

Moving an Address Book to another SQL Server

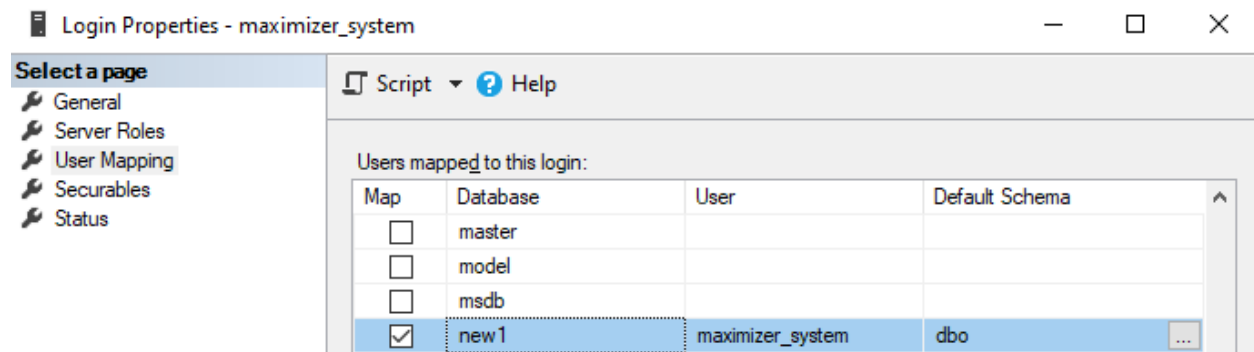
Move an Address Book in v2020 format to another SQL server

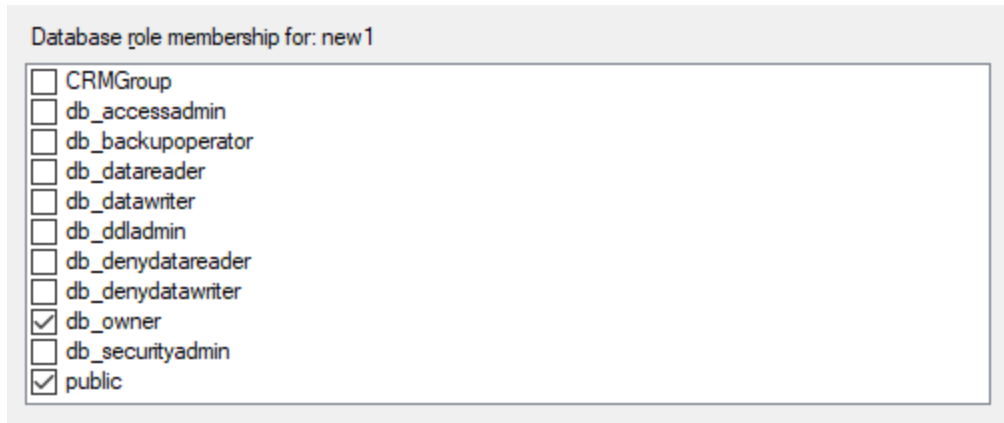
If a Maximizer Address Book in v2020 format is moved from one SQL server to another, after the Address Book is restored and employed as Maximizer Address Book for the Maximizer deployment pointing to that SQL server, it is necessary to map the maximizer_system SQL login from the SQL server to the Maximizer Address Book DB as maximizer_system user with dbo database role.

NOTE: Before you begin, please do not remove the Maximizer database you intend to move from the list of available databases until this whole operation is complete. If you do this too early, you will lose all the original passwords of all your users and will have to reset them all.

Steps:

1. Make a backup of the database you intend to move on the original SQL server
2. Copy the backup to the new SQL server
3. On that same server open SQL Management Studio
4. Restore the DB to new Maximizer deployment SQL server
5. Expand down to the now restored database and click on Security>Users
6. You will see a maximizer_system user already on the database. You need to delete this user as it is not from this server. If you get an error trying this, do the following:
 - a) Expand down to the now restored database and click on Storage>Full text catalogs
 - b) For each catalog shown, right click on them and choose "Properties"
 - c) Under "General" change Owner from "maximizer_system" to "dbo"
 - d) Once done for all Full text catalogs try deleting the user again. It should succeed.
7. Open properties for maximizer_system SQL login
8. Open User mapping tab
9. Map the login to the Address Book with dbo role





10. If you have not already, you need to add the old SQL server as a linked server. (See SQL server documentation for details on how to do this)
11. Run the following SQL query against the new SQL server MaConfig database to migrate the ability login with old passwords unto the new SQL server replacing <new sql server name> with the name of the new SQL server, <old sql server name> with the name of the old SQL server and replacing <database name> with the SQL database you are migrating:

```
INSERT INTO
Login_Identity (UserID, [Database], [Server], Salt, [Hash], [Version], [Flags], LastPasswordChange)
SELECT UserID, [Database], '<new sql server name>', Salt, [Hash], [Version], [Flags], LastPasswordChange
FROM [<old sql server name>].Maconfig.[dbo].Login_Identity
WHERE [Database] = '<database name>'
```

12. Now you must employ this database in the new Maximizer CRM v2020 environment by:
 - a) Launch the Maximizer CRM Windows Administrator module on the Maximizer CRM Application Server.
 - b) If prompted to login click Cancel.
 - c) Click File>New Address Book...
 - d) Change the "Database Server" to the new SQL Server if need be. Click "Next"
 - e) Login with your SQL server SQL Authentication credentials and click OK
 - f) Change "Target Action" to "Employ an existing Maximizer database"
 - g) From the "Database name" dropdown choose the database you are migrating and click "Next"
 - h) Click "Start"
 - i) When the employing the database is complete, click "Close"
 - j) Click "OK" when told the MASTER password has been set to "CONTROL"
 - k) When you get control back again, click File>Open Address Book...
 - l) Select the database you just employed and click "Open"
 - m) Type in the MASTER password which now is "CONTROL" and click OK
 - n) You can now login to Web Access to this migrated database as the MASTER user with the password "CONTROL" when you do this the first time you will be prompted to change it. Make the new password what you would like it to be.
 - o) Other users should be able to login to the new server now as well with their old passwords.

NOTE: If you removed the database from the list of databases on the old SQL server before following these steps, it will be necessary to go into the Maximizer Web Administrator and reset the password for each other user that isn't MASTER and give the reset password to those users. After they use that password for the first time in Web Access, they will be prompted to change the password to something else they would rather have.

Move an Address Book in v2019 or earlier format to another SQL server

If a Maximizer Address Book in v2019 format is moved from one SQL server to another, after the Address Book is restored you must perform the following steps otherwise other users besides MASTER will not be able to log in.

- 1) In the Maximizer Windows Administrator, employ the database. The MASTER password will be set to CONTROL after this.
- 2) Click Utilities > Upgrade Maximizer CRM V2017 / V2018 / V2019 Database...
- 3) Go through the Upgrade process. You will be prompted for the MASTER user and password. Use CONTROL.
- 4) Migration of passwords will begin. After the migration is completed it will immediately upgrade the database as well.
- 5) The upgrade will complete.

When successfully logging in for the first time in Maximizer Web Access with their old password after upgrade, each user will be asked to set a new password.