not appear in the list, click the **Browse** button to browse to the location of your Pervasive (Btrieve) Address Book files and click **OK**. Then, enter an Address Book name and click **OK**.

6 Select the Address Book from the available Address Book list, and click **Open**.

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

Time Zone Alignment

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

ⓘ Users can only be aligned once.

➤ **To align time zones**

1 Select **Utilities** > **Time Zone Alignment**.

2 Select all users that belong to a specific time zone.

3 From the **Time Zone** drop-down list, select the time zone of the users.

4 Select the **Adjust for daylight saving time** option if the selected users are in a time zone or region that observes daylight saving time.

5 Click **Align**.

6 Repeat steps 2 to 5, as necessary, for all applicable users and time zones.
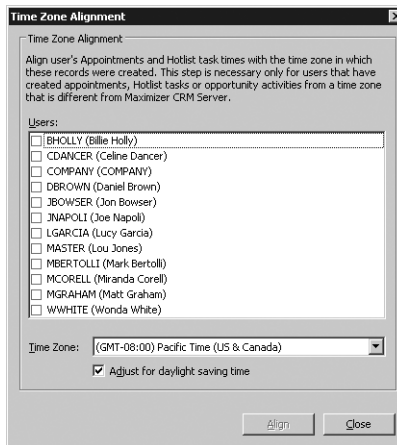
Importing Vertical Templates

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

➤ To import a vertical template

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

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

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

– or –

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

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

3 Click **Import**.

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

When the import process is complete, an Import Summary displays the number of items imported with the vertical template.
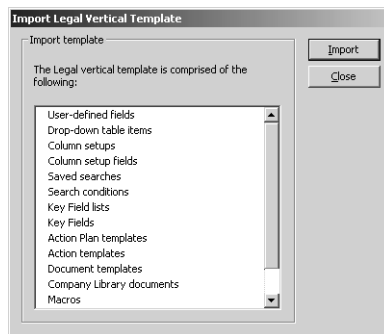
Setting Up Users, Groups, and Teams

In this chapter...

Adding a User to an Address Book

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

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

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

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

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

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

The Manage Users dialog box opens.

2 Click **Add**.
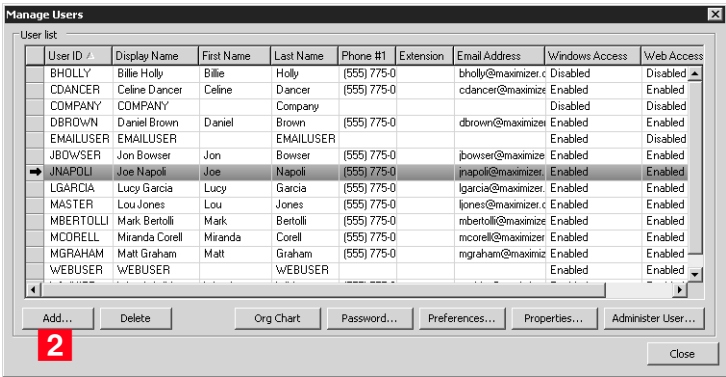
The Copy Selected User's Settings dialog box opens.

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

The Add User dialog box opens.

4 In the **General** tab, fill in the basic information for this user.

- In the **User ID** field, enter unique identification for the user.

  The user must specify the User ID to log in to Maximizer.

- The **Display name** field fills in automatically with the user's first and last names. You can change the display name.

- The **Dept** and **Division** fields affect where the user is displayed in user-selection lists (for example, in the Add Appointment dialog box).

- In the **Email** field, enter an email address for the user.

  The user must have an email address specified to send email from Maximizer.

- Under **Module login**, ensure **Enabled** is selected next to **Windows Access** or **Web access**.

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

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

You can set up these custom fields in the File > Set Up User-Defined Fields dialog box. Refer to "Setting Up User-Defined Fields for an Address Book" on page 152 for more information.

6 Select the **Access Rights** tab.

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

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 76.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 77.

8 Click **OK** to save the changes to the access settings.

9 In the **Groups/Teams** tab, select any security groups and sales/marketing teams to which the user should belong.

(To add groups and teams, use the File > Security Groups and Teams dialog box.)

10 Click **OK**.

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

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

Enabled and Disabled Users

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

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

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

User Administration

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

Navigation pane option	Allows you to...
User Properties	View and edit general information, user-defined fields, access rights, groups/teams, or linked Windows login for the selected user in the Properties dialog box. For more information, see "User and Group Security" on page 76.
User Preferences	View and edit preferences for the current user in the Preferences dialog box. For more information, see the *Maximizer CRM User's Guide*.
Password	Change the password for the selected user in the Password dialog box. For more information, see "Changing User Passwords" on page 75.
Default Entries	Modify the Address Book, opportunity, and customer service default entries for the selected user. For more information on default entries, see the *Maximizer CRM User's Guide*.
Default Notes	Change the Address Book, opportunity, customer service, and campaign default note for the selected user. For more information on default notes, see the *Maximizer CRM User's Guide*.
Security Groups and Teams	Configure security groups and sales and marketing teams in the Security Groups and Teams dialog box. For more information see "Security Groups" on page 83 and "Sales and Marketing Teams" on page 90.

Changing User Passwords

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

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

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

The Manage Users dialog box opens.

2 Select the Maximizer user, and click **Password**.
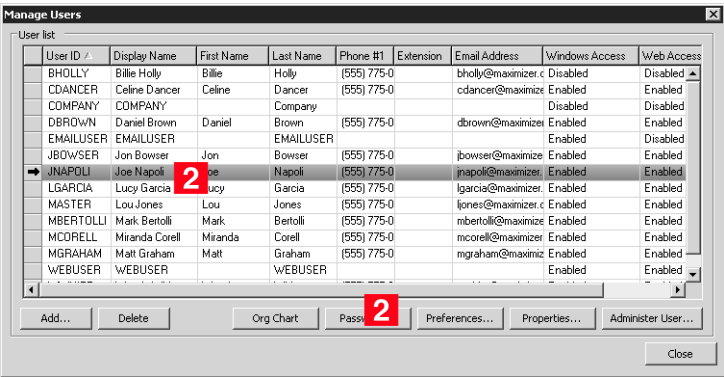
The default password for a new user is "maximizer".

The Password dialog box opens.

3 Type the new password, then retype it on the next line to confirm it.

4 Click **OK** to save the new password.
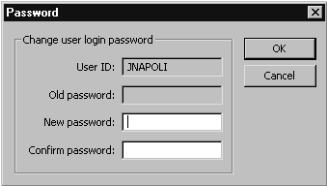
User and Group Security

As the Administrator, you can restrict each user's access rights to types of entries, essentially providing per-module security. User access rights are accessible by going to the Access Rights tab of a user's properties (see "Modifying User Access Settings" on page 81). These user access rights consist of the access settings (security settings) of the user account as well as the access settings of any security groups the user is a member of. For example, if the Opportunity Delete permission is not set in the user's access settings, but is granted in the access settings of a group the user is a member of, then the user is granted Delete permissions to Opportunity entries.

Each checkbox contains one of the following potential values:

Checkbox State	Access Setting	Access Right
☑	Granted	Granted
☒	Denied	n/a
☐	Not set	Not granted

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

User Access Setting	+ Group Access Setting	= User Access Right
☐	☐	☐
☐	☑	☑
☑	☐	☑
☐	☒	☐
☒	☐	☐
☑	☒	☐
☒	☑	☐
☒	☒	☐
☑	☑	☑

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

User or Group Access Setting	+ User or Group Access Setting	+ User or Group Access Setting	= User Access Right
☐	☑	☒	☐

User Access Rights and User/Group Access Settings

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

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

Permissions

Permissions	Controls the selected user's or group's right to view, add, change, or remove . . .
Address Book	Entries in the Address Book window
User-defined fields	Values in user-defined fields
User-defined field setup	User-defined field definitions
Notes	Notes attached to entries Users must have the Delete checkbox selected to be able to use the File > Purge > Notes function.
Documents	Documents attached to entries Users must have the Delete checkbox selected to be able to use the File > Purge > Documents function.
Mailing Address	Mailing addresses of Address Book entries
Company Library	Files and folders in the Company Library
OrderDesk	Entries in the OrderDesk window. This access right applies only to earlier versions of Maximizer.
Opportunities	Entries in the Opportunities window
Strategy Library	Strategy Library information for opportunities
Campaigns	Entries in the Campaigns window
Customer Service	Entries in the Customer Service window
Knowledge base	Articles in the Knowledge Base window
User/Group setup	Users and Security Groups • If the user does not have any User/Group Setup rights, other users' or groups' properties are not accessible. • If the user has read rights only, the related tabs are visible, but information cannot be modified. • Insert, Modify, and Delete rights provide the corresponding access rights to all user and group properties.

Permissions	Controls the selected user's or group's right to view, add, change, or remove . . .
Accounting	Accounting transactions. This access right applies only to earlier versions of Maximizer.
Action Plan Library	Action plan templates in the Action Plan Library
Dashboards	Dashboard entries

Privileges

Privilege	Grants authorization to . . .
Allow Global Edit	Perform global edits of Address Book entries in Maximizer. Consider advising users with this privilege to back up the Address Book before making significant changes with Global Edit.
Allow private entries	Add entries that are not visible to other users. The user can use the Owner, Full Access, or Read Access fields to create private entries or restrict entries to a group or a user.
Allow public entries	Add entries that are visible to all other users in the Address Book. Note that the Allow private entries and Allow public entries options cannot be denied at the same time. If both of these options are denied in two different groups a user belongs to (i.e., the checkboxes contain an x), the user is granted the Allow private entries right by default.
Allow transfer	Transfer Address Book entries between Maximizer Address Books. If you do not select this option, the menu items for transferring are disabled. This privilege applies only to earlier versions of Maximizer.
Allow import	Import Address Book entries between Maximizer Address Books or from external applications. If you do not select this option, the commands for importing are disabled.
Allow export	Export Address Book entries between Maximizer Address Books, and export information to Microsoft Excel. If you do not select this option, the commands for exporting are disabled.

Privilege	Grants authorization to . . .
Allow sync contacts with external clients	Synchronize Address Book entries using Outlook Integration. However, users can still synchronize calendar appointments or Hotlist tasks without this access right.
Modify system tables	Add, modify, or delete available values (items) of system fields, such as City and Category in Address Book entries. See "System Table Fields" on page 81 for more information.
Modify note properties	Change the values of the date, time, and creator fields in notes.
Modify email templates	Create and modify email templates.
Modify/delete other owners' notes	Change and delete other users' notes. However, to be able to view other users' private notes, the user must have the "Modify other users' private entries" privilege enabled.
Modify other users' private entries	View and modify entries marked as private that belong to other users. This security privilege will override any other security settings for entries, including any settings based on security groups, so if a user has this privilege enabled, the user has full read and modify access to all entries, regardless of the entry's Full Access, Read Access, or Owner settings. This security privilege is very powerful and should be granted with caution.
Modify other users' general information	Change information in the General and User-Defined Fields tabs of the user properties for other users. Modifying a user's general information, such as Last Name, First Name, Company, and Phone Number, does not have to be restricted to the MASTER user. In many cases, an administrative assistant or a receptionist can be granted the rights to modify user's general information without compromising the security of Maximizer. This privilege allows the user to have access to all Maximizer users' general information without giving them full security rights to the Address Book.
Allow manage currencies	Access the Currency Library in Maximizer, and add, edit, or delete entry currencies
Read audit log	View the audit log for entries.

User's Roles

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

Allow printing to these destinations

These settings apply only to earlier versions of Maximizer.

Destination	Grants authorization to . . .
Printer	Print to the default printer.
File (Rich Text Format)	Print to a .RTF file.
File (PDF Format)	Print to a .PDF file.
Email	Attach the report to an email message, usually in a .RTF file.
HTML Format	Print to a .HTM file.
Preview	Display a preview of the print output on the screen.

System Table Fields

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

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

Modifying User Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 76.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 77.

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

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

2 Select the Maximizer user, and click **Properties**.

3 Select the **Access Rights** tab.
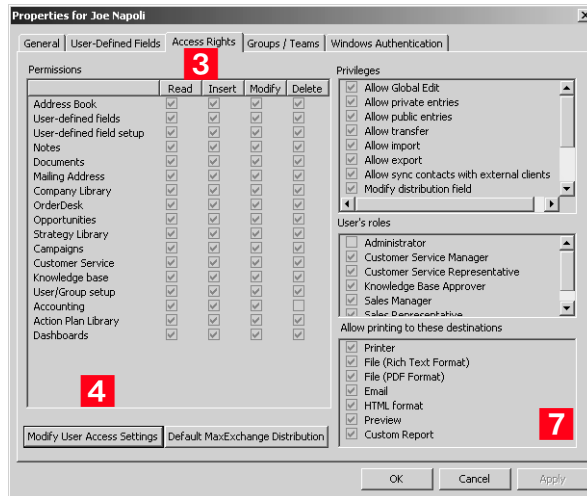
4 Click **Modify User Access Settings**.

5 Modify any of these settings as appropriate.
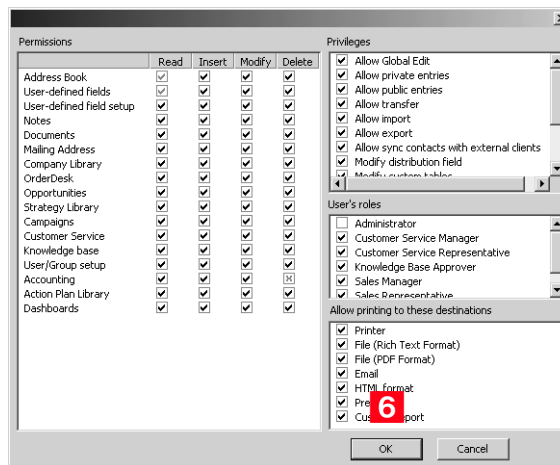
6 Click **OK** to close the Access Settings.

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

Security Groups

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

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

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

Group Name and ID

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

Group Access Settings

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

group Access Settings, refer to "User and Group Security" on page 76.

Group Members

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

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

Default Security Groups in all New Address Books

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

Security Group Name	Group ID	Enables group members to...
Accounting	ACCTNG	Restrict accounting transaction notes to members of this group. This security group applies only to previous versions of Maximizer.
Company Announcement Authors	A_CAA	Access the Company Announcements folder in Company Library, where group members can add announcements that appear in the Company Announcements box on the My Work Day page in Maximizer and Maximizer Web Access.
Crystal Reports Users	R_CRU	Generate new reports from the Crystal Reports option in the Reports tab in Maximizer. This security group applies only to previous versions of Maximizer.
Customer Access Admin Users	C_ADM	Access the News Manager section of the Customer Access Administrator. In Address Books that have been upgraded from a previous version, this group may be called "Customer Portal Administration Users".
Customer Access Config Users	C_CFG	Access the Configuration Manager section of Customer Access Administrator. In Address Books that have been upgraded from a previous version, this group may be called "Customer Portal Configuration Users".

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

Creating a New Security Group

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 76.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 77.

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

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

2 Click **Add**.

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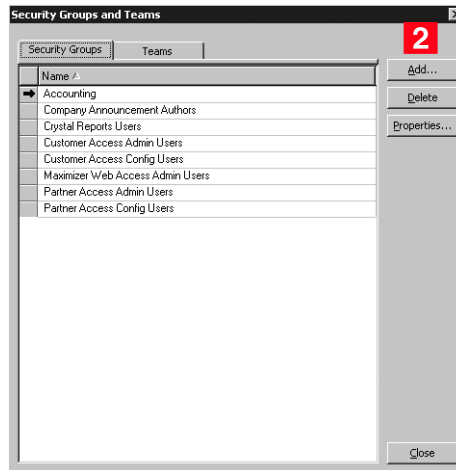
3 Enter a **Group Name**.

4 Enter a unique **Group ID** (up to 6 characters). The first character of the Group ID must be a letter.

5 Assign **Access Settings** to the group.

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

6 Select the **Members** tab.

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

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

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

Modifying Group Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 76.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 77.

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

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

2 Select the group name.

3 Click **Properties**.

4 Select the appropriate settings for the group, and click **OK**.

# Record Ownership

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

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

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

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

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

Sales and Marketing Teams

If your company or organization is using opportunity or campaign management, you can set up sales and marketing teams. Sales teams are used for sales opportunities in Maximizer, and marketing teams are used for traditional marketing campaigns.Teams help leaders delegate and manage opportunities and traditional campaigns in Maximizer. Team leaders can delegate tasks in an opportunity or a traditional campaign to team members.A team is composed of a team leader and team members:

*   **Team Leader**: In a team, one person is designated as a team leader who has the right to make changes to the opportunity or traditional campaign, as well as to the opportunity's or traditional campaign's team.

*   **Team Member**: A regular team member does not have the right to change the traditional campaign/opportunity or the team. The member's role is to perform the tasks the team leader assigns.

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

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

*   **Edit**: Allows a member full access to all campaigns and opportunities assigned to the team. Members with this type of access have full team leader rights and may modify the status of an opportunity or campaign and may also reassign tasks.

*   **Audit**: Allows a member to view all campaigns and opportunities assigned to him/her.

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

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

➤ **To create a new sales or marketing team**

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

2 Select the **Teams** tab, and click **Add**.
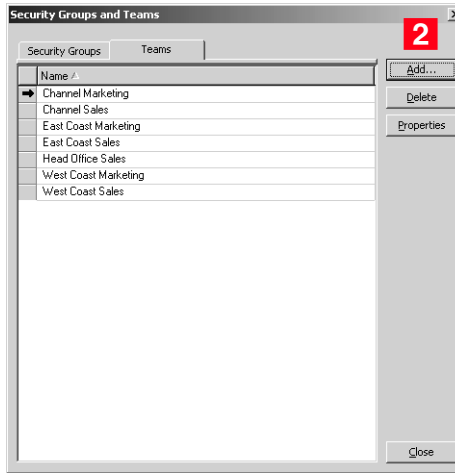
3 On the **General** tab, enter a team name.

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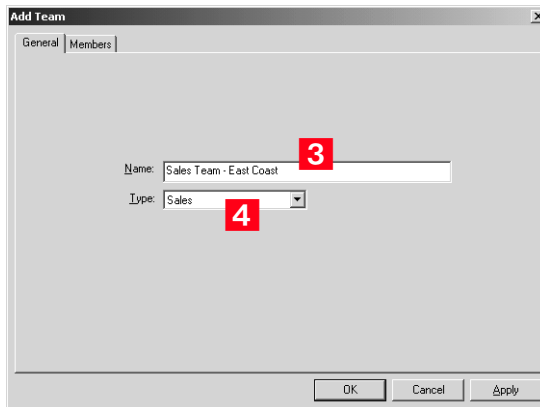
5 Select the **Members** tab.

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

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

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

There can be only one leader in the team.

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

9 Click **OK** to save the new team.
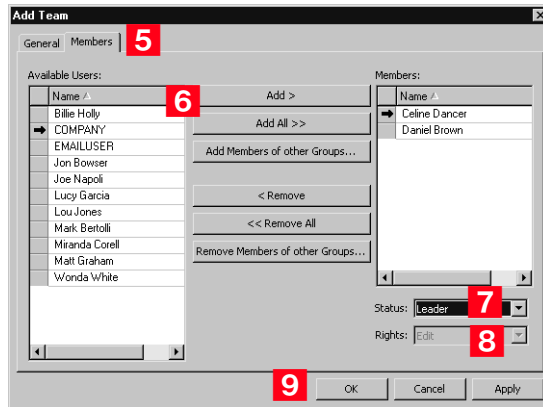
Linking Maximizer Users to Windows Logins

Linking Maximizer users with Windows logins enables them to access
Maximizer Address Books without specifying a user name and
password. This provides a "single sign-on" configuration for
Maximizer users—they won't need to log into the network with one
user name and password and log into Maximizer with another.

➤ **To enable Maximizer users to log in to Maximizer
automatically using single sign-on**

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

2 Select the Maximizer user, and click **Properties**.

The Properties dialog box opens.

3 Select the **Windows Authentication** tab.

4 Click **Add**.
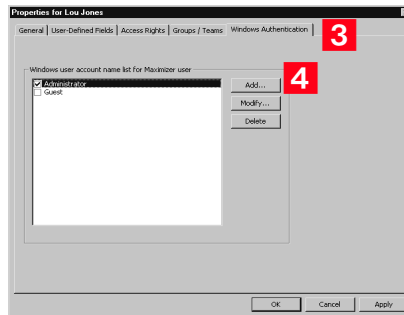
5 Enter the qualified name of the user that corresponds to the
Maximizer user (e.g., DOMAIN-NAME\user_name).

6 Select the **Enabled** checkbox, and click **OK**.

You can assign multiple network users to a Maximizer user.

User Preferences

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

➤ **To set Address Book user preferences**

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

2 Select the Maximizer user, and click **Preferences**.
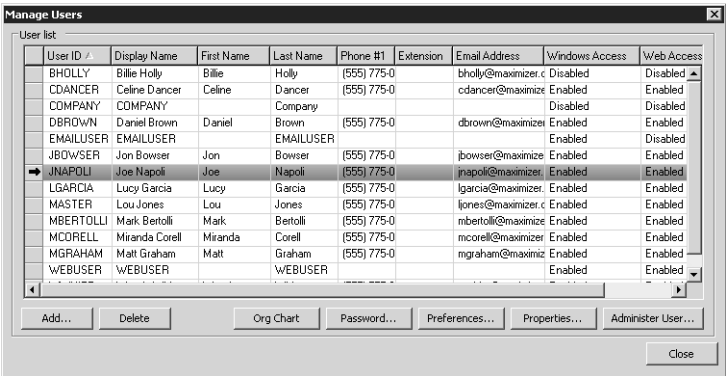
See the *Maximizer CRM User's Guide* for more information on user-related preferences.

3 Set the user-related preferences on each of the tabs.
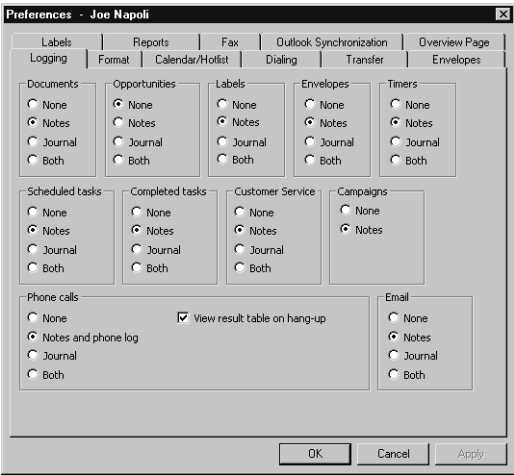
Configuring an Address Book

In this chapter...

Address Book Preferences

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

In this section	You can set the following preferences:
Address Book	- Values available in the Category field for Address Book entries. - Fields to check for duplication of Address Book entries.
Auditing	Auditing preferences for Address Book entries.
Automated Services	Automated email service preferences and initialization. 🛈 If you are using automated campaigns, ensure you have the "Activate services for the currently open Address Book" checkbox selected in the Automated Services tab.
Campaigns	- Campaign completion reasons. - Settings for campaign monitoring.
Customer Service	- Customizable values for the Billing type, Subject, Case origin, Case queue, Case reason, Status, and Case Type fields. - Default case response time and case status. - Settings to disallow direct changes to case fields. - Default case monitoring lists. - Assign or unassign email templates for user and customer notification.
Dashboards	- Configure dashboards from the server. - Add or modify SQL metrics for dashboard indicators.
Diagnostic	Log file settings for Maximizer modules. Note that users can also set Diagnostic preferences in Maximizer.
Key Fields	Key field lists available for Address Book entries, opportunities, campaigns, and customer service cases.
Locations and Resources	Locations and resources available in appointments.
Mandatory Fields	Mandatory and optional data entry requirements for system fields in Address Book entries, opportunities, campaigns, and customer service cases.

In this section	You can set the following preferences:
Opportunities	• Opportunity processes, stages, and probabilities of close. • Opportunity confidence rating schemes. • Opportunity completion reasons. • Opportunity monitoring lists. • Email notification templates for opportunities.
Security	Account lockout and Mobile Access security options.
System Fields	• Add, modify, and delete note and document categories. • Add, modify, and delete values of the products/services and categories (in opportunities, campaigns, customer service cases, and appointments) and Do Not Solicit By (in Address Book entries) fields.
System Options	• Global server. • Address Book nameand ID. • System-assigned Address Book entry IDs, campaign IDs, customer service case IDs, and opportunity IDs. • Overview page caption. • Default settings for Maximum entries field in Maximizer search dialog boxes. • Partner notification of assigned Address Book entries or opportunities. • User/group setting which determines if lists of users/groups display only groups to which the current user belongs and other users in the groups in fields such as Read Access and Full Access. • Event notification. • Live Update options. • Multi-currency. • Opportunity and campaign synchronization.

Set Address Book Preferences

1 Select **File > Preferences**.

2 Set the Address Book preferences on each of the tabs.

System Fields

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

- **System Fields –** The Category fields in notes and documents, the Do not solicit by field in Address Book entries, and the Products/Services and Categories fields in opportunities, campaigns, customer service cases, and appointments.

- **Locations/Resources –** The Location and Resources fields in appointments.

- **Customer Service –** The Billing Type, Case or Article Subject, Origin, Queue, Reason, Status, and Type fields in customer service cases.

- **Opportunity –** The Process, Stage, Confidence Rating, and Completion Reason fields in opportunities.

- **Campaigns –** The Completion Reason field in automated campaigns.

- **Address Book –** The Category field in Address Book entries.

Add Custom Items to System Fields

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

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

2 Select the tab that contains the system field.

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

3 In the left pane, under **Preferences**, select the section that contains the system field.

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

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

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

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

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

6 Enter the name of the item.

7 If necessary, enter other properties of the item.

- For most fields, specify the user who requested the item.

- For the **Status** field in customer service cases, select the actions (assign, escalate, or resolve) for which you want to apply the item.

- For the **Process** field in opportunities, click **Add Stage** to add one or more stages to the process.

- For the **Stage** field in opportunity processes, specify the probability of close and target age for the stage.

- For the **Completion reason** field in opportunities and campaigns, specify the completion status the item applies to.

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

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

Modifying System Table Fields in Maximizer

End users can modify values of some system table fields directly in Maximizer. Users must have the Modify system table fields privilege to change the values. The following fields can by changed:

- **Address Book entry fields –** Mr/Mrs, Position, Salutation, Company, Department, Division, City, St/Prov, Country, Email Description, Phone Description, Do Not Solicit By, Category, Lead Source, and Related Address Book Entry Relationship Type

- **Phone fields –** Subject and Phone Call Result

- **Task and appointment fields –** Activity and priority

- **Campaign fields –** Traditional Campaign Objective, Traditional Campaign Activity, Traditional Campaign Template Activity Description, Automated Campaign Products/Services, and Automated Campaign Categories

- **Customer service fields –** Products/Services, Categories, and Subject

- **Opportunity fields –** Products/Services, Categories, Objective, and Next Action

User-Defined Fields

User-defined fields are custom fields used to record additional information on Maximizer entries. You can set up different user-defined fields for the different types of entries in Maximizer. Each user-defined field can be associated with only one type of entry. You can create user-defined fields for the following types of entries:

- **Address Book –** Classifies Address Book entries. You can view these fields in the Address Book window or in an open Address Book entry.

- **Opportunities –** Classifies opportunities. You can view these fields in the Opportunities window or in an open opportunity.

- **Campaigns –** Classifies campaigns. You can view these fields in the Campaigns window or in an open campaign.

- **Customer Service –** Classifies customer service cases. You can view these fields in the Customer Service window or in an open customer service case.

- **Users –** Classifies Maximizer users. You can view these fields in the User Properties dialog box.

You can include user-defined fields in Key Fields lists in the Basic Information tab of open Address Book entries, opportunities, customer service cases, and campaigns.

Types of User-Defined Fields

You can create different types of user-defined fields depending on the types of values required for the field. Maximizer defines the following types of user-defined fields:

- **Alphanumeric user-defined fields –** These fields record any alphanumeric text (letters and numbers) up to a specified maximum number of characters. You can encrypt alphanumeric fields for security protection. Note that you cannot disable or enable encryption once you have created the field.

  You can use alphanumeric user-defined fields to record URLs for entries. The fields are displayed as hyperlinks in Key Fields lists and in the User-Defined Fields following window.

(i) Encrypted user-defined fields cannot be transferred, imported, or exported. They are also not searchable.

- **Date user-defined fields –** These fields store a specific date or an annually recurring date.

- **Duration user-defined fields –** These fields calculate the duration between another date basic or user-defined field and the current date. Because they are calculated from values of other fields, values for duration fields can be viewed in entries but cannot be set manually.

- **Formula user-defined fields –** These fields calculate values based on other basic or user-defined fields. Formula user-defined fields can return alphanumeric, date, or numeric values. Because they are calculated from values of other fields, values for formulas fields can be viewed in entries but cannot be set manually.

- **Numeric user-defined fields –** These fields record numeric values. You can specify a number of decimal places. For example, specify two decimal places to use this type of field for monetary values. You can also specify that currency symbols are displayed with the field.

- **Table user-defined fields –** These fields enable you to select a value or values from a list. This type of field is very useful for multiple choice or multiple value fields. If you create a table user-defined field with the "single value only" attribute, only one value can be selected from the list.

- **Yes/no user-defined fields –** These fields record either yes or no values. Since the fields must contain one of these values, these user-defined fields are always mandatory.

Access Rights for User-Defined Fields

The Maximizer adminstrator user can create user-defined fields at any time in Administrator. You can also give any user the ability to create, change, or delete user-defined fields in Maximizer by enabling the following access rights in Administrator:

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

- The User-defined field setup access right enables the user to create new user-defined fields.

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

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

- **Public –** Assigns the user-defined field access permission to all users.

- **[user] –** Assigns the user-defined field access permission to an individual user.

- **[security group] –** Assigns the user-defined field access permission to all members of a security group.

Setting Up User-Defined Fields

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

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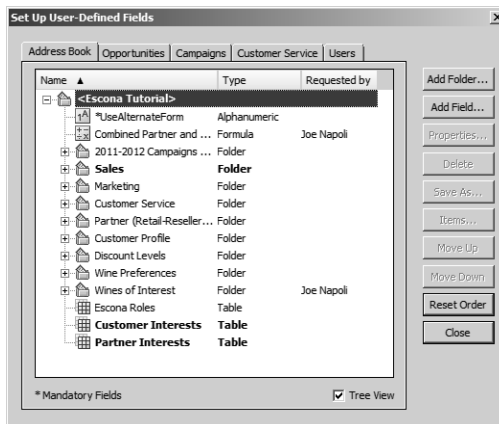
The following sections contain information on setting up user-defined fields:

- "Sorting User-Defined Fields" on page 103
- "Create a Folder for User-Defined Fields" on page 104
- "Create a User-Defined Field" on page 105
- "Add Items to a Table User-Defined Field" on page 106

Sorting User-Defined Fields

The order that user-defined fields display in the Set Up User-Defined Fields dialog boxUser-Defined Fields page determines the order that user-defined fields display for users.

Click the Move Up and Move Down buttons to move a field or folder up or down in the list. These buttons move fields only within their current folder level. You cannot use them to move items in or out of folders. To select a field, click on the blank space on a field row.

Use the Reset Order button to sort items in alphabetical order. All user-defined fields and folders in the selected folder are resorted.

You can also use the mouse to drag and drop a field or a folder to a different position in the list. Dragging it onto a field places it immediately below that field. Dragging it onto a folder places it at the top of the list inside that folder. Holding the mouse on a folder for about a second expands the folder, and then you can continue dragging the item to a specific position in that folder.

Create a Folder for User-Defined Fields

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

1 Select the tab for the category of user-defined fields you want to work with.

2 To create a top-level folder, select the Address Book name at the top of the list.

– or –

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

3 Click **Add Folder**.

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

The new folder now appears in the user-defined fields list.

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

5 Move the new folder to a different position in the list, if desired.

> (i) If you set the folder to hidden, it is not displayed on the User-Defined Fields tab when you clear the Show hidden fields option.

Create a User-Defined Field

To complete this procedure, you must have Insert permission for user-defined field setup.

You can create user-defined fields for Address Book entries, opportunities, campaigns, customer service cases, and user accounts in the Set Up User-Defined Fields dialog box. This dialog box is available from the Setup tab in Maximizer or the File menu in Administrator.

1 Select the tab for the category of user-defined fields you want to work with.

2 Select an existing folder, inside which you want to create a new field.

– or –

Select a user-defined field to create the new field at the same level as the selected field.

3 Click **Add Field**.

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

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

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

🛈 Duration user-defined fields can only be created in Maximizer Web Access or Web Access Administrator.

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

7 Specify the properties of the user-defined field.

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

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

8 Click **OK**.

The user-defined field is added to the list.

Add Items to a Table User-Defined Field

Table user-defined fields contain a list of similar items from which a user may select one or more items. As part of the process of creating a new user-defined field of this type, you should add the items to the table.

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

– or –

Double-click the table user-defined field.

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

2 Click **Add**.

3 Type a name for the item, and specify the other properties of the item.
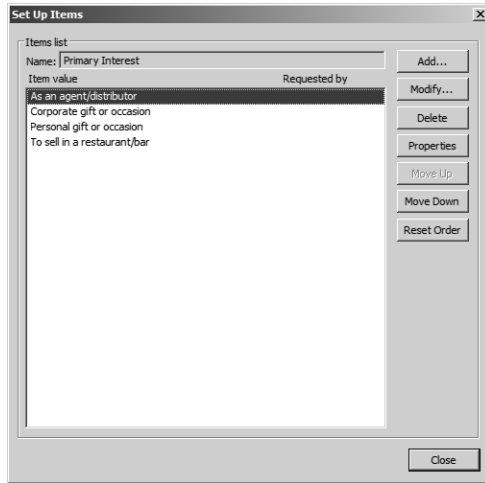
(i) If you set the item to hidden, you can hide it from the Available Values list by clearing the Show hidden items option.

4 Click **OK**.

5 Repeat steps 2 to 4 to add any additional items to the table user-defined field.

Formula User-Defined Fields

Formula user-defined fields calculate values based on other basic or user-defined fields. Because they are calculated from values of other fields, values for formulas fields can be viewed in entries but cannot be set manually.

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

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

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

The following sections contain information on writing formulas for user-defined fields:

Conditional Expressions for Formulas

You can create conditional expressions in your formula user-defined fields. Conditional expressions use the If expression to evaluate comparison statements and return values based on the results of the statements.

Conditional expressions use the following syntax:

If (Comparison Statement, True Value, False Value**)**

*   **Comparison Statement –** Uses comparison operators to compare two values. Comparison statements can use the following operators:
    *   **==** to check that two values are equal to each other.
    *   **!=** to check that two values are not equal to each other.
    *   **>** to check that the first value is greater than the second value.
    *   **<** to check that the first value is less than the second value.
    *   **>=** to check that the first value is greater than or equal to the second value.
    *   **<=** to check that the first value is less than or equal to the second value.

    Comparison statements can be combined with logical operators:
    *   **Or –** Combines two comparison statements where either one of the statements is true.
    *   **And –** Combines two comparison statements where both of the statements is true.
    *   **Not –** Negates a comparison statement.
*   **True Value –** The value of the expression when the comparison statement is true. It can also be combined with other expressions.
*   **False Value –** The value of the expression when the comparison statement is false. You can include other conditional statements to supply different answers for different values.

Examples of Conditional Expressions

The following examples illustrate complex formula user-defined fields using conditional expressions.

Example 1

If ([Creation Date] > Date(2009, 7, 9), "New", "Old")

This example compares a date field with a constant date, using the Date function to format the date properly. The formula returns an alphanumeric value. If the date is later than the supplied date, the field has a value of "New". If the date is earlier than the supplied date, the field has a value of "Old".

Example 2

If(Not(Search("Canada",[Country])>0 Or Search("USA",[Country])>0 Or Search("Mexico",[Country])>0),"Other","North America")

This example inspects the Country field of an Address Book entry to determine if the entry is located in North America or not. It uses the alphanumeric Search function to look for the countries "Canada", "USA", or "Mexico". If none of those strings are found in the entry's Country field, the formula evaluates to "Other", but if one of those strings is found it outputs "North America".

Example 3

If (Dayofweek([Creation Date]) == 1, "Sunday",
    If (Dayofweek([Creation Date]) == 2, "Monday",
    If (Dayofweek([Creation Date]) == 3, "Tuesday",
    If (Dayofweek([Creation Date]) == 4, "Wednesday",
    If (Dayofweek([Creation Date]) == 5, "Thursday",
    If (Dayofweek([Creation Date]) == 6, "Friday",
    If (Dayofweek([Creation Date]) == 7, "Saturday", " ")))))))

This example uses the Dayofweek function to get the day of the week expressed as an integer value for a date field. It compares the value with integer values and outputs a string representing the day of the week in. If it does not have a value, it outputs an empty string.

Transfer User-Defined Fields Between Address Books

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

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

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

3 Click **Transfer**.

4 To copy the data into a target Address Book that is accessible from the computer, select the **Direct Address Book access** transfer method.

Accessible Address Books are listed in Available target Address Books.

– or –

If the target Address Book is not listed, select the **Email** transfer method.

The data is compressed into a .MET file and attached to an email message.

5 If you selected **Direct Address Book access**, select the target Address Book, click **OK**, and log on to the Address Book.

Maximizer transfers the user-defined fields and notifies you when the transfer is complete.

– or –

If you selected **Email**, click **OK**.

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

Mandatory Fields

You can specify that system fields and user-defined fields are mandatory. System fields are set as mandatory in Administrator. User-defined fields are set as mandatory when creating the user-defined fields in Administrator or in the Set Up User-Defined Fields dialog box.

Mandatory fields are denoted with an asterisk displayed after the field type.

When you create or modify entries, Maximizer checks that all mandatory fields have values. If any mandatory fields are empty, you are prompted to enter a value for the field.

Set a System Field as Mandatory

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

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

Use this procedure to set a system field as mandatory or optional.

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

2 Select the **Mandatory Fields** tab.

3 From the **Show mandatory entries for** drop-down list, select the type of entry that the field applies to.

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

4 Select the field.

5 Click **Mandatory** or **Optional**.

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

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

Set a User-Defined Field as Mandatory

To complete this procedure, you must have Modify permission for user-defined field setup.

Use this procedure to set an existing user-defined field as always mandatory.

1 Select the user-defined field and click **Properties**.

– or –

Double-click the alphanumeric, date, or numeric user-defined field.

2 From the **Mandatory** drop-down list, select **Always mandatory**.

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

Rules for Mandatory User-Defined Fields

When you work with Address Book entries, opportunities, or customer service cases, you can specify that user-defined fields are mandatory if a rule is matched. For example, you can write a rule that makes a user-defined field mandatory only when the category for an Address Book entry is set to "Partner". When users set the value of the Category field to Partner, they are prompted to set a value for the user-defined field when they save the entry.

A mandatory rule consists of a comparison statement. It may compare a field with a value or with another field. Or it may compare formulas using the same syntax as formula user-defined fields.

You can create comparison statements with the following symbols.

- **==** to check that two values are equal to each other.
- **!=** to check that two values are not equal to each other.
- **>** to check that the first value is greater than the second value.
- **<** to check that the first value is less than the second value.
- **>=** to check that the first value is greater than or equal to the second value.
- **<=** to check that the first value is less than or equal to the second value.

Comparison statements are often combined with logical operators to add multiple statements together.

- **Or –** Combines two comparison statements where either one of the statements is true.

- **And –** Combines two comparison statements where both of the statements is true.
- **Not –** Negates a comparison statement.

While the comparison statements may be simple, say to compare a field with a value or with another field, you can also write more complex rules. Within the comparison statements, you can include arithmetic operators (+, -, * /) and alphanumeric, date, and numeric functions to create complex formulas.

Set a User-Defined Field as Mandatory Given Conditions

To complete this procedure, you must have Modify permission for user-defined field setup.

Use this procedure to set a user-defined field as mandatory when a specified rule is matched. This procedure applies only to user-defined fields for Address Book entries or opportunities.

1 Select the user-defined field and click **Properties**.

– or –

Double-click the alphanumeric, date, or numeric user-defined field.

2 From the **Mandatory** drop-down list, select **Mandatory based on rule**.

3 To the right of the **Rule** field, click the ellipsis button.

4 Enter the rule, and click **OK**.

Click **Insert Field** to add basic or user-defined fields to the rule.

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

Mandatory Rules Using Table Fields

When you create mandatory rules that compare table fields, the values in the fields are treated like alphanumeric fields.

To compare a table field that contains multiple values, the comparison statement must include the same text that's displayed in the Maximizer interface, including all values for the field. For example, the statement [Category] == "Partner" will be true only if the only value set in the Category field is "Partner". If the Category field includes the "Distributor" value as well, the rule would validate with the following statement: Category == "Distributor, Partner". You can use the Search function to locate text in multiple-value table fields.

To check that one of multiple values are set in a table field, use the OR operator in the rule. To check that two (or more) values are set in a table field, use the AND operator in the rule.

Example: Mandatory rule for table field using OR

The following rule validates if either the Distributor or Partner value is set in the Category field:

(Search("Partner",[Category]) > 0) OR (Search("Distributor",[Category]) > 0)

Example: Mandatory rule for table field using AND

The following rule validates if both "Distributor" and "Partner" are set in the Category field:

(Search("Partner",[Category]) > 0) AND (Search("Distributor",[Category]) > 0)

Writing Formulas and Mandatory Rules

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

Formula user-defined fields calculate values based on other basic or user-defined fields. You can write formulas consisting of arithmetic expressions, alphanumeric, date and numeric functions, as well as conditional expressions.

When you work with Address Book entries, opportunities, or customer service cases, you can specify that user-defined fields are mandatory if a rule is matched. Rules for mandatory user-defined fields are similar to the formulas in formula user-defined fields. A mandatory rule consists of a comparison statement. It may compare a field with a value or with another field. Or it may compare formulas using the same syntax as formula user-defined fields. Comparison statements can contain any of the elements included in formulas, including alphanumeric, date, and numeric functions.

Arithmetic Expressions

Using the basic arithmetic symbols, you can include arithmetic expressions in formula user-defined fields and in rules for mandatory user-defined fields. Combine multiple expressions to create complicated arithmetic formulas.

Formula user-defined fields and rules for mandatory user-defined fields can use the following symbols:

- **+** for addition.

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

- **-** for subtraction.

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

- ***** for multiplication.

  Multiply numeric values together.

- **/** for division.

  Divide numeric values by other numeric values.

- **( )** for nested operations.

  Use parentheses to create more complex operations on several numeric values or to combine multiple comparison statements.

Example: Numeric Values

Formula: ([Numeric field] + [Numeric field]) * [Numeric field]
Return value: Numeric

Example: Date Values

Formula: [Date 1] - [Date 2]
Return value: Numeric, the number of days between the two dates.

Example: Date and Numeric Values

Formula: [Date 1] + [Numeric field]
Return value: Date

Example: Alphanumeric Values

Formula: [FirstName] + " " + [LastName]
Return value: Alphanumeric, the two words listed together, separated by a
space (FirstName LastName).

Alphanumeric Functions

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

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

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

- **Uppercase –** Converts a string to upper-case characters.
- **Value –** Converts an alphanumeric value to a numeric value. Alphanumeric values beginning with alphabetical characters return a value of 0. You can manipulate the string using any of the numeric functions.

Len

Returns the length of a string.

Syntax

Len(Alphanumeric**)**

Parameters

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

Example

Len([Company])

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

Lowercase

Converts a string to lower-case characters. Use this function or the Uppercase function with the Search function and with equal (==) statements to compare alphanumeric values when you do not care about the case of the string.

Syntax

Lowercase(Alphanumeric**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string to convert to lower case.

Example

Lowercase([City])=="vancouver"

This example of a mandatory rule checks for the value "Vancouver" in the City field. The rule validates if an entry has the values "Vancouver", "vancouver", or "VANCOUVER" in the City field.

Mid

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

Syntax

Mid(Alphanumeric, StartInt, LengthInt**)**

Parameters

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

Example

Mid("First Last", 7)

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

Search

Searches a string for text and returns the position of the text in the string. This function is case sensitive.

Syntax

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

Parameters

Parameter	Data Type	Description
SearchString	String	The text to search for in the string.
Alphanumeric	String	The string to search through. To ignore the case of the string, include the Lowercase or Uppercase function in this parameter.
StartInt	Integer	(Optional) The starting character to search.

Examples

Search("Wine", [Company_Name])

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

Search("Partner", [Category]) > 0

This example of a mandatory rule searches for the value "Partner" in the Category field. This rule validates if an entry has the category set to "Partner" even if the there are other values set in the Category field as well.

Search("wine", Lowercase([Company_Name])) > 0

This example of a mandatory rule searches for the text "wine" in the company name ignoring the case. This rule validates if the Company Name field includes the text "Wine", "wine", or "WINE".

Substitute

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

Syntax

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

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string containing the text you want to change.

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

Example

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

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

Text

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

Syntax

Text(Number, DecPlace**)**

Parameters

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

Example

Text([Revenue], 2)

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

Uppercase

Converts a string to upper-case characters. Use this function or the Lowercase function with the Search function and with equal (==) statements to compare alphanumeric values when you do not care about the case of the string.

Syntax

Uppercase(Alphanumeric**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string to convert to upper case.

Example

Uppercase([City])=="VANCOUVER"

This example of a mandatory rule checks for the value "Vancouver" in the City field. The rule validates if an entry has the value "Vancouver", "vancouver", or "VANCOUVER" in the City field.

Value

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

Syntax

Value(Alphanumeric**)**

Parameters

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

Example

Value([Contract Number])

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

Date Functions

Use date functions to manipulate date fields in formula user-defined fields and in rules for mandatory user-defined fields. When you use date functions, you can use date fields as the parameters for the function or you can supply date values for the functions. When you supply date values, use the Date function to format the values as dates.

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

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

Date

🛈 Any formula that supplies an invalid date to the Date function will result in a blank value. For example, the function "Date (2012, 4, 31)" is invalid since the month of April does not have 31 days. If this function is part of a larger compound expression, the entire expression will evaluate to blank.

Converts integers to date values.

Syntax

Date(Year, Month, Day**)**

Parameters

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

Example

Date(2009, 7, 9)

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

Day

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

Syntax

Day(Date**)**

Parameters

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

Examples

Day(Date(2009, 7, 9))

This example returns 9 as the day of the month in the date value.

Day([Creation Date])

This example returns the day of the month that an entry was created.

Dayofweek

Returns the day of the week expressed as an integer for a specified date value, with 1 = Sunday, 2 = Monday, 3 = Tuesday, and so on.

Syntax

Dayofweek(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	The date value for which to return the day of the week.

Examples

Dayofweek(Date(2009, 7, 9)

This example returns 5, for Thursday, as the day of the week for the given date.

Dayofweek([Creation Date])

This example returns the day of the week that an entry was created.

Month

Returns the month as an integer from a date value.

Syntax

Month(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	The date from which to return the month.

Examples

Month(Date(2009, 7, 9))

This example returns 7, for July, as the month in the date value.

Month([Creation Date])

This example returns the month that an entry was created.

Year

Returns the year as an integer from a date value.

Syntax

Year(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	Date value for which to return the year.

Examples

Year(Date(2009, 7, 9))

This example returns 2009 as the year for the date value.

Year([Creation Date])

This example returns the year that an entry was created.

Numeric Functions

Use numeric functions to manipulate numeric values in formula user-defined fields and in rules for mandatory fields. You can add the following functions to formulas using numeric fields.

- **Ceiling –** Rounds a number up to the nearest integer or up to a specified number of decimal points.
- **Floor –** Rounds a number down to the nearest integer or down to a specified number of decimal points.
- **Round –** Rounds a number to the nearest integer or to a specified number of decimal points.

Ceiling

Rounds a number up to the nearest integer or up to a specified number of decimal points.

Syntax

Ceiling(Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value to round.
DecPlace	Integer	(Optional) The number of decimal places to round up to.

Example

Ceiling(2.32, 1)

This example returns 2.4.

Floor

Rounds a number down to the nearest integer or down to a specified number of decimal points.

Syntax

Floor(Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value to round.
DecPlace	Integer	(Optional) The number of decimal places to round down to.

Example

Floor(2.36, 1)

This example returns 2.3

Round

Rounds a number to the nearest integer or to a specified number of decimal points.

Syntax

Round(Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value to round.
DecPlace	Integer	(Optional) The number of decimal places to round to.

Example

Round(2.45687, 2)

This example returns 2.46.

Comparison Statements in Formulas and Mandatory Rules

Rules for mandatory user-defined fields consist of comparison statements. Formula user-defined fields may also include comparison statements if the formulas include conditional expressions, using "If" statements.

You can create comparison statements with the following symbols.

- **==** to check that two values are equal to each other.

  For example, **[Category] == "Partner"** verifies that the Category field is set to "Partner".

- **!=** to check that two values are not equal to each other.

  For example, **[Category] != ""** verifies that the Category field is not empty, i.e. it has a value.

- **>** to check that the first value is greater than the second value.

  For example, **[Annual Sales] > 20000** verifies that the Annual Sales user-defined field has a value greater than 20,000.

- **<** to check that the first value is less than the second value.

  For example, **[Contract Expiry Date] < [Last Service Date]** verifies that the Contract Expiry Date field is earlier than the Last Service Date field.

- **>=** to check that the first value is greater than or equal to the second value.

- **<=** to check that the first value is less than or equal to the second value.

Comparison statements are often combined with logical operators to add multiple statements together.

You can compare any values including alphanumeric, date, and numeric values. Alphanumeric values are compared by checking the alphabetical order of the string. When you compare values from table fields, they are treated as alphanumeric values.

Comparison statements are case sensitive. If you want to ignore the case of fields, include the Lowercase or Uppercase function in the statement. For example, [City] == "Vancouver" is true only if the value of the City field is set to "Vancouver". However, Lowercase([City]) == "vancouver" is true if the value of the City field is set to "Vancouver", "vancouver", or "VANCOUVER".

To compare a table field that contains multiple values, the comparison statement must include the same text that's displayed in the Maximizer interface, including all values for the field. For example, the statement [Category] == "Partner" will be true only if the only value set in the Category field is "Partner". If the Category field includes the "Distributor" value as well, the rule would validate with the following statement: Category == "Distributor, Partner".

You can use the Search function to locate text in multiple-value table fields.

Logical Operators for Formulas and Mandatory Rules

You can use logical operators to build more complex comparison statements in formula user-defined fields and in rules for mandatory fields.

You can use the following logical operators:

- **Or –** Combines two comparison statements where either one of the statements is true.

    For example, **[Category] == "Partner" OR [Category] == "Distributor, Partner"** is true if the Category field has either the "Partner" value alone or has both the "Partner" and the "Distributor" values.

- **And –** Combines two comparison statements where both of the statements is true.

    For example, **[Category] == "Partner" AND [Annual Sales] > 20000** is true if the Category field has the "Partner" value and if the Annual Sales field is greater than 20,000.

- **Not –** Negates a comparison statement.

    For example, **NOT ([Category] == "Partner" AND [Annual Sales] > 20000)** is true in all cases where the previous example is false.

Key Fields Lists

Key Fields are important user-defined fields and system fields that are highlighted on the Details tab for Address Book entries, opportunities, and customer service cases, and on the Basic Information tab in campaigns, making them more readily accessible.

You can choose any user-defined fields and some system fields to include in the Key Fields lists. You may want to select mandatory fields as Key Fields, so users don't miss them when creating new records. You may also select frequently used fields, making it easier for users to quickly enter these values. And you may select fields important to a particular group of users because different Key Field lists can be defined for specific users and groups, or for all users.

Key Fields for Different Types of Entries

Each Key Fields list contains different sets of fields for each type of entry. For example, you can create a new Key Fields list and add different sets of fields for Companies and Opportunities. When you add new fields to the list for opportunities, you can add only opportunity basic fields and user-defined fields. When you view the Details tab for an opportunity in Maximizer, only the fields added to the opportunities list will be displayed.

When you work with Address Book entries, you can set up separate lists of Key Fields for Companies, Individuals, and Contacts. As well, each type of Address Book entry has different lists for sales leads and for regular entries. For example, Individual - Lead Key Fields appear only in Individual Address Book entries that are marked as sales leads.

Add fields to the Key Fields list for only the types of entries that you want to make the Key Fields list available to. If the Key Fields list contains no fields for a specific type of entry, the list will not be available when you view that type of entry.

Each Key Fields list can contain separate lists for the following types of entries:

- **Company Lead –** For Companies marked as sales leads.
- **Company –** For Companies that are not marked as sales leads.
- **Individual Lead –** For Individuals marked as sales leads.
- **Individual –** For Individuals that are not marked as sales leads.
- **Contact Lead –** For Contacts that are marked as sales leads.
- **Contact –** For Contacts that are not marked as sales leads.
- **Opportunity –** For opportunities.

- **Campaign –** For campaigns
- **Customer Service –** For customer service cases.

Restricting Access to Key Fields

The Key Fields lists in the Details tab or in the Basic Information tab are visible only to the users or groups specified as having Read Access to the Key Fields lists. However, other users may still be able to access the fields in the list through the User-Defined Fields tab or through other Key Fields lists. Assigning a field to a Key Fields list does not determine who can access the field. The field is available as a Key Field only to users with access to both the user-defined field and to the Key Fields list.

Create a Key Fields List

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

2 Select the **Key Fields** tab.

3 Click **Add**.
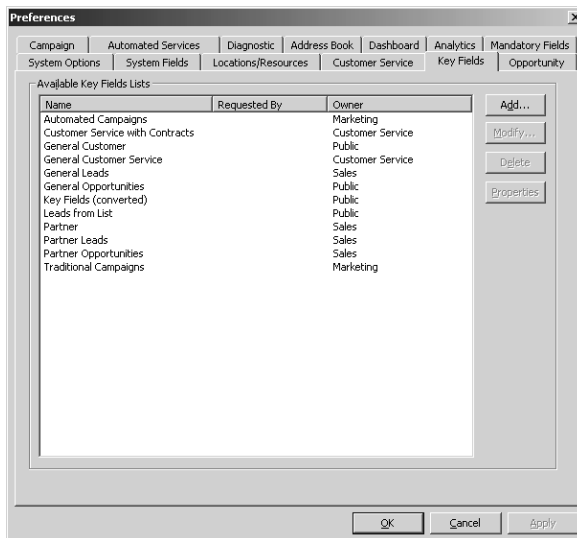
4 Enter the properties for the Key Fields list.

- In the **List name** field, enter a name for the Key Fields list.
- In the **Description** field, enter a description for the Key Fields list.

- From the **Owner** drop-down list, select the user or security group with access to the Key Field list, or leave it as Public.

- If necessary, from the **Requested by** field, select the user who requested the Key Fields list.

5 Select the **Key Fields** tab and from the **Show key fields for** drop-down list, select the type of Maximizer entry to assign Key Fields to.

6 Add user-defined fields and system fields to the list.

- Click **Add**, select **Key Field**, select a system or user-defined field, and click **Insert**.

- To insert a separator, click **Add**, and select **Separator**.

  Separators are used to group the Key Fields into visible groups.

ⓘ If you add a separator at the top or bottom of the list, or if you add two separators in a row, the separators will be suppressed when the entry is viewed in Maximizer.

- Use the Move buttons to reposition the selected field or separator in the list.
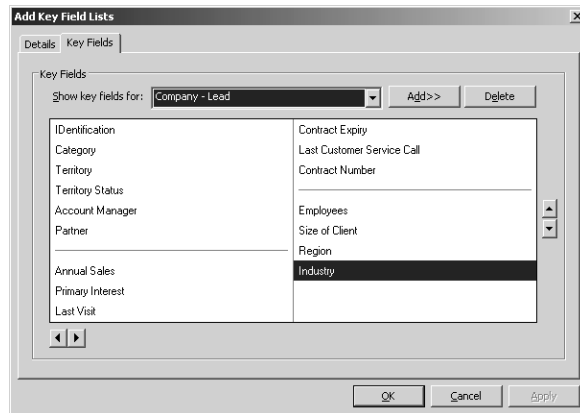
7 If necessary, from the **Show Key Fields for** drop-down list, select a different type of entry, and add fields to the list for that type of entry.

8 Click **OK** to save the Key Fields list.

Preventing Duplicate Entries

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

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

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

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

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

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

Check List	Fields
Duplicate Check List 1:	1. Full Name/Company Name 2. All Phone Numbers 3. None
Duplicate Check List 2:	1. Full Name/Company Name 2. Zip/Postal 3. None
Duplicate Check List 3:	1. None 2. None 3. None

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

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

• **Merge with selected entry –** The newly created or modified Address Book entry merges with, and overwrites, the existing (selected) entry. If a duplicate entry is private, this option is unavailable.

• **Edit selected entry –** The existing (selected) Address Book entry opens, allowing it to be edited by the user. Any information entered in the newly created entry that was detected as a duplicate must be re-entered. If a duplicate entry is private, this option is unavailable.

• **Add the new entry –** This option adds the new entry. It is available only under certain circumstances. If a user or group has permission to create duplicate entries ("Duplicates may be entered by" field in the Address Book tab), he or she has the option to create duplicate entries. This option is also available if partial matching is enabled and Maximizer finds a partial match. If a duplicate entry is private, only users with the ability to enter duplicates can create the duplicate entry.

Partial Matching

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

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

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

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

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

- If all three fields are defined in the list, an entry is considered a possible duplicate if only the first field matches, or if both the first and second field match.

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

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

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

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

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

Permission to Create Duplicate Entries

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

Retrieving Private Entries with Duplicate Checking

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

Configure Duplicate Checking for Address Book Entries

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

2 Select the **Address Book** tab.

3 Select **Check for duplicates when adding Address Book entries**.

4 From the **Duplicate check list** drop-down list, select one of the Duplicate Check Lists.

5 In the **Fields to match for the selected list** box, select the first, second, and third fields to match.

You can select up to three fields, but selecting all three fields is not required.

6 Repeat the previous two steps to configure any of the other Duplicate Check Lists.

7 To enable partial matching, select **Allow partial match**.

8 If you want any users or groups to be able to create duplicate entries, select the name of the user or group from the **Duplicates may be entered by** drop-down list.

Email Notification for Opportunities/Customer Service Cases

Maximizer can send email to customers, partners, and users when the status of customer service cases or opportunities changes.

Maximizer includes default notification messages that are sent to users. You can also create custom email notification templates in Administrator. You can assign email templates for each action such as when you create a customer service case or when you win an opportunity. Each action can also have separate templates sent to customers/partners and to users.

When writing the email templates, remember that each template applies to all customer service cases or opportunities of that notification event type. They should be specific to the action they are assigned to but generic enough to apply to all cases or opportunities with that action. Use merge fields to personalize emails based on generic templates.

You can also create default case and opportunity monitoring lists in Administrator. Email messages are sent to users when cases or opportunities are modified. Users can specify what changes to receive notification for in their preferences. Users can also assign monitors to specific cases and opportunities.

Email Notification for Customer Service Cases

Maximizer sends email messages to customers, partners, and users when you create, assign, escalate, or resolve customer service cases. You can configure the email notifications in the Notification tab of the Customer Service preferences in Administrator.

You can choose to send notification automatically to Address Book entries when cases are first created. For the other customer notification templates, users have the option to send the notification while performing the specified actions in Maximizer. You also have the option to send a copy of the email message to the partners when notifying customers. User notification email messages are sent to the users identified in the Owner and Assigned To fields for the case.

Email Notification for Opportunities

Maximizer can automatically send email to users and partners when opportunities are created, abandoned, lost, suspended, or won. You can configure the email notifications in the Opportunities preferences in Administrator.

When partner or user templates are assigned to the various actions, the email messages are automatically sent to the assigned partner or

users when the actions are performed. You can choose to send a copy of email messages sent to partners to the associated Account Manager as well. You can also notify sales leaders automatically whenever the leader field is changed. User notification email is sent to users identified as monitors for the opportunities.

Merge Fields in Email Notification Templates

Merge fields in the email template personalize the message for each recipient by replacing the merge field syntax with the actual field value for the Address Book entry. For example, including the {First_Name?} merge field in an email template replaces the syntax with each email recipient's actual first name.

ⓘ The question mark in a merge field is used to alert users to not leave a space if no value is assigned to the related Address Book entry for the merge field.

Commonly used customer service and opportunity merge fields are described below. For a complete list of merge fields to include in the email templates, see the Insert Merge Field dialog box in the Maximizer Word Processor. Press F1 when a field is selected to view its description.

You can create templates in either .ETF (Maximizer Word Processor) or .HTML format. When you create templates in the Maximizer Word Processor, click the Merge Field button and select the merge field to insert into your email template. When you create HTML templates in an HTML or text editor, you must enter the merge field syntax manually or copy the syntax from the Maximizer Word Processor.

Customer Service Case Merge Fields

The following table lists the basic customer service case merge fields to include in email templates.

- **{My_Name?}** – Full name of the logged-in user (first name, initial, and last name).
- **{My_Company?}** – Name of the logged-in user's company.
- **{CS.Case_Number?}** – Case number.
- **{CS.Client_Name?}** – Name of the associated Address Book entry (Company or Individual).
- **{CS.Contact_Name?}** – Name of the Contact associated with the case.

  Because this field is not mandatory in customer service cases, a value may not display in case notification emails.
- **{CS.Subject?}** – Case subject.
- **{CS.Assigned_To?}** – Name of the user who the case is assigned to.

  Applies to case assignment or escalation emails only.

- **{CS.Resolved_By?}** – Name of the user who resolved the case.

  Applies to case resolution emails only.

- **{CS.Resolved_Date?}** – Date when the case was resolved.

  Applies to case resolution emails only.

- **{CS.Resolved_Time?}** – Time when the case was resolved.

  Applies to case resolution emails only.

- **{Case_Solution?}** – Knowledge base article number associated with the case resolution.

  Applies to case resolution emails only.

- **{Case_Solution_Note?}** – Notes from the Solution Notes field in the Solution Information & Billing tab of the Case dialog box.

  Applies to case resolution emails only.

Opportunity Merge Fields

The following table lists the basic opportunity merge fields to include in email templates.

- **{My_Name?}** – Full name of the logged-in user (first name, initial, and last name).

- **{My_Company?}** – Name of the logged-in user's company.

- **{Opportunity.Client_Name?}** – Name of the associated Address Book entry (Company or Individual).

- **{Opportunity.Opportunity_Contact_Name?}** – Name of the Contact associated with the opportunity.

  Because this field is not mandatory in customer service cases, a value may not display in case notification emails.

- **{Opportunity.Objective?}** – The objective of the opportunity.

- **{Opportunity.Categories?}** – The category of the opportunity.

- **{Opportunity.Products_Services?}** – The products/services of the opportunity.

- **{Opportunity.Description?}** – The opportunity's description.

- **{Opportunity.Stage?}** – The stage the opportunity is at.

- **{Opportunity.Confidence_Rating?}** – The current confidence rating of the opportunity.

- **{Opportunity.Status?}** – The current status of the opportunity.

- **{Opportunity.Start_Date?}** – The start date of the opportunity.

- **{Opportunity.Close_Date?}** – The close date of the opportunity.

- **{Opportunity.Next_Action?}** – The opportunity's next action.

- **{Opportunity.Revenue?}** – The opportunity's projected revenue.
- **{Opportunity.Cost?}** – The opportunity's cost.
- **{Opportunity.Team_Name?}** – The name of the team associated with the opportunity.
- **{Opportunity.Opportunity_Leader?}** – The leader of the opportunity.

Create an Email Notification Template

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

2 Select the **Customer Service** or **Opportunity** tab depending on the module you are working with.

3 Click **Notification**.

4 Click **Assign**.

- For customer service case email notification, select **Customer Template** or **User Template**.
- For opportunity email notification, select **Partner Template** or **User Template**.

The Email Notification Template Library opens.

5 Click **New**.

6 Select **Maximizer Message Body** (Maximizer Word Processor .ETF template) or **HTML Message Body** (HTML template).

The Message Body Name dialog box opens.

7 Type a name to identify the template and click **OK**.
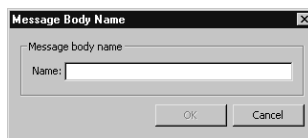
ⓘ It's a good idea to include the action (Create, Assign, Escalate, or Resolve) and the recipient type (Customer or User) in the template name, so the template is easier to identify.

8 Write the content of the email template, including customer service case or opportunity merge fields.
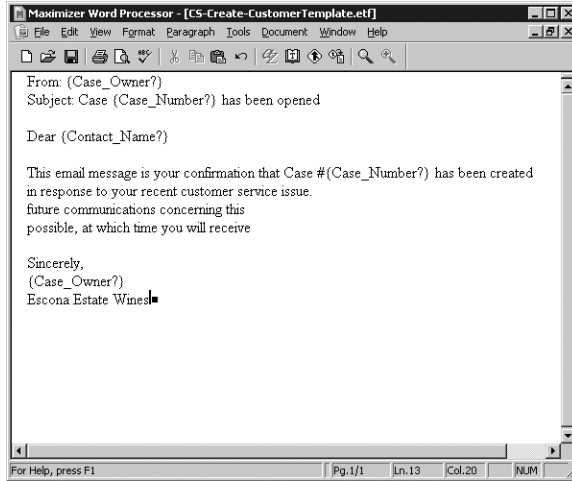
To insert merge fields in the Maximizer Word Processor, click the **Merge Field** button.
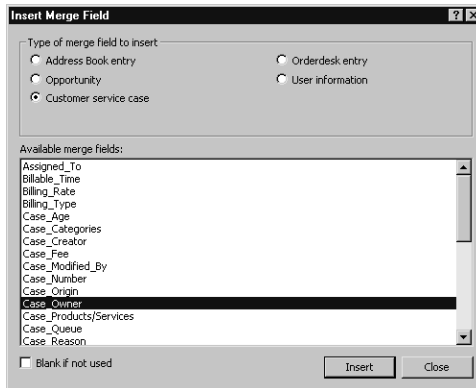
To use merge fields in HTML email templates, you must type the merge field syntax manually. To simplify the process, you might choose to create the template with its merge field syntax in the Maximizer Word Processor, and then copy and paste the text into the HTML document.

9 Save the template and close the editor.

Assign Email Notification Templates

Use this procedure to assign email notification templates for customer service cases. The templates must already be created in the desktop version of Administrator.

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

2 Select the **Customer Service** or **Opportunity** tab depending on the module you are working with.

3 Click **Notification**.

4 Under **Email templates for notification**, select an action name.

5 Click **Assign**.

- For customer service case email notification, select **Customer Template** or **User Template**.

- For opportunity email notification, select **Partner Template** or **User Template**.

The Email Notification Template Library opens.

6 Select an existing template from the list and click **OK**.
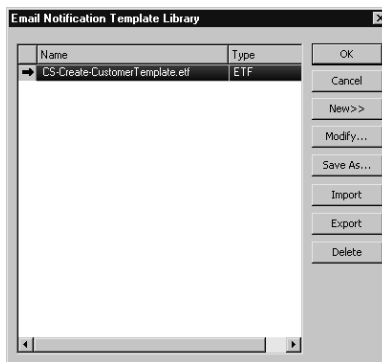
The template is now associated with the action name for customers or users.

7 Specify the remaining notification settings.

- For customer service email notifications, to email the associated partner when notifying a customer, select **Carbon Copy the associated Partner when notifying Customers**.

- For opportunity email notifications, to email the associated account manager when notifying a partner, select **Carbon**

Copy the Associated Account Manager when notifying the Partner.

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

Turn Off Email Notification

Use this procedure to remove a notification template from a customer service or opportunities action. You can remove a user template to stop sending notification to Maximizer users, a customer template to stop sending notification to customers (customer service cases only), or a partner template to stop sending notification to partners (opportunities only).

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

2 Select the **Customer Service** or **Opportunity** tab depending on the module you are working with.

3 Click **Notification**.

4 In the **Email templates for notification** group, select an action name.

5 Click **Unassign**, and select the type of template you want to remove.

- For customer service case email notification, select **Customer Template** or **User Template**.

- For opportunity email notification, select **Partner Template** or **User Template**.

Set Default Opportunity/Case Monitors

You can set up default opportunity and customer service case monitoring lists in Administrator. Users can assign the default list of monitors to opportunities and cases in Maximizer. Users can also specify custom lists of opportunity and case monitors in specific entries.

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

2 Select the **Customer Service** or **Opportunity** tab depending on the module you are working with.

3 Click **Monitoring**.

The current list of users assigned for monitoring is displayed.

4 Add or remove users from the list.

- To add a user to the list, click **Add**, select a user, and click **OK**.

- To remove a user from the list, select the user, and click **Delete**.

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

Event Notification

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

Most often these events are significant error conditions requiring human intervention, such as a severe Email Server error during an email marketing campaign. They may also be notifications of irregularities in business process, such as a remote user who has not synchronized in a threshold number of days.

Event notification email messages and log files contain the following information about events:

- Date and time when the event occurred
- Type of event
- Address Book in which the event occurred
- Action resulting from the event (for example, activity suspended due to fatal error)
- Additional information about the event, such as error codes, suggested resolutions, etc.

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

Event description	Module	Cause	Resolution
Email service fatal error	AutoEmail	The connection to the SMTP Email Server has failed or the SMTP authentication username and/or password is incorrect.	Check the SMTP server name, check the network connection, and check the authentication username and password on the Automated Services tab (available in Administrator from the File > Preferences menu).

Enable Event Notification

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

2 On the **System Options** tab, click **Event Notification**.

3 Select **Enable event notification**.

4 In the **Events** list, select an event, and click **Properties**.

5 Specify the notification options to enable for this event.

6 If you selected **Via email** as one of the notification options, click **Add** to specify names and email addresses of notification recipients.

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

8 Repeat steps 4 through 7 for each event for which you want to enable notification or logging.

9 Complete the **SMTP server settings** fields as they apply to your SMTP server, and click **OK**.

View Event Notification

Use this procedure to view the event notification log file in a text editor.

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

2 On the **System Options** tab, click **Event Notification**.

3 On the Events Notification dialog box, click **View Log File**.

Open Windows Event Viewer

Use this procedure to open Windows Event Viewer where you can view Maximizer event notifications.

1 Select **Start > Programs > Administrative Tools > Event Viewer**.

2 In the left pane, select **Application Log**.

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

Recording Holidays in the Holiday Editor

The Holiday Editor is a utility you can use to add or edit holidays in the Maximizer calendar. By default, the Holiday Editor contains many North American holidays. The holidays listed in the Holiday Editor also appear in the Calendar page in Maximizer. You can use Administrator to modify or delete existing holidays, or add new holidays.

If you wish to add personal holidays or events to your calendar, such as "Alice's birthday", you must create a yearly recurring appointment using the Calendar page in Maximizer.

The Holiday Editor's data file—Mxzhol.nam—is inserted in the Maximizer program folder when you install Maximizer. In this location, you use Administrator's Holiday Editor to manage one set of holidays for your installation of Maximizer.

Add a Holiday

Use this procedure to add a holiday to your calendar using the Holiday Editor.

1 In Administrator, select **Utilities > Holiday Editor**.
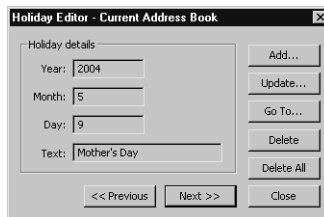
2 Click **Add**.

3 Enter the details of the new holiday.
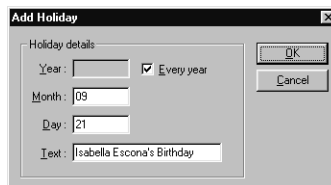
4 Click **OK** to close the Add Holiday dialog box.

Configuring Email

In this chapter...

Configuring Email

The Maximizer Email Service sends email messages as part of automated campaigns, opportunity and case email notification, and appointment reminders. You must configure the Maximizer Email Service to use these features properly.

Automated campaigns track various statistics for email activities, including the number of bounces and replies generated from email activities. To track these statistics, you must specify the email accounts to monitor.

The following sections contain information on configuring email:

Configuring the Maximizer Email Service

The Maximizer Email Service is installed automatically with Maximizer, and it works with the following operations in Maximizer:

- Automated campaign email activities
- Opportunity and customer service email notifications
- Appointment notification using iCalendar attachments and appointment reminders
- Email messages sent through Maximizer Web Access or Mobile Access

The Maximizer Email Service must be running for these operations to function.

By default, Maximizer will delete any email messages queued by the email service that are older than 14 days. Messages are queued when the email service is stopped. To change the maximum age of unsent email messages, modify the value of the EMGR_MSG_AGE_LIMIT key in the MaConfig table. To disable email message age limits, set this value to 0.

Ensure that users have an email address entered in their user properties, so they can receive customer service case email notifications and appointment reminders by email. Users should also set their email appointment notification option in Maximizer (In the Setup tab, select Preferences. In the Preferences dialog, select the Calendar/Hotlist tab).

For more information about the properties in the Automated Services tab, click inside the tab and press **F1**.

➤ **To configure the Maximizer Email Service**

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

2 Select the **Automated Services** tab.

3 Select **Email** from the **Preferences for Activity type** drop-down list.

4 Set the **Service cycle time check**.

The service cycle time check controls how often the Maximizer Email Service processes the email activities in automated campaigns. By default, this option is set to 1 minute.

5 To send large quantities of email messages, select the **Enable sending in batch mode** option, and set the **Batch size**.

If you are using an ISP, it's important to control the email batch settings.

6 Enter a URL in the **URL of Campaign Manager Statistics** field.

This URL specifies the URL of the script that redirects the email recipients to the Landing page URL (as specified in the Add Email Activity dialog box), which is included in automated email activities. This option applies to automated email activities only, and it is available only if Maximizer Components for Microsoft IIS is installed.

7 Choose a character set from the **Character set used by email service** drop-down list. This is the friendly name for the character set. The actual name of the character set is shown in the field on the right of the drop-down list.

This character set is used for all outgoing email sent by the Maximizer Email Service.

If the character set does not appear in the list, you can enter the name of the character set in the field on the right. The field on the left is then displayed as a blank value.

8 Select the **Activate services for the currently open Address Book** option.

This checkbox must be enabled to use automated email campaigns, customer service case email notifications, and appointment reminders by email.

9 Enter the **Service computer** and **SMTP server** names and the **SMTP port** number.

ⓘ The SMTP server is specified during the Maximizer installation and the port number is set to 25 by default.

10 If the **SMTP server requires authentication**, select the checkbox and enter the account name and password.

① The authentication settings are
specified during Maximizer
installation.

1 1 Click **OK**.

Maximizer is now configured to use the Maximizer Email Service
for automated email campaign activities, customer service case
email notifications, and appointment reminders by email.

Configuring Email Accounts for Campaign Monitoring

To track some statistics for email campaigns, you must specify the
settings for the IMAP server and email accounts used for monitoring
bounces and replies for campaign email activities. Maximizer tracks
the number of email messages sent to these accounts and generates
statistics for each campaign.

You must specify settings for the same email accounts that are
specified as the "From" and "ReplyTo" addresses in the Email
Addresses tab of a campaign email activity.

➤ **To configure campaign monitoring email accounts**

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

2 Select the **Campaign** tab.

3 Under **Campaign monitoring options**, click **Monitoring**.

The Campaign Monitoring Settings dialog box opens.

4 Under **Server settings**, specify settings for the IMAP email
server.

• In the **IMAP Server** field, enter the URL for the IMAP server.

- • In the **Port** field, enter the port number for the IMAP server.
- • Select **SSL** if Secure Sockets Layer (SSL) is enabled on the IMAP server.
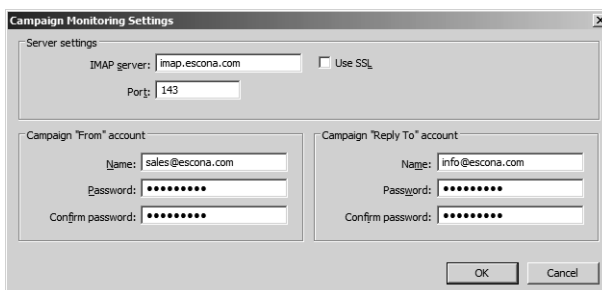
5 Under **Campaign "From" account**, specify the name and password for the email account that appears as the "From" address in campaign messages.

This account must match the email address specified as the "From" address in the Email Addresses tab of campaign email activities.

6 Under **Campaign "Reply To" account**, specify the name and password for the email account to which to send replies.

This account must match the email address specified as the "ReplyTo" address in the Email Addresses tab of campaign email activities.

If the From and Reply To accounts are the same, you need to specify the credentials only once, in either section. The specified email account is monitored for both replies and bounces.

7 Click **OK** to close the Campaign Monitoring Settings dialog box.

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

User Account for SQL Server Reporting Services Integration

In order to enable the SQL Server Reporting Services Integration, you must specify a user account to connect with the Maximizer database. The user account must match the following criteria:

- • The user is a member of the SSRS Report Management security group in Maximizer. For information on security groups, see "Security Groups" on page 83.
- • The login for the user has the sysadmin server role on the SQL Server hosting the Maximizer database. For information on user

logins in Microsoft SQL Server, see the SQL Server
documentation.

The MASTER user automatically meets these criteria.

Enabling SQL Server Reporting Services

You can enable SQL Server Reporting Services in the System Options
preferences in Maximizer Web Access Administrator. When you
enable SQL Server Reporting Services, a number of default reports
are automatically created on the SQL Server Reporting Services
server.

➤ **To enable SQL Server Reporting Services**

1 Log in to Maximizer Web Access Administrator.

2 In the left pane, under **Preferences**, click **System Options**.

3 Select the **SQL Server Reporting Services Settings** tab.

4 Click **Modify Options**.

5 Select **Enable SQL Server Reporting Services Integration**.

The URL to the Reporting Services server and the path to the
current Address Book are automatically filled in.

6 Under **Database Account**, enter the username and password
for the user account used to connect to the Maximizer database.

Whenever the password changes, you must specify the new
password in this page.

7 Click **Save**.

8 The SQL Server Reporting Services settings are saved on the report server. You may need to wait a moment for the settings to save.

In this chapter...

Introduction to Web Access

The Maximizer CRM Server setup program installs and registers several machine-level COM DLLs and sets up some machine-level registry settings. If you are moving Maximizer Web Access to a different server, ensure you run the setup program again.

Maximizer Web Access, Customer Access, Partner Access, and Mobile Access are installed automatically with Maximizer CRM Server. The Maximizer web access sites provide web browser access to a Maximizer Address Book from any Internet-connected computer or mobile device.

The Maximizer CRM Server installation provides the option to install Start Menu shortcuts to the sites. These links are intended to connect to Maximizer Web Access Administrator for the convenience of internal users. Only one instance of a Partner Access and one instance of a Customer Access can be set up for this quick access for each Address Book. To set it up, log into the Address Book you want to set up in Maximizer Administrator, select File > Web Access > Shortcuts, and enter the URL to be accessed on the relevant line. Both the Partner Access URL and the Customer Access URL can be specified here.

Maximizer Web Access can be configured in many different ways. Refer to the Maximizer knowledge base for information on setting up Maximizer Web Access in different environments.

Site Types

There are several site types, each with a different purpose and functionality. The site types are described below.

Maximizer Web Access

Maximizer Web Access is a browser-based application providing the functionality of Maximizer over the Internet. Employees can work with Address Book entry information, notes, calendar appointments, Hotlist tasks, user-defined fields, and opportunities, as well as view company documents and other pertinent information.

- **Local path**: C:\Program Files\Maximizer\Portals\Employee
- **Virtual folder**: http://<server name>/MaximizerWebAccess
- **Main login URL**: http://<server name>/MaximizerWebAccess/ Default.aspx

Mobile Access

Mobile Access provides access to Maximizer through mobile web browsers. When users open Mobile Access from the Windows Start menu, a URL displays. Users enter this URL into a mobile browser to access Mobile Access.

- **Local path**: C:\Program Files\Maximizer\Portals\Wireless
- **Virtual folder**: http://<server name>/MaximizerMobileAccess
- **Main login URL**: http://<server name>/MaximizerMobileAccess/

Partner Access

Partner Access is a browser-based application providing a two-way flow of information between your organization and its business partners. This medium allows for a multi-tier distribution group to effectively distribute sales opportunities and keep all involved parties informed.

All aspects of the site are administered with a separate web access administrator application.

- **Local path**: C:\Program Files\Maximizer\Portals\Partner
- **Virtual folder**: http://<server name>/MaximizerPartner
- **Main login URL**: http://<server name>/MaximizerPartner/ Default.aspx
- **Administrator login URL**: http://<server name>/ MaximizerPartner/Admin/Default.aspx

The following third-party applications are installed with Customer and Partner Access, and are available from the Windows Start menu:

- Excentrics World Components
- Microsoft Internet Explorer WebControls

Customer Access

Customer Access is similar to Partner Access. It's a browser-based application providing a two-way flow of information between your organization and its customers. Customers have access to news and events.

Like Partner Access, the site is administered with a web access administrator application. This is separate from the main site.

- **Local path**: C:\Program Files\Maximizer\Portals\Customer
- **Virtual folder**: http://<server name>/MaximizerCustomer

- **Main login URL**: http://<server name>/MaximizerCustomer/
  Default.aspx

- **Administrator login URL**: http://<server name>/
  MaximizerCustomer/Admin/Default.aspx

The following third-party applications are installed with Customer
and Partner Access, and are available from the Windows Start menu:

- Excentrics World Components
- Microsoft Internet Explorer WebControls

Supported File Types in Company Library and Documents

The following document types are supported in the Company Library
and Document window of the web access sites:

- .DOC and .RTF (Microsoft Word)
- .XLS (Microsoft Excel)
- .PPT (Microsoft PowerPoint)
- .HTM and .HTML
- .BMP (bitmaps)
- .TXT (text files and Company Library notes)
- .JPG, .GIF, and .TIF (graphics files)
- .PDF (Adobe Portable Document Format)

You can add support for other file types using Microsoft Internet
Information Services (IIS) Manager. For more information, see
"Adding Support for File Types" on page 21.

Enabling Web Access Sites

By default, all Maximizer web access sites are disabled. Enabling a site is a simple process, which must be completed before anybody can access them. You can activate them during installation, or modify the Web.Config file for each site you want to enable. To enable a site during installation, see "Installing Maximizer CRM Server" on page 34.

➤ **To enable a site via the Web.Config file**

1 Open the site's **Web.Config** file in a text editor, such as Notepad.

The Web.Config file is located on the Maximizer server at the following path:

C:\Program Files\Maximizer\Portals\<*site*>\Web.Config

If Maximizer was installed in a folder other than the default location of C:\Program Files\, replace that portion of the path with the folder where Maximizer was installed.

2 In the **appSettings** section, locate the **Enabled** key, which is shown below:

```
<add key="Enabled" value="false" />
```

3 Change the value to **true**, as show below:

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

4 Save the Web.Config file.

Note that if you are using Windows 2008 or 2012, you must also select the "Detailed errors" option in IIS. This setting is found under Error Pages > Edit Feature Settings.

Escona Tutorial Sample Sites

The Escona Tutorial Address Book includes sample web access sites. The sample sites, Maximizer Web Access, Customer Access, and Partner Access, require no configuration and are accessible from the Maximizer folder on the Windows Start menu. These sample sites are installed on the Maximizer IIS Server as part of the Maximizer Components for Microsoft IIS installation.

You can access the sample sites using the following user IDs and passwords.

Sample Site	User ID	Password
Maximizer Web Access Administrator	master	control
Maximizer Web Access	jnapoli	maximizer
Customer Access Administrator	jnapoli	maximizer
Partner Access Administrator	jnapoli	maximizer
Customer Access	mary	password
Partner Access	paul	password
Mobile Access	jnapoli	maximizer

This section steps you through the following procedures with the Escona Tutorial sample sites:

- "To start the Default Web Site" on page 163
- "To change a site to an application" on page 163
- "To access Escona Tutorial Customer or Partner Access Administrator" on page 167
- "To enable Address Book entries to access the site" on page 192
- "To access Escona Tutorial Customer or Partner Access" on page 168

Many of these procedures also apply to your own sites.

➤ **To start the Default Web Site**

ⓘ Before accessing the sample sites, ensure that the Default Web Site is started.

1 On the Maximizer IIS Server, select **Start** > **Programs > Control Panel > Administrative Tools** > **Internet Information Services Manager**.

2 Select **Default Web Site**, and click the **Start item** button.
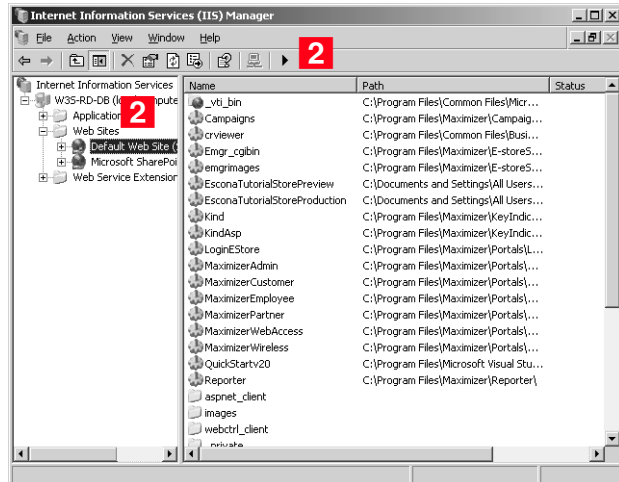
When the Start item button becomes dimmed, the Default Web Site is started, and you can access the sites.

➤ **To change a site to an application**

ⓘ Do not use this procedure unless you received a "Server Error in "/" Application" error when you opened the site.

1 On the Maximizer IIS Server, select **Start** > **Programs > Control Panel > Administrative Tools** > **Internet Information Services Manager**.

2 Open the **Default Web Site** branch.

3 Right-click **MaximizerWebAccess**, and click **Properties**.
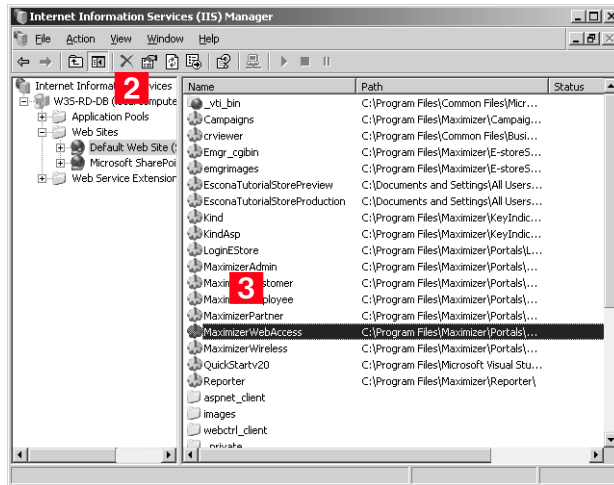
4 Click **Create**.

Maximizer Web Access has now been converted to an application.

5 Click **OK** and then close Internet Information Services.
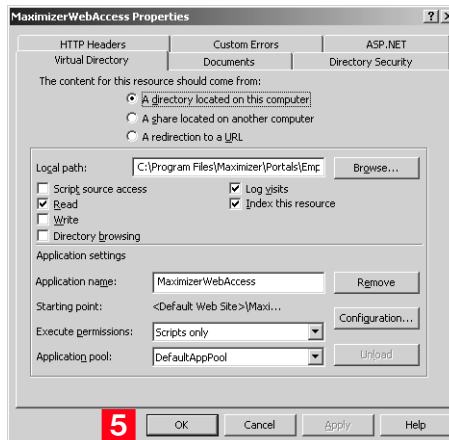
Escona Tutorial Maximizer Web Access Administrator

➤ **To access Escona Tutorial Maximizer Web Access Administrator**

1 Select **Start** > **Programs** > **Maximizer CRM** > **Web Access** > **Maximizer Web Access Administrator**.

The Maximizer Web Access Administrator login page opens.

2 Log into the site using the following login information:

User ID = **MASTER**

Password = **control**

ⓘ You can access Maximizer Web Access Administrator from Maximizer Web Access. In the left navigation pane, hover your mouse over Administration and select Administrator from the pop-up window.

Escona Tutorial Maximizer Web Access

➤ **To access Escona Tutorial Maximizer Web Access**

1 Select **Start** > **Programs** > **Maximizer CRM** > **Web Access** > **Maximizer Web Access**.

The Maximizer Web Access login page opens.

2 Log into the site using the following login information:

User ID = **JNAPOLI**

Password = **maximizer**

Escona Tutorial Mobile Access

➤ **To access Escona Tutorial Mobile Access**

1 On your mobile device, open a web browser.

2 In the Address bar, enter the Mobile Access URL.

The default, the URL is in the form: **http://<server name>/ MaximizerMobileAccess**

3 Log into the site using the following login information:

User ID = **JNAPOLI**

Password = **maximizer**

Escona Tutorial Customer and Partner Access Administrator

➤ **To access Escona Tutorial Customer or Partner Access Administrator**

1 On the server, select **Start** > **Programs** > **Maximizer CRM** > **Web Access** > **Customer Access** or **Partner Access**.

The Maximizer Customer or Partner Access Viewer opens.

2 Select **Escona Tutorial**, and click **View**.
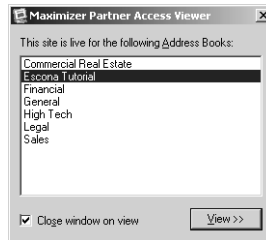
The Customer/Access Partner Administrator login page opens.

3 Log into Customer/Partner Access Administrator:

User ID = **JNAPOLI**

Password = **maximizer**

Customer/Partner Access Administrator opens, with either or both of the News Manager and Configuration Manager links available, depending on which web access security groups you belong to.

For information about web access security groups, refer to "Web Access Security Groups" on page 177.

> ⓘ The News Manager link is available only if you are logged in with a User ID belonging to the Customer or Partner Access Administration Users security group. The Configuration Manager link is available only if you are logged in with a User ID belonging to the Customer or Partner Access Configuration Users security group.

➤ **To create a site PIN for the sample sites**

• Refer to "Assigning Site Login PINs to Contacts and Individuals" on page 193 for an explanation of how to create a site PIN for yourself. When you are creating the PIN for the Escona Tutorial sample sites, modify the email address and category of one of the Address Book entries, so you can use that Individual or Contact as your site user account:

   • **Email Address**: When you are creating a customer and/or Partner Access login account for the Escona Tutorial sample sites, enter your own email address into a sample Contact or Individual's Address Book entry. Then, when you send a site

PIN email, it sends the PIN to your email address instead of to the fictional email address in the sample database.

- **Category**: Select both the Customer and Partner categories in the Address Book entry.

Escona Tutorial Customer and Partner Access

➤ **To access Escona Tutorial Customer or Partner Access**

1 Select **Start** > **Programs** > **Maximizer CRM** > **Web Access** > **Customer Access** or **Partner Access**.

The Maximizer Customer or Partner Access Viewer opens.

2 Select **Escona Tutorial**, and click **View**.

The login page opens.

3 Click the **View Customer/Partner Access Site** link.

4 Log in to the site.

To log into the sample **Partner Access** site, use the sample Address Book contact, Paul Samson of Samson Consulting:

- User ID = **paul**
- Password = **password**

To log into the sample **Customer Access** site, use the sample Address Book contact, Mary Smart of Acme Tool Co.:

- User ID = **mary**
- Password = **password**

Customer or Partner Access opens.

Application Settings for Web Access Sites

The XML-formatted Web.config file, stored in the ...\Program Files\Maximizer\Portals\<site> folder, is the key to configuring the sites and any other ASP.NET web application.

You can edit this file using Windows Notepad or another text editor. For Windows 2008 Server or later, you can also edit the settings in Internet Information Services (IIS) Manager on the ASP.NET tab of the site's properties.

The settings that control the Outlook integration options for Web Access are located in a Web.config file in the services folder (...\Program Files\Maximizer\Portals\Employee\Services\). The only settings that apply to the Web Access Outlook integration are the maximum request length and timeout settings in the "httpRuntime" element.

The Partner Access and Customer Access sites are configured to connect to a single Address Book each. Which Address Book the site connects to is defined in a file called Web.config, which is located in the root folder of the Partner and Customer folders (which are located in ...\Program Files\Maximizer\Portals\). Initially, the Web.config file is configured to connect to the Escona Tutorial sample Address Book. Before you deploy Partner Access or Customer Access, you must update the Web.config file for your Address Book.

After you have deployed Maximizer Web Access, Mobile Access, Customer Access, or Partner Access for your Address Book, you can make further changes to the Web.config file at any time. You are not required to restart the IIS service for changes to take effect.

➤ **To configure the external site application settings**

1 Browse to the Web Access folder where you have installed Maximizer Components for Microsoft IIS (...\Program Files\Maximizer\Portals\<site>\).

2 Open the Web.config file in the Employee, Customer, Partner, or Wireless folder. Note that the following application settings do not apply to all web access sites.

Site Application Settings <appSettings>

ⓘ It is optional to change these application settings with the exception of the Enabled setting. This value must be set to true in order make the site accessible.

You can update any of the site application settings values if they appear under the appSettings parent node. The settings that appear in the Web.config file are dependent on the Web Access application that it is associated with.

Child	Description
<add key="AddressBook" value="name" />	The name is the true name of the Address Book. See 'AddressBook' on page 174.
<add key= "AddressBookColumnSetup" value="user/Address Book window column setup name" />	Specifies a specific column setup to be used for the Address Book page in Mobile Access. Only the first two columns of a column setup can be displayed (from left to right). The user specified in this setting is the creator of the column setup. This setting is optional.
<add key="AlarmCheckPeriod_ Seconds" value="x">	The site will check for alarms every x seconds.
<add key="EmailAttachmentLimitSize InKB" value="x">	Sets the largest allowable email attachment size to be x KiloBytes. Note that if you increase this limit, you must also increase the "maxRequestLength" setting on the "httpRuntime" element by a corresponding amount.
<add key="MaxFileUploadLimitSizeIn KB" value="x">	Sets the largest allowable document size that can be uploaded in the Documents following tab and Company Library to be x KiloBytes. Note that if you increase this limit, you must also increase the "maxRequestLength" setting on the "httpRuntime" element by a corresponding amount.
<add key="MaxNumberOfFilesUpload " value="x">	Sets the maximum number of files that can be uploaded at one time in the Documents following tab.

Child	Description
<add key="AllowUnsupportedBrowsersWithWarning" value="True">	This setting allows users to log in to Maximizer Web Access with unsupported web browsers, such as Apple Safari. Users are prompted with a warning message when they first log in to Maximizer Web Access with unsupported browsers. You can change the value to "False" to block users from accessing Maximizer Web Access with unsupported web browsers. Note that Maximizer Software recommends that users access Maximizer Web Access only with supported web browsers. You can access the current list of supported browsers on our website.
<add key= "AlternateRequiredCategory" value="">	By default, to access Partner Access or Customer Access, an entry must have a category of Partner or Customer, respectively. This setting specifies an alternative category. See 'AlternateRequiredCategory" on page 175
<add key="Context" value="MA_PARTNER">	The only difference between the default Partner Access site and the default Customer Access site is the value in the Context key. See 'Context" on page 174.
<add key= "CSCaseColumnSetup" value="user/Customer Service window column setup name" />	Specifies a specific column setup to be used for customer service cases. Only the first two columns of a column setup can be displayed (from left to right). The user specified in this setting is the creator of the column setup. This setting is optional.
<add key= "DefaultAddressBook" value="name" />	The name is the true Address Book name, rather than the "friendly" name, meaning it does not contain spaces or special characters.

Child	Description
<add key="Enabled" value="true">	By default, sites are disabled, and you must change the Enabled setting to "true" before you can use the sites. Setting Enabled to "false" instantly stops new visitors to the site from being allowed to log in, while allowing already-logged-in visitors to continue with their session.
<add key= "EnableOutlookIntegration" value="true" />	The value must be set to true to enable Microsoft Outlook integration with Maximizer Web Access. Note that this integration applies to Outlook 2003 and higher. See 'EnableWordIntegration/ EnableOutlookIntegration" on page 175
<add key= "EnableRecordLocking" value="true" />	Enables record locking for Address Book entries in Maximizer Web Access to prevent two or more people from modifying an entry at the same time. Change the value to "false" to disable record locking.
<add key= "EnableWordIntegration" value="true" />	The value must be set to true to enable Microsoft Word integration with Maximizer Web Access. Note that this integration applies to Word 2003 and higher. See 'EnableWordIntegration/ EnableOutlookIntegration" on page 175
<add key="JavaMaxRecToRetrieve" value="200">	The maximum number of records (Address Book entries, opportunities, customer service cases, notes, or documents) to retrieve in a list in Mobile Access. The default value is 200, but you can change this setting to display more or fewer entries in a list.
<add key="MaximizerMobileRedirect URL" value=""/>	Redirects mobile device users to the specified URL.

Child	Description
`<add key="MobileUserAgent" value=" "/>`	Lists the HTTP user agent values for mobile web browsers. Users who visit the site from these web browsers are automatically redirected to the Mobile Access URL specified in the MaximizerMobileRedirectURL key.
`<add key= NotificationCheckPeriod_ Seconds" value="x">`	The site will check for notifications every x seconds.
`<add key= "OpportunityColumnSetup" value="user/Opportunity window column setup name" />`	Specifies a specific column setup to be used for Opportunities in Mobile Access. Only the first two columns of a column setup can be displayed (from left to right). The user specified in this setting is the creator of the column setup. This setting is optional.
`<add key= "ShowAllPhoneNumberAndEma il"value="false" />`	This setting can be set to true and it is an optional setting. All phone numbers and email addresses are displayed in the appointment dialog box if this is set to true.
`<add key="SubContext" value= "name">`	The SubContext key is provided to implement more than one of a certain type (context) of site. See 'SubContext' on page 174.
`<add key="DaysToStartDisplayMainte nanceExpire" value="45" />`	Displays a reminder message on the Web Access login page about upcoming maintenance contract expiry the specified number of days prior to the maintenance expiry date. By default, this message is displayed 45 days prior to maintenance contract expiry.
`<add key="URLtoRenewMaintenance " value="https:// www.maximizer.com/url/ maxcrm/ maxcrm_maintenanceexpiry.ht ml" />`	The URL to use in the renewal link that is displayed in the maintenance expiry reminder message on the Web Access login page.

Context

The only difference between the default Partner Access site and the default Customer Access site is the value in the Context key. The two possible values for this key are MA_PARTNER and MA_CUSTOMER. This key determines the following settings:

- The default graphic for the main login page can be replaced with a custom graphic. For more information, see "Customizing the Graphic on the Site Main Page" on page 196.

- The groups controlling access to the administration-side of the sites (Customer Access Administration Users / Partner Access Administration Users and Customer Access Configuration Users / Partner Access Configuration Users)

- The default name of the site —"Partner Access" and "Customer Access". These names can be overridden with the Name setting under General Settings in the Configuration Manager.

- The default name of the type of user accessing the site. For example, when logged into Partner Access, Paul Samson could expect to see "Partner: Paul Samson" at the top of the screen. This name may be overridden with the Name setting under General Settings in the Configuration Manager.

SubContext

The SubContext key is provided to implement more than one of a certain type (context) of site. Application settings within an external site's Configuration Manager are stored in the Address Book (in the ADMN_Config table) referencing the site's Context and SubContext keys.

If you would like two Customer Access sites, each with their own application settings, you would give both instances a Context value of MA_CUSTOMER, but make sure each instance has a **different value** for SubContext. For example, give one a value of WINE and one a value of BEER if you were in the business of selling both products but wanted a different site for each customer base.

If, however, you were setting up the application across two servers in a load-balancing scenario, you would give each version of the application the **same value** for SubContext because you'd want each instance to share one set of application settings.

AddressBook

The AddressBook key must be set with the database name of the Address Book to use for this site. Note that this is not the friendly name for the Address Book set in Administrator to reference the Address Book but the actual SQL database name. It makes a specific

Address Book accessible for customers and partners and it must be set to enable the sites for access.

AlternateRequiredCategory

In Maximizer CRM, membership in a segment of the Address Book is specified using an Address Book entry's Category field. By default, Partner Access requires accessing visitors to have a Category of Partner, and Customer Access requires accessing visitors to have a Category of Customer. These defaults may be overwritten, however, by setting a different value in the AlternateRequiredCategory key. The company implementing Beer Customer Access and Wine Customer Access would add items for each site to the Category field in Maximizer, and then reference the required item's name in the AlternateRequiredCategory key for each site.

EnableWordIntegration/EnableOutlookIntegration

If the Word or Outlook integration is enabled, users can set up the integration directly from Maximizer Web Access. The setup involves downloading Active X controls, which may be disallowed on some networks. To disable Word or Outlook integration, change the value to "false".

Session State Storage Options <sessionState>

By default, the web access sites are configured to store session identifiers in a cookie and to use a timeout value of 20 minutes. Maximizer ships Mobile Access, Customer Access, and Partner Access with a sessionState element containing default values. You can modify the value of the "timeout" attribute to set a different timeout value, in minutes, for the site.

Maximum Request Length and Timeout Options <httpRuntime>

The maximum request length and timeout options on the "httpRuntime" element control the maximum size and duration of requests that will be accepted by the IIS server. These settings take precedence over any application settings related to upload file sizes, and must be increased by a corresponding amount when increasing the value of other settings like the maximum email attachment size, for example.

Option	Description
maxRequestLength	The value following maxRequestLength is the size, in kilobytes, of the largest email (including the size of all attachments) that can be saved. It is advisable to set this number to twice the desired maximum size, since temporary encoding can require a larger request size. For example, if your email system allows attachments up to 20 MB in size, set maxRequestLength to "40000" to allow the largest emails to be saved.
executionTimeout	The value following executionTimeout is the maximum number of seconds a request to save an email is allowed to take before an error occurs. The default is 10 minutes (600 seconds).

Web Access Users and Security Groups

The following sections describe how to configure users in Maximizer to access web access sites:

Web Access Security Groups

Every Address Book contains several web-access-related security groups, which are described in the following table. The MASTER user belongs to these groups by default, but you can add additional users to each group as required.

(i) The Company Announcements Authors security group does not apply to sites.

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

To be able to access Customer or Partner Access Administrator, a user must belong to at least one of the Administration Users or Configuration Users security groups for that site.

Security Group Name	Group ID	Enables group members to access the...
Customer Access Admin Users	C_ADM	News Manager section of Customer Access Administrator
Customer Access Config Users	C_CFG	Configuration Manager section of Customer Access Administrator
Maximizer Web Access Admin Users	EMPADM	Edit section of Maximizer Web Access, where the user can update external links
Partner Access Admin Users	P_ADM	News Manager section of Partner Access Administrator
Partner Access Config Users	P_CFG	Configuration Manager section of Partner Access Administrator

➤ **To add a user to a site security group**

1 In Administrator, select **File** > **Security Groups and Teams**.

2 Select the security group, and click **Properties**.
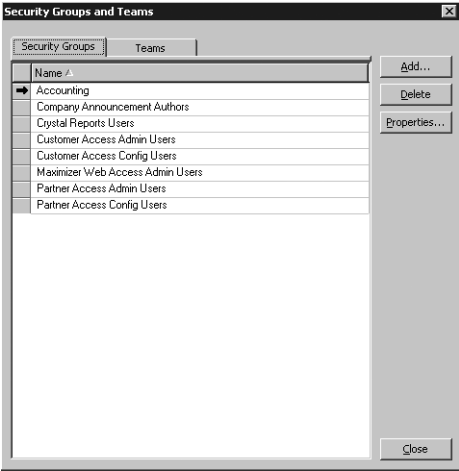
3 Set the appropriate Access Settings for the group members.
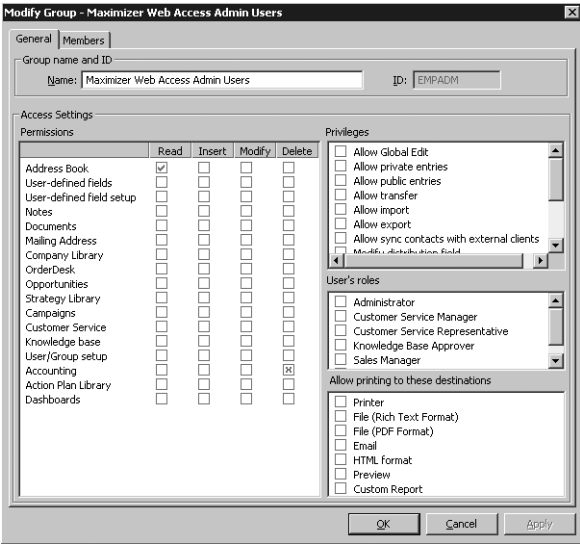
4 Click the **Members** tab.

5 Select a member to add to the group, and click **Add**. Repeat this process for all members to add to the group.

– or –

Click **Add All** to add all users to the group.
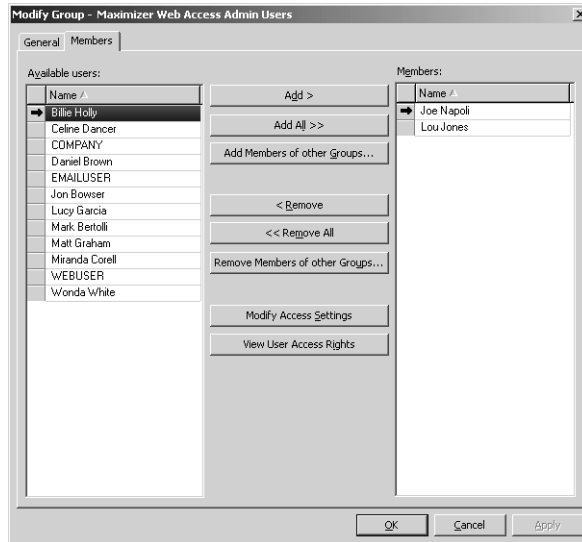
6 Click **OK** to close dialog boxes.

7 Repeat this procedure to add users to the other site security groups.

The selected users can now log into the site and access the functions available to their security group(s).

Web Access Users

Address Book users are enabled to access the web access sites by default. However, you can change user access to sites in the user's general properties if required. The "Web Access" access right in User Properties applies to all sites.

➤ **To set web access rights**

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

2 Select the Maximizer user, and click **Properties**.

3 In the **Module Login** section (bottom right), select **Web Access**.

4 From the drop-down list, select **Enabled** or **Disabled**.

Maximizer Web Access

Maximizer Web Access is functional automatically for all Address Books. Anybody with a user account for that Address Book can access it immediately, provided that the IIS Server is running and the "Web Access Login" right has not been disabled in the user's account. (For more information about the "Web Access Login" right, refer to "Web Access Users" on page 180.)

(i) *Maximizer Web Access settings follow the Maximizer Address Book settings in Administrator.*

On the IIS Server, you can access the sites from the Windows Start menu (Start > Programs > Maximizer CRM > Web Access). Other computers can access Maximizer Web Access with the following URL (unless it has been changed from the default):

> http://<IIS_Server_Name>/MaximizerWebAccess/Default.aspx

The following sections contain information specific to Maximizer Web Access:

• "Creating External Links in Maximizer Web Access" on page 181

• "Passing a Search String Parameter to the Login Page" on page 182

• "ActiveX Controls in Maximizer Web Access" on page 183

Creating External Links in Maximizer Web Access

To customize external links available on Maximizer Web Access, you must log into the site as the MASTER user, or as a user who belongs to the Maximizer Web Access Administration Users security group. (For information on this security group and how to add users to it, refer to "Web Access Security Groups" on page 177.)

➤ **To create external links on Maximizer Web Access**

1 Log into Maximizer Web Access as MASTER or as a user who belongs to the Maximizer Web Access Admin Users security group.

2 In the left navigation pane, hover your mouse over **Links**, and select **Edit** from the pop-up window.

🛈 In Maximizer Web Access, an external link must be a URL.

3 Add, edit, or remove any groups or links as desired.

4 Click **Close** to finish.

The External Links section of the Maximizer Web Access main page now reflect the changes you just made.

Passing a Search String Parameter to the Login Page

You can pass a search string parameter to the login page to display a search after logging in to Maximizer Web Access. The Address Book page is opened directly after successfully logging in—the My Work Day page and the Choose Address Book List dialog box is bypassed.

➤ **To add a search string parameter to the Login Page**

Append the Maximizer Web Access URL with the search string parameter. Note that the search string must be URL encoded. Following are some examples of the search string that you can use in the URL:

• **To retrieve a Favorite List from the Address Book**

http://[server name]/MaximizerWebAccess/ default.aspx?ss=FLIST%28[Favorite list key]%29

e.g., http://[server name]/MaximizerWebAccess/ default.aspx?ss=FLIST%288cFOcdn15sZIuP9HO7lucIrMRGl892Gp %29

The above search retrieves the "All entries in Escona" Favorite List in the Escona Tutorial Address Book.

• **To retrieve a particular company and its associated contacts from the Address Book**

http://[server name]/MaximizerWebAccess/
default.aspx?ss=EQ%28ClientID%2c[Identification]%29

Note that the [Identification] can be found in Properties of the
ABEntry > Identification.

e.g. http://[server name]/
MaximizerWebAccess?ss=EQ%28ClientID%2c37266200083%29

A simple way to build your search string is by copying the search
source code from Maximizer Web Access directly following a search
performed in the Address Book page.

➤ **To use source code from Maximizer Web Access**

1 Perform a search in Maximizer Web Access.

2 Immediately following the search, right-click in Internet
Explorer, and choose **View Source**.

3 Copy the first line of source code shown at the top of the
window prefixed by **http://[server name]/
MaximizerWebAccess?ss=** as shown above in the examples.

For more information on Maximizer search string language, refer to
"Search String Language" on page 336.

ActiveX Controls in Maximizer Web Access

Maximizer Web Access uses an ActiveX control for its integrations
with Microsoft Office products, including Microsoft Word, Microsoft
Excel, and Microsoft Outlook. These integrations are supported only
in Microsoft Internet Explorer.

If your web server configuration includes a firewall, you may need to
configure the firewall to allow the MaThinIEActiveX.ocx file to be
downloaded from the server. The MaThinIEActiveX.ocx file is an
ActiveX control used to run the Export to Excel command and to
install the Word and Outlook integrations in Maximizer Web Access.

Maximizer Web Access Administrator

Use Maximizer Web Access Administrator for the following tasks:

• Create and configure Address Books

• Manage users, sales/marketing teams, and security groups

• Manage Maximizer application settings

You can access Maximizer Web Access Administrator from Maximizer Web Access. You can also enter the Maximizer Web Access Administrator URL directly in a web browser. Only administrators can log in to Maximizer Web Access Administrator.

➤ **To log in to Maximizer Web Access Administrator**

1 Enter the Maximizer Web Access URL in a web browser:

By default, the URL is in the form: [server]/ MaximizerAdministrator.

– or –

From Maximizer Web Access, in the left pane, hover your mouse over Administration, and select Administrator from the pop-up.

2 If necessary, select the Address Book, enter the User ID and password of an administrator, and click **Log In**.

If you are access Maximizer Web Access Administrator from Maximizer Web Access, you are automatically logged in to the Address Book.

Mobile Access

As with the other sites, Mobile Access is installed automatically when you select the Maximizer Components for IIS option in the Server Components screen of the Maximizer installation. You must then enable the site as described in "Enabling Web Access Sites" on page 161. To access the site, enter the Mobile Access URL into your browser. By default, the Mobile Access URL is in the following form:

<Server Name>/MaximizerMobileAccess

e.g., http://mobile.maximizer.com/MaximizerMobileAccess

The following sections contain information specific to Mobile Access:

*   "Supported Browsers for Mobile Access" on page 185
*   "Configuring Automatic Redirection to Mobile Access" on page 185
*   "Limiting the Number of Entries Displayed in Mobile Access" on page 186
*   "Specifying the Mobile Access URL for Integration" on page 187

Supported Browsers for Mobile Access

The following web browsers are compatible with Mobile Access:

*   BlackBerry web browser
*   Apple Safari
*   Android web browser

Visit Maximizer's website at www.maximizer.com for the most up to date list of supported browsers.

To use the full functionality in Mobile Access, users may need to configure their browsers in the following ways:

*   Enable JavaScript.
*   Enable browser cookies.

Configuring Automatic Redirection to Mobile Access

You can set up automatic redirection from Maximizer Web Access to Mobile Access. When users access Maximizer Web Access from a mobile web browser associated with a specified mobile user agent, they are redirected to the Mobile Access URL.

➤ **To configure automatic redirection for mobile users**

1 Open the web.config file for Maximizer Web Access.

The file is stored in the following folder:

...\Program Files\Maximizer\Portals\Employee

2 In the **<appSettings>** section, locate the
MaximizerMobileRedirectURL key.

3 Next to **value**, enter the Mobile Access URL between the
quotation marks.

4 Locate the **MobileUserAgent** key.

5 If necessary, next to **value**, modify the list of user agents that are
redirected to Mobile Access.

The major mobile browsers are included in the list by default.

6 Save the changes to the web.config file.

Limiting the Number of Entries Displayed in Mobile Access

In the Mobile Access web.config file, you can specify the maximum
number of entries retrieved in lists. The default value is 200, but you
can change this setting to display more or fewer entries in a list. The
setting affects lists of Address Book entries, opportunities, customer
service cases, notes, and documents.

➤ **To change the maximum number of entries
displayed in lists**

1 Open the Mobile Access web.config file.

The file is stored in the following folder:

...\Program Files\Maximizer\Portals\Wireless

2 In the **<appSettings>** section, locate the
JavaMaxRecToRetrieve key.

3 Next to **value**, enter the maximum number of entries between
the quotation marks.

4 Save the changes to the web.config file.

Specifying the Mobile Access URL for Integration

You can specify the Mobile Access URL in Administrator to ensure the site is available for integration with other programs. As well, Maximizer users can access the Mobile Access URL from the Start menu.

You must specify the URL in every Address Book that uses Mobile Access.

Note that in previous versions of Maximizer, Mobile Access was named Wireless Access. The default name of the Mobile Access virtual directory and the default URL have also changed. If you are upgrading from a previous version of Maximizer and you keep the default virtual directory, you should update the Mobile Access URL specified in Administrator.

➤ **To specify the Mobile Access URL in Administrator**

1 Open Administrator and log in to the Address Book.

2 Select **File > Web Access**.

3 Next to **Mobile Access URL**, enter the URL.

By default the URL is in the form **http://[server]/ MaximizerMobileAccess**.

4 Click **OK**.
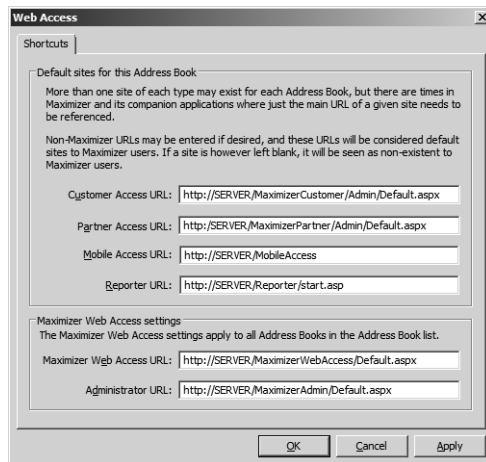
5 If necessary, repeat this procedure for any other Address Books that use Mobile Access.

Customer Access and Partner Access

Unlike Maximizer Web Access, you must enable Customer Access and Partner Access yourself.

➤ **To enable and configure Customer Access or Partner Access**

1 Add administrators to the appropriate **Security Groups** in Administrator, as described in "Adding Users to Site Security Groups" on page 189.

2 Ensure the **Web Access Login** right is enabled for any users who will access the site. (This right is enabled by default. For further information, refer to "Web Access Users" on page 180.)

3 Customize the **Web.config** file for the site, as described in "Application Settings for Web Access Sites" on page 169.

4 Customize the **graphic** on the main site page. Typically, you would replace it with your company's logo. For instructions on changing this graphic, refer to "Customizing the Graphic on the Site Main Page" on page 196.

5 Assign a **URL** to the site, as described in "Determining External Site URLs" on page 189.

6 Enable any site **configuration options** as desired, as described in "Configuring Site Options" on page 191.

7 Assign Contacts and/or Individuals the status of Customer or Partner in the **Category** field as part of the entry's basic information, as described in "Setting Up Business Partners and Customers" on page 192.

8 Give business partners and customers access using the **External Site PIN** merge field, as described in "Assigning Site Login PINs to Contacts and Individuals" on page 193.

Introduction to Customer and Partner Access Administrator

Consisting of both the News Manager and the Configuration Manager, Customer/Partner Access Administrator is part of each instance of a Partner or Customer Access site and provides a way for administrators to complete the following tasks:

• turn site sections on and off

• specify the properties of generated emails

• specify the name of the site

- add and modify news items

The options available in Customer and Partner Access are primarily the same.

The main page of Customer/Partner Access Administrator contains one or both of the following links, depending on which site security groups you belong to:

- **News Manager** – This link is available if you are a member of the Customer Access Administration Users or Partner Access Administration Users security group for the selected site type.

- **Configuration Manager** – This link is available if you are a member of the Customer Access Configuration Users or Partner Access Configuration Users security group for the selected site type.

You can also click the **View Customer/Partner Access Site** link in the upper-right corner of the screen to view the site itself, rather than the administrator.

For more specific information about Customer/Partner Access Administrator, open it and click **Help**.

Adding Users to Site Security Groups

The default configuration for Customer and Partner Access allows any Maximizer user to access Customer/Partner Access Administrator if they have rights to the section granted through Security Groups. Use the File > Security Groups and Teams dialog box in Administrator to control user access. Site security groups function in the same way as general Maximizer security groups. For more detailed information about site security groups, refer to "Web Access Security Groups" on page 177.

Determining External Site URLs

ⓘ You must configure the external sites before these URLs are enabled for the Address Book as described in the previous section.

Once you have configured the database and enabled both Partner Access and Customer Access for an Address Book, the sites are available for use through the URLs. Maximizer Web Access requires no additional configuration for use with an Address Book.

The default URLs are listed below, although you can change them as necessary. To determine the URL for a site, substitute your IIS Server name for [YourServerName].

- **Maximizer Web Access URL**

  http://[YourServerName]/MaximizerWebAccess/Default.aspx

- **Customer Access URL**

  http://[YourServerName]/MaximizerCustomer/Default.aspx

- • **Partner Access URL**

  http://[YourServerName]/MaximizerPartner/Default.aspx

- • **Customer Access Administrator**

  http://[YourServerName]/MaximizerCustomer/Admin/
  Default.aspx

- • **Partner Access Administrator**

  http://[YourServerName]/MaximizerPartner/Admin/Default.aspx

Accessing Sites from the Start Menu

To access your sites through the Maximizer CRM program Start menu, enter your URLs in the Sites dialog box in Administrator.

➤ **To set up access for the sites from the Windows Start menu**

1 In Administrator, select **File** > **Web Access**.

2 Enter the URLs for sites in the corresponding fields.

For example, for Partner Access Administrator, you would enter the following in the Partner Access URL field:

http://[YourServerName]/MaximizerPartner/Admin.aspx

Configuring Site Options

Use the Configuration Manager to set preferences for the sites such as Address Book, calendar of events, customer service, forgotten credentials recovery, general settings, help, knowledge base, leads, links, news, opportunities, personalization, and quick info.
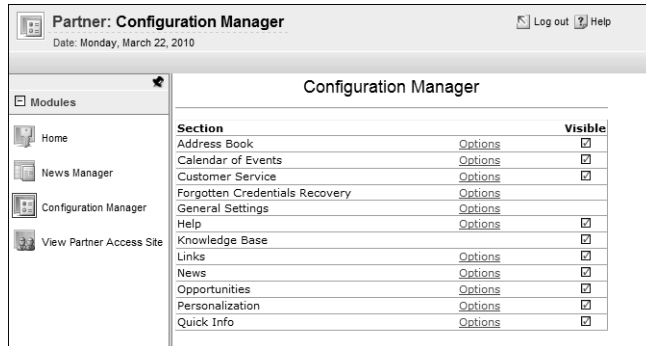
To access the Configuration Manager, you must be a member of the Customer or Partner Access Configuration Users security group. When you log into Customer/Partner Access Administrator, you will see a Configuration Manager link.

For information about each of the configuration options, open Customer/Partner Access Administrator and click **Help**.

Setting Up Business Partners and Customers

Start Maximizer and create Address Book entries for all the business partners and customers who need to access the sites. Each customer and partner must be set up as follows:

• Be a Contact or Individual in Maximizer

• Have an assigned email address in Maximizer

• Have "Partner" and "Customer" as the assigned value in the Category field

• Have at least one entry in the Partner Interests or Customer Interests user-defined field if you would like only certain new items to appear by default

Set up a test account for yourself so you can log into the site as a business customer and partner and confirm that everything is working correctly. Do this by creating an Individual record with your name, email address, and the selected values of Customer and Partner for the Category field on the entry's Details tab.

➤ **To enable Address Book entries to access the site**

1 In the Address Book page, select the Address Book entry for the Contact or Individual for whom to create a site login account.

2 Click the **Edit** icon in the Details tab to edit the entry.

3 Ensure that the Contact or Individual's correct email address is entered in the **Email address** field.

4 Click the button beside the **Category** field.

5 In the **Category** drop-down, select the checkbox beside either the **Customer** or **Partner** category.

If you select Customer, the Contact or Individual will be able to log into Customer Access.

If you select Partner, the Contact or Individual will be able to log into Partner Access.

6 Click **Save**.

7 Repeat this procedure to enable any other Address Book entries to access the sites.

After you have completed this procedure, you must provide the customer or partner with a site PIN, which enables them to register and log into the site.

Assigning Site Login PINs to Contacts and Individuals

You provide each business customer and partner with a PIN. The PIN works only once. Each customer or partner can set up only one web account. Site PINs and logins are shared for both Partner Access and Customer Access.

Login PINs are created by a Maximizer merge field called External Site PIN. The values of the External Site PIN merge field are generated when you do a merge to email or when you generate an automated activity for an automated campaign.

➤ **To send Site PINs by email**

1 Select the Address Book entry or entries for whom you want to generate a PIN.

2 Select **Actions > Write an Email**.

– or –

Right-click and select **Write an Email**.

The Send Email dialog box opens.

ⓘ You can generate PINs for a whole list of entries or just the current entry.

3 Choose how to use the current list, and click **OK**.

You can send the message to only the current entry, to all selected entries, or to all entries in the list.

4 If you are sending the email message to multiple Address Book entries, choose the **Separately** option from the **Send as** drop-down list.

ⓘ You can include any content in the merge document such as the URL for the site.

5 Enter a subject and the text of the email message.

You must include the **External Site PIN** merge field to send it to customers or partners, so they can create their login accounts.

6 To save the email template for re-use later, click the **Template** icon in the editing toolbar and save the email as a template.

7 Click **Send**.

An assigned PIN appears in each merged email that is sent.

➤ **To activate a site login PIN through an automated campaign activity**

ⓘ For more information on creating automated campaign templates, refer to the *Maximizer CRM User's Guide* and online help files.

• When setting up your automated campaign template, use the **External Site PIN** merge field in one of the automated campaign activities.

➤ **To open the main site for Partner Access or
Customer Access**

1 Set up a site PIN for yourself and activate a login.

2 Log into either Partner Access Administrator or Customer Access
Administrator.

3 Click the **View Partner/Customer Access Site** link to see the
main web access sites.

Activating a Login Account

The following procedure explains the steps for the business customer or partner to activate a login account with the provided PIN.

➤ **To activate a login account**

1 Open Customer Access or Partner Access using the provided URL.

2 At the Login screen, click the **Register now** link.

The registration page opens.

3 Enter your last name, email address, PIN, user ID, and password.

The Customer or Partner Access page displays.

Removing Web Access

To block access to Customer or Partner Access for a business customer or partner who currently has access, start Maximizer, locate the Address Book entry, and remove the Customer or Partner value from the Category field.

Retrieving a Forgotten Password

ⓘ For this feature to work, the Forgotten Credentials Recovery configuration must have been set up previously in Customer/Partner Access Administrator.

A customer or partner who forgets a password can use the "Forgotten Login Credentials" link to load a page that asks for an email address and last name or user ID. The customer or partner then receives the password by email.

Changing a Password

Partners or customers can change their password from inside the site any time they want (if you enable that feature through the Personalization link in Configuration Manager). All passwords are encrypted; your Maximizer users do not have access to passwords.

Advanced Site Configurations

This section describes the following additional site customizations:

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Customizing the Graphic on the Site Main Page

> ⓘ With the exception of the contents of the \CustomGraphics folder, you should not modify application files, including graphics.

You can replace the default graphic on the site main page with your own custom graphic. This procedure applies to all sites.

➤ **To customize the graphic on the site main page**

1 Create a graphic that is 280 pixels wide by 130 pixels in height and save it as **LoginCorporate.gif**.

2 Copy the graphic file to the appropriate folder:

...\Program Files\Maximizer\Portals\<site>\CustomGraphics\

The sections.xml File

The sections.xml file contains information on modules that are available to users in Maximizer Web Access and the other web access sites such as Partner Access. By editing the sections.xml file, you can add, disable, or change the default order that the modules appear.

The sections.xml file is located on the machine where the Maximizer Components for IIS are installed, at the following path:

\\Program Files\Maximizer\Portals\<site>\Config\sections.xml

Disabling Modules in Sites

You can disable specific modules in the web access sites. The sections.xml file determines what modules are displayed in the site.

The easiest way to disable a module is to comment out the shortcut element for that module in the sections.xml file. The shortcut element will remain in the file, but it will be enclosed between XML comment tags and ignored by Maximizer.

➤ **To disable a module in a site**

(i) Always back up the sections.xml file before making any changes.

1 Open the site's **sections.xml** file in a text editor such as Notepad.

2 Locate the **shortcut** element containing the module.

The name of the module, as it appears in Maximizer, is displayed between the title tags in the shortcut element.

3 Add an opening comment tag, **<!--**, before the shortcut opening tag, **<shortcut>**.

4 Add a closing comment tag, **--!>**, after the shortcut closing tag, **</shortcut>**.

5 Save the file.

The following example shows comment tags around the opportunities shortcut element. In this example, the opportunities module would be disabled on the site.

```
<!--
    <shortcuts>
        <id>opp</id>
        <title>Opportunities</title>
        <image>opportunity</image>
        <module_id>0<module_id>
        <url>/Content/Opportunities.aspx</url>
```

```
                    <external>No</external>
                    <has_grid>Yes</has_grid>
            </shortcuts>
    -->
```

Changing the Order of Modules in the Icon Bar

In Maximizer Web Access, you can define the icons and the default order that they appear in the icon bar by modifying the sections.xml file. Users will only see the icons for the modules that they have the rights to view.

The easiest way of doing this is copying the module section of the module you want to move (the code surrounded by the <shortcut> tags) and pasting it between other module sections.

If the order of the icons has been changed by a user in the Icon Bar Properties dialog box (in Maximizer Web Access, from the top right corner, select preferences), the new order is saved in the ADMN_Config table where the TaskCode = the user's ID and the KeyCode = IconBarButtonOrder. If modules are hidden in the Icon Bar Properties, references to the hidden modules are saved in the ADMN_Config table where the TaskCode = the user's ID and the KeyCode = IconBarButtonHide.

The followingWindowSets.xml File

The followingWindowSets.xml file contains information on following windows that are available to users in Maximizer Web Access and the other web access sites such as Partner Access. By editing the followingWindowSets.xml file, you can change the name (title) of a following window or disable a following window entirely.

The followingWindowSets.xml file is located on the computer where the Maximizer Components for IIS are installed, at the following path:

\\Maximizer\Portals\<site>\Config\followingWindowSets.xml

Renaming or Disabling Following Windows in Sites

You can rename or disable specific following windows in the web access sites.

➤ **To rename or disable a following window**

1 Open the site's **followingWindowSets.xml** file in a text editor such as Notepad.

2 Locate the **following window** element.

The name of the following window, as it appears in Maximizer, is displayed between the title tag.

3 Adjust the tags as necessary to rename or disable a following window, as follows:

<title> - contains the **name** of the following window

<url> - contains the **ASPX file** that is displayed when a user selects this following window

<visible> - the value of **yes** is specified to display the following window and the value **no** is specified to disable or hide the following window

4 Save the file.

In the following example, the Contacts following window is renamed to People.

```
<tab id="contacts">
    <title>People</title>
    <url>fwContacts.aspx</url>
    <visible>Yes</visible>
</tab>
```

Displaying Custom System Messages

You can create custom system messages that are broadcast to all Maximizer Web Access users. System messages display across the top of web access pages. They can include two lines of text and a hyperlink. The properties of a message are specified in the SystemMessages.xml file. The file specifies the content of the message, the appearance of the message, and the start and end date/time that the message is displayed.

➤ **To display a custom system message**

1 Open the site's **SystemMessages.xml** file in a text editor such as Notepad.

The file is located on the Maximizer server at the following path:

C:\Program Files\Maximizer\Portals\Employee\Config\ SystemMessages.xml

2 Use the XML tags in the bottom part of the SystemMessages.xml file to specify the properties of the system message. The top part of the file explains the role of each set of tags. The bottom part of the file contains the actual tags that are used.

For descriptions and examples of each element, see "Elements in SystemMessages.xml File" and "Example SystemMessages.xml File" below.

3 Between the **Enabled** tags, replace **False** with **True**. The line in the file should be **<Enabled>True</Enabled>**.

4 Save the file.

Elements in SystemMessages.xml File

The SystemMessages.xml file contains one <SystemMessages> element, which in turn contains one <SystemMessage> element. This element determines the properties of the message.

The following table describes each of the sub-elements in the <SystemMessage> element.

Element	Description
<HeaderLine1>	Bolded text at the beginning of the first line
<TextLine1>	Plain text placed at the end of the first line.
<TextLine2>	Plain text placed at the beginning of the second line.
<Hyperlink Text>	Text for a hyperlink placed at the end of the second line.
<HyperlinkUrl>	The URL for the hyperlink.
<Background Color1>	The background color of the message.
<StartDate>	The start date and time in the format yyyy-mm-dd hh:mm. If specified, the message is displayed only after this date and time.
<EndDate>	The end date and time in the format yyyy-mm-dd hh:mm. If specified, the message is displayed only before this date and time.
<Enabled>	True means the system message will display if at least one text element has a value and the current date/time is within the start and end date/time values. False means the system message will not display regardless of the other elements.

Example SystemMessages.xml File

The following example shows the content of the <SystemMessages> element:

```
<SystemMessages>

  <SystemMessage>

    <HeaderLine1>Notice</HeaderLine1>

    <TextLine1>Maintenance to phone lines</TextLine1>

    <TextLine2>The phone lines will be out of service
    between 4:00 and 5:00 pm this evening.</TextLine2>

    <HyperlinkText>More info.</HyperlinkText>

    <HyperlinkUrl>http://Server/Maintenance</HyperlinkUrl>

    <BackgroundColor1>Yellow</BackgroundColor1>

    <StartDate>2011-11-10</StartDate>

    <ExpiryDate>2011-11-10 17:30</ExpiryDate>

    <Enabled>True</Enabled>

  </SystemMessage>

</SystemMessages>
```

The example displays a message alerting Maximizer Web Access users that phone lines are out of service. The message is displayed only on the specified day until 5:30 pm.

Adding Custom Actions to the CustomActions.xml File

The Address Book, Customer Service, and Opportunities pages, along with the Details tab in the Address Book following pane and the read-only Address Book dialog in Maximizer Web Access each contain an Actions menu, and you can add custom action commands to those menus. Clicking on a custom action in the menu will open a custom dialog box created by you, in which you can display information about the current record, selected records, or all records in the list. You can add as many custom actions as you want to the Actions menu.

To enable Maximizer Web Access to register and recognize your custom actions, you must add information to the CustomActions.xml file. The file identifes which custom actions are enabled and defines specifics about the dialog box. The file is located in the <portal_root>\Config\ folder.

The file contains four sections, one for each page (Address Book, Campaigns, Customer Service, and Opportunities). Each section contains the following XML elements.

Element Tag	Description
<id>	Identifies which page the custom action is for (ab = Address Book, cam = Campaigns, cs = Customer Service, and opp = Opportunities). Do not change the value of this element.
<CustomAction>	Defines what page should be called when a user clicks a the custom action in the Actions menu.

The following table describes each of the sub-elements in the <CustomAction> element.

Element Tag	Description
<ID>	Unique ID of the menu command. Can be any value, but must be unique within the <Page> element.
<Title>	Menu command title as it will appear in the Actions menu.
<Url>	Name of the file that will appear in the pop-up dialog box after the command is called by a user. This file must reside in <portal_root>\Dialogs\CustomDialogs\.
<MergeURL>	Custom URL containing a merge field from Maximizer.
<Width>	Width of the pop-up dialog box, in pixels.
<Height>	Height of the pop-up dialog box, in pixels.
<DisabledIfNo Records>	Defines whether the custom Action menu command will be disabled when there are no entries displayed in the grid on the page. Must have a Yes or No value.
<Resizable>	Determines if the custom window can be resized. Must have a Yes or No value.
<Scrollable>	Determines if the custom window can be scrolled. Must have a Yes or No value.
<ShowLocation>	Determines if the custom action URL should be opened in a new browser window/tab or not. Must have a No or blank value. If the value is No, the URL will be opened in a pop-up window. If the value is blank, the URL will be opened in a separate browser window or tab.

Example of the CustomActions.xml File

```
<?xml version="1.0" encoding="utf-8" ?>

    <!--

    ConfigActions.xml
```

```
                    ===================

                    This file manages custom actions.

                    Sample:

                    =======

                        <CustomAction>

                            <ID>CA_id</ID>              : Must be unique

                            <Title>Custom Action...</Title>: As it will
          appear in the Actions menu

                            <Url>c.aspx</Url>          : Must exist in
          <EmployeePortalRoot>\Dialogs\CustomDialogs\ folder

                            <MergeUrl>No</MergeUrl> : Must be Yes or No

                            <Width>800</Width>         : Must be a number
          (width in pixels)

                            <Height>200</Height>   : Must be a number (height
          in pixels)

                            <DisabledIfNoRecords>Yes</DisabledIfNoRecords>:
          Must be Yes or No

                            <Resizable>No</Resizable>: Must be Yes or No

                            <Scrollable>No</Scrollable>: Must be Yes or No

                            <ShowLocation>No</ShowLocation>: Must be No or
          blank

                        </CustomAction>
```

Creating Custom Links to External Websites

You can create custom links in the CustomActions.xml file to external websites that include merge fields from Maximizer. The custom URLs are then accessible from the Actions menu in Maximizer Web Access. This allows a user to link to a web page based on the contents of the current record. For example, you could include the "city" merge field as part of the external link URL and based on the city contained in the record, information related to the associated city would be shown in the web page.

Note the URLs must be encoded. Different types of encryption are supported for passing parameters to URLs.

To create a custom link with a merge field, add the custom link information to the CustomActions.xml file. See the following example of a CustomActions.xml file for more information.

Example of an Integration with a Wikipedia Search

```
                    <CustomAction>

                        <ID>CA_id</ID>

                        <Title> Wikipedia...</Title>
```

```
    <Url>http://en.wikipedia.org/wiki/
[EncodingStartSpaceAsUnderscore] [C.CompanyName]
[EncodingEnd]</Url>
    <MergeUrl>yes</MergeUrl>
    <Width>700</Width>
    <Height>400</Height>
    <DisabledIfNoRecords>No</DisabledIfNoRecords>
    <Resizable>Yes</Resizable>
    <Scrollable>Yes</Scrollable>
</CustomAction>
```

Example of an Integration with a Google Search

```
<CustomAction>
    <ID>CA_id2</ID>
    <Title>Google Search...</Title>
    <Url>http://www.google.ca/
search?q=[EncodingStartSpaceAsPlus][C.CompanyName][EncodingE
nd]</Url>
    <MergeUrl>Yes</MergeUrl>
    <Width>700</Width>
    <Height>400</Height>
    <DisabledIfNoRecords>No</DisabledIfNoRecords>
    <Resizable>Yes</Resizable>
    <Scrollable>Yes</Scrollable>
</CustomAction>
```

Example of an Integration with Google Maps

```
<CustomAction>
    <ID>CA_id3</ID>
    <Title>Google Map...</Title>
    <Url>http://maps.google.ca/
maps?q=[EncodingStartSpaceAsPlus][C.AddressLine1]%2c[C.City]
%2c[C.StateProvince][EncodingEnd]</Url>
    <MergeUrl>Yes</MergeUrl>
    <Width>1100</Width>
    <Height>800</Height>
    <DisabledIfNoRecords>Yes</DisabledIfNoRecords>
    <Resizable>Yes</Resizable>
    <Scrollable>Yes</Scrollable>
</CustomAction>
```

Specifying the Address Book on the Site Login Screen

There are several methods of controlling which Address Books are available through the login screens of Maximizer Web Access and Mobile Access:

- Users enter the site URL, and the resulting login page displays a drop-down list of available Address Books
- Users enter the site URL, appended by the "ab" parameter, and the resulting login page displays the specified Address Book name as a static field
- You enter a value in the AddressBook key of the site's Web.config file, and when users enter the site URL, the resulting login page displays the specified Address Book name as a static field

Displaying a Drop-down List of Available Address Books

You can provide access to any Address Book through Maximizer Web Access or Mobile Access. By default, when a user enters the site URL in a browser, the resulting login screen includes a drop-down list of available Address Books.

Specifying the Address Book in the URL

You can also specify the Address Book in the URL. By specifying the new parameter called "ab" in the URL, you can provide a direct shortcut to the Address Book in Maximizer Web Access or Mobile Access.

- **Maximizer Web Access:** http://SERVERNAME/ MaximizerWebAccess/default.aspx?ab=EsconaTutorial
- **Mobile Access:** http://SERVERNAME/MobileAccess/ default.aspx?ab=EsconaTutorial

The value of the ab parameter must be the Address Book's SQL database name, not the user-definable Address Book name set in Administrator (File > Preferences > System Options tab).

Enabling Access to a Single Address Book Only

You can also restrict an instance of Maximizer Web Access or Mobile Access to be able to access a single Address Book only, rather than showing the Address Book drop-down list or specifying the Address Book in the URL. Specify the "AddressBook" property in the appSettings section of the site's Web.config file, as shown in the following example:

```
<add key="AddressBook" value="EsconaTutorial" />
```

The value of the AddressBook key must be the Address Book's SQL database name, not the user-definable Address Book name set in Administrator (File > Preferences > System Options tab).

If the value of the AddressBook key does not correspond to a valid Address Book, the login page displays the Address Book list.

Similarly, you can display a default Address Book. This is also specified in the appSettings section of the site's Web.config file, as shown in the following example:

```
<add key="DefaultAddressBook" value="EsconaTutorial" />
```

Globalization of Sites

The Globalization element in the web.config file enables you to change the site's regional display settings such as numbers and dates. The Globalization element is optional. If it or any of its attributes are not added to the Web.config file, US English is used by default.

In Maximizer Web Access, users can also choose a locale in the user preferences. The user's locale setting takes precedence over the globalization element in the web.config file.

To change the globalization settings of a site, you must add the section below as a child to the system.web element

```
<globalization
    requestEncoding="utf-8"
    responseEncoding="utf-8"
    culture="en-US"
    uiCulture="en"
/>
```

The regional settings are defined in the **culture** and **uiCulture** attributes. To use display settings other than US English, replace the values of the culture and uiCulture attributes in the Globalization element. The following list includes some of the possible values:

Country, Language	culture	uiCulture
United States, English	en-US	en
Britain, English	en-GB	en
Canada, English	en-CA	en
France, French	fr-FR	fr
Canada, French	fr-CA	fr
Belgium, French	fr-BE	fr
Germany, German	de-DE	de
China, Chinese	zh-CN	zh

The country codes are defined in the ISO 3166 standard, which is available at the following URL:

http://www.iso.org/iso/country_codes.htm

The concept of combining these country codes with language is defined in RFC 3066, which is available at the following URL:

http://www.faqs.org/rfcs/rfc3066.html

Configuring Multiple IIS Servers to Connect to a Single Maximizer CRM Server

You can use the procedure described below to configure multiple Address Books on multiple IIS servers to connect to a single Maximizer CRM server.

➤ **To configure multiple IIS servers to connect to a single Maximizer CRM Server**

1 On each IIS server, install **Maximizer Components for Microsoft IIS** from the Maximizer CRM Server disc and during setup, select your Maximizer CRM Server machine.

2 On each IIS server, change the AddressBook key of the Web.config file for Customer and Partner Access to point to the appropriate Address Book.

Moving a Site

Web access sites are ASP.NET web applications, which implies a level of portability. If you choose, you can rename the virtual folder holding the application and therefore its URL. You may even change the physical path of the application by copying the application someplace else on the IIS machine's hard drive. When doing this, be sure to move the **entire** folder.

Installing Sites to Non-Default Folders

The Maximizer installation creates an XML file called PortalLocations.xml (unless the file already exists on the machine, in which case it does not overwrite the existing file). The PortalLocations.xml file is located in the folder where the sites are installed. The default site installation folder is ...\Program Files\Maximizer\Portals. There is only one PortalLocations.xml file for each Maximizer CRM Server.

The PortalLocations.xml file describes the folder location of each site. If you install any sites to a non-default location, you can optionally add their location to the PortalLocations.xml file. Any sites identified in this file will be updated by the Maximizer installation for any

upgrades or updates such as service releases. Any sites installed to non-default locations will not be updated unless they are added to the PortalLocations.xml file.

By default, the PortalLocations.xml file contains location information for the four default sites.

```
<Portals>

    <Portal ID="DefCustomerPortal">

        <Location>C:\Program
Files\Maximizer\Portals\Customer</Location>

        <Context>MA_CUSTOMER</Context>

        <Description>Maximizer Default Customer Portal</
Description>

    </Portal>

    <Portal ID="DefPartnerPortal">

        <Location>C:\Program
Files\Maximizer\Portals\Partner</Location>

        <Context>MA_PARTNER</Context>

        <Description>Maximizer Default Partner Portal</
Description>

    </Portal>

    <Portal ID="DefEmployeePortal">

        <Location>C:\Program
Files\Maximizer\Portals\Employee</Location>

        <Context>MA_EMPLOYEE</Context>

        <Description>Maximizer Default Employee Portal</
Description>

    </Portal>

    <Portal ID="DefWirelessPortal">

        <Location>C:\Program
Files\Maximizer\Portals\Wireless</Location>

        <Context>MA_WIRELESS</Context>

        <Description>Maximizer Default Wireless Portal</
Description>

    </Portal>

</Portals>
```

The XML file contains a site ID, location, context, and description for each site. These elements are described in the following table.

Element	Description
<Site/Portal>	This element has an ID attribute, which must be unique for each site. This ID will not be displayed in the site itself.
<Location>	Installation location of the site.
<Context>	Identifies the type of site. Must be one of the following values: • MA_Employee • MA_Customer • MA_Partner • MA_Wireless
<Description>	Description of the site.

Setting Up Multiple Customer or Partner Sites

To this point, the chapter has explained how to set up a single Partner Access site and a single Customer Access site. However, you can create additional Partner and Customer Access sites for one or more Address Books. For example, you might want to create a Media Site for your Address Book, or you might want to create a Customer or Partner Access site for a second Address Book.

The major steps involved in creating additional Partner or Customer Access sites is as follows:

- Assign a Category field value to Address Book entries. The Category field of an Address Book entry controls which sites(s) an Address Book entry can access. Therefore, you must assign a Category field value to all Address Book entries that should be granted access to the new site. You can create a new field value, or you can assign one of the existing field values.

- Create the new site. The process of creating a new site is very simple. Essentially, you duplicate an existing Customer or Partner Access site folder, rename it, and edit the Web.config file for the new site.

- Configure the new site. At this point, the site is functional. The only remaining task is to configure the new site using Customer/Partner Access Administrator and provide access PINs to those Individuals and Contacts who you want to be able to log into it.

Each of these procedures are described in detail below.

➤ **To create a new Category field value**

1 Run Maximizer and log into the Address Book.

2 Open an Address Book entry to grant access to the new site.

3 If the Address Book entry is in View mode, click **Edit** to switch to Edit mode.

4 Click the ellipsis button beside the **Category** field.

5 If a new field value is required, click **New Value** and add an item to the list.

6 Select the checkbox beside the field value that enables the Address Book entry to access the new site, and click **OK**.

For example, if you are creating a Media Access site, you would probably select Media as the required Category field value. If

you were creating an Investor Access site, you would create a
new Category field value of Investor.
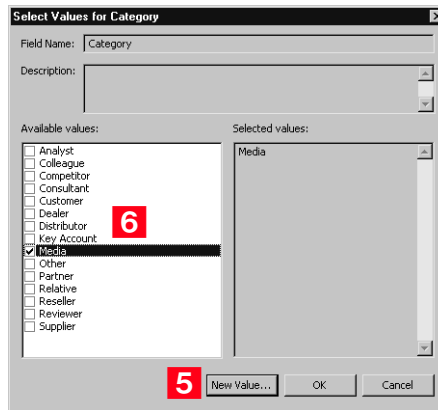
7 Repeat this process to assign the Category to any other Address
Book entries which should have access to the new site.

➤ **To create the new site**

1 Open Windows Explorer, and navigate to the sites directory. (In a
default installation, this folder is located at
C:\Program Files\Maximizer\Portals.)

2 Create a copy of the **Customer** or **Partner** folder inside the
Portals folder.

Make sure you copy the entire Customer or Partner folder,
including all subfolders and files.

3 Rename the folder with the new site name.

4 Right-click the new folder, and select **Properties** from the shortcut menu.

5 Select the **Web Sharing** tab.
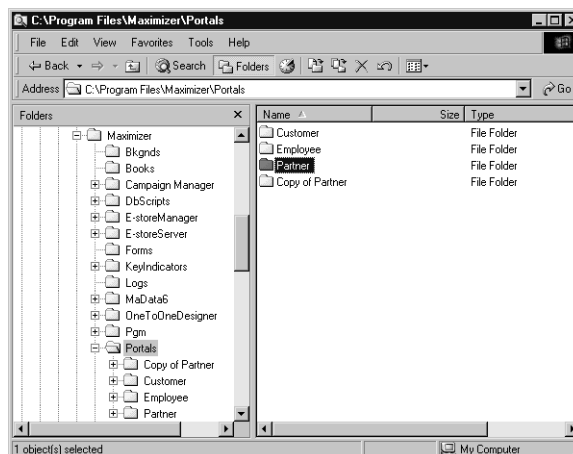
ⓘ Do not use spaces in the virtual folder name.

6 Select **Default Web Site** from the **Share on** drop-down list, and select the **Share this folder** option.
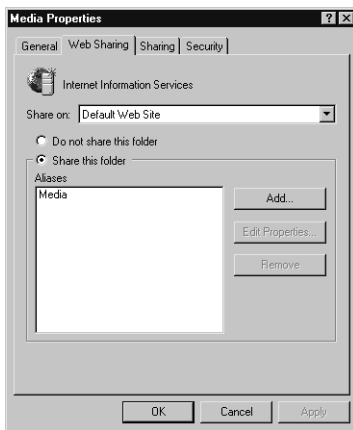
The Edit Alias dialog box opens.

7 Enter an alternate **Alias** if desired, select the **Read** access permission, select the **Scripts** application permissions, and click **OK**.
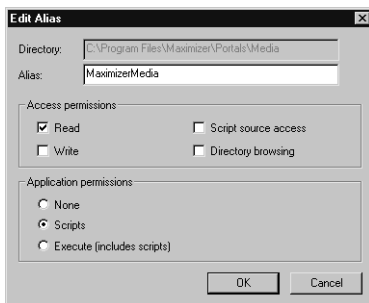
8 Click **OK** to close the Properties dialog box.

9 In the new folder, select the **Web.config** file and open it in a text editor, such as Windows Notepad.
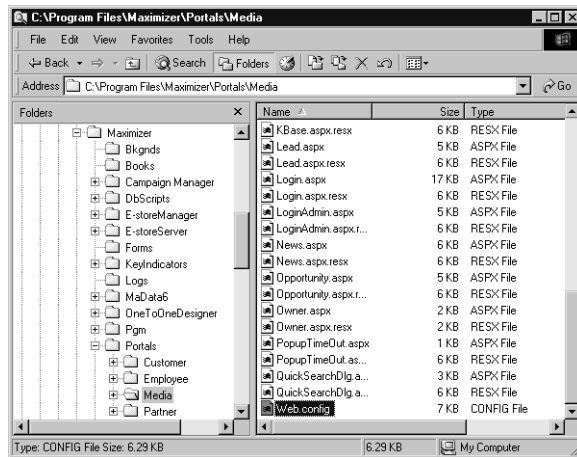
10 Assign a meaningful value to the **SubContext** key.

The sites have a Context value and a SubContext value. The Context value is MA_PARTNER for a Partner Access site and MA_CUSTOMER for a Customer Access site. The Context value for the new site is already defined because you copied it from an existing site, so you just need to assign a SubContext value, which differentiates this new site from the original.

For example, if you are creating a Media site, you would probably choose to assign a SubContext value of "Media".

11 Enter the Category field value (from the previous procedure) as the **AlternateRequiredCategory** value.

If you used the "Media" Category field value, you would assign "Media" as the AlternateRequiredCategory value.

12 Save the Web.config file.

Do not change the name or location of this file.

➤ **To configure the new site**

1 Open a web browser and enter the URL of the new site. The default site URL is

http://<web_server_name>/<site_alias>/Admin.aspx

In the case of the example site, the URL is http://test-server/ MaximizerMedia/Admin.aspx.

Customer/Partner Access Administrator opens. The login page appears as the Partner Access Administrator or Customer Access Administrator login page, depending on which site you copied the new one from.

2 Log into Customer /Partner Access Administrator.

3 Configure the site as desired. Refer to the previous sections of this chapter for more information.

Include setting the site name as part of the configuration. You can set the name in the General Settings page of the Configuration Manager.

4 Assign a site PIN to all Individuals and Contacts who should have site access, as described in "Assigning Site Login PINs to Contacts and Individuals" on page 193.

Creating a Custom Case Wizard for Partner Access

Partner Access includes a wizard for creating new customer service cases. It is available from the Edit > Create a Customer Service Case menu item on the Customer Service page of the site. You can also create your own custom customer service case wizards and make them accessible from the Edit menu.

Create your own case wizards by describing them in an XML file, naming the file CustomCSCaseWizards.xml, and placing it in the Config folder of Partner Access. The XML elements that your CustomCSCaseWizards.xml file may contain are described below, along with a sample XML file. When you create multiple case wizards, they must all be described in the same XML file, with each wizard set apart by the <CSCaseWizard> element.

Note that if the XML is not well-formed, the custom wizards will not appear in the Edit menu, and no error messages will appear.

➤ **To create a custom customer service case wizard**

1 Create an xml file describing the contents of each screen of the wizard.

For more information, refer to the custom wizard example and the table describing the XML tags, which are provided in this section.

2 Name the xml file **CustomCSCaseWizards.xml**.

3 Place the xml file in the following folder:

...\Maximizer\Portals\Partner\Config

This folder is typically located in the C:\Program FIles\ folder.

Custom Wizard Example

Below are the contents of an example CustomCSCaseWizards.xml file.

```xml
<CustomCSCaseWizards>
<CSCaseWizard>
<Id>SuggestionWizard</Id>
<MenuOption>Enter a Suggestion</MenuOption>
<HeaderStep1>Categorize your suggestion</HeaderStep1>

    <ShowOrigin>true</ShowOrigin>
    <OriginPrompt>Suggestion origin</OriginPrompt>
    <DefaultOrigin>Website</DefaultOrigin>
    <MandatoryOrigin>true</MandatoryOrigin>

    <ShowType>true</ShowType>
    <TypePrompt>Suggestion type</TypePrompt>
    <DefaultType>Suggestion</DefaultType>
    <MandatoryType>true</MandatoryType>

    <ShowProduct>true</ShowProduct>
    <ProductPrompt>Product or service</ProductPrompt>
    <DefaultProduct>Accessories</DefaultProduct>
    <MandatoryProduct>true</MandatoryProduct>

    <ShowCategory>true</ShowCategory>
    <CategoryPrompt>Category</CategoryPrompt>
```

```
    <DefaultCategory>Other</DefaultCategory>
    <MandatoryCategory>true</MandatoryCategory>

    <ShowPriority>true</ShowPriority>
    <PriorityPrompt>Priority</PriorityPrompt>
    <DefaultPriority>Medium</DefaultPriority>

    <ShowSeverity>true</ShowSeverity>
    <SeverityPrompt>Severity</SeverityPrompt>
    <DefaultSeverity>Medium</DefaultSeverity>

    <DefaultAssignedTo>JNAPOLI</DefaultAssignedTo>
    <DefaultOwner>JNAPOLI</DefaultOwner>
    <DefaultQueue>Standard</DefaultQueue>

    <udfPrompt1>Send acknowledgement email</udfPrompt1>
    <udfTypeId1>107</udfTypeId1>
    <MandatoryUdf1>true</MandatoryUdf1>
    <DefaultUdf1>No</DefaultUdf1>

<HeaderStep2>Provide details</HeaderStep2>

    <SubjectPrompt>Short description</SubjectPrompt>
    <DescriptionPrompt1>Details</DescriptionPrompt1>
    <DescriptionPrompt2>More details</DescriptionPrompt2>

<HeaderStep3>Review your suggestion</HeaderStep3>
</CSCaseWizard>
<CSCaseWizard>...(Second custom wizard)...</CSCaseWizard>
<CSCaseWizard>...(Third custom wizard)...</CSCaseWizard>
</CustomCSCaseWizards>
```

The first screen of the example custom wizard displays the following fields: Suggestion origin, Suggestion type, Product or service,

Category, Priority, Severity, and Send acknowledgement email. All of the fields have default values.

The second screen of the example custom wizard contains three fields: Short description, Details, and More details.

The third screen in the example custom wizard displays a summary of the values entered in the previous screens.
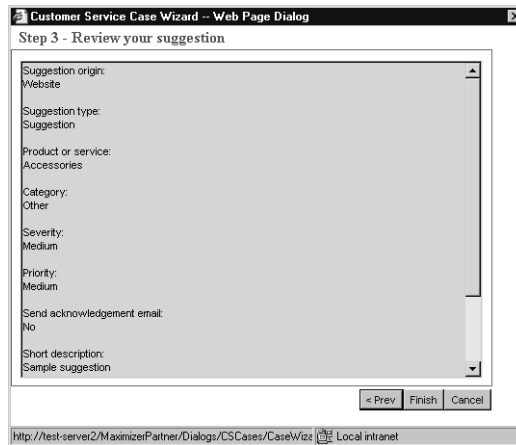
XML Tags in the CustomCSCaseWizards.xml File

The following table lists each of the XML tags in the CustomCSCaseWizards.xml file, as well as their data type and a description.

All XML tags are case-sensitive.

XML Tag	Data Type	Description
CSCaseWizard		Contains all other tags describing a single wizard. Each custom case wizard must be set apart by its own set of CSCaseWizard tags inside the file.
Id	string	Mandatory. Unique identification of the wizard.
MenuOption	string	Mandatory. Menu item text as it will appear in the Edit menu of the Customer Service page.
HeaderStep1	string	Header text that appears at the top of each page of the wizard. Header text is automatically prefixed by "Step 1 - ", "Step 2 - ", or "Step 3 - ". If these tags are not included, the wizard will use the default header text, as it appears in the default Customer Service Case Wizard.
HeaderStep2	string	
HeaderStep3	string	
ShowOrigin	boolean	Specifies whether to display the Case origin, Case type, Products/Services, Categories, Priority, and Severity fields:
ShowType	boolean	
ShowProduct	boolean	• If "true", the field(s) appear on the first page of the wizard.
ShowCategory	boolean	
ShowPriority	boolean	• If "false", the field(s) do not appear in the wizard.
ShowSeverity	boolean	• If you omit the XML tag, all of these fields, except "Origin" appear in the wizard by default.

XML Tag	Data Type	Description
DefaultOrigin	string	Specifies the default value of the Case origin, Case type, Products/ Services, Categories, Priority, and Severity fields. The value of the XML element must be a valid value of the related field in the Address Book. The values of the DefaultAssignedTo, DefaultOwner, and DefaultQueue fields are not visible in the wizard because there is no related "Show..." XML tag. Therefore, site users cannot change the value of these fields through the wizard. ⓘ The DefaultAssignedTo tag does not check whether the specified user has the "Customer Service Representative" or "Customer Service Manager" access right. It is up to you to verify that the user identified in the DefaultAssignedTo tag has the appropriate access rights.
DefaultType	string	
DefaultProduct	string	
DefaultCategory	string	
DefaultPriority	string	
DefaultSeverity	string	
DefaultAssignedTo	string	
DefaultOwner	string	
DefaultQueue	string	
OriginPrompt	string	Specifies the text that appears beside the field in the wizard. If you omit an XML tag, the wizard uses the default prompt, as it appears in the "Create a Customer Service Case" wizard.
TypePrompt	string	
ProductPrompt	string	
CategoryPrompt	string	
PriorityPrompt	string	
SeverityPrompt	string	
SubjectPrompt	string	
DescriptionPrompt1	string	Specifies the text that appears above the last two fields on the second page of the wizard. If you omit an XML tag, the wizard uses the default prompt, as it appears in the "Create a Customer Service Case" wizard.
DescriptionPrompt2	string	

XML Tag	Data Type	Description
MandatoryOrigin	boolean	Specifies whether site user must provide a value for the Case origin, Case type, Products/ Services, or Categories field in the wizard:
MandatoryType	boolean	
MandatoryProduct	boolean	
MandatoryCategory	boolean	• If "true", the site user must select a value for the field before proceeding to the next page in the wizard. • If "false", the site user may leave the field blank. • If you omit the XML tag, the fields are not mandatory.
udfTypeId1 ... udfTypeId7	integer	Specifies the user-defined field to include on the first page of the wizard. Specify the Type_Id of the user-defined field as the value of this XML tag. You can include up to seven user-defined fields. The wizard can display only table user-defined fields defined for customer service cases.
udfPrompt1 ... udfPrompt7	string	Specifies the text that appears beside each user-defined field included in the wizard.
MandatoryUdf1 ... MandatoryUdf7	boolean	Specifies whether the site user must provide a value for each user-defined field included in the wizard.
DefaultUdf1 ... DefaultUdf7	string	Specifies the default value of each user-defined field included in the wizard.

In this chapter...

Introduction to Maximizer Live Update

The Live Update service checks for and downloads appropriate Maximizer CRM software updates for your local Maximizer CRM installation. The Live Update service can be configured to point to either the Maximizer Software update server (which is the default setting) or to your organization's own Live Update server. The Live Update service is installed and enabled automatically as part of the regular Maximizer CRM installation. However, to use your own Live Update server, you must install and configure Live Update Manager separately, as described in this chapter.

Live Update Manager is an optional component of the Maximizer Live Update service and is available on the Maximizer CRM Server disc. Live Update Manager is a standalone component that enables you to control the timing and distribution of software updates, as well as to test them before releasing Maximizer software updates to your users.

Installing Live Update Manager

Before you install Live Update Manager, you will need to create a virtual directory on your web server. The following sections describe how to install LIve Update Manager:

- "Creating a Virtual Directory for Live Update on your Web Server" on page 225
- "Installing Maximizer Live Update Manager" on page 225

Creating a Virtual Directory for Live Update on your Web Server

ⓘ For instructions on creating a virtual directory, refer to your web server software documentation.

Designate a machine as your Live Update server, which will serve updates to the Live Update service on Maximizer machines in your organization. It can be a web server outside the firewall if Internet access is required (for example to support remote offices) or a web server available locally only. In either case, it must be an IIS server.

Create a virtual directory for Live Update on your web server. You will be prompted for the URL of your Live Update server during the Live Update Manager installation.

You will also be prompted for the location to save updates that Live Update Manager downloads from Maximizer Software. If possible, use the same location as the physical location of the virtual directory of your Live Update server. However, in some situations (such as when the URL is of a web server outside the firewall) this configuration is not the most secure and you should specify a different location.

Installing Maximizer Live Update Manager

Live Update Manager is the program that enables you to check for, download, and manage updates for Maximizer CRM installations. The Live Update Manager installation is available on the Maximizer CRM Server disc. Live Update Manager does not need to be co-located with a Maximizer CRM Server, but it can be if desired. The installation location of the Live Update Manager (by default C:\Program Files\Maximizer Live Update) must have network access to the physical folder that will be used to store Maximizer CRM product updates downloaded from the Maximizer Software update server.

➤ **To install Maximizer Live Update Manager**

1 Close all programs running on the machine.

2 Insert the Maximizer CRM Server disc.

3 On the Autorun screen, click **Install Maximizer Live Update Manager**.

4 On the Welcome screen, click **Next**.

5 On the Customer Information screen, enter your **User Name**, **Company Name**, and select whether to install the application for all users of the computer or only for the current user.

6 On the Choose Destination Location screen, click **Next** to install the application to the default folder.

– or –

Click **Browse**, select an alternative location, and click **Next**.

7 On the Corporate Update Server properties screen, enter the **URL** for the Live Update virtual directory you created previously (e.g., http://www.escona.com/liveupdate).

– or –

Enter the UNC network path of the Live Update folder on your Live Update web server (e.g., \\LiveUpdateServer\liveupdate).

The **Download** field specifies the folder that updates from Maximizer will download to. You can change this path if needed.

Click **Next**.

8 On the Start Copying Files screen, review your installation settings and click **Next** to begin the installation.

9 When the installation is complete, click **Finish**.

Live Update Manager is now accessible from the Start menu.

Configuring Live Update Manager

Once you have installed Live Update Manager, configure it and enter the PSNs for your Maximizer products.

➤ **To configure Live Update Manager**

1 Run Live Update Manager. It is available from **Start** > **Programs** > **Maximizer Live Update** > **Live Update Manager**.

2 Click the **Settings** tab.

3 Ensure that the **URL of your corporate update server** field contains the URL (e.g., www.escona.com/liveupdate) or the UNC network path (e.g., \\LiveUpdateServer\liveupdate) of the Live Update virtual folder on your Live Update web server.

4 In the **Product** list, ensure the checkboxes are selected for all Maximizer Software Inc. products installed in your organization. De-select the checkboxes for any products not installed.

ⓘ The Base URL of the update server field may already be completed if you provided the information during the Live Update Manager installation.

5 For each installed product, select the product, click **Edit**, enter your **PSN**(s) for that product, and click **OK**. If you have more than one PSN for a product, separate the PSNs with commas.

6 You can optionally change any of the settings on the **Preferences** tab. For information about each of these options, select the Preferences tab and press **F1**.

7 Click **Apply** to save your changes.
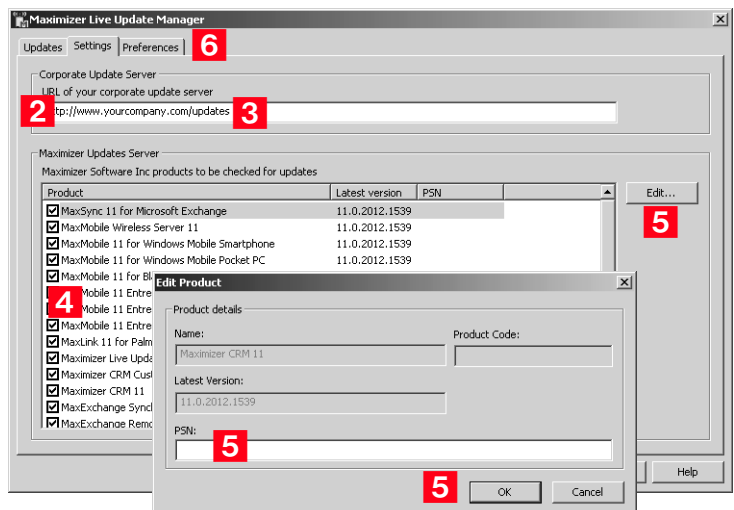
Downloading Updates from Maximizer with Live Update

The Live Update Wizard in the Live Update Manager connects to the Maximizer Live Update Server and downloads available updates from Maximizer Software Inc.

➤ **To start the Live Update Wizard**

• If the **Enable automatic Maximizer Live Update notification** option is selected on the **Preferences** tab, a message box notifies you when new updates are available. Click **OK** to start the Live Update Wizard.

   – or –

• In Live Update Manager, click the **Check for updates** button on the **Updates** tab, which opens the Live Update Wizard.

➤ **To download software updates from Maximizer**

1 Start the **Live Update Wizard** as described above.

   If you started the Live Update Wizard from the automatic notification message box, it takes you directly to the Available Updates screen. Skip to step 3.

2 Click **Next** on the welcome screen.

   The Live Update Wizard connects to the Maximizer Live Update Server to check for any available updates.

3 Select the update(s) to download.

4 Click **Next** to download the selected updates.

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

   The update files are now located in the updates download folder. The default location of this folder is **C:\Documents and Settings\All Users\Application Data\Maximizer\Live Update Manager**.

ⓘ The updates download folder path is specified in the Preferences tab of Live Update Manager.

If your Live Update Manager configuration does not use the default location, this folder may be in a different location.

Approving Updates

Once you have downloaded any available updates with the Live Update Wizard, they appear in the Available Updates list of the Updates tab in Live Update Manager. You must approve these updates before copying them (and the MaxUpdates.xml file) to your Live Update server.

Use the Approve button on the Updates tab to approve and disapprove updates. Approving an update modifies the MaxUpdates.xml file, which keeps track of approved updates. Once an update is approved, it is available to any Maximizer CRM servers that check for updates.

The following sections contain more information on approving updates for Maximize users:

*   "Testing Updates Before Approval" on page 229
*   "Approving Updates for Download" on page 229

Testing Updates Before Approval

Between receiving an update from Maximizer Software and releasing it to your organization, you should test the update in a test environment and once satisfied should deploy it to all Maximizer CRM servers that host Address Books. Assuming that you have already deployed a production Live Update Manager deployment, the two ways to set up testing are as follows:

*   Install a test deployment of Live Update Manager on another machine, with its own testing Live Update server URL. The download location could be the same as for the production Live Update Manager. One or more Maximizer CRM servers should be configured for testing and to download updates from the test Live Update server. Once these updates are verified, you can return to the production Live Update Manager and approve the updates.

*   Alternatively, rather than using a test Live Update Manager to manage updates, simply copy the downloaded updates to the test Maximizer CRM server(s) and run the update(s) manually on the test machines (i.e., distribute the updates for testing manually rather than using Live Update Manager to distribute the updates). Following testing, return to the production Live Update Manager and approve the updates.

Approving Updates for Download

After testing the updates, you can use Live Update Manager to approve updates. After approving the updates, you must copy the

update files and MaxUpdates.xml file to your Live Update server
before users can download the updates from Administrator or
Maximizer.

➤ **To approve software updates for download**

1 In the **Updates** tab of Live Update Manager, select one or more
downloaded update(s).

2 Click the **Approve** button.

The values of the Approved column changes from "No" to
"Yes".

3 Click **Apply** to save your changes.

4 Repeat these steps to approve any other updates, as needed.

Copying the Update and XML Files to the Web Server

After you have downloaded and approved any updates, you must copy the files and the MaxUpdates.xml file to the virtual directory on your Live Update server. The location of the files on the server must match the URL specified in the updates properties.

Once you have copied the files to your Live Update server, you can verify the URLs for each update using Live Update Manager. The Verify URLs button checks that the approved update file(s) and updated MaxUpdates.xml file actually exist at the location specified by the Live Update server URL.

➤ **To copy the update files to the Live Update server**

- Copy the following files to the virtual directory on your Live Update server.

File(s) to copy	Location to copy file(s) from
Downloaded update file(s)	Updates download folder, specified on the Preferences tab of Live Update Manager. The default updates download folder is C:\Documents and Settings\All Users\Application Data\Maximizer\Live Update Manager
MaxUpdates.xml	Live Update Manager program folder (usually C:\Program Files\Maximizer Live Update). This file contains information about downloaded updates and gets updated every time you download an update. You have to copy the most recent version of this file to your web server each time you approve a new update.

➤ **To verify update URLs**

- On the **Updates** tab of Live Update Manager, click **Verify URLs**.

  Live Update Manager verifies all approved updates. If the verification succeeds, your Maximizer server(s) can download the updates from your Live Update server.

  If the verification fails, ensure that the update files and current MaxUpdates.xml file have been copied to the correct location on the Live Update server, that the URL defined for the update is correct, and that your web server settings are correct.

Configuring the Maximizer Live Update Service

The default configuration for Maximizer CRM servers is with the Live Update service enabled and using the URL for the Maximizer Software update server. Change the URL in Administrator Preferences to point to your own Live Update server to enable all Maximizer CRM servers to use the Live Update service through your Live Update server.

➤ **To configure the Live Update Service**

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

2 On the System Options tab, click **Live Update**.

3 The **Enabled Maximizer Live Update** checkbox is selected by default. If it has been cleared, make sure to select it.

4 By default, the **URL of update server** field contains the URL of the Maximizer Software Live Update server. Change it to the URL (e.g., www.escona.com/liveupdate) or the UNC network path (e.g., \\LiveUpdateServer\liveupdate) of the Live Update folder on your web server.

5 By default, **Enable automatic Maximizer Live Update notification** is turned on. When enabled, Live Update displays a message on the Maximizer server(s) and workstations when a new update becomes available on the Live Update server. If you turn automatic notification off, users must manually check for updates on each machine.

6 By default, Live Update automatically checks for updates every 14 days. You can optionally change the **Interval to check for updates**.

7 Click **OK** to save your changes and close the dialog box.
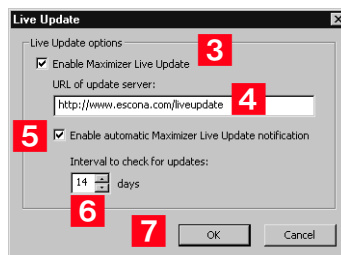
Updating Maximizer with Live Update

The Maximizer Live Update Service is installed automatically with Maximizer CRM server. It enables servers to download updates such as hot fixes and service releases, and you can configure Live Update to provide automatic notification of available updates.

The Live Update Wizard on Maximizer servers connects to your Live Update Server and downloads any available updates.

After downloading the software updates, the downloaded executable file should launch immediately to start the installation. If you need to locate the downloaded file, it is in the user's Application Data folder (typically C:\Documents and Settings\<CurrentUser>\Application Data\Maximizer\Live Update).

> ⓘ The updates download folder path is specified in the Preferences tab of Live Update Manager.

If the Enable automatic Maximizer Live Update notification option is selected in the Live Update options in Administrator, a message box you when new updates are available. You can also check for updates at any time from Maximizer or Administrator.

> ⓘ Live Update options iare accessible through the Live Update button on the System Options preferences in Administrator. (Select File > Preferences.)

➤ **To download software updates from the server**

1 If you are notified that new updates are available, click **OK** in the message box to start the Live Update Wizard.

– or –

In Administrator, select **Help > Maximizer Live Update**.

2 Click **Next**.

The Live Update Wizard connects to the Live Update Server to check for any available updates.

3 Select the update(s) to download.

4 Click **Next** to download the selected updates.

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

SQL Server Reporting Services

In this chapter...

About Microsoft SQL Server Reporting Services

Microsoft SQL Server Reporting Services is a server-based reporting system that's included with most editions of Microsoft SQL Server.

Maximizer Web Access can integrate with SQL Server Reporting Services. You can create custom reports that point to Maximizer data, and host the reports in SQL Server Reporting Services. Then, you can access the reports from Maximizer Web Access.

The Maximizer Web Access integration with SQL Server Reporting Services creates a number of default reports that users can access from the Reports page in Maximizer Web Access. Users can also create new reports using Microsoft SQL Server Report Builder.

Integrating SQL Server Reporting Services with Maximizer Web Access

You can integrate Microsoft SQL Server Reporting Services with Maximizer Web Access. The integration is installed automatically when you install Maximizer CRM Server. To use the integration, you must complete the following steps:

• Set up a user account for the integration. For information, see "User Account for SQL Server Reporting Services Integration" on page 237

• Enable SQL Server Reporting Services in Maximizer Web Access Administrator. For information, see "Enabling SQL Server Reporting Services" on page 237.

If you run Maximizer Web Access on HTTPS, you must also follow additional steps to configure SQL Server Reporting Services. For information, see "SQL Server Reporting Services with Maximizer Web Access on HTTPS" on page 239.

User Account for SQL Server Reporting Services Integration

In order to enable the SQL Server Reporting Services Integration, you must specify a user account to connect with the Maximizer database. The user account must match the following criteria:

• The user is a member of the SSRS Report Management security group in Maximizer. For information on security groups, see "Security Groups" on page 83.

• The login for the user has the sysadmin server role on the SQL Server hosting the Maximizer database. For information on user logins in Microsoft SQL Server, see the SQL Server documentation.

The MASTER user automatically meets these criteria.

Enabling SQL Server Reporting Services

You can enable SQL Server Reporting Services in the System Options preferences in Maximizer Web Access Administrator. When you enable SQL Server Reporting Services, a number of default reports are automatically created on the SQL Server Reporting Services server.

➤ **To enable SQL Server Reporting Services**

1 Log in to Maximizer Web Access Administrator.

2 In the left pane, under **Preferences**, click **System Options**.

3 Select the **SQL Server Reporting Services Settings** tab.

4 Click **Modify Options**.

5 Select **Enable SQL Server Reporting Services Integration**.

The URL to the Reporting Services server and the path to the current Address Book are automatically filled in.

6 Under **Database Account**, enter the username and password for the user account used to connect to the Maximizer database.

Whenever the password changes, you must specify the new password in this page.

7 Click **Save**.

8 The SQL Server Reporting Services settings are saved on the report server. You may need to wait a moment for the settings to save.

SQL Server Reporting Services with Maximizer Web Access on HTTPS

If you run Maximizer Web Access using HTTP Secure (HTTPS), you must configure SQL Server Reporting Services to connect with Maximizer Web Access under HTTPS.

➤ **To configure SQL Server Reporting Services for HTTPS**

1 On the computer hosting SQL Server Reporting Services, open the Report Manager web.config file.

The file is stored in the following location:

[SQL Server Installation Folder]\Reporting Services\ ReportManager\web.config

2 In the <appSettings> element, locate the **MaxAuthWebServicesURL** key.

3 Next to **value**, change **http** to **https**.

4 Save the file.

5 Open the **rsreportserver.config** file.

The file is stored in the following location:

[SQL Server Installation Folder]Reporting Service\ ReportServer\rsreportserver.config

6 Locate all lines containing the **<MaxAuthWebServicesURL>** element.

The element is located in the **<Security>** and **<Authentication>** elements.

7 In the URL for each **<MaxAuthWebServicesURL>** element, change **http** to **https**.

8 Save the file.

Customizing Dashboards 11

In this chapter...

Working with Dashboards

Dashboards are graphical display of quantitative Address Book information. They includes a variety of indicators that display information about Address Book entries, opportunities, campaigns, customer service cases, quotas, and activities. Dashboards are accessible from the My Work Day window in Maximizer. Users can also view dashboards from mobile devices using Mobile Access.

Users must have the rights to be able to view and modify dashboards. For more information, see "User Access Rights and User/Group Access Settings" on page 77.

In Administrator, you can delete or view the properties of dashboards and create SQL metrics for dashboard indicators. In Maximizer, you can create and modify dashboards and dashboard indicators. For information on setting up dashboards and dashboard indicators, see the *Maximizer CRM User's Guide*.

Dashboard Indicators

Indicators display the information in dashboards. Each dashboard can contain multiple indicators.

You can set up indicators to access information in the Address Books in the following ways:

- **Searches –** Users can link indicators with existing searches in the search catalog. The indicator reports either the number of entries returned in the search or a calculation based on fields in the entries.

- **SQL metrics –** In Administrator, you can set up SQL queries that report on any information in your Address Book. While they are defined in Administrator, users can add any of these metrics to dashboard indicators in Maximizer.

Users can choose from a number of indicator controls to display the data. These controls format your Address Book data in charts, lists, and gauges.

SQL Metrics for Indicators

Dashboard indicators display numeric values returned by catalog searches or by custom SQL queries. You can define your own SQL metrics in Administrators to display custom data in dashboard indicators. The SQL metrics consist of custom SQL queries and the click-through URL for the indicator.

Users can associate indicators with SQL metrics in Maximizer. Users can also link indicators with catalog searches.

The following sections contain information on setting up SQL metrics for dashboard indicators:

- "Queries for SQL Metrics" on page 243
- "SQL Queries Across Databases" on page 243
- "Creating or Modifying Custom SQL Metrics" on page 244

Queries for SQL Metrics

A SQL query used in a SQL metric must return a single numeric value (real). Otherwise, the indicator will display a 0. You must have a good understanding of SQL syntax and the database structure to create SQL queries.

SQL queries are run for the current logged in user. A dashboard indicator using a SQL metric may display different results to different Maximizer users.

SQL queries must select data from database views, and not from tables. For example, to query data in AMGR_CSCases_Tbl, you should write the query for the AMGR_CSCases view.

SQL Queries Across Databases

SQL queries for dashboard indicators are not restricted to the current Maximizer Address Book database. You can define SQL metrics that query another database on the same SQL server.

To create a cross-database SQL query, use the following syntax:

Select * from <database name>.<db owner>.<table name>

The following example shows a cross-database SQL query:

Select SUM (Revenue) from Accounting.dbo.Purchases

Requirements for Cross-Database Queries

To successfully use cross-database SQL queries in dashboard indicators, the following conditions must be met:

- Database(s) referenced in the SQL query must all reside on the same SQL Server as the Maximizer Address Book where the dashboard indicators are being created.

- The Maximizer user running the SQL queries must be granted Select access (read access) to the views in database(s) being queried.

  Alternatively, in the Maximizer Address Book, you can create views that reference an external database and grant users access to these views. This method may require enabling the "Cross database ownership chaining" option on the SQL server, which is not recommended for security reasons.

Creating or Modifying Custom SQL Metrics

Use the procedure below to create a new SQL metric. You can also follow these instructions to modify an existing SQL metric. Instead of clicking Add, select the indicator to change and click Properties.

➤ **To create a custom SQL metric**

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

2 Click the **Dashboard** tab.

3 Click **Add**.

4 Enter a **Name** and **Description** for the SQL metric.

5 Enter the **SQL Query**.

ⓘ SQL metrics query only values that the logged in user can access.

The SQL query must return a single numeric value (real). Otherwise it displays a 0 in the dashboard.

6 Click **Test Query** to test the SQL query.

7 Click **OK** to save the new SQL metric.

Managing Address Book Data 12

In this chapter...

Backing Up and Restoring Address Book Data

This section explains how to back up and restore Maximizer Address Book database files, which contain the majority of your Maximizer data, including Address Book entries, opportunities, customer service cases, campaigns, etc. However, if your Address Book uses a custom dictionary or holidays, you must back up those files separately.

The following sections contain information on backing up Address Book data in Maximizer:

- "Backing Up an Address Book" on page 248
- "Restoring an Address Book from a Backup" on page 251
- "Moving an Address Book to a Different Server" on page 253
- "Backing Up the Dictionary and Holiday Files" on page 253

Backing Up an Address Book

There are two types of backup procedures available:

- **Regular Backup.** This backup procedure requires the Address Book to be closed. Regular backup can be performed only in Maximizer.

- **Quick Backup.** This backup procedure is performed on an open Address Book. You can perform a Quick Backup from either or Maximizer. If security is enabled, you will need access to the MASTER user password.

Regular Backup

ⓘ The extension of the backup file is .BAK.

A regular backup is saved by default to the folder containing the SQL database files for the Address Book. If you don't want to save the backup to this location, you can browse to another one.

➤ To perform a regular backup

1 To verify currently logged in users, open the Address Book in Administrator and select Reports > Current Users. Ensure that no users are logged into the Address Book you want to back up.

2 In Administrator, close the Address Book and select **Utilities** > **Back Up Address Book**.

3 Select the Address Book to back up, and click **OK**.

4 Enter the MASTER user password, and click **OK**.

The Backup / Restore Details dialog box opens.

5 Select the backup folder:

- If you want to save the backup to the default location, leave the Backup Location field blank.

- If you want to save the backup file to a different folder, click **Browse**. Select a folder for the backup file and click **OK**.

Maximizer starts backing up the files. Depending on the size of the Address Book, the backup could take several minutes or several hours. A message box confirms that the backup is complete. The backup file name is displayed.

6 Click **OK**.

The default location is where the SQL database files for the Address Book are stored.

Quick Backup

The advantage of using Quick Backup is that you can perform frequent backups of any open Address Book.

If you choose to save the backup to the default location, Quick Backup creates a subfolder named Backup in the same folder as the Address Book files.

The backup file name includes the current date as an identifier. For example, the following backup file was created from a Quick Backup performed on March 23, 2007. (The backup was saved to the following default location).

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaT utorial_20070323_01.BAK

The "_01" is added to the file name to differentiate between backups from the same day, so a second backup on the same day would be saved as follows:

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaT utorial_20070323_02.BAK

Quick Backup also lets you determine how many backups are kept. If you were to set Quick Backup to retain only five backups, then when you create the sixth backup, Quick Backup deletes the oldest backup.

➤ **To perform a Quick Backup**

1 Open the Address Book to back up.

2 Select **File** > **Quick Backup**.

3 Enter the MASTER user password.

If this box is disabled, continue to the next step.

4 Select the backup folder:

If you want to save the backup file to the default location (Address Book folder), leave the Backup Location field blank.

If you want to save the backup file to a different location, click Browse. Select a folder in the Browse for Folder dialog box and click OK. The location is displayed in the Backup Location field.

5 Specify the number of previous backups to retain.

6 Click **OK** to begin backing up.

When the Quick Backup is complete, a message box confirms that the backup was successful. The backup file name and location are displayed.

7 Click **OK**.

Restoring an Address Book from a Backup

If you lose or damage your Address Book, you can restore it to a previously backed up version. When you perform a restore, existing Address Book data is replaced with backup Address Book data.

➤ **To restore an Address Book**

1 To determine if users are logged in, open the Address Book in Administrator and select **Reports > Current Users**.

Ensure that the Address Book you want to restore is not currently open by a user.

2 In Administrator, select **File > Close Address Book** to close the Address Book

3 Select **Utilities** > **Restore Address Book**.

4 Select the Address Book to restore.

ⓘ The Restore Address Book command is enabled only when the Address Book is closed in Administrator.

5 Click **OK**.

6 Enter the MASTER user password, and click **OK**.

The Backup / Restore Details dialog box opens.

7 Click **Browse**, select the backup file you want to restore, and click **Open**.

The full path of the backup file is displayed in the Backup Location field.

8 Click **OK**.

Maximizer restores the Address Book from the selected backup file. A message box confirms that the restore is successful.

Moving an Address Book to a Different Server

You can use the backup and restore functionality to move an Address Book to a different computer.

➤ **To move an Address Book**

1 Backup up the Address Book. For more information, see "Backing Up an Address Book" on page 248.

2 Move the backup Address Book (.BAK) file to the new computer.

3 Restore the Address Book on the new computer. For more information, see "Restoring an Address Book from a Backup" on page 251.

Backing Up the Dictionary and Holiday Files

The Maximizer dictionary and holiday files are not backed up as part of the Address Book backup procedure(s) described previously. Therefore, if you have customized the dictionary or holidays, you need to back up those files separately, especially before upgrading or re-installing Maximizer.

To back up the dictionary and holiday files, copy them from the following location and paste them to another location, preferably the same location where your Address Book is backed up.

🛈 By default, the Maximizer program folder is C:\Program Files\Maximizer. If Maximizer was installed in a different folder, then change the path accordingly.

User Dictionary File Location:

...\Program Files\Maximizer\MaData6\Userdict.lex

Holiday File Location:

...\Program Files\Maximizer\MaData6\Mxzhol.nam

Converting Embedded Documents to Linked Documents

Maximizer has a built-in utility in Administrator for converting embedded documents to linked documents. This allows you to manage the size of your Address Book.

Converting embedded documents to linked documents causes the documents to be unavailable to Web Access, Mobile Access, Partner Access, and Customer Access users.

If necessary, you can move your linked documents from one location to another.

ⓘ Note that a converted Address Book size cannot exceed 10 GB. If you are upgrading a Pervasive.SQL database to SQL Express, and the Address Book size exceeds 10 GB, the upgrade process is stopped and the initial state of the Pervaisve.SQL is retained.

➤ **To convert embedded documents to linked documents**

1 In Administrator, select **File > Document Administration > Convert Embedded Documents**.

2 Select the **Convert embedded documents** checkbox.

3 Specify the document size and age limits. If these values are left as zeros, all embedded documents regardless of size/age are converted to linked documents.

4 Optionally, select the **Shrink database when completed** checkbox. This reduces the size of the Address Book once the conversion is complete. If you haven't chosen to convert your embedded documents, this reduces the size of the Address Book by removing any unused space.

5 Specify the folder in which linked documents will be stored in the **Link Folder** field.

You should use the full UNC path as the location. For example, enter \\[computer name]\Linked Documents\. To ensure the

correct UNC path is used, browse to computer and folder where the linked documents are to be stored.

6 Click the **Recalculate** button after revising the conversion settings to estimate the size of the Address Book with the revised settings.

➤ **To modify the location of linked documents**

1 In Administrator, select **File > Document Administration > Move Linked Documents**.

Modify Location of Linked Documents	
Move Linked Documents	
From folder:	Browse...
To folder:	Browse...
	OK Cancel

2 Specify the folder where the linked documents were previously stored in the **From folder**.

3 Specify the new folder where the linked documents will be stored in the **To folder**.

You should use the full UNC path for both folders.

Verifying and Recovering Address Book Data

You can verify and recover only one Address Book at a time.

Address Book verification enables you to quickly identify and resolve invalid and orphan items in your Address Book. You should always run Address Book verification and recovery after upgrading or restoring an Address Book. Also, if database views have not been created for any user-defined fields and are needed for generating reports, use Address Book verification and recovery to create the missing database views.

Address Book verification and recovery identifies the following Address Book items.

Address Book Item	Description
Orphan Contacts	Contacts that are not associated with a Company record.
Orphan alternate addresses	Addresses that are not associated with an Address Book record.
Orphan notes	Notes that are not associated with an Address Book entry, campaign, customer service case, or opportunity.
Opportunity records with invalid Start_Date field value	Opportunities whose start date does not match the earliest Sales Step start date (applies only to opportunities with an assigned strategy).
Notes with undefined Entity Type	Notes that do not have an entity type value (Address Book entry, opportunity, campaign, customer service case, or user) assigned to the record.
Orphan Link Records	Opportunities that do not have a related Address Book entry.
Broken Company Library links	Company Library links that try to connect to a missing document (link exists but the document is missing).
Orphan Company Library links	Company Library links that link to a missing Company Library folder (document exists, link exists, but the Company Library folder is missing).
Orphan Company Library documents	Company Library documents not listed in the Company Library folders (document exists but the link is missing).
Misplaced Document records	Documents whose Owner field contains an incorrect value.

Address Book Item	Description
User-defined fields that do not have associated database Views	User-defined fields for which a database view has not been created.
Invalid Table UDF Item records	Table user-defined field items that have the wrong type (Company, Individual, Contact, etc.).
Invalid/orphan Table UDF values	Table user-defined field values that reference non-existent table items.

ⓘ To see recovered entries, you must log in as MASTER or have rights to open other users' entries.

When you choose to recover the Address Book, Maximizer transfers recovered Address Book entries into a single entry called "Recovered on [date of recovery]", and it transfers recovered Company Library documents into a single folder called "Recovered on [date of recovery]". You can then view the recovered entries and either delete or move them as needed.

➤ **To verify an Address Book**

1 In Administrator open the Address Book.

2 Select **File** > **Address Book Verification**.

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.

Importing Address Book Data from MXI or XML Files

You can use Administrator to import Address Book entries, customer service cases, knowledge base articles, and other data from MXI (Maximizer XML Interface) or XML Files. These MXI and XML files may have been created by exporting from a previous version of Maximizer or by exporting the information from another source and converting it to XML using the Maximizer XML schema. For more information about the Maximizer XML Schema, refer to "" on page 317.

After importing Address Book entries into Maximizer, a list of imported Address Book entries is stored in a favorite list named according to the file format and import date and time.

The following sections contain additional information on importing data from MXI and XML files:

* "Importing MXI or XML Files Using Advanced Import" on page 259

* "Unattended Import of MXI or XML Files" on page 261

Importing MXI or XML Files Using Advanced Import

For more control over importing MXI files, or to import XML files, use the Advanced Import method described below, which enables you to specify a number of preferences about how to import the file.

Note that customer service cases are always imported as separate records and are never merged with existing cases. Formula user-defined fields are imported as formulas as values.

➤ **To import from an MXI or XML file**

ⓘ Always back up the Address Book before importing.

1 In Administrator, select **File** > **Import** > **Advanced Import**.

2 For the **File name** field, click **Browse** and locate the .XML or .MXI file to import.

Once you have selected the file to import, Maximizer fills in the Log File field automatically.

3 To change the default **Log File**, click **Browse** and provide an alternate log file location and/or name.

4 Select a **Log Level** from the drop-down list.

5 Specify any additional import options in the other group boxes, or just use the default values.

6 Click **OK** to begin the import.

Maximizer imports the data and then displays the number of records inserted, updated, and failed for each record type.

7 Click **OK** to close the message box.

Unattended Import of MXI or XML Files

To import an MXI or XML file using OLE automation, refer to the ImportXMLFile function documentation in the Customization Suite documentation.

An alternative to Advanced Import is an unattended import, which you can initiate by double-clicking the MXI or XML file or by passing parameters to the Maxwin executable (MaxWin.exe) through a command-line interface. When using unattended import, you may choose to specify some of the import preferences within the MXI or XML file itself. For more information about MXI and XML files, refer to "" on page 317.

Importing MXI or XML Files by Double-Clicking

➤ **To import an MXI or XML file by double-clicking**

1 Locate the MXI file on the computer.

2 Double-click the file.

3 Select the Address Book to import into, and click **Open**.

4 Enter your **User ID** and **Password** in the Login dialog box, and click **OK**.

Maximizer imports the data, and then displays a message identifying the number of records inserted, updated, and failed for each record type.

5 Click **OK**.

Maximizer displays a message with the name of the Favorite List, which lists the imported Address Book entries.

6 Click **OK** to view the Favorite List.

Importing MXI or XML Files from the Command Line

To import an MXI or XML file from a command line, call Maxwin.exe with the following command-line syntax:

The command-line syntax shown here uses sample parameter values.

```
Maxwin.exe /DATABASE "EsconaTutorial" /USERID "JNAPOLI"
/PASSWORD "maximizer" /FILE="d:\ABentries051013.mxi"
```

Keep the following points in mind:

- Only one space is allowed after the DATABASE, USERID, and PASSWORD keywords.

- Values must be surrounded by double quotation marks.

- The equal sign (=) after the FILE keywords must NOT have space before or after it.

- The FILE parameter must be the last parameter.

Importing Data from Other File Formats

You can use Administrator to import Address Book information from other sources, such as ACT!, GoldMine, or Outlook.

After importing Address Book entries into Maximizer, a list of imported Address Book entries is stored in a favorite list named according to the file format and import date and time.

Administrator provides the following methods of importing data. The best import method depends on the type of data you are importing.

- **Address Book Entries**: This method imports entries from a CSV (comma-separated values) or tab-delimited text file that is created when you export from Maximizer or another application. Outlook, for example, can export its address book to a text file. When you import from a text file, you must choose to import all the entries as Companies/Individuals or as Contacts, or you can do a two-tier import to import Companies/Individuals first and then import the associated Contacts. For more information, refer to "Two-Tier Import" on page 264.

- **ACT! or GoldMine Database**: Importing an ACT! or GoldMine database is straightforward because Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. Refer to "Importing Data from ACT! and GoldMine" on page 270.

- **Other Contact Manager Database**: This option enables you to import a variety of data file formats, including Organizer, Clipper, dBASE, FoxBase, and FoxPro, among others. For more information, refer to "Importing from Other Contact Managers" on page 267.

Use the following table to determine which import method to use.

File Type	Import Method(s) (File > Import > ...)
ACT! 1.x, 2.x, 3.x, 4.x, 2000, 6.x (*.dbf)	ACT! 6.0 or 2004 or earlier
ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012	ACT! 2005–2012 and ACT! Premium for Workgroups 2005–2012
GoldMine 2.x, 3.x, 4.x, 5.x, 6.x (*.dbf)	GoldMine 6.7 or earlier
GoldMine 6.7 Corporate Edition (MSSQL)	GoldMine 6.7 Corporate Edition or earlier
GoldMine 8.x Premium Edition (Firebird SQL, MSSQL)	GoldMine Premium Edition 8.x
Organizer 1.x (*.org)	Other Contact Manager Database
Delimited (*.txt, *.prn)	Other Contact Manager Database
Comma Delimited (*.csv) Tab Delimited (*.txt)	Address Book Entries
Clipper Summer '87 (*.dbf)	Other Contact Manager Database
Clipper 5.x (*.dbf)	Other Contact Manager Database
dBase III, III+, IV (*.dbf)	Address Book Entries
dBase V (*.dbf)	Other Contact Manager Database
Visual dBase 5.x (*.dbf)	Other Contact Manager Database
FoxBase/FoxBASE+ (*.dbf)	Other Contact Manager Database
FoxPro 1.x, 2.x (*.dbf)	Other Contact Manager Database
Visual FoxPro 3.x (*.dbf)	Other Contact Manager Database

Field Mapping

When importing some types of data files, you need to map (create an association between) the fields in the source file and the fields in Maximizer. Keep in mind that different applications name their fields differently. For example, the field for a company name is called "Company" in Outlook and "Company or Individual" in Maximizer.

When you are importing a file type that requires you to map fields Field Mapping dialog box opens where you can map Maximizer fields to fields in the source file. For each field in the source file, select one of the available Maximizer fields, and click Add to map the fields. Select a corresponding Maximizer field for every field in the source file. If there is no corresponding field, select <Skip Field> from the list of Maximizer fields. When you have finished mapping the fields, the Order of Import (middle column) displays the corresponding Maximizer field beside each field in the Fields from File column.

Two-Tier Import

Many contact management programs keep two types of address book entries:

• Companies

• Contacts for Companies

Maximizer keeps its Address Book entries organized in a similar way:

• Companies/Individuals

• Contacts (associated with a Company or Individual)

The Import Address Book Entries function enables you to perform a two-tier import. In a two-tier import, you first import Company entries as Companies/Individuals Address Book entries, and then you import the people as Contacts.

Two-tier importing is only applicable to comma-separated value files, tab-delimited files, dBase III, III+, or IV, or XML files using the File > Import > Address Book Entries command.

➤ **To import Address Book entries (two-tier import)**

1 From the **File** menu, select **Import** > **Address Book Entries**.

The Import Address Book Entries dialog box opens.

2 Click **Browse** and locate the file to import.

3 Select the **Companies / Individuals** option to import all records in the source file as Company or Individual Address Book entries.

(After you complete this procedure, repeat it a second time to import the Contacts. If you choose not to do a two-tier import, just select either **Companies / Individuals** or **Contacts**.)

4 In the **Lead handling** box, select the appropriate option for importing records as lead or non-lead Address Book entries.

5 Click **OK**.

The Select Fields for Import dialog box opens.

6 In the **Available Maximizer fields** column, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**.

Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

For example, if the first field in the right column is First Name, select First Name from the Available Maximizer fields.

For fields that contain more than one value such as non-single valued table user-defined fields, and full/read access fields, each

value must be its own column in the file and the same field must be mapped to each of those items.

The fields listed in the Available Maximizer Fields column is slightly different, depending on whether you selected Companies / Individuals or Contacts as the Type of Import in step 3.

7 To convert text that is in capital letters (uppercase) into mixed case, select the **Convert to name case** checkbox.

8 Many comma-delimited data files use the first line as a column header. To exclude the first line from being imported, select the **Do not import first record; it is a header** checkbox.

(i) You can save the field mapping for reuse by clicking the Catalog button.

9 Click **Import**.

The data from the source file now imports into Maximizer.

10 Repeat this procedure a second time to import the second tier, except select **Contacts** instead of **Companies / Individuals** as the Type of Import in step 3.

Importing from Other Contact Managers

The instructions below describe importing data from a contact manager other than ACT! or GoldMine. For information about importing from ACT! or GoldMine, refer to "Importing Data from ACT! and GoldMine" on page 270.

➤ **To Import Contacts from another type of contact management database**

1 Select **File > Import > Other Contact Manager Database**.

The Import Databases dialog box opens.

ⓘ Always back up the Address Book before importing.

2 From the **List files of type** drop-down list, select the file format of the database you are importing.

3 Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** drop-down list to access the network drive.

4 In the **Import Options** group box, select the options you want to include. Depending on the type of database you are importing, some of these options may not be available.

5 If you are importing a character delimited text file, you must specify a **Date Format**.

To do so, click the **Date Format** button, select the date format used in the source file, and click **OK**.

6 If you are importing a .txt or .prn file, you must also specify the character used as the field **Delimiter** in the import file.

Click the **Delimiter** button, select the delimiter type, and click **OK**.

7 In the **Duplicate handling** group box, select one of the options to specify what Maximizer should do when it encounters duplicate Address Book entries, and click **OK**.

The Select Fields for Import dialog box opens.

8 In the **Contact fields** or **Address Book entries fields** lists, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**. Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

For example, if the first field in the right column is First Name, select First Name from the Contact fields or Address Book entries fields list.

Use **Contact fields** to create Contacts for Companies or Individuals.

Use **Address Book entries fields** to create Company or Individual Address Book entries.

To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

9 Click **Import** to begin the import process.

Once Maximizer imports the data from the import file, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings.

The Error Log appears next displaying the location of the import error message file. If you want to view this file, make a note of where it is located. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

Importing Data from ACT! and GoldMine

(i) Duplicate Contacts are created on the second Import of the same ACT! or GoldMine database.

This section describes the procedure for importing data from ACT! or GoldMine, as well as the field mapping for data imported into Maximizer.

Importing Contacts from ACT! 6.0, 2004, or Earlier, or from GoldMine 6.5 or Earlier

➤ **To import contacts from ACT! 6.0, 2004, or earlier, or from GoldMine 6.5 or earlier**

(i) Always back up your Maximizer Address Book before importing data.

1 From the **File** menu, select **Import** > **ACT! 6.0 or 2004 or earlier**.

– or –

Select **Import** > **GoldMine 6.5 or earlier**.

The Import Databases dialog box opens. The file type is selected for you automatically.

(i) When importing GoldMine Contacts, GoldMine must be installed on the same machine as Maximizer; the Borland database engine is required during the import.

2 Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** field drop-down list to access the folder.

3 In the Import Options group box, select the **Log Errors to File** checkbox if you want to log any errors that occur during the import process to a text file.

All other options in the Import Options group box are handled automatically by Maximizer.

4 Specify how you want duplicate records handled, and click **OK**.

If duplicate records are found in the data, the option you select here determines whether or not duplicate records are combined. They will be added to the Address Book.

Maximizer requires that each Address Book entry be assigned a unique Address Book entry ID. If the import record contains an Address Book entry ID that is the same as an existing Maximizer Address Book entry or Contact, the Address Book entry ID of the imported entry is automatically changed when that entry is added to Maximizer and this action is recorded in the import error message file.

5 Click **OK** to begin the Import process.

During the import process, a status indicator appears on the screen. Click **Cancel** if you want to halt the import process.

6 Once the data is imported, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, or merged, and the number of records with associated import warnings. Click **OK** to close the message box.

The Errorlog.txt file appears in the same folder as the import file. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

Importing from ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012

There are two methods of importing from an ACT! 2005–2012 database. The first method explains how to import from ACT! when both ACT! and Administrator are installed on the same machine. The second method explains how to import from ACT! when ACT! and Administrator are on separate machines.

➤ **To import from ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012 – Primary Method**

1 Make sure you are logged into Windows as an administrator on the SQL Server machine. Also ensure no users are logged into the ACT! database.

2 In Administrator, log into the Address Book where you want to import the ACT! database.

3 In Administrator, select **File** > **Import** > **ACT! 2005-2012 and ACT! Premium for Workgroups 2005-2012**.

The Reattaching ACT! databases process may take several minutes.

4 Select the ACT! database to import from the drop-down list, and click **OK**.

Maximizer imports the database. When the import is complete, it displays the Import Statistics dialog box.

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

The import is complete.

➤ **To import from ACT! 2005–2012 or ACT! Premium for Workgroups 2005–2012 – Secondary Method**

1 Back up your ACT! database in ACT!.

The Backup is typically saved to C:\Documents and Settings\<User Name>\My Documents\ACT\ACT for Win 7\Databases\

2 In the Backup folder, there should be a zip file. Open this zip file and extract the .BAK file that contains the name of your ACT! database in the filename.

3 The extracted file is a SQL backup. Restore this backup to a normal SQL 2005 (or later) server.

See your SQL Server documentation for details on how to restore backups.

4 Once the backup is restored, create a DSN to point to the database on the SQL Server. For instructions on creating a DSN, refer to the procedure below.

5 Start Administrator.

6 Open the Address Book to import the data into.

7 Select **File** > **Import** > **ACT! 2005-2012 and ACT! Premium for Workgroups 2005-2012**.

8 Click **OK** on the message box.

9 Click the **Machine Data Source** tab, select the DSN you created in step 4, and click **OK**.

You will be prompted for your sa password.

10 Enter the sa password, and click **OK**.

Maximizer begins importing the data.

➤ **To create a DSN to point to the database on the SQL Server**

1 Open **Control Panel** > **Administrative Tools** > **Data Sources (ODBC)**.

2 Click the **System DSN** tab, and click the **Add** button.

3 Select **SQL Server**, and click **Finish**.

4 Give a meaningful name and description, select the SQL server where you placed the restored backup, and click **Next**.

5 Select the **With SQL Server authentication** option, fill in the Login ID as **sa**, enter the sa password, and click **Next**.

6 Select **Change the default database to**, select the restored ACT! database from the drop-down list, and click **Next**.

7 Click **Finish**.

8 Click the **Test Data Source** button to make sure the DSN was configured correctly.

9 Click **OK** and then **OK** again to save the DSN.

Importing from GoldMine 6.7 Corporate Edition (or Earlier) SQL Databases

➤ **To import from a GoldMine 6.7 Corporate Edition (or earlier) SQL database**

Always back up your Maximizer Address Book before importing data.

1 Start Administrator.

2 Select **File** > **Import** > **GoldMine 6.7 Corporate Edition or earlier**.

3 Click **OK** on the message box.

4 Click the **Machine Data Source** tab, select the GoldMine DSN, and click **OK**.

You will be prompted for your sa password.

5 Enter the sa password, and click **OK**.

Maximizer begins importing the data.

Importing from GoldMine 8.x Premium Edition SQL Databases

Maximizer supports importing data from GoldMine 8.x Premium Edition with MSSQL or Firebird SQL.

➤ **To import from a GoldMine 8.x Premium Edition SQL database**

> Always back up your Maximizer Address Book before importing data.

1 If you are importing from GoldMine 8.x with Firebird SQL, convert the Firebird SQL database to MSSQL. You can convert the database in GoldMine 8.02 or later. (In GoldMine, select **Tools** > **Database** > **New Databases**.) For more information, see the GoldMine documentation.

2 In Administrator, select **File** > **Import** > **GoldMine Premium Edition 8.x**.

3 Click **OK** in the message box.

4 Click the **Machine Data Source** tab, and select **GoldMine DSN**. Click **OK**.

You will be prompted for your sa password.

5 Enter the sa password, and click **OK**.

Maximizer begins importing the data.

Setting User Passwords and Properties After Import

Note that if a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. After importing data, you can set each user's password, preferences, and properties manually.

➤ **To set user passwords, preferences, and properties after import**

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

2 Select the Maximizer user, and click **Administer User**.

The Administer User dialog box opens.

3 In the Administer User dialog box, set the user properties, preferences, password, and other settings.

For more information on these settings, see "User Administration" on page 74.

ACT! Data Conversion

The following table describes field mapping between ACT! and Maximizer. Before importing data into Maximizer, export the data from ACT! to a DBF file and use the DBF file for the import.

ACT! 2000 (5.0), 6.0, or 2004–2012	Maximizer	Imported?	Comments
Company	Company	Yes	
Contact	First Name & Last Name	Yes	ACT! Contacts are imported as Contacts in Maximizer and the basic information about each Contact such as email address are imported into the Basic Info tab in the Address Book entry dialog box. If any of the information associated with the Contact cannot be mapped to a Maximizer field in this tab, the information is imported as user-defined fields. In ACT!, First and Last Name belong to the same single field. The correct names may not be properly imported into Maximizer. For example, a Contact 'Toni Spooner (female)' in ACT! is imported into Maximizer as "Toni Spooner" in the First name field and "(female)" in the Last name field.
Title	Position	Yes	
Department	Department, Position	Yes	In Maximizer, Department is populated with the Department information of the first Contact and the rest in the Position field separated by comma.
Phone	Phone 1	Yes	Adds "Business" to the Phone Description field in Maximizer.
Fax	Phone 2	Yes	Adds FAX to Extension field in Maximizer.
Toll-Free	Phone 3	Yes	Adds "Toll-Free" to the Phone Description field in Maximizer.
Mobile	Phone 4	Yes	Adds CELL to Extension field in Maximizer.
Alt Phone		No	
Ticker	UDF Ticker Symbol	Yes	Adds UDF to Company.
ID/Status	Category	Yes	

ACT! 2000 (5.0), 6.0, or 2004–2012	Maximizer	Imported?	Comments
Address	Address	Yes	First address line in ACT! is imported as Address 1 in Maximizer. Second line goes to Address 2. Address comes from one of the Contacts for this Company and if there is no address, it may end up empty. Alternate addresses are added to Maximizer from different Contacts of the Company and alternate addresses are named by that Contact. The same address is not added but renamed by the other Contact. For some Contacts, the appropriate alternate address may not be selected.
Address	Division		Division in Maximizer may be populated by the address line in ACT!.
City	City/Town	Yes	Imported correctly to main and alternate addresses.
State	St/Co/Prov	Yes	Imported correctly to main and alternate addresses.
Zip	Zip/Postcode	Yes	Imported correctly to main and alternate addresses.
Country	Country	Yes	Imported correctly to main and alternate addresses.
Salutation	Salutation	Yes	
Referred By	UDF Referred By	Yes	Adds UDF to Company.
Web Site	Website	Yes	Imported into the Company's website field.
E-mail Address	Email	Yes	Imported into the Contact's email field.
Last Result	Creates Table UDF named "Result"	Yes	Adds Company Table UDF with corresponding items selected for each Contact.
Assistant		No	
Asst. Title		No	
Asst. Phone		No	
User fields for Contacts and Companies (ACT! 2005–2012 & ACT! 2005–2012 Premium only)	Creates UDFs for Contacts and Companies with the same name as in the source database	Yes	These fields can be renamed and can be changed to different field types. Any fields that are of MEMO type or are more than 120 Characters are converted to Notes in Maximizer.

ACT! 2000 (5.0), 6.0, or 2004–2012	Maximizer	Imported?	Comments
User 1...User 15 (ACT! 2000 (5.0), 6.0, or 2004 only)	Creates UDFs named "Details Field 1"… "Details Field 15"	Yes	Adds UDFs to Company. Some UDFs that belong to some different Contacts in ACT! may be lost.
Users	Users	Yes	ACT! users are imported into Maximizer as users. Passwords are set to "maximizer" if the import was done using a DBF file. Users are displayed in the Administrator's Manage Users dialog box which may be accessed by selecting File > Manage Users. If a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. By default, passwords for users are set to "maximizer". Passwords can be changed manually for each imported user.
Notes	Notes	Yes	
Schedule Call Schedule To-do Schedule Appointment Schedule Personal Activitiy	Hotlist Task	Yes	The Company name of some conflicting tasks may not be preserved. The Duration information in ACT! is not imported to Maximizer.
Schedule Meeting	Appointments	Yes	Recurring appointments are not imported.
Notes Attachments	Notes Attachments	No	
Document	Document	No	
Groups	Groups	No	
Sales/ Opportunities	Opportunities	No	
History (ACT! 2005-2012 & ACT! 2005-2012 Premium only)	Notes	Yes	Each entry from the History tab in ACT! becomes a Note in Maximizer.

GoldMine Data Conversion

The following table describes field mapping between GoldMine and Maximizer.

Note that Action, Call, and Appointment notes in GoldMine 6.x and 8.x may be in HTML format. When you import these notes into Maximizer, they contain HTML tags.

GoldMine 5.x, 6.x, & 8.x	Maximizer	Imported?	Comments
Company	Company	Yes	
Contact First Name Initial Last Name	First Name Initial Last Name	Yes	GoldMine's Contact field contains (First Name) (Initial) (Last Name) separated by spaces. In Maximizer, appropriate fields are populated accordingly.
Title	Position	Yes	
Dept	Dept.	Yes	In Maximizer, Dept. is populated with the department of the main Company's Contact.
Asst	Assistant (UDF)	Yes	Adds UDF to Contact record.
Source	Contact type (UDF)	Yes	Adds UDF to Contact record.
Address	Address1 & Address2	Yes	Address from the main Contact becomes the main Company address. The first line in the Address field from GoldMine goes to Address1 in Maximizer. The second line goes to Address2. The third line from GoldMine is NOT imported. Alternate Addresses in Maximizer are created from the addresses of the Contact from the Contacts tab in GoldMine. Appropriate Alternate Addresses are selected for imported Contacts.
City	City/ Town	Yes	Imported correctly to main and alternate addresses.
State	St/Co/Prov	Yes	Imported correctly to main and alternate addresses.
Zip	Zip	Yes	Imported correctly to main and alternate addresses.
Country	Country	Yes	Imported correctly to main and alternate addresses.
Phone 1-3	Phone 1-3	Yes	Appropriate extensions are imported.
Fax	Phone 4	Yes	Adds FAX to Extension field in Maximizer.
E-mail	Email	Yes	Email address of the main Contact is imported. Email addresses of Contacts from the Contacts tab in GoldMine are also imported.
Web Site	Website	Yes	Imported to main Contact record.
Contact Type	Contact Type	Yes	Adds UDF to Contact record.

GoldMine 5.x, 6.x, & 8.x	Maximizer	Imported?	Comments
Business	Business	Yes	Adds UDF to Contact record.
Interest	Interest	Yes	Adds UDF to Contact record.
Accnt Mngr	Accnt Mngr	Yes	Adds UDF to Contact record.
Open	Open	Yes	Adds UDF to Contact record.
Summary	Note	Yes	A note containing details from the Summary tab is created for the Company.
Role Status Account Type Account Size No. of Users Key Interest Competitor Platform	User role Purchase Status Account Type Account Size Users Key Interest Competitor Platform	Yes	Appropriate UDFs are created in Maximizer and populated with proper values.
Notes	Note	Yes	A note is created for the Contact in Maximizer and contains all the notes from the Notes tab in GoldMine.
Documents	Document	No	
Users	Users	Yes	GoldMine's users are imported into Maximizer as users. Users are displayed in the Administrator's Manage Users dialog box, which is accessible through the File > Manage Users menu. If spaces are included in a user name, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. After import, users' Windows Access, Web Access, and Mobile Access are disabled in Maximizer and must be enabled by the administrator. By default, passwords for users are set to "maximizer". Passwords can be changed manually for each imported user.
Details	Notes	Yes	For every detail, a note is created. Details are referred to as Profiles in the notes.
Pending	Hotlist Task	Yes	Each entry from the Pending tab in GoldMine is imported as Hotlist task in Maximizer.
Calendar	Hotlist Tasks	Yes	Calls and Activities from GoldMine's Calendar are imported as Hotlist tasks in Maximizer.

GoldMine 5.x, 6.x, & 8.x	Maximizer	Imported?	Comments
Referrals	Notes	Yes	A note is created for every Referral. Referrals are called References.
History	Notes	Yes	Each entry from the History tab in GoldMine becomes a Note in Maximizer.
Members		No	
Tracks		No	
Links		No	
Opptys		No	
Projects		No	
Partner	Notes	Yes	Limited information is imported.
Email text (email)	Documents	Yes	Imports email as documents in the Documents window. This feature is supported for GoldMine 8 only.

Field Mapping for Outlook

The following table describes the field mapping that is used in Outlook Synchronization.

Microsoft Outlook	Maximizer
Appointments	
Subject	Subject
Start and End time date	Date
Start time	Start time
End time	End time
Reminder	Alarm time
Toggle alarm	Toggle alarm
Importance	Priority
Private	Private
Location	Location
Note (text box)	Note (text box)
Tasks	
Due date	Date

Microsoft Outlook	Maximizer
Alarm time	Time
Subject	Activity
End time	End time
Reminder set	Alarm set
Priority	Priority
Private	Private

Purging Outdated Notes and Documents

After a long period of activity, you may want to delete outdated notes and documents using Administrator's purge feature.

When you purge notes, you must specify the note types to delete.

Note Type	Creation Method
Accounting	Created from accounting transactions. Applicable only to previous versions of Maximizer.
Customer Service	Notes created in the Address Book window when you add a case.
Email	Notes created in the Address Book window when you send an email to one or more Address Book entries. Email notes are also created when you launch a campaign.
History	Created when opportunities cases, or campaigns are added or changed. History notes can be printed or searched only from these windows.
Incoming call	Created when you receive a phone call.
Mail-out	Created when users print labels, envelopes, or letters using the Maximizer Word Processor's merge feature. Mail-out notes are also created when users send an email to more than one Address Book entry.
Manual	Added manually to the Notes window.
Opportunity	Created in the Address Book window when opportunities are added or changed. Opportunity notes can be printed or searched only from the Address Book window.
Other	Third-party or custom notes created by the administrator.
Outgoing call	Created when phone an Address Book entry.
Tasks	Created when appointments or Hotlist tasks are scheduled or completed.
Timed notes	Created when the Timer is used while writing a note.
Transfer log	Notes logged when Address Book entries are transferred between Address Books. Applicable only to previous versions of Maximizer.

The purge command deletes all notes, with the exception of other user's private notes (unless the user purging the notes has rights to delete other users' notes), in the specified date range for all Address

Book entries in the open Address Book. You should back up the
Address Book before purging notes.

> ➤ **To purge notes**

1 In Administrator, open the Address Book you want to clean up.

2 Select **File** > **Purge** > **Notes**.

3 Specify a date range.

Maximizer deletes notes dated between the specified dates.

4 Select the type(s) of notes to delete, and click **OK**.

> ➤ **To purge documents**

1 In Administrator, open the Address Book you want to clean up.

2 Select **File** > **Purge** > **Documents**.

3 Specify a date range.

Maximizer deletes documents dated between the specified
dates.

4 If you want to purge private documents belonging to other
users, select the **Delete other users' private documents**
option.

5 Click **OK**.

Using Log Files for Diagnosis

One of the most powerful tools in diagnosing a Maximizer installation is the automated logging feature. Maximizer supports logging for a number of server and client components.

You can control the amount of detail that is logged for various modules. The range of logging levels is 0 through 7:

- 0 = logging disabled
- 1 = least detailed
- 7 = most detailed

You can also control the frequency in which the log files are purged and if the information is sent to the Windows event log.

Logs are written into the default folder "\Program Files\Maximizer\Logs". You can define logging preferences in Administrator and Maximizer. These preferences control the following registry keys.

Email Service (CMGR-Email)	HKEY_LOCAL_MACHINE\SOFTWARE\ Maximizer Software\Maximizer\ Modules\AutoProgService\Email	CMGR-Email_yyyymmdd.log CMGR-Service_yyyymmdd.log
MaAccess (MACC)	HKEY_LOCAL_MACHINE\SOFTWARE\ Maximizer Software\Maximizer\ Modules\MACC\EVENTLOGSETTINGS	MACC_yyyymmdd.log

➤ **To set logging preference values**

1 In Maximizer, click the **Setup** tab and select **Preferences**. In Administrator, select **File > Preferences**.

2 Select the **Diagnostic** tab.

If you want logs for all modules saved in one specific location, specify a default folder where your log files will be saved. If you don't specify a location in this field or a location per module, logs are saved in the Logs folder where Maximizer is installed (e.g., Program Files\Maximizer\Logs).

3 Select a module from the **Preferences for this module** drop-down list.

4 If you want logs related to a module saved in a specific location, specify a folder in the **Module log folder** field.

5 Select a logging detail level from the **Maximizer log level** drop-down list.

6 Set your other logging preference values such as the frequency logs are purged. By default, logs are purged after 5 days.

7 Repeat the previous steps to configure logging for any other module(s).

8 Click **OK**.

9 If you changed the log settings for the **Email Service (CMGR-Email)**, you must restart the service(s) for the changes to take effect.

Restart these services from Windows Control Panel > Services.

For samples and explanations of Maximizer Email Service log files, see "Maximizer Email Service Log Files" on page 298.

System Reports

HTML reports can be opened easily in Microsoft Excel, where you can edit the data as required.

The Reports menu in Administrator enables you to quickly create a number of reports about the open Address Book, as described below.

Report	Information Reported
User ID List	• Total number of users in the Address Book • Total number of security groups in the Address Book For each user in the Address Book: • User ID • Display Name • First and Last Name • Phone number • Email Address • Maximizer Login Enabled/Disabled status • User's Roles (Access Rights) For each security group in the Address Book: • Group Name • Group ID • Group members
User-Defined Fields	• Folder (if applicable) and field name • Type of entry the field is applicable to (Company, Individual, Contact, Opportunity, Campaign, Case, or User) • Full Access and Read Access • Type (Table, Date, Alphanumeric, Numeric, Formula, Yes/No) • Creator • Requested by • Description • Attributes • Items in table user-defined fields • Usage count (only if Show Usage Count checkbox selected in Print Report dialog box)

Report	Information Reported
Address Book Summary	Total number of each of the following types of entries in the current Address Book: • Users • Security groups • Companies and Individuals • Lowest, highest, average, and total number of contacts per Company and Individual • Opportunities (total and per status) • Automated campaigns (total and per status) • Traditional campaigns (total and per status) • User-defined fields (total and per type) • User-defined field entries (total and per type) • Notes • Documents • Knowledge base articles (total and per status) • Customer service cases (total and per status)
Sales/Marketing Teams	Details about teams and team members, sorted by Team Type (Sales or Marketing) • Team name • Member user ID • Member name • Member status (member or team leader)

Report	Information Reported
Installed Workstations	Details about any Maximizer workstation that has connected to the current Address Book on the current server: • Name of the Maximizer workstation machine • Module used to connect to the server (Administrator, Maximizer, etc.) • Date and time when the module connected to the server • Maximizer version, series, and build of the module ⓘ This report applies only to previous versions of Maximizer.
Current Users	• Number of licenses in use For each user currently logged into the Address Book: • User name • Computer name • Date and time logged in • Maximizer module connected Licenses installed: • Product license number (PLN) • Computer name • Product • User count • Description • Total number of applied licenses ⓘ This report displays on-screen rather than printing. To print the report, press Alt and Print Screen to capture the report window to the Windows clipboard, and then paste it into a word processor or graphics program.

Troubleshooting 13

In this chapter...

Recreating the Maximizer_Default User

The maximizer_default security login is created during the initial installation of Maximizer.

The following are steps to recreate the Maximizer_Default user if it is not in the list of security logins in SQL.

➤ **To create the maximizer_default security login**

• Select **Utilities > Repair Database**.

Troubleshooting Issues with Automated Campaigns

Use this section to troubleshoot potential issues with automated campaigns.

The following sections contain information on troubleshooting issues with automated campaigns:

* "SMTP Time-out Error" on page 291
* "Email Messages Use Wrong Character Set" on page 291
* "Campaigns Remain "In Progress" without Activity" on page 292

SMTP Time-out Error

This issue describes SMTP time-out errors in automated campaigns.

Problem	For some subscribers, an automated campaign fails due to Time_out, and you are sure the subscriber's email address is valid.
Symptom	A Time_out message displays in the notes of the affected campaign and Address Book entry.
Resolution	Verify that the subscriber's email address is valid. If it is valid, then increase the SMTP_TIMEOUT value. You can find the SMTP_TIMEOUT value in the MaConfig table Global Settings section. The default value for SMTP_TIMEOUT is 100 (seconds). You can increase it to 500, 1000...n.

Email Messages Use Wrong Character Set

This issue affects email messages sent by automated campaigns using the wrong character set

Problem	Email messages sent by Maximizer Email Service use the wrong character set, ignoring the regional settings on a user's computer.
Symptom	Email messages sent by automated campaigns are illegible.
Resolution	In Administrator, configure the Maximizer Email Service to use the correct character set. For more information, see "Configuring Email" on page 150.

Campaigns Remain "In Progress" without Activity

This issue is a problem with campaigns remaining "In Progress" without any activity.

Problem	If the password for EMAILUSER is not synchronized, automated campaigns do not function properly.
Symptom	A campaign's status is "In Progress" but it is inactive and does not send out emails, faxes, or print jobs.
Resolution	Change the EMAILUSER password to EMAILSYSTEM (which is the default), synchronize passwords, and restart the Maximizer Email Service.

➤ **To change the EMAILUSER password**

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

2 Select **EMAILUSER**, and click **Password.**

3 Type **EMAILSYSTEM** in the **New Password** and **Confirm Password** fields, and click **OK**.

Maximizer prompts you to apply the new password across all databases.

4 Click **Yes** to synchronize passwords.

➤ **To restart the Maximizer Email**

1 Select **Start** > **Programs** > **Administrative Tools** > **Services** to open the Services window.

2 Double-click **Maximizer Email Service**.

3 Click **Stop**.

4 Click **Start** to restart the service.

5 Click **OK**.

Resolving Issues with Microsoft IIS

The following sections contain information on troubleshooting potential issues with Microsoft IIS:

- "Configuring Maximizer Web Access on a 64-bit Operating System" on page 293

- "Maximizer Components for IIS and Windows Server 2008 or 2012" on page 293

Configuring Maximizer Web Access on a 64-bit Operating System

This issue affects computers running Maximizer Web Access on a 64-bit Operating System.

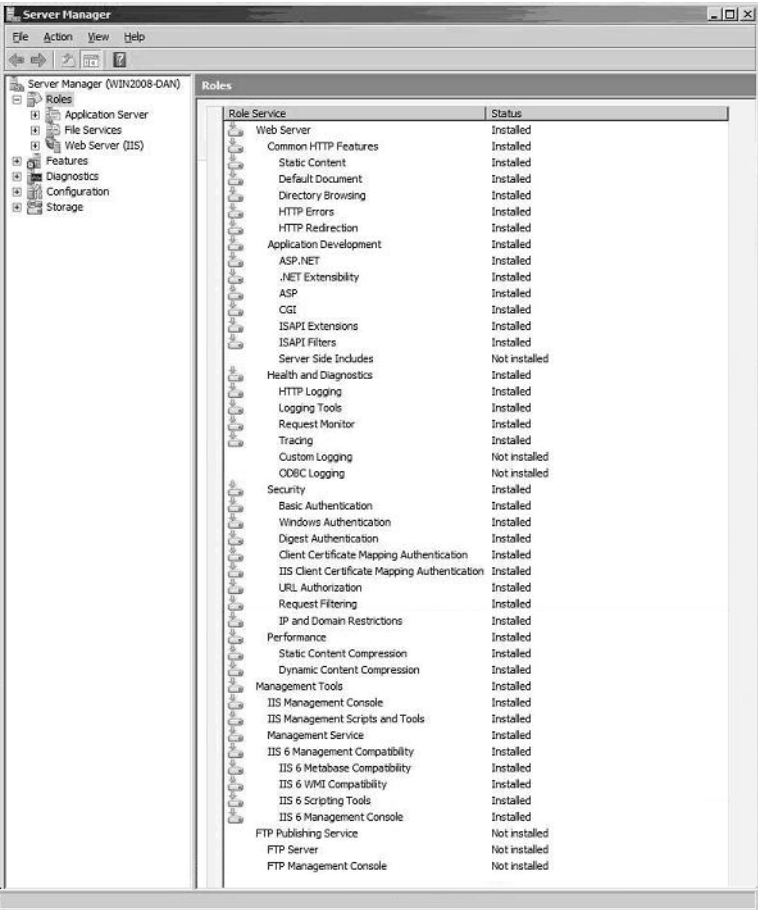| Problem	Maximizer Web Access requires the 32-bit version of ASP.NET 4.0 in order to run on a 64-bit operating system.
Symptoms	Maximizer Web Access does not work when installed on a 64-bit operating system.
Resolution	Enable the 32-bit version of IIS on the machine that Maximizer Web Access is installed on. For more information, see "Microsoft IIS on 64-Bit Operating Systems" on page 19.

Maximizer Components for IIS and Windows Server 2008 or 2012

If you are using Windows Server 2008 or 2012, you may need to perform additional steps before installing Maximizer components for IIS. For more information, see "Microsoft IIS on Windows Server 2008 or 2012" on page 17.

If you continue to have problems, you may need to install additional roles for Web Server (IIS). In particular, ensure the following roles are installed:

- Under **Common HTTP Features**, **Static Content**.

- Under **Application Development**, **ASP.NET** and **.NET Extensibility**.

- Under **Security**, **Basic Authentication** and **Windows Authentication**.

- Under **Management Tools**, all roles.

Troubleshooting Web Access Sites

The following sections contain information on troubleshooting potential issues with web access sites:

- "Maximizer Web Access Templates" on page 295
- "User-Defined Field Visibility" on page 295
- "Site Tree Control" on page 296
- "Blocked Files in Maximizer Web Access" on page 297

Maximizer Web Access Templates

When the Sites (File > Web Access) dialog box is opened in Administrator (File > Web Access), a "master list" of templates is compared with the template list stored for the Address Book. If any of the templates differ, you are prompted to overwrite the Address Book templates with the master templates. If you have customized any of the templates used for Maximizer Web Access, you may wish to keep a backup copy or mark the templates as read-only so the files are not inadvertently overwritten.

The "master list" of templates is the list of files stored under:

\MxServer\Thinclients on the Maximizer application server

The list of templates available for publishing for an Address Book is stored under:

\MxData\<Address Book Name>\Html on the application server

If you have problems with an Address Book's site templates, delete the "Html" folder under MxData and open the Sites dialog box in Administrator—the Address Book's templates folder. The template files then regenerate from the master template list. Other files in the folder—such as the online site Help files—are also regenerated.

User-Defined Field Visibility

Visibility of user-defined fields for Web visitors (external web access users) is based on what WEBUSER has security rights to view. To allow external visibility for a user-defined field, ensure WEBUSER has access to the field; if the user-defined fields belongs to a group, WEBUSER must be part of that group.

Site Tree Control

This issue affects the tree view control in web access sites.

Problem	The sites use the Microsoft Internet Explorer TreeView WebControl to display tree structures. Maximizer CRM Server installs the graphical components of this tree control in the C:\INETPUB\wwwroot folder in a subfolder called webctrl_client. Since C:\INETPUB\wwwroot is the default location of the Internet Information Services (IIS) root folder, the control is assumed to be available from the root. However, if the location of the root folder (Default Web Site or other web site to which you may have moved the sites) has been changed, the graphical components of this control are no longer available and the control displays as simple text.
Symptom	The tree view control in Maximizer Web Access, Partner Access, and Customer Access may display External Links, UDFs when in tree mode, and Company Library data as long strings of text rather than the expected graphical tree structure representation. No interaction is available.
Resolution	To correct this issue, copy the C:\INETPUB\wwwroot\webctrl_client folder, and all its contents, to the new root folder designated as the Local Path of the new root under Properties for the Default Web Site in the IIS Manager. Detailed steps for this procedure are provided below.

➤ **To resolve the site tree control display issue**

1 Open the IIS Manager.

2 Right-click on the **Default Web Site**, or other web site to which you may have moved the sites, and click **Properties**.

3 Click the **Home Directory** tab.

4 Take note of the path in the Local Path field. This is the folder that you will copy the C:\INETPUB\wwwroot\webctrl_client folder and its contents to.

5 Close the Default Web Site Properties dialog box.

6 Open Windows Explorer.

7 Copy the **C:\INETPUB\wwwroot\webctrl_client** folder and its contents to the Local Path identified in step 4 above.

The site tree structures should now display correctly.

Blocked Files in Maximizer Web Access

This issue affects users after first logging in to Maximizer Web Access.

Problem	The web server configuration includes a firewall or other software that is blocking the MaThinIEActiveX.ocx file.
Symptom	When a user logs in to Maximizer Web Access, the web browser displays a message that the MaThinIEActiveX.ocx file is blocked.
Resolution	Configure the firewall to allow this file to be downloaded from the server. For more information, see "ActiveX Controls in Maximizer Web Access" on page 183.

Maximizer Email Service Log Files

The Maximizer Email Service log files store the following codes:

- 1 = Initialization or database connection problem

- 2 = Not used

- 3 = Exception (other error code)

Samples and explanations of both Maximizer Email Service log files are included below. For more information on log files, see "Using Log Files for Diagnosis" on page 284.

Sample CMGR-Email_yyyymmdd.log File

ⓘ Line numbers are not written into an actual log and are provided here for convenience.

```
17:50:14  =============== OPENING LOG ===============
CURRENT DATE:2010/05/16
```

1. `17:50:14  INFO    [Line 1506] [ini] COMMON_SERVER_SETTING =`

2. `17:50:14  INFO    [Line 1516] [ini] COMMON_Address BookS = Escona`

3. `17:50:14  INFO    [Line 1534] [***] current Address Book = Escona`

4. `17:50:14  INFO    [Line 1552] [ini] AUTO_EMAIL_RUN = 1`

5. `17:50:14  INFO    [Line 1570] [ini] DB_NAME = Escona`

6. `17:50:14  INFO    [Line 1579] [ini] DB_SERVER = Servername`

7. `17:50:14  INFO    [Line 1588] [ini] SERVICE_USERID = EMAILUSER`

8. `17:50:14  INFO    [Line 1607] [ini] SERVICE_Address Book_PATH = DSN:MAP_ESCONA`

9. `17:50:14  INFO    [Line 1637] [ini] AUTO_EMAIL_TEMPLATES = C:\Program Files\Maximizer\ServerShared\Email Templates\`

10. `17:50:14  INFO    [Line 1646] [ini] AUTO_EMAIL_SMTP_SERVER = mail.maximizer.com`

11. `17:50:15  WARNING [Line 512]   email to 'devsupport@maximizer.com' failed (Reason: Load template '.etf' failed)`

ⓘ The test environment that produced this log had an invalid path for the email template directory, resulting in a detailed error in line 11.

12. `17:50:17  WARNING [Line 396]   0 email messages were sent successfully, 1 email messages failed`

```
17:50:17  =============== CLOSING LOG ===============
```

Description of Sample CMGR-Email_yyyymmdd.log File

The following table describes some of the numbered lines from the previous example.

Line #	Description
1	Confirmation as to whether the Common Server setting parameter is enabled in the MaConfig table. NOTE: This setting controls whether passwords are encrypted or not encrypted.
2	A list of all of the Maximizer Address Books—read from the MaConfig table.
3	The current Address Book that the service is using.
4	Whether the Email Service is active or not. 1 = active; 0 = inactive
5	The name of the database that the service is accessing.
6	The name of the server that hosts the database; a generic name of servername is listed for demonstration purposes only.
7	The name of the server account that will be used to log in to the database.
9	The location of the email templates directory.
10	The name of the SMTP Server that the service will send email through.
11	Explanation why the email failed.
12	Count of successful and unsuccessful emails sent.

Sample CMGR-Service_yyyymmdd.log File

ⓘ Line numbers are not written into an actual log and are provided here for convenience.

```
CURRENT DATE:2010/05/16
```

1. `17:49:12   INFO    [Line 64]    email service started`

2. `17:49:12   INFO    [Line 402]   [ini]`
`AUTO_EMAIL_CYCLE_TIME = 1`

3. `17:49:12   INFO    [Line 410]   [ini]`
`AUTO_EMAIL_TIME_UNIT = 0`

4. `17:50:13   INFO    [Line 402]   [ini]`
`AUTO_EMAIL_CYCLE_TIME = 1`

5. `17:50:13   INFO    [Line 410]   [ini]`
`AUTO_EMAIL_TIME_UNIT = 0`

ⓘ The error code #2 in line 6 identifies a problem locating the email template.

6. `17:50:17   INFO    [Line 256]   email service finished`
`cycle with error code 2`

🛈 The warning in line 7 confirms that the email message was not sent.

7. `17:50:17  WARNING [Line 396]   0 email messages were`
`sent successfully, 1 email messages failed`

Description of the Sample CMGR-Service_yyyymmdd.log File

The following table describes some of the numbered lines from the previous example. Due to the error in the configuration as stated above, the send attempt failed.

Line #	Description
1	Launching of the send application.
2	The setting for the email send cycle; stated in minutes.
6	The status of the last send attempt.
7	Count of successful and unsuccessful emails sent.

In this chapter...

MaConfig Table (Server and Address Book Configuration)

Maximizer uses a special SQL database called MaConfig to store the settings for the Address Books, global settings, and some IIS settings. During a Workstation installation, the Maximizer Workstation Setup program reads from the server's MaConfig table in the MaConfig database to obtain the correct registry settings for the workstation.

The following sections contain information on the MaConfig table:

- "Editing the MaConfig Settings" on page 302
- "Four-letter Module Codes" on page 302
- "MaConfig Table: Entries and their Meanings" on page 347

Editing the MaConfig Settings

If you need to edit the MaConfig table directly, you can access it through Microsoft SQL Enterprise Manager.

> ➤ **To edit the Maximizer configuration settings in the MaConfig table using Microsoft SQL Enterprise Manager**

1 Open Microsoft SQL Enterprise Manager.

2 Browse to the SQL Server, and select the **MaConfig** database.

3 Under **Tables** locate and select the **MaConfig** table.

4 Right-click the table, and select **Open Table** > **Return All Rows**.

Enterprise Manager displays the entire MaConfig table.

5 Edit the entries as needed, and close the table.

Four-letter Module Codes

Entries in the MaConfig table often contain a four-letter code to identify which component uses that particular entry.

Code	Module
ADMN	Administrator
AMGR	Maximizer
AUTO	Maximizer Automated Services
CMGR	Campaign Manager
DSGN	Portals (not used)

Code	Module
EMPP	Maximizer Web Access
EXTP	Partner Access and Customer Access
EXCH	MaxExchange

MaConfig Table: Entries and their Meanings

The MaConfig table contains information about a set of Maximizer Address Books. The MaConfig table is stored in the MaConfig database in SQL Server. Some of the entries in the table may not apply depending on the edition of Maximizer you are using.

The following tables describe the keys in the MaConfig table.

Table 1   Address Book Configuration Settings in the MaConfig Table

Section	Key	Value
<Address Book>	AUTO_EMAIL_TEMPLATES	Path to the automated campaign email template files (*.etf).
<Address Book>	DASHBOARD_DISABLED	Determines if dashboards are disabled for the current Address Book: yes = Dashboards are disabled This key is not included by default in the MaConfig table. You must manually add a new entry to the table with this key for the specific Address Book.
<Address Book>	Dashboard_URL	URL of dashboards.
<Address Book>	DB_NAME	Actual name of the Maximizer database. It can be different from display name.
<Address Book>	DB_SERVER	Network machine name of the computer that hosts the Maximizer configuration table (MaConfig table).
<Address Book>	DB_SYS_TYPE	Type of database used for the Maximizer Address Book.
<Address Book>	DB_USERFRIENDLY_NAME	Display name of Maximizer database in Address Book list.
<Address Book>	DSGN_ISAPI_CUSTOMER	URL of Customer Access.
<Address Book>	DSGN_ISAPI_PARTNER	URL of Partner Access.
<Address Book>	DSGN_SSL_ISAPI	
<Address Book>	EADV_MASRCH_FILE	
<Address Book>	EADV_MASRCH_Update_URL	

Table 1   Address Book Configuration Settings in the MaConfig Table

Section	Key	Value
<Address Book>	HTML_TEMPLATES_PATH	Path of the root HTML folder on the Maximizer Application Server. (Maximizer\Address Books\<AddressBook>\Html).
<Address Book>	HTML_TEMPLATES_URL	
<Address Book>	IN_MEMORY_RESPONSE_TABLE	
<Address Book>	LIST_LIMIT	Controls the maximum value of the Maximum entries field in the Search dialog boxes that can be carried forward to the next session. The value of the Maximum entries field in any of the Search dialog boxes will always be less than or equal to the LIST_LIMIT value the next time the Search dialog box is opened. If the user selects a value less than LIST_LIMIT, that value will be selected automatically the next time they open the dialog box. If the user selects a value greater than LIST_LIMIT, the value will be reset to LIST_LIMIT the next time they open the dialog box. This control helps avoid overloading the SQL server. By default, the value of LIST_LIMIT is 1000. Setting LIST_LIMIT to 0 allows the "All" option to be saved for the next session.
<Address Book>	Refresh ISAPI Details	
<Address Book>	RPTR_START_FINANCIAL_DAY	Day of the month (specified in "RPTR_START_FINANCIAL_ MONTH") in which the fiscal year begins.
<Address Book>	RPTR_START_FINANCIAL_ MONTH	Month (i.e., 1–12) in which the fiscal year begins.
<Address Book>	SERVICE_CMGR_PASSWORD	Default email service password for automated campaigns (emailsystem).
<Address Book>	SERVICE_CMGR_USERID	Default User ID for email service login user. (EMAILUSER).
<Address Book>	SERVICE_DSGN_PASSWORD	Default WEBUSER password. (websystem).
<Address Book>	SERVICE_DSGN_USERID	Default User ID for ISAPI login user. (WEBUSER).
<Address Book>	SERVICE_PASSWORD	
<Address Book>	SERVICE_SMTP_SERVER	
<Address Book>	SERVICE_USERID	

Table 1   Address Book Configuration Settings in the MaConfig Table

Section	Key	Value
<Address Book>	SERVICE_WORKSPACE_PATH	DSN of the Address Book.
<Address Book>	PUBLISHED_PROJECTS	
<Address Book>	AUTO_TRANSLATE	This key must be created manually. Create this key when a workstation that uses non-English regional settings must access a database that uses an English database collation. It affects the "Perform translation for character data" flag in the database DSN. Set the value of this key to 0 or 1. 0 = Turn "Perform translation for character data" flag OFF 1 = Turn "Perform translation for character data" flag ON If you use a database collation other than the default, SQL_Latin1_General_CP1_Ci_AS, set the value to 0. This Key must also be added to the Global Settings section.

Table 2   Global Address Book Server Configuration Settings in the MaConfig Table

Section	Key	Value
Global Settings	AcntQB	
Global Settings	AcntQB0	
Global Settings	AcntQBDesc0	
Global Settings	AUTO_EMAIL_BATCH_CYCLE	
Global Settings	AUTO_EMAIL_BATCH_SIZE	Number of emails sent in the specified interval of time for the batch.
Global Settings	AUTO_EMAIL_CYCLE_TIME	Number of polls in the time unit specified under "AUTO_EMAIL_TIME_UNIT" in which the SQL Server is checked for outgoing automated emails.
Global Settings	AUTO_EMAIL_JOB_PER_ THREAD	Length of prepared messages sent to queue per thread. The default is 20.
Global Settings	AUTO_EMAIL_REDIRECT_URL_ BASE	Specifies the URL of the script that redirects the email recipients to the Landing page URL in automated email campaign activities.

Table 2   Global Address Book Server Configuration Settings in the MaConfig Table

Section	Key	Value
Global Settings	AUTO_EMAIL_REQUIRES_AUTH	Specifies if SMTP server requires authentication: 0 = Authentication not required 1 = Authentication required
Global Settings	AUTO_EMAIL_SERVICE	Default server that hosts the Email Service.
Global Settings	AUTO_EMAIL_SMTP_PORT	Port number of the SMTP server. The default is 25.
Global Settings	AUTO_EMAIL_THREAD_COUNT	Number of email threads. This value cannot be higher than 31 and the default is 20.
Global Settings	AUTO_EMAIL_TIME_UNIT	Time unit used for AUTO_EMAIL_CYCLE_TIME: 0 = Minutes 1 = Hours 2 = Days 3 = Months
Global Settings	AUTO_PRINTFAX_BATCH_CYCLE	
Global Settings	AUTO_PRINTFAX_BATCH_SIZE	Number of print jobs for each batch.
Global Settings	AUTO_PRINTFAX_CYCLE_TIME	Number of polls in the time unit specified in AUTO_PRINTFAX_TIME_UNIT, in which the SQL Server is checked for outgoing automated print jobs and faxes.
Global Settings	AUTO_PRINTFAX_TIME_UNIT	Time unit used for AUTO_PRINTFAX_CYCLE_TIME: 0 = Minutes 1 = Hours 2 = Days 3 = Months
Global Settings	BTI_PATH	Defines the UNC location of the "Maximizer\Address Books" folder on the Maximizer Main Server. The "Address Books" folder is usually shared as "EAddress Books", so that in a typical installation the UNC path would be "\\<servername>\ EAddress Books".
Global Settings	CAMPAIGN_PRINTFAX_DEVICES	List of printers and fax software used by the Maximizer Print/Fax Service.

Table 2   Global Address Book Server Configuration Settings in the MaConfig Table

Section	Key	Value
Global Settings	COMMON_WORKSPACES	Defines the Maximizer Address Books that are to appear in the Address Books list when you open an Address Book. The Address Book names should be separated by a comma, as in "COMMON_ Address BookS=Address Book1,Address Book2,Address Book3". Each Address Book listed here should have a corresponding section in the MaConfig table. For example "Address Book1" would have a "[Address Book1]" section.
Global Settings	Dashboard_URL	URL of dashboards.
Global Settings	DB_SERVER	Name of database server.
Global Settings	DB_SYS_TYPE	Type of database (SQL).
Global Settings	EMPLOYEE_PORTAL_URL	URL of Maximizer Web Access.
Global Settings	ENCRYPTION_TYPE	Type of encryption: 0 = Standard 1 = No encyption 2 = BLOWFISH40
Global Settings	IIS	Name of the IIS Server.
Global Settings	IIS External Server	Network machine name of the IIS Server that you have set up for external Internet access.
Global Settings	IIS Internal Server	Network machine name of the IIS Server that you have set up for internal access.
Global Settings	Install Path	Local path of the Maximizer program folder on the Maximizer Application Server.
Global Settings	License_MAXIMIZER	Number of installed Maximizer PLNs (Product License Numbers).
Global Settings	License_MAXIMIZER_DESCn	Description of nth Maximizer PLN.
Global Settings	License_MAXIMIZERn	nth Maximizer PLN.
Global Settings	License_PORTAL	Number of installed Web Access Site PLNs (Product License Numbers).
Global Settings	License_PORTAL_DESCn	Description of nth Web Access Site PLN.
Global Settings	License_PORTALn	nth Web Access Site PLN.
Global Settings	Maximizer Server	Network machine name of the Maximizer Server.
Global Settings	Maximizer Server Setup	Maximizer series number installed on the Maximizer Application Server. This value is set by the installation program.

Table 2   Global Address Book Server Configuration Settings in the MaConfig Table

Section	Key	Value
Global Settings	NONTESTED_COLLATION_LIST	
Global Settings	ONETOONE_REQUIRES_AUTH	
Global Settings	ONETOONE_SMTP_SERVER	
Global Settings	ONETOONE_SMTP_SERVER_ PORT	
Global Settings	Server Path UNC	Refers to the UNC path of the "Maximizer\ ServerShared" folder. The "ServerShared" folder is shared as "MaximizerServer" during a Maximizer installation. For example, a typical installation would have the entry "Server Path UNC=\\<servername>\ MaximizerServer".
Global Settings	SMTP Server	Specifies the name of the outgoing mail server used for automated campaigns.
Global Settings	SMTP_TIMEOUT	Duration that the email service waits for the SMTP server's response for each email. The unit of measurement is in seconds.
Global Settings	SQL_SERVER	
Global Settings	<IIS Server>_Domain Name	HTTP server name.
Global Settings	TESTED_COLLATION_LIST	Comma-delimited list of SQL database collations supported by Maximizer.
Global Settings	Thin_Clients_Installation	
Global Settings	USE_UNIFIED_LOGIN	"Trusted Connection" login security: 0 = Disabled 1 = Enabled
Global Settings	AUTO_TRANSLATE	This key must be created manually. Create this key when a workstation that uses non-English regional settings must access a database that uses an English database collation. It affects the "Perform translation for character data" flag in the database DSN. Set the value of this key to 0 or 1. 0 = Turn "Perform translation for character data" flag OFF 1 = Turn "Perform translation for character data" flag ON If you use a database collation other than the default, SQL_Latin1_General_CP1_Ci_AS, set the value to 0. This Key must also be added for the Address Book with the non-default database collation.

Table 2   Global Address Book Server Configuration Settings in the MaConfig Table

Section	Key	Value
Global Settings	WEBAPI_URL	This key contains the full URL of the Maximizer.Web.Data API, including the protocol (http or https).
Global Settings	WEBAUTHENTICATION_URL	This key contains the full URL of the Maximizer Authentication service, including the protocol (http or https).

Table 3   ISS Server Configuration Settings in the MaConfig Table

Section	Key	Value
IIS_<IIS Server>	BASE_HREF	
IIS_<IIS Server>	IIS_URL	Virtual directory path of the "Scrptpub.dll".
IIS_<IIS Server>	WORKSPACE	
IIS_<IIS Server>	WORKSPACE_PATH	Installation path of the Address Books folder.

Table 4   Live Update Configuration Settings in the MaConfig Table

Section	Key	Value
Live Update	Enable	
Live Update	Enable Auto	
Live Update	Server Base URL	

Table 5   Workstation Configuration Settings in the MaConfig Table

Section	Key	Value
Workstation_<Server>	Installed_Series	
Workstation_<Server>	Setup_Completion_Date	

The ADMN_Config table in your Maximizer Address Book database contains Address Book-specific settings.

AppCode	KeyCode	SubKeyCode	Comment
	ALLOW_COPY_CLIENTS_TO_OUTLOOK		Controls Address Book synchronization between Maximizer and Outlook. 0 = Disable (default) 1 = Enable
	AUTO_EMAIL_PASSWORD		Maximizer Email Service outgoing SMTP server account password
	AUTO_EMAIL_REQUIRES_AUTH		Enable/disable Maximizer Email Service outgoing SMTP server authentication 0 = Disable 1 = Enable
	AUTO_EMAIL_RUN		Automated services activation 0 = Inactive 1 = Active (but not yet used by any automated services) 2 = Active
	AUTO_EMAIL_SERVICE		The name of server which hosts the automated services
	AUTO_EMAIL_SMTP_PORT		Maximizer Email Service outgoing SMTP server port number
	AUTO_EMAIL_SMTP_SERVER		Maximizer Email Service outgoing SMTP server name
	AUTO_EMAIL_TEMPLATES		Automated services templates path
	AUTO_EMAIL_USERNAME		Maximizer Email Service outgoing SMTP server account name
	ClientUdfInfo	CustomerService	
	ClientUdfInfo	EssentialUDFs	Essential UDFs
	ClientUdfInfo	EssentialUDFs_Caption	Essential UDFs group box caption
	Mandatory Basic Fields	Company, Contact or Individual	Marks basic field as mandatory for specific entry type
	NotifyAction ("CustomerNotify")	CustomerService	Notify Address Book entry when a customer service case is created for them
	ResponseTime	CustomerService	Default case response time
	Address Format	0	Custom address format, accessible from Preferences > Format

AppCode	KeyCode	SubKeyCode	Comment
	MyWorkDay	MyWorkDayCaption	Caption text for Overview page, set in Administrator preferences
	Calendar	Appt_iCal_Attachment	Preference for including an iCal attachment in an appointment notification email.
	Calendar	CarryForward	CarryForward for Hotlist in Calendar window
	Calendar	HideLegend	Hide/Show user and location/resources legend
	Calendar	HideTask	Hide/Show Hotlist tasks in Calendar
	Calendar	Legend	Users, resources, and locations visible in legend
	EMAIL_DEFAULT _TEMPLATE	0	DataMachineID, SequenceNumber of the email template in the AMGR_Letters table.
	RecentEntries	0	Client_id of a recent entry
	RecentEntries	bVisible	Hide/Show recent entries on Icon bar
	DefaultAbTab		
	Format(User)	ShowDisabled	Show/Hide disabled users
	Format(User)	Name	User format
	RecentEntries	NumToShow	Number of recent entries to show
	LastCatalogSearches		
	MWD_LAYOUT		What is shown in MWD
	MWD_STARTUP		Whether or not MWD opens on startup
	PRINTER<n>	NAME	Printer name or UNC path
	Printing Rights	Rights	Allow printing to specified output
	Quick Access Entries	bVisible	Show/Hide quick access list on Icon bar
	Quick Access Entries	Selected Commands	Action listed in quick access
	User_Colors	Resource	Resource colors
	User_Colors	User	User Colors
	Column Setup	Address Book Campaigns	
	Column Setup	Campaigns	

AppCode	KeyCode	SubKeyCode	Comment
	IconBarButtonOrder		The order of the buttons in the icon bar.
	IconBarButtonHide		The icons that are hidden on the icon bar.
NOTIFICATION	AutoEmail	EVENT_MAX_AUTO _EMAIL_FATAL	Event notification for Maximizer Email Service fatal error
NOTIFICATION	AutoPrintFax	EVENT_MAX_AUTO _PRINTFAX_FATAL	Event notification for Maximizer Print/Fax Service fatal error
NOTIFICATION	NOTIFICATION_ SETTING	Notification CFG Version	Event notification version number. Used to synchronize the EventNotification.cfg file with these table entries.
NOTIFICATION	NOTIFICATION_ SETTING	NOTIFICATION_ ENABLE	Event notification activation 0 = Inactive 1 = Active
NOTIFICATION	NOTIFICATION_ SETTING	NOTIFICATION_ REQUIRE_AUTH	Enable/disable events notification outgoing SMTP server authentication 0 = Disable 1 = Enable
NOTIFICATION	NOTIFICATION_ SETTING	NOTIFICATION_ SENDER_ADDRESS	Event notification sender email address
NOTIFICATION	NOTIFICATION_ SETTING	NOTIFICATION_ SENDER_NAME	Event notification sender name (email)
NOTIFICATION	NOTIFICATION_ SETTING	NOTIFICATION_ SMTP_AUTH_NAME	Event notification outgoing SMTP server account name
NOTIFICATION	NOTIFICATION_ SETTING	NOTIFICATION_ SMTP_AUTH_ PASSWORD	Event notification outgoing SMTP server account password
NOTIFICATION	NOTIFICATION_ SETTING	NOTIFICATION_ SMTP_PORT	Event notification outgoing SMTP server port number
NOTIFICATION	NOTIFICATION_ SETTING	NOTIFICATION_ SMTP_SERVER	Event notification outgoing SMTP server name

Maximizer File Types

The following table lists the extensions of file types created in the registry during the Maximizer installation.

Extension	Application	Comment
.MDE	MaxWin.exe	Maximizer Data Exchange file used by email transfer (prior to version 7 – now .MET)
.MEC	ecMecIm.exe	OrderDesk's order data file
.MET	MaxWin.exe	Maximizer Email Transfer files (version 7 and higher)
.MXD	MaxWord.ter	Maximizer Document extension
.MXI	MaxWin.exe	Maximizer XML format data file
.MTI	MaxWin.exe	Maximizer Transfer Interface (CSV format data file – elaborate or skip CSV altogether; manual says EDI, flags, etc.)

The following table lists the extensions of file types used by Maximizer. These file types have no association in the registry.

Extension	Application	Comment
.ETF	MaxWord.ter	Template files used for automated campaigns, customer service emails, and by MaxWord

The following table lists the extensions of file types created in the registry during the MaxExchange installation in previous versions.

Extension	Application	Comment
.MEX		MaxExchange lock file

The following table lists the extensions of file types used by MaxExchange in previous versions. These file types have no association in the registry.

Extension	Application	Comment
.HDR		Packet header file
.ATT		Data packet file
.MA		Internally used by MaxExchange to store information about email data packets (as in Dld_q.ma)

Virtual Directories

The following table describes the virtual directories created by the Maximizer installation.

By default, [Install Directory] is C:\Program Files\Maximizer\.

Virtual Directory	Description	Directory
MaximizerWebAccess	Maximizer Web Access	[Install Directory]\ Portals\Employee
MaximizerMobileAccess	Mobile Access	[Install Directory]\ Portals\Wireless
MaximizerPartner	Partner Access	[Install Directory]\ Portals\Partner
MaximizerCustomer	Customer Access	[Install Directory]\ Portals\Customer
Dashboard	Dashboards	[Install Directory]\ Portals\Dashboard
Campaigns	Statistics for email campaigns	[Install Directory]\ Campaign Manager\ Statistics

Virtual Directory Permissions

The following sections list the default permissions for the virtual directories created by the Maximizer installation.

Maximizer Web Access, Partner Access, and Customer Access Virtual Directories

The following table lists the default permissions for the MaximizerWebAccess, MaximizerPartner, and MaximizerCustomer virtual directories:

Permission	Setting
Read Access	True
Write Access	False
Script Source Access	False
Directory Browsing	False
Indexing	True
Log Visits	True

Permission	Setting
Default Document	Default.aspx
Delete During Uninstall	True
Execute Permissions	Scripts Only
Application Protection	Medium
Application Mappings	Default mappings
Session Timeout	20
ASP Script Timeout	90
Authentication Methods	Anonymous + Integrated Windows

Campaigns Virtual Directory

The following table lists the default permissions on the Campaigns virtual directory:

Permission	Setting
Read Access	True
Write Access	False
Script Source Access	False
Directory Browsing	False
Indexing	True
Log Visits	True
Default Document	Default.asp
Delete During Uninstall	True
Execute Permissions	Scripts Only
Application Protection	Medium
Application Mappings	Default mappings
Session Timeout	20
ASP Script Timeout	90
Authentication Methods	Anonymous + Integrated Windows

Dashboard Virtual Directory

The following table lists the default permissions for the Dashboard virtual directory:

Permission	Setting
Read Access	True
Write Access	False
Script Source Access	False
Directory Browsing	False
Indexing	True
Log Visits	True
Default Document	Default.asp
Delete During Uninstall	True
Execute Permissions	Scripts and Executables
Application Protection	High
Application Mappings	Default mappings
Session Timeout	20
ASP Script Timeout	90
Authentication Methods	Anonymous + Integrated Windows

Database Views for User-Defined Fields

When you create a user-defined field, a database view for that user-defined field is also created. You can use these views to report on user-defined fields in Crystal Reports. For example, when a new Address Book user-defined field called "Salary" is created, a new view named "A_Salary" is dynamically created. Based on the type of user-defined field, the view name is prefixed by a designated letter. The following table identifies the table or view name prefixes for each type of user-defined field.

Maximizer uses the Microsoft SQL database driver (MAS_ DSN).

Microsoft SQL View Prefixes

The Microsoft SQL driver creates database views for user-defined fields, using the following prefixes.

Prefix	Type of user-defined field
A_	Address Book
BP_	Third-Party Integration
C_	Campaign
CS_	Customer Service
O_	Opportunity
U_	Users
S_	System

Maximizer XML Interface (MXI)

Maximizer enables you to import Address Book entries, customer service cases, and knowledge base articles from Maximizer or other applications using XML. If the records were exported from Maximizer in MXI (Maximizer XML Interface) or XML format, you can import them back into Maximizer directly. However, to import records from other applications in XML format, you must ensure that the XML file conforms to the Maximizer XML schema.

After you have converted your data to XML format, you can use the Import command to import this data into an Address Book.

The names of and relationships between the elements in the Maximizer XML schema correspond to the Maximizer Address Book fields, with a few exceptions. Several elements are named "Detail...". These elements correspond to user-defined fields:

- **DetailDef** – Definition of a user-defined field.
- **DetailDate** – Date user-defined field.
- **DetailNumber** – Numeric user-defined field.
- **DetailString** – Alphanumeric user-defined field.
- **DetailList** – Single-value table user-defined field.
- **DetailListMulti** – Multiple-value table user-defined field.
- **DetailFormula** – Formula user-defined field.
- **DetailBoolean** – Yes/no user-defined field.

The following sections outline the tree-structure hierarchy of Maximizer XML elements. The first section outlines just the top-level elements, and the following sections outline the elements below the top-level. Mandatory elements are shown in bold, and are mandatory only if their parent element is used.

Top-Level Elements

The <AllData> element is the root element, which contains the following elements, which contain all other elements. For specific information about each of the elements, refer to the appropriate section.

<AllData>

    <ImportOptions>

        See ImportOptions Element.

    </ImportOptions>

    <DetailDef>

        See DetailDef Element for sub-elements.

```
        </DetailDef>
        <Individual>
            See Individual Element for sub-elements.
        </Individual>
        <Company>
            See Company Element for sub-elements.
        </Company>
        <KnowledgeBaseArticle>
            See KnowledgeBaseArticle Element for sub-elements.
        </KnowledgeBaseArticle>
        <Case>
            See Case Element for sub-elements.
        </Case>
</AllData>
```

ImportOptions Element

The <ImportOptions> element and its sub-elements describe how Address Book entries and customer service cases should be imported.

```
<ImportOptions>
    <LeadHandling></LeadHandling>
    <ClientIdGeneration></ClientIdGeneration>
    <LogFile></LogFile>
    <LogLevel></LogLevel>
    <ClientOptions>
        <MatchMode></MatchMode>
        <MatchDetail></MatchDetail>
    </ClientOptions>
    <ContactOptions>
        <MatchMode></MatchMode>
        <MatchDetail></MatchDetail>
    </ContactOptions>
</ImportOptions>
```

The following table describes the values of each of the <ImportOptions> elements. The valid values for each element are listed in the Value column. The Equivalent Field column identifies the field in the import dialog boxes that sets the same import option.

Element Name	Valid Values	Equivalent Field(s) in Maximizer	Description
LeadHandling	Lead	Import all entries as leads	Imports all Address Book entries in the import file as sales leads, regardless of any sales lead values specified in the file.
	Normal	Import all entries as non-leads	Imports all Address Book entries in the import file as non-sales leads, regardless of any sales lead values specified in the file.
	File	Use values from the import file	Imports Address Book entries as either sales leads or non-sales leads, as specified in the values of the import file. This is the default option. If the file was exported from Maximizer, the sales lead status of each Address Book entry was automatically included in the exported file. This option simply carries those values forward to the imported records.
ClientIdGeneration	Setting	n/a	If the imported Address Book entry contains a Client ID, it uses the Client ID of the imported entry. If the imported Address Book entry does not contain a Client ID, it creates a new Client ID for the imported Address Book entry.
	System	n/a	Creates a new Client ID for each imported Address Book entry.
	File	n/a	Uses the Client IDs of the Address Book entries being imported.
LogFile		n/a	Path and filename where the log file should be saved (e.g., c:\folder\file.log).
LogLevel	0	n/a	Do not log (leaving this element value blank has same result).
	1	n/a	Log errors only.
	5	n/a	Log record additions and field changes.
	7	n/a	Record all details (very large log file size).
ClientOptions	n/a	n/a	Client Options apply to Company and Individual Address Book entries; Contact Options apply to Contact Address Book entries. Client Options and Contact Options are defined in the nested <MatchMode> and <MatchDetail> elements.
ContactOptions	n/a	n/a	

Element Name	Valid Values	Equivalent Field(s) in Maximizer	Description
MatchMode	AlwaysInsert	n/a	Inserts all Company, Individual, and Contact records from the import file and does not match imported records to existing records. Duplicate entries may result.
	Id	n/a	Uses Address Book identification values as the criteria for matching records. For Company and Individual records, this option uses the Client ID field to match entries. For Contact records, this option uses the Client ID and Contact Number fields to match entries.
	Name	n/a	Company records will use the Company field, and Individual and Contact records will use the Last Name field as the criteria for matching records.
	Detail	n/a	Specifies an alphanumeric user-defined field to use as the criterion for matching records. Only Address Book entry user-defined fields that apply to the applicable record type appear in this list.
MatchDetail		n/a	Name of the alphanumeric user-defined field to use to match entries when MatchMode is set to Detail.

DetailDef Element

The <DetailDef> element and its sub-elements describe the user-defined field definitions. If the user-defined field includes a description, it appears in the <Description> element. If it is a table user-defined field, the table items each appear in the <ListItem> elements.

```
<DetailDef Name="" Type="">
    <Description></Description>
    <ListItem></ListItem>
</DetailDef>
```

Much of the information about the user-defined field is stored in the element's attributes, which are described in the following table.

Attribute	Data Type	Valid Values	Description
Name	string		Name of the user-defined field.
Type	string	Multiple Single Date String Number	Indicates the type of user-defined field: • Multiple = Table user-defined field that allows selection of multiple items. • Single = Table user-defined field that allows selection of single item only. • Date = Date user-defined field. • String = Alphanumeric user-defined field. • Number = Numeric user-defined field. • Formula = Formula user-defined field. • Boolean = Yes/No user-defined field. This attribute also applies to the \<Detail> elements within other elements. The maximum length of the Type attribute is 80 characters.
Cases	string	No Yes	Indicates whether the user-defined field can be assigned to Cases.
Companies	string	No Yes	Indicates whether the user-defined field can be assigned to Company, Individual, or Contact Address Book entries.
Individuals	string	No Yes	
Contacts	string	No Yes	
DateAnnual	string	Yes	Applies to Date user-defined fields only. Yes = Annually recurring event.
RetainYear	string	Yes	Applies to Annually Recurring Date user-defined fields only. Yes = Retain year in annually recurring dates.
Hotlist	integer	1	Applies to Date user-defined fields only. 1 = Create Hotlist task.
Length	integer		Applies to Alphanumeric user-defined fields only. Indicates the maximum length of the field value.

Individual Element

The \<Individual> element describes an Address Book entry for an Individual. Mandatory sub-elements are shown in bold.

\<Individual>

    \<ContactNo>\</ContactNo>

    \<FirstName>\</FirstName>

    \<LastName>\</LastName>

    \<Initial>\</Initial>

```
<MrMs></MrMs>
<Title></Title>
<Salutation></Salutation>
<Phone>
     <Number></Number>
     <Extension></Extension>
     <Description></Description>
</Phone>
<Email>
     <Address></Address>
     <Description></Description>
</Email>
<Department></Department>
<Division></Division>
<ReportsTo></ReportsTo>
<AssignedTo></AssignedTo>
<Category></Category>
<DoNotSolicitBy></DoNotSolicitBy>
<Website></Website>
<Created></Created>
<LastModified></LastModified>
<SalesLead></SalesLead>
<Address>
     See Address Element.
</Address>
<DetailDate Name=""></DetailDate>
<DetailNumber Name=""></DetailNumber>
<DetailString Name=""></DetailString>
<DetailList Name=""></DetailList>
<DetailListMulti Name="">
     <Value></Value>
</DetailListMulti>
<Note>
     See Note Element.
</Note>
<Document>
```

```
            See Document Element.
        </Document>
        <Id></Id>
        <Firm></Firm>
        <Contact>
            See Contact Element.
        </Contact>
</Individual>
```

Company Element

The <Company> element describes an Address Book entry for a Company. Mandatory sub-elements are shown in bold.

```
<Company>
        <Id></Id>
        <Name></Name>
        <Department></Department>
        <Division></Division>
        <Phone>
                <Number></Number>
                <Extension></Extension>
                <Description></Description>
        </Phone>
        <Email>
                <Address></Address>
                <Description></Description>
        </Email>
        <Website></Website>
        <AssignedTo></AssignedTo>
        <Category></Category>
        <DoNotSolicitBy></DoNotSolicitBy>
        <Created></Created>
        <LastModified></LastModified>
        <SalesLead></SalesLead>
        <Address>
                See Address Element.
        </Address>
```

```
<DetailDate Name=""></DetailDate>
<DetailNumber Name=""></DetailNumber>
<DetailString Name=""></DetailString>
<DetailList Name=""></DetailList>
<DetailListMulti Name="">
    <Value></Value>
</DetailListMulti>
<Note>
    See Note Element.
</Note>
<Document>
    See Document Element.
</Document>
<Contact>
    See Contact Element.
</Contact>
</Company>
```

KnowledgeBaseArticle Element

The <KnowledgeBaseArticle> element describes a Knowledge Base Article. The contents of the article itself are stored in the <Data> sub-element.

Note: To import your own knowledge base articles that were not exported from Maximizer, you must encode the text in Base64 for the Data field in the MXI/XML file.

```
<KnowledgeBaseArticle>
    <Machine></Machine>
    <Sequence></Sequence>
    <Status></Status>
    <Creator></Creator>
    <Owner></Owner>
    <LastModified></LastModified>
    <Created></Created>
    <FileName></FileName>
    <FileExt></FileExt>
    <Title></Title>
    <KeyWords></KeyWords>
```

```
            <Product></Product>
            <Category></Category>
            <Data></Data>
    </KnowledgeBaseArticle>
```

Case Element

The <Case> element describes a Customer Service Case. Mandatory sub-elements are shown in bold.

```
<Case>
    <CaseNumber></CaseNumber>
    <CaseId></CaseId>
    <Subject></Subject>
    <CaseCompanyIndividual>
        <Id></Id>
        <ContactNo></ContactNo>
    </CaseCompanyIndividual>
    <CaseContact>
        <Id></Id>
        <ContactNo></ContactNo>
    </CaseContact>
    <Solution>
        <Id></Id>
        <ContactNo></ContactNo>
    </Solution>
    <ArticleId></ArticleId>
    <Priority></Priority>
    <Severity></Severity>
    <Fee></Fee>
    <BillRate></BillRate>
    <BillableTime></BillableTime>
    <Owner></Owner>
    <AssignedTo></AssignedTo>
    <CreatedBy></CreatedBy>
    <ModifiedBy></ModifiedBy>
    <ResolvedBy></ResolvedBy>
    <CaseOwner></CaseOwner>
```

```
                    <Type></Type>
                    <Reason></Reason>
                    <Origin></Origin>
                    <Category></Category>
                    <BillingType></BillingType>
                    <Queue></Queue>
                    <Status></Status>
                    <ModifyDate></ModifyDate>
                    <DeadlineDate></DeadlineDate>
                    <CreateDate></CreateDate>
                    <ResolveDate></ResolveDate>
                    <Description></Description>
                    <DetailDate Name=""></DetailDate>
                    <DetailNumber Name=""></DetailNumber>
                    <DetailString Name=""></DetailString>
                    <DetailList Name=""></DetailList>
                    <DetailListMulti Name="">
                        <Value></Value>
                    </DetailListMulti>
                    <Note>
                        See Note Element.
                    </Note>
                    <Document>
                        See Document Element.
                    </Document>
              </Case>
```

Contact Element

The <Contact> element describes an Address Book entry for a Contact. This element is nested within the <Individual> and <Company> elements. Mandatory sub-elements are shown in bold.

```
<Contact>
    <ContactNo></ContactNo>
    <FirstName></FirstName>
    <LastName></LastName>
    <Initial></Initial>
```

```
<MrMs></MrMs>
<Title></Title>
<Salutation></Salutation>
<Phone>
     <Number></Number>
     <Extension></Extension>
     <Description></Description>
</Phone>
<Email>
     <Address></Address>
     <Description></Description>
</Email>
<Department></Department>
<Division></Division>
<ReportsTo></ReportsTo>
<AssignedTo></AssignedTo>
<Category></Category>
<DoNotSolicitBy></DoNotSolicitBy>
<Website></Website>
<Created></Created>
<LastModified></LastModified>
<SalesLead></SalesLead>
<Address>
     See Address Element.
</Address>
<DetailDate Name=""></DetailDate>
<DetailNumber Name=""></DetailNumber>
<DetailString Name=""></DetailString>
<DetailList Name=""></DetailList>
<DetailListMulti Name="">
     <Value></Value>
</DetailListMulti>
<Note>
     See Note Element.
</Note>
<Document>
```

See Document Element.

</Document>

</Contact>

Address Element

The <Address> element describes the address of an Address Book entry. This element is nested within the <Individual>, <Company>, and <Contact> elements.

<Address>

<Description></Description>

<AddressLine1></AddressLine1>

<AddressLine2></AddressLine2>

<City></City>

<StateProvince></StateProvince>

<Country></Country>

<ZipCode></ZipCode>

</Address>

Note Element

The <Note> element describes any notes for Address Book entries or customer service cases. This element is nested within the <Individual>, <Company>, and <Contact>, and <Case> elements. Mandatory sub-elements are shown in bold. The body of the note is stored in the <Text> element.

<Note>

<Date></Date>

<Creator></Creator>

<Owner></Owner>

<Type></Type>

<Text></Text>

</Note>

Document Element

The <Document> element describes any Documents for Address Book entries or customer service cases. This element is nested within the <Individual>, <Company>, and <Contact>, and <Case> elements. Mandatory sub-elements are shown in bold. The body of the document is stored in the <DocData> element in Base64 format.

```
<Document>
    <DocumentId></DocumentId>
    <Name></Name>
    <Date></Date>
    <Creator></Creator>
    <Owner></Owner>
    <Extension></Extension>
    <DocData></DocData>
</Document>
```

Element Details

The following table lists all the elements in the Maximizer XML schema in alphabetical order and describes the following properties of each:

- **Element Name** – The name of the XML element. An element name may be listed more than once if it has different properties depending on its parent element. Most of the element names correspond to Maximizer field names.

- **Parent Element(s)** – The name of the XML element(s) within which the element is nested. If an element with the same name and same properties may exist within more than one parent element, all parent elements are listed.

- **Min. Occur.** – The minimum number of times the element must occur within its parent element. A value of 1 indicates that the element is mandatory, and a value of 0 indicates it is not.

- **Max. Occur.** – The maximum number of times the element may occur within its parent element.

- **Data Type** – The type of data that may be stored in the element.

- **Max. Length** – The maximum length of the element contents. If this value is blank, there is no maximum length.

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Address[a]	Email	1	1	string	120
Address[a]	Individual Company Contact	0	1	none[b]	
AddressLine1	Address	0	1	string	80
AddressLine2	Address	0	1	string	80
AllData	none	1	1	none[b]	
ArticleId	Case	0	1	string	80

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
AssignedTo	Individual Company Contact Case	0	1	string	11
BillableTime	Case	0	1	double	
BillingType	Case	0	1	string	80
BillRate	Case	0	1	double	
Case	AllData	0		none[b]	
CaseCompanyIndividual	Case	0	1	none[b]	
CaseContact	Case	0	1	none[b]	
CaseId	Case	0	1	string	80
CaseNumber	Case	0	1	string	80
CaseOwner	Case	0	1	string	80
Category[a]	Individual Company Contact	0	1	string	
Category[a]	KnowledgeBaseArticle Case	0	1	string	80
City	Address	0	1	string	80
ClientIdGeneration	ImportOptions	0	1	string	
ClientOptions	ImportOptions	0	1	none[b]	
Company	AllData	0	unlimited	none[b]	
Contact	Individual Company	0	unlimited	none[b]	
ContactNo[a]	Individual Contact	0	1	integer	
ContactNo[a]	CaseCompanyIndividual CaseContact Solution	1	1	integer	
ContactOptions	ImportOptions	0	1	none[b]	
Country	Address	0	1	string	80
Created	Individual Company Contact KnowledgeBaseArticle	0	1	dateTime	
CreateDate	Case	0	1	dateTime	
CreatedBy	Case	0	1	string	80

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Creator	Note Document KnowledgeBaseArticle	0	1	string	80
Data[c]	KnowledgeBaseArticle	0	1	string	
Date	Note Document	1	1	dateTime	
DeadlineDate	Case	0	1	dateTime	
Department	Individual Company Contact	0	1	string	80
Description[a]	Phone Email	0	1	string	22
Description[a]	Address	0	1	string	80
Description[a]	DetailDef Case	0	1	string	
DetailDate	Individual Company Contact Case	0	unlimited	date	
DetailDef	AllData	0	unlimited	none[b]	
DetailList	Individual Company Contact Case	0	unlimited	string	80
DetailListMulti	Individual Company Contact Case	0	unlimited	none[b]	
DetailNumber	Individual Company Contact Case	0	unlimited	double	
DetailString	Individual Company Contact Case	0	unlimited	string	120
Division	Individual Contact Company	0	1	string	80
DocData	Document	0	1	string	

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Document	Individual Company Contact Case	0	unlimited	none[b]	
DocumentId	Document	0	1	integer	
DoNotSolicitBy	Individual Company Contact	0	1	string	
Email	Individual Company Contact	0	3	none[b]	
Extension	Phone Document	0	1	string	22
Fee	Case	0	1	double	
FileExt	KnowledgeBaseArticle	0	1	string	22
FileName	KnowledgeBaseArticle	0	1	string	120
Firm	Individual	0	1	string	80
FirstName	Individual Contact	0	1	string	80
Id	Individual Company CaseCompanyIndividual CaseContact Solution	1	1	string	23
ImportOptions	AllData	0	1	none[b]	
Individual	AllData	0	unlimited	none[b]	
Initial	Individual Contact	0	1	string	80
KeyWords	KnowledgeBaseArticle	0	1	string	120
KnowledgeBaseArticle	AllData	0	unlimited	none[b]	
LastModified	Individual Company Contact KnowledgeBaseArticle	0	1	dateTime	
LastName	Individual Contact	1	1	string	80
LeadHandling	ImportOptions	0	1	string	
ListItem	DetailDef	0	unlimited	string	80
LogFile	ImportOptions	0	1	string	
LogLevel	ImportOptions	0	1	integer	

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Machine	KnowledgeBaseArticle	0	1	integer	
MatchDetail	ClientOptions ContactOptions	0	1	string	
MatchMode	ClientOptions ContactOptions	1	1	string	
ModifiedBy	Case	0	1	string	80
ModifyDate	Case	0	1	dateTime	
MrMs	Individual Contact	0	1	string	80
Name	Company Document	1	1	string	80
Note	Individual Company Contact Case	0	unlimited	none[b]	
Number	Phone	1	1	string	22
Origin	Case	0	1	string	80
Owner	Note Document KnowledgeBaseArticle Case	0	1	string	80
Phone	Individual Company Contact	0	4	none[b]	
Priority	Case	0	1	string	80
Product	KnowledgeBaseArticle	0	1	string	80
Queue	Case	0	1	string	80
Reason	Case	0	1	string	80
ReportsTo	Individual Contact	0	1	string	80
ResolveDate	Case	0	1	dateTime	
ResolvedBy	Case	0	1	string	80
SalesLead	Individual Company Contact	0	1	boolean	
Salutation	Individual Contact	0	1	string	80
Sequence	KnowledgeBaseArticle	0	1	integer	
Severity	Case	0	1	string	80

Element Name	Parent Element(s)	Min. Occur.	Max. Occur.	Data Type	Max. Length
Solution	Case	0	1	none[b]	
StateProvince	Address	0	1	string	80
Status[a]	KnowledgeBaseArticle	0	1	integer	
Status[a]	Case	0	1	string	80
Subject	Case	0	1	string	
Text	Note	1	1	string	
Title[a]	Individual Contact	0	1	string	80
Title[a]	KnowledgeBaseArticle	0	1	string	120
Type	Note Case	0	1	string	80
Value	DetailListMulti	1	unlimited	string	80
Website	Individual Company Contact	0	1	string	120
ZipCode	Address	0	1	string	80

a. This element is listed more than once because of differing properties depending on which element is the parent element.

b. This element cannot contain a value. It can contain only other elements.

c. To import your own knowledge base articles that were not exported from Maximizer, you must encode the text in Base64 for the Data field in the MXI/XML file.

Search String Language

Each access object in Maximizer.Data has a method called ReadList() which returns a .NET collection of the associated objects. This method may be called with no parameters to return everything in the Address Book or with a search string.

The ReadList() method generally searches fields contained within the calling object. However, Address Book entry fields and methods are also available for searching in the Opportunity and CSCase access objects. To call an Address Book field from the Opportunity or CSCase access object, add "ABENTRY_" before the field name. For example, to call the City field for an Address Book entry in the Opportunity object, the syntax for the field search should be "ABENTRY_City".

Search Syntax

The syntax for the search string is a functional or prefix operator notation. Expressions are of the form **<Operator>(["]<Parameter1>["]{,["]<Parameter>["]})**. This syntax was chosen because it's well suited to a search tree interface. Double-quotes are always optional, although, you need them if a search parameter includes commas, spaces, or parentheses. In most programming languages, you should ensure you escape double-quote characters when specifying them as a string.

Example

```
AND(EQ(City,Vancouver), OR(LIKE(Phone1,604%),
LIKE(Phone2,604%)))
```

Result

This search string would return all Address Book entries where the city is Vancouver and at least one of the first two phone numbers starts with 604.

Search Operators

Each object supports a subset of the total search string syntax, and each operator supported by the object supports its use on a subset of the object's fields. Deviation from what is supported will result in an exception being thrown as described later. As a minimum, the KEY operator is supported by every object as a means of selecting a single record in the set.

The following tables describe the operators available to the search string language.

Object-level Search Operators

The following search operators apply to the object. The documentation of each object lists which search operators are available for that object. However, the KEY operator is available for all objects.

Operator	Description	Parameters
AND	All sub-expressions must evaluate to true to return an object in the result set.	Each parameter is a sub-expression to be AND/OR together. A minimum of one parameter is required.
OR	At least one sub-expression must evaluate to true to return an object in the result set.	
KEY	An object must have the given key or derive from a supported foreign key for it to be returned in the result set.	The parameter is a supported key for this object. Exactly one parameter is required. IMPORTANT NOTE: Maximizer.Data keys are encrypted. A key may include letters, numbers and special printable characters, but will NEVER include double quote characters. It is recommended that when using this operator, you surround your key with double quotes.

The following search operators apply to the AbEntryAccess object only.

Operator	Description	Parameters
WNOTE	An object must have an associated note as described to be returned in the result set.	Up to eight parameters may be specified. Only the first parameter is mandatory, and those left unspecified will not be included in the search. The first parameter is the search text. The search text may occur anywhere in a note. "_" is a single character wildcard. The second and third parameters are the start and end dates expressed as YYYY-MM-DD. The fourth parameter is the set of note types to return (e.g. "1,2,4"). The fifth parameter is the Creator. The sixth parameter is the Owner. If you want to return only public notes, put "PUBLIC" here. The seventh parameter is the note category. The eighth parameter is the option to use full text search. If you want to use the full text search, put "FULLTEXT" here.
NWNOTE	An object cannot have an associated note as described to be returned in the result set.	
FLIST	An object (generally an Address Book entry) must be in the favorite list to be returned in the result set.	The only parameter is the FavoriteList key. Exactly 1 parameter is supported. Ensure to enclose the keys in double quotes.
LIST	An object (generally an Address Book entry) must be explicitly listed to be returned in the result set.	List the AbEntry keys corresponding to the objects you want to return. Any number of parameters is supported. Ensure to enclose the key in double quotes.

Operator	Description	Parameters
WDOC	An object must have an associated document as described to be returned in the result set.	Up to eight parameters may be specified. Only the first parameter is mandatory, and those left unspecified will not be included in the search. The first parameter is the search text. The search text may occur anywhere in a document. "_" is a single character wildcard. The second and third parameters are the start and end dates expressed as YYYY-MM-DD. The fourth parameter is the document name. The fifth parameter is the minimum size of the document. The sixth parameter is the Creator. The seventh parameter is the Owner of the document. The eighth parameter is the document category.
NWDOC	An object cannot have an associated document as described to be returned in the result set.	

Field-level Search Operators

The following search operators apply to the fields within each object. The documentation of each field lists which operators are available for each field.

Operator	Description	Parameters
EQ	A given field must be equal to the search criteria to return an object in the result set.	The first parameter is the field name. The second parameter is the search criteria. No wildcards are supported. See LIKE/NLIKE. Exactly two parameters are required.
NEQ	A given field cannot be equal to the search criteria to return an object in the result set.	
LIKE	A given field must be similar to the search criteria to return an object in the result set.	The first parameter is the field name. The second parameter is the search criteria. Standard SQL wildcards "_" and "%" are supported. Exactly two parameters are required.
NLIKE	A given field cannot be similar to the search criteria to return an object in the result set.	

Operator	Description	Parameters
RANGE	A given folder must be in the range provided to return an object in the result set.	The first parameter is the field name. The second and third parameters define the range. Exactly 3 parameters are required.
NRANGE	A given field cannot be in the range provided to return an object in the result set.	

Exceptions

Syntax errors in supplied search strings are reported with the throwing of an exception from the ReadList() method. All exceptions thrown from the Maximizer.Data assembly are derived from MxException, so they may be caught and handled collectively.

Example (C#)

```
try

{

oAbEntryAccess.ReadList("EQ(City,Vancouver)");

}

catch
(Maximizer.Data.MxSupportedKeywordSearchStringException
exKeyword)

{

// A custom message for this particular error type.

MessageBox.Show("AbEntry doesn't support " +
exKeyword.ErrorDetail);

}

catch (Maximizer.Data.MxException exGeneric)

{

// Generically pop-up a message box explaining the
error.

MessageBox.Show(exGeneric.ToString());

}
```

The following table contains the exceptions that may be thrown when parsing a search string. It also contains the error message that is displayed for each exception if you use the ToString() function.

Exception	Error Message
MxPreProcessSearchStringException	Unable to pre-process the given search string. It may be missing or have extraneous parentheses or double quotes.
MxProcessSearchStringException	Unable to process the given search string. It contains an unsupported operator.
MxListSearchStringException	Unable to process the given search string. The LIST expression should take at least one parameter.
MxFlistSearchStringException	Unable to process the given search string. The FLIST expression should take exactly one parameter. The parameter should be the key of the desired favorite list to retrieve.
MxEqSearchStringException	Unable to process the given search string. The EQ expression should take exactly two parameters.
MxNeqSearchStringException	Unable to process the given search string. The NEQ expression should take exactly two parameters.
MxLikeSearchStringException	Unable to process the given search string. The LIKE expression should take exactly two parameters.
MxRangeSearchStringException	Unable to process the given search string. The RANGE expression should take exactly three parameters.
MxNrangeSearchStringException	Unable to process the given search string. The NRANGE expression should take exactly three parameters.
MxNlikeSearchStringException	Unable to process the given search string. The NLIKE expression should take exactly two parameters.
MxWnoteSearchStringException	Unable to process the given search string. The WNOTE expression should take between one and six parameters.
MxWdocSearchStringException	Unable to process the given search string. The WDOC expression should take between one and six parameters.
MxNwnoteSearchStringException	Unable to process the given search string. The NWNOTE expression should take between one and six parameters.
MxNwdocSearchStringException	Unable to process the given search string. The NWDOC expression should take between one and six parameters.
MxKeySearchStringException	Unable to process the given search string. The KEY expression should take exactly one parameter.

Exception	Error Message
MxVerifyFieldSearchStringException	Unable to process the given search string. The field specified is not supported with the given operator for this object.
MxSupportedKeywordSearchString Exception	Unable to process the given search string. It includes a keyword unsupported by this object.
MxDateTimeOrderSearchStringException	Unable to process the given search string. When searching by a date range the start date must be earlier than the end date.

In this chapter...

Maximizer and Administrator Terminology

.NET – See Microsoft .NET Framework.

access rights – Security settings for users. Access rights control each user's permissions to read, insert, modify, or delete various types of Maximizer entries. They also control general Maximizer privileges, user roles, and allowed printing destinations. Access rights determined by the user's access settings and the access settings of any security groups the user belongs to. For more information about access rights, refer to "User and Group Security" on page 76.

access settings – There are two types of access settings: user access settings and group access settings. Combined user and group access settings determine a user's access rights. For more information about access settings, refer to refer to "User and Group Security" on page 76.

Address Book – A Maximizer database.

Address Book entry – A Company, Individual, or Contact in the Maximizer Address Book.

Administrator – A Maximizer module in which the Address Book administrator can perform configuration and maintenance of the Maximizer system and Address Books.

advanced import – Importing an MXI or XML file into an Address Book. For more information about advanced import, refer to "Importing Address Book Data from MXI or XML Files" on page 259.

Application Server – See Maximizer Application Server.

automated campaign – A series of automated emails, faxes, or printed documents that Maximizer sends on a predefined schedule. An automated campaign is based on an automated campaign template.

automated services – Maximizer Email Service. Used for automated campaigns, customer service case email notifications, and appointment reminders by email.

Calendar – A Maximizer page where you can manage your appointments.

Campaign Manager Statistics – A Maximizer component that tracks the number of emails opened by the recipients, the number of recipients who clicked web links within the email, and the number of recipients who chose to unsubscribe from future campaigns.

campaign template – A pre-defined strategy used by email and traditional marketing campaigns. See automated campaign and traditional campaign.

Company – An Address Book entry used to record information for a company or organization.

Company Library – A shared library of company literature.

COMPANY user – A Maximizer system user account used for the company calendar to display company events in the Maximizer calendar.

Contact – An Address Book entry used to record information for an individual person associated with a Company or Individual type of Address Book entry.

Customization Suite – A Maximizer add-on enabling you to customize Maximizer's functionality and interface and to integrate it with other applications. For more information, refer to the Maximizer web site.

Dashboards – Component of Maximizer Web Access that display real-time information on your company using dashboard-style instrumentation.

default entry – An Address Book entry containing field values that are propagated to new Address Book entries by default.

demilitarized zone (DMZ) – A network area between the external router, which talks to the Internet, and the corporate firewall, which protects internal computers from Internet security breaches

DSN – A Data Source Name providing connectivity to a database through an ODBC driver.

EMAILUSER – A Maximizer system user account that gives Maximizer access to Address Book data when it performs automated email activities such as automated campaigns.

Escona Tutorial – The Escona Tutorial Address Book is a sample Address Book included with a typical installation of Maximizer. Using the example of a fictitious vintner in the Sonoma Valley, this Address Book demonstrates many of Maximizer's possibilities.

event notification – Automatic email notification and logging when specific Maximizer events occur.

global Address Book – A shared Address Book residing on the server. When creating a global Address Book, it is recommended that you create the new Address Book on the Maximizer Server. If you create a new global Address Book from the workstation, you must have administrative rights to the server.

Global Edit – A Maximizer operation that enables you to apply the same change to multiple Maximizer entries simultaneously.

group – See security group.

Holiday Editor – A tool in Administrator for adding holidays to the Maximizer Calendar window.

Hotlist – A page in Maximizer used to display tasks and appointments in a specific date range.

IIS – See Microsoft Internet Information Server.

IP address – A number used to uniquely identify a specific computer on the Internet. Every Internet-connected computer has an IP address. In Maximizer, you use the IIS server's IP address when you preview or publish your online catalog.

Key Fields – Important user-defined fields that are highlighted on the Basic Information tab of Maximizer entries. For more information, refer to "Creating Key Fields Lists" on page 170.

Knowledge base – A database containing articles pertaining to solutions for customer service and/or technical issues.

lead – An Address Book entry (Company, Individual, or Contact) that has been flagged as a potential client or customer.

list – A listing of entries in Maximizer. You can create a list using a search or by selecting specific entries and reducing the list to the selection. Most activities are performed for the current list or the current entry.

load balancing – When a web server is running at capacity, new connections are to another web server for processing.

mandatory field – Fields in Maximizer entries that must contain a value. Mandatory fields are designated through File > Preferences > Mandatory Fields in Administrator.

mandatory user-defined field – User-defined fields in Maximizer entries that must contain a value. Mandatory user-defined fields are designated through File > Set Up User-Defined Fields in Administrator or Maximizer.

marketing team – A group of users to support team-based work on marketing campaigns in Maximizer.

MASTER user – The Address Book administrator's user ID. This user ID permits access to Administrator.

MaxAlarm – A discontinued Maximizer companion application that automatically monitors appointments for one or more people in any number of Address Books and notifies them of appointments.

MaxExchange – A discontinued Maximizer program that was used to synchronize an Address Book between a central server and remote distribution sites via FTP, email, or a direct network connection.

Maximizer – A Maximizer CRM module in which you can perform contact management and sales force automation activities.

Maximizer Application Server – The principal Windows Server where Maximizer CRM Server is installed.

Maximizer Email Service – A Maximizer automated service that provides automated email campaign activities, customer service case email notifications, and appointment reminders by email.

Maximizer XML Interface (MXI) – An XML file format for importing entries into a Maximizer Address Book.

MDAC – Microsoft Data Access Components. Provides ActiveX Data Objects (ADO), OLE DB, and Open Database Connectivity (ODBC) components for Maximizer to integrate information from multiple sources.

merge field – Text inserted into a document or template that is replaced by Address Book information during a mail merge. For example, a merge field can be a Contact's name, so you can customize a letter's salutation with the recipient's name.

Microsoft .NET Framework – A Microsoft operating system platform required for Maximizer Web Access, and Maximizer Campaign Manager Statistics.

MaxSync for Microsoft Exchange – A discontinued Maximizer add-on for synchronizing some Maximizer entries, such as Address Book entries, between Maximizer and a Microsoft Exchange Server.

Microsoft Internet Information Server (IIS) – Microsoft web server software. Internet Information Server, or IIS, is used for many of the Maximizer components.

Microsoft SQL Server – A database server used by Maximizer for the Address Book data.

MXI – See Maximizer XML Interface.

note – A text document attached to Address Book entries, Contacts, opportunities, and campaigns.

OLE – Object linking and embedding (OLE) is a technology that allows you to insert files, portions of files, and links to files into a document or application. You can insert files in the Documents window and the Company Library. Double-clicking the file opens it in the associated (and installed) application.

opportunity – An entry in Maximizer used to record an opportunity to make a sale. Opportunities can organize a sales team using a structured sales strategy.

PLN – Product License Number. A Maximizer license. For more information, refer to "Installing Licenses" on page 51.

preferences – A collection of program options that allow users to customize how Maximizer functions. Some preferences are set in Administrator

PSN – Product Serial Number. Entered during product installation.

registry key – Configuration information stored in the Windows operating system.

related entries – An entry that records a relationship between two Address Book entries. For example, one Address Book entry might be an accountant for another Address Book entry, which could be recorded as a related entry in Maximizer.

sales team – A group of users to support team-based work on sales opportunities in Maximizer.

sites – Web-based interfaces (Maximizer Web Access) for Maximizer Address Books. This includes Maximizer Web Access, Customer Access, Partner Access, and Mobile Access.

script file – A file containing commands that can be executed without user interaction.

security group – A set of access settings for a subset of Maximizer users. For more information, refer to "User and Group Security" on page 76.

SMTP – An SMTP server is a server used for outgoing Internet email.

SQL – See Microsoft SQL Server.

strategy – A structured, team-based approach to pursuing sales opportunities. Strategies define the steps, activities, and roles involved in successfully completing a sale.

system field – All Maximizer fields that are not user-defined fields are system fields. A few system fields have customizable value-selection lists, which can be defined through File > Preferences > System Fields in Administrator.

system-defined field – User-defined fields created by Maximizer rather than by users. Users can modify some properties of these fields but cannot delete them. In the Set Up User-Defined Fields dialog box, system-defined fields are displayed in bold.

team – See sales team or marketing team.

template – A file that outlines the design for a document, email, or web page. Maximizer uses templates for word processor documents, and for automated activities that belong to automated campaigns. Templates can contain merge fields for bulk mailings. Also, see campaign template.

thin-client applications – Allow you to remotely access Maximizer Address Book data using the web. "Maximizer on the Web" consists of Maximizer Web Access, Mobile Access, Partner Access, and Customer Access.

traditional campaign – Used to organize a marketing effort, including a marketing team's steps, activities, and roles.

two-tier import – A procedure for importing Address Book entries where Companies are imported first followed by Contacts.

UDF – See user-defined field.

UNC – Universal Naming Convention. A kind of network path used to locate files and folders. An example of a UNC path is "\\Escona\MxServer\".

user ID – A name that uniquely identifies a Maximizer user. Users must enter their user ID and password to gain access to a Maximizer Address Book.

user-defined field – A custom field used to record additional "user-defined" information for Address Book entries, opportunities, campaigns, and users.

virtual directory – An IIS folder that points to a physical folder on the computer. The contents of the physical folder that the virtual directory refers to is accessible to the Internet or intranet via the IIS server.

Web Access – Web access allows you to remotely access Maximizer Address Book data using the web. "Maximizer on the Web" consists of Maximizer Web Access, Mobile Access, Partner Access, and Customer Access.

web.config – A configuration file for .NET applications. Each of the applications has its own web.config file.

WEBUSER – A Maximizer system user account required for Customer Access and Partner Access.

workflow automation – A tool that monitors your business systems and automatically assigns the appropriate people to take action.

XML – Extensible Markup Language. A file format that can be displayed is XML-enabled web browsers.

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