Maximizer CRM

Administrator's Guide

for Maximizer Web Access

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This document applies to Maximizer CRM 2018 and later version.

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What is Administrator?

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

- 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.

➤ **To log in to Administrator**

1 From Maximizer Web Access, in the left pane, hover your mouse over **Administration**, and select **Administrator** from the pop-up.

– or –

Enter the Maximizer Web Access Administrator URL in a web browser:

The URL is in the form: **[server]/MaximizerAdministrator**

2 Select an Address Book.

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

The Address Book opens in Administrator.

➤ **To open an Address Book**

1 In the left pane, under **Database Management**, select **Open Address Book**.

2 From the **Address Book** drop-down list, select an Address Book.

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

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

Address Books

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

1 Change the MASTER user password. Refer to "Changing the MASTER User Password" on page 5.

2 **Add users to the Address Book.** When a new Address Book is created, it contains only the MASTER, EMAILUSER and WEBUSER user accounts. Create an account for each Maximizer user. Refer to "Adding a User to an Address Book" on page 7.

3 **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 10.

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

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.

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

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.

All Address Books on the same SQL Server must have the same MASTER user password.

➤ **To change the MASTER user password**

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

2 In the left pane, click **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 **Save**.

The MASTER user password is updated.

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 set up for you. Log in as an administrative user in Administrator to perform setup or administrative tasks.

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.

Use the User Properties dialog box to enter a user's name and contact information, 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 In the left pane, click **Users**.

The list of users is displayed.

2 Click **Add**.

The Copy User's Properties dialog box opens.

3 To copy the properties from an existing user, select the user from the drop-down list, and click **OK**.

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.

- Under **Time Zone**, specify the time zone for the user.

Users can also specify the time zone in Maximizer.

5 Select the **Access Rights** tab.

6 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 10.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 11.

7 Click **Save Settings** to save the changes to the access settings.

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

9 Click **Save**.

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.

Changing User Passwords

The following procedure explains how to change user passwords in Administrator. However, users can also change their own passwords in Maximizer in the user preferences.

It is strongly recommended that users working in more than one Address Book on the same SQL Server use the same password for every Address Book.

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

1 In the left pane, click **Users**.

The list of users is displayed.

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

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

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

4 Click **Save** 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 15). 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.

Permissions

Permissions	Controls the selected user's or group's right to view, add, change, or remove . . .
Address Book	Entries in the Address Book page
User-defined fields	Values in user-defined fields
User-defined field setup	User-defined field definitions
Notes	Notes attached to entries.
Documents	Documents attached to entries
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 page
Strategy Library	Strategy Library information for opportunities
Campaigns	Entries in the Campaigns page
Customer Service	Entries in the Customer Service page
Knowledge base	Articles in the Knowledge Base page
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.
Accounting	Accounting transactions. This access right applies only to earlier versions of Maximizer.
Action Plan Library	Action plan templates in the Action Plan Library

Permissions	Controls the selected user's or group's right to view, add, change, or remove . . .
Quotas	Entries in the Quotas page
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.
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.

Privilege	Grants authorization to . . .
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 15 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 key fields	Create and modify key fields lists from Maximizer.
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 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, use territory alignment, and create or modify quota templates. 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.

Destination	Grants authorization to . . .
Preview	Display a preview of the print output on the screen.
Custom Report	Open and print reports from the Crystal Reports option in the Reports tab in Maximizer. Note that the user cannot create custom reports unless he or she is also a member of the Crystal Reports Users security group.

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 10.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 11.

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

1 In the left pane, click **Users**.

2 Click on the User ID of the Maximizer user.

3 Select the **Access Rights** tab.

4 Click **Modify User Access Settings**.

5 Modify any of these settings as appropriate.

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

7 Click **Save** 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.

(i) 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 10.

Group Members

You can add or remove users from the group in the Members tab of the Security Group page.

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".
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".

Security Group Name	Group ID	Enables group members to...
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 10.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 11.

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

1 In the left pane, click **Security Groups**.

2 Click **Add**.

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 the users to add to the security group, and click **Add**.

8 Click **Save** 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 10.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 11.

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

1 In the left pane, click **Security Groups**.

2 Select the group name.

3 Select the appropriate settings for the group, and click **Save**.

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 In the left pane, click **Teams**.

3 Click **Add**.

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

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

6 Select the **Members** tab.

7 From the **Available Users** list, select the users to add to the team, and click **Add**.

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

8 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.

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

1 0 Click **Save** to save the new team.

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 In the left pane, click **Users**.

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

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

CHAPTER

Configuring an Address Book

3

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.
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.
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.
Opportunities	• Opportunity stages and probabilities of close. • Opportunity confidence rating schemes. • Opportunity completion reasons. • Opportunity monitoring lists.
Security	Account lockout and Mobile Access security options.

In this section	You can set the following preferences:
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	• Address Book name. • System-assigned customer service IDs. • Overview page caption. • 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. • Multi-currency. • SQL Server Reporting Services settings. • Start of the fiscal year. • Maximum number of entries to return in Mobile Access. • Add or remove approved OAuth 2.0 client applications.

Set Address Book Preferences

1 In the left section of the page, click **Preferences**.

The Preferences section opens.

2 Click the link related to the section for which you want to set preferences.

For example, click System Options.

3 Set Address Book preferences for each of the sections.

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 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 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.

2 If you are working in the System Fields preferences, expand the root folder to display the list of fields to edit.

3 Expand the plus sign next to the field.

The current list of values are displayed under the field name.

4 Click **Add New Value**.

5 Enter the name of the item.

6 If necessary, enter other properties of the item.

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

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

- For the **Stage** field in opportunities, specify the range of the probability of close to apply to the stage.
- For the **Completion reason** field in opportunities and campaigns, specify the completion status the item applies to.

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

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

Auditing Changes to Entries

You can set up auditing preferences for Address Book entries, opportunities, and customer service cases. By enabling the auditing feature, you can manage audit logs and view the system audit report.

About Auditing

Maximizer has the ability to log a history of changes made to entries in your Address Book. When Auditing is enabled, a history of the changes made to the basic fields, user-defined fields, notes, and documents of your entries is automatically saved to the audit log.

You have to enable and configure Auditing preferences for the Address Book module to allow users to view audit logs.

The size of your Address Book database may increase substantially when Auditing is turned on. The current size of the audit log file is displayed in the Auditing preferences page.

Enable Auditing

You can enable auditing options to log changes to entries in your Address Book.

1 In the left pane, under **Preferences**, select **Auditing**.

2 Click **Edit Audit Settings** to enable auditing options for your entries.

🛈 The Audit log ignores Full and Read Access settings for user-defined fields, notes, and documents and displays history for all changes, regardless of security settings.

3 For each of the entry types you want to Audit, select the changes you wish to log.

- Select the **Fields** checkbox to track changes made to basic fields and user-defined fields.

- Select the **Notes** checkbox to track changes made to notes.

- Select the **Documents** checkbox to track changes made to documents.

4 Click **Save**.

Purge the Audit Log

You can manage the database storage used by the audit log history by deleting old audit logs.

1 In the left pane, under **Preferences**, select **Auditing**.

2 Under **Manage audit log**, specify a **Delete logs older than** interval.

3 Click **Delete**.

4 Click **Yes** to confirm audit log deletion.

Audit log entries created before the specified interval are deleted.

System Audit Report

Auditing allows you to track modifications made in user-defined fields, notes and documents for entries in your Address Book. You can report on the audit history using the system audit report to retrieve the change history for your entries.

The system audit report contains details of each of the changes made to your entries, including the date the change was made, the user who made the change, along with the action that was taken and the value that was changed.

You can filter the changes included in the system audit report to include changes made by all users or only by a particular user. You can also filter the report by a specific date range. After you generate it, you can export the report to Excel for further customization and analysis.

View the System Audit Report

You can generate a system audit report to show the changes made to your entries in your Address Book over a specified date range.

1 In the left pane, under **Preferences**, select **Auditing**.

2 Under **View system audit report**, select the options for the report.

- From the **Report for** drop-down list, select the type of entries to include in the report.

- Specify the **Date range**.

- From the **User** drop-down list, select the user whose changes you want to include in the report.

3 Click **View Report** to generate the report.

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 page.

• **Opportunities –** Classifies opportunities. You can view these fields in the Opportunities page.

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

• **Customer Service –** Classifies customer service cases. You can view these fields in the Customer Service page.

• **Users –** Classifies Maximizer users.

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

ⓘ 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.

• **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.

Sorting User-Defined Fields

The order that user-defined fields display in the User-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.

Move a User-Defined Field or Folder to Another Folder

1 In the left pane, under **User-Defined Fields**, select the category of user-defined fields that you want to work with.

2 To search for a field, enter all or part of a field name in the search box and click the search icon.

All matching fields in the list are highlighted, and the number of matching fields is displayed.

3 Select the field or folder you want to move.

4 Click **Move To**.

5 From the **Folder name** drop-down list, select the folder you want to move the field or folder to, and click **Save**.

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 In the left pane, under **User-Defined Fields**, select the category of user-defined fields that 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 **Save**.

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

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

ⓘ 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.

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

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.

1 In the left pane, under **User-Defined Fields**, select the category of user-defined fields that 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**, and select the type of user-defined field you want to add.

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

5 If you are adding a formula user-defined field, enter the formula in the **Formula** field.

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

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

6 Specify the properties of the user-defined field.

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

7 Click **Save**.

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 In the left pane, under **User-Defined Fields**, select the category of user-defined fields that you want to work with.

2 To search for a field, enter all or part of a field name in the search box and click the search icon.

All matching fields in the list are highlighted, and the number of matching fields is displayed.

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

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

4 Click **Add New Value**.

5 Type a name for the item, and specify the other properties of the item.

ⓘ If you set the item to hidden, you can hide it from the Available Values list by clearing the Show hidden items option.

6 Click **Save**.

7 Repeat steps 4 to 6 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 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.

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.

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 or with a red border.

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. If you are working in the Details pane, any user-defined fields that are empty are added to the current Key Fields list.

Set a System Field as Mandatory

You can set up different lists of mandatory fields for Companies, Individuals, Contacts, customer service cases, opportunities, and automated 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 the left pane, under **Preferences**, click **Mandatory Fields**.

2 Click **Modify Options**.

3 Click the plus sign beside the type of entry 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 **Save** 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 In the left pane, under **User-Defined Fields**, select the category of user-defined fields that you want to work with.

2 To search for a field, enter all or part of a field name in the search box and click the search icon.

All matching fields in the list are highlighted, and the number of matching fields is displayed.

3 Click on the user-defined field.

4 In the **Mandatory** section, select **Always mandatory**.

5 Click **Save** 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 To search for a field, enter all or part of a field name in the search box and click the search icon.

All matching fields in the list are highlighted, and the number of matching fields is displayed.

2 Click on the user-defined field.

3 In the **Mandatory** section, select **Mandatory based on rule**.

4 In the text field, enter the rule.

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

5 Click **Save** 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)

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

Complying with Anti-Spam Regulations

Maximizer has the ability to prevent sending email messages without the recipient's consent to facilitate compliance with the anti-spam regulations.

About Anti-Spam Compliance in Maximizer

Maximizer can help you comply with anti-spam regulations by preventing certain types of email from being sent from Maximizer without the recipient's consent.

Maximizer allows you to set up different email types for which you can specify whether recipient consent is required or not in order to receive that type of email. You can manage the consent, or opt-in settings for your email recipients via the email profile of each Address Book entry's email address.

When sending an email type that requires consent from Maximizer, the email profiles of the recipients are checked to ensure that they have consented, or opted-in to receive that type of email, and the email will only be sent to those recipients who have opted-in to that email type.

For example, you could create an email type called "Marketing" to be used when sending promotional email, and another email type called "Service" to be used when sending customer service emails, and specify that consent is required for the "Marketing" type emails, but is not required for the "Service" type emails. When sending a "Marketing" type email, the email would not be sent to any recipients who have not opted-in to receive promotional emails. On the other hand, since no consent is required when sending a "Service" type email, the email would be sent without checking the email profiles of the recipients.

You can use the "Do Not Solicit By" field to prevent automated campaign emails from being sent to your Address Book entries. If the "Do Not Solicit By" field is set to "Email" for an entry, no automated campaign emails will be sent to that entry, regardless of the entry's other email profile settings.

About Email Profiles

Maximizer allows you to set up different email types for which you can specify whether recipient consent is required or not in order to receive that type of email. You can manage the consent, or opt-in settings for your email recipients via the email profile of each Address Book entry's email address.

When sending an email type that requires consent from Maximizer, the email profiles of the recipients are checked to ensure that they have consented, or opted-in to receive that type of email, and the email will only be sent to those recipients who have opted-in to that email type. The email types available in Maximizer can be configured by your system administrator.

If no email type is configured in Maximizer then the default value will be blank for email type. You can manage the email profile and opt-in information for your Address Book entries in the Details tab of the following pane in the Address Book page.

You can set up email profiles for the email addresses of each company, individual, or contact in your Address Book. The email profile for each email address allows you to select the email types that the entry has opted-in to for that email address. You can select multiple opt-in email types for each email address. For each email type that has been opted-in to, you can specify the Opt-in date, the date that opt-in consent expires, and a comment about the opt-in consent. The email profile for each email address can be viewed by hovering over the email address in the Details tab of the following pane in the Maximizer Address Book page.

Add an Email Type

You can add items to the email types and email opt-in comments system fields.

1 In the left pane, under **Preferences**, select **System Fields**.

2 Expand the **Address Book, Opportunity, Campaign and Customer Service** section.

3 Click the plus sign next to the **Email type** field.

4 Click **Add New Value**.

5 Enter the name of the item.

6 Specify the user who requested the item.

7 From the **Category** drop-down list, select a category.

- Select **Permission from the email recipients required** to check the email profile before sending this type of email to the recipient.

- Select **Permission from the email recipients not required** to send this type of email without checking the email profile.

8 Select the **Default email type for outgoing messages** checkbox to make this email type the default option for all outgoing email messages.

9 Enter **Description** for additional notes on the email type.

10 Click **Save** to finish adding the item.

Voice Over IP and Instant Messaging

You can integrate Maximizer with external Voice Over Internet Protocol (VOIP) and Instant Messaging (IM) software using URLs formatted for the specific application. In Administrator, you can specify the format of the URL, including any phone numbers or user-defined fields defined in Maximizer. Then, in Maximizer, users can access the formatted URLs from the Phone Call dialog box. The VOIP or IM application is launched using field values from the Maximizer entry. Users can take notes on the call in Maximizer and log notes with the entry.

Voice Over IP and Instant Messaging URLs

In Administrator, you can specify up to four URLs to integrate with VOIP and IM software. Each URL can include Maximizer merge fields, including the phone number and phone number extension fields and any user-defined fields.

You must type in merge fields manually into the URL, using the following formats:

- **[PhoneNumber]** – Includes any of the phone number fields defined for the entry in the URL. If you have an entry with three phone numbers defined, users can choose any of the phone numbers when calling the entry.

- **[Extension]** – Includes any of the phone number extension fields defined for the entry in the URL.

- **[User-defined field name]** – Includes the specified user-defined field from the root folder in the URL.

- **[Folder name/User-defined field name]** – Includes the specified user-defined field from the specified folder in the URL.

Example: URL for calling with Skype

skype:[PhoneNumber]?call

This URL will launch a Skype call using phone number fields defined for the entry. When users make phone calls from Maximizer, they can select to use Skype with any of the phone number fields defined for the entry.
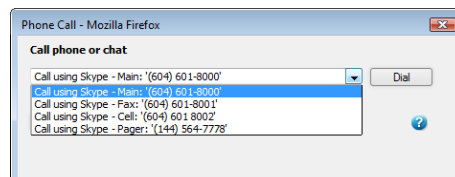
Example: URL for video calling with a Skype ID

skype:[Contact Info/SkypeID]?call&video=true

This URL launches a Skype video call using a Skype user name stored as the "SkypeID" user-defined field in the "Contact Info" folder.

Configure a Voice-Over IP or Instant Messaging Integration

You can configure up-to four integrations with Voice-Over IP (VOIP) and Instant Messaging (IM) software in Administrator.

1 In the left pane, under **Preferences**, click **System Options**.

Under VOIP/IM Integrations, you can view any VOIP or IM integrations defined in the Address Book.

2 Click **Modify Options**.

3 Next to **Description**, enter a description for the VOIP/IM integration.

4 Next to **URL**, specify the URL for the VOIP/IM integration including any Maximizer merge fields in square brackets.

You can include the [PhoneNumber] and [Extension} merge fields, as well as any user-defined fields.

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

SQL Server Reporting Services

If you install and configure SQL Server Reporting Services, Maximizer users can access reports from Maximizer Web Access. If you use Maximizer CRM Enterprise Edition, you must first install SQL Server Reporting Services on the computer hosting Microsoft SQL Server. If you use Maximizer CRM Group Edition, SQL Server Reporting Services is installed by default. See the Maximizer CRM Administrator's Guide for information on installing SQL Server Reporting Services Integration.

Once SQL Server Reporting Services is enabled, users can access SQL Server Reporting Services reports from the Reports icon in Maximizer Web Access. Users can also create new reports using Microsoft SQL Server Report Builder.

To set up SQL Server Reporting Services, you must complete the following steps in Maximizer Web Access Administrator:

• Set up a user account for the integration.

• Enable SQL Server Reporting Services.

• Add Maximizer users to the SSRS Report Management security group.

User Account for SQL Server Reporting Services

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.

• 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.

If you use Maximizer CRM Group Edition, you can specify the MASTER user account. The MASTER user automatically meets these criteria. If you use Maximizer CRM Enterprise Edition, the MASTER user does not automatically have the sysadmin server role.

Enable 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.

Once you configure SQL Server Reporting Services, the settings are saved on the report server. You may need to wait a moment for the settings to save.

1 Log in to Maximizer Web Access Administrator.

2 In the left pane, under **Preferences**, click **System Options**.

3 Select the **SQL Server Reporting Services Settings** tab.

4 Click **Modify Options**.

5 Select **Enable SQL Server Reporting Services Integration**.

The URL to the Reporting Services server and the path to the current Address Book are automatically filled in.

6 Under **Database Account**, enter the username and password for the user account used to connect to the Maximizer database.

If you are using Windows Authentication, you must specify the Windows domain and user account in the Account field.

Whenever the password changes, you must specify the new password in this page.

7 Click **Save**.

Add Users to the SSRS Report Management Group

Members of the SSRS Report Management Security Group can create and modify folders and reports in the Reports module in Maximizer Web Access. The MASTER user is automatically added to this security group, but you can add any Maximizer user to the security group.

1 In the left pane, select **Security Groups**.

2 Click **SSRS Report Management**.

3 Select the **Members** tab.

4 From the **Available Users** list, select the users to add to the security group, and click Add.

5 Click **Save**.

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