– DATASHEET

Setting up Azure AD with Maximizer SSO

MAXIMIZER™CRM

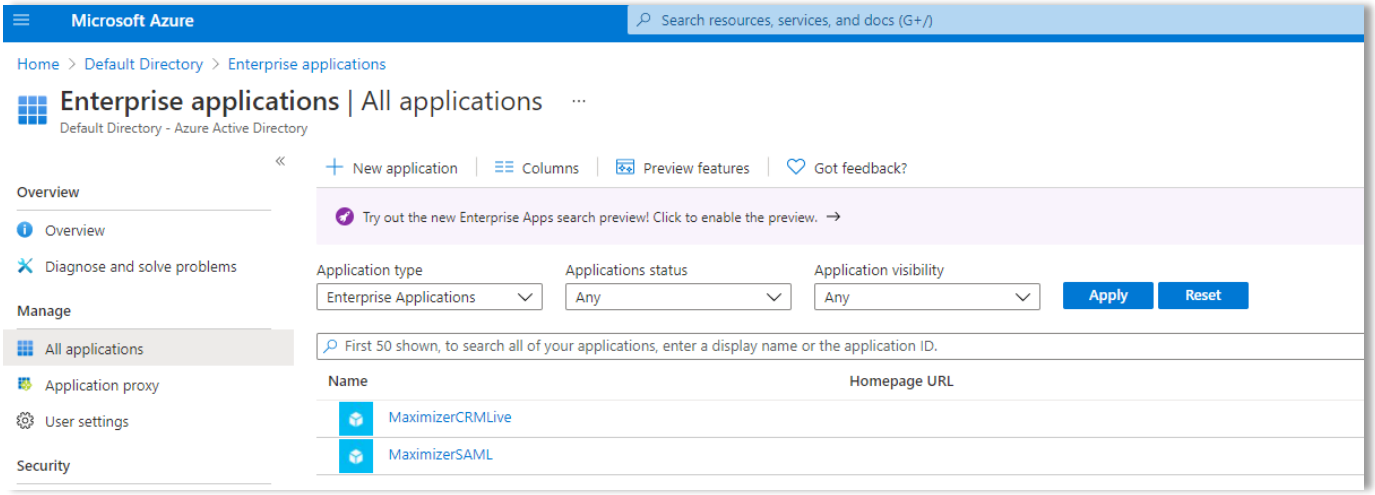
Setting up Azure Active Directory (AD) with Maximizer single sign-on (SSO)

Please Note:

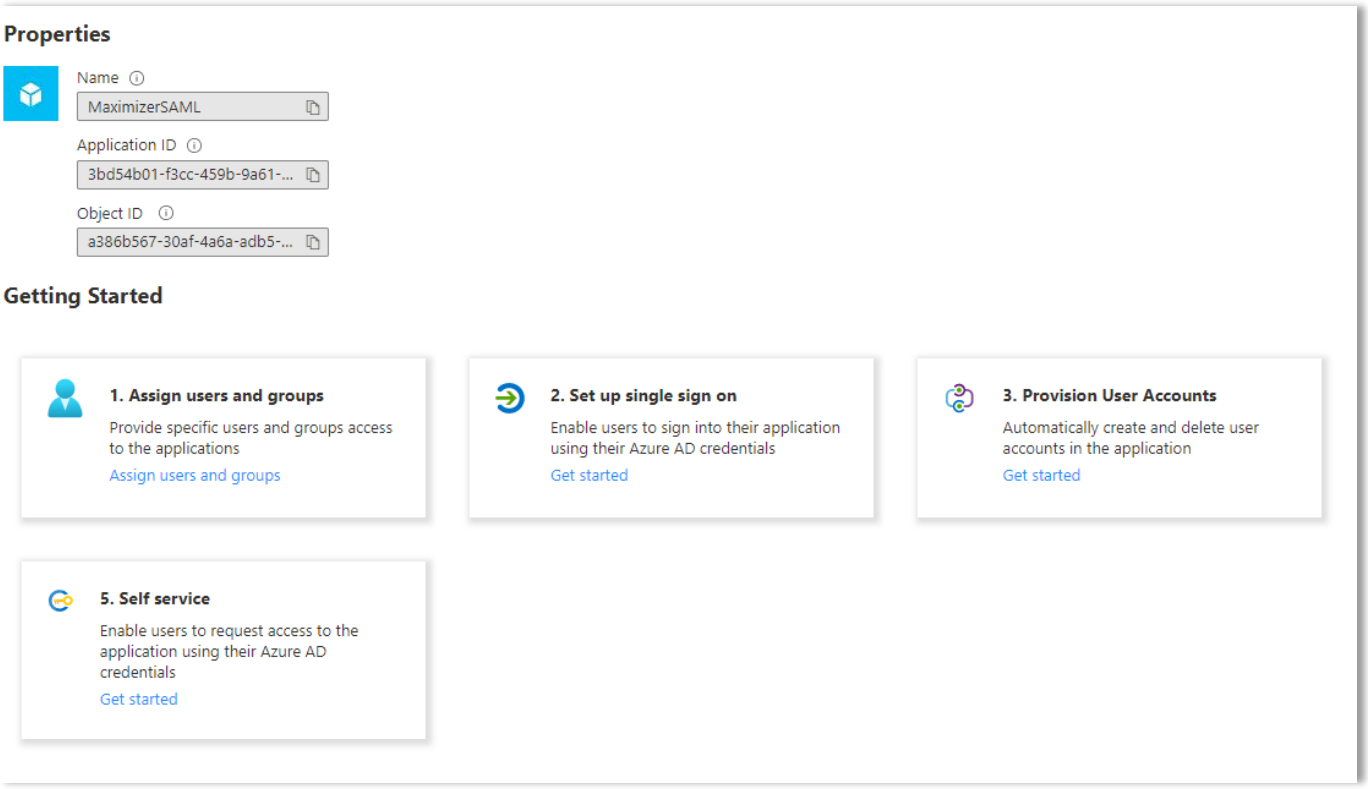
The instructions in this document are provided for informational purposes only to help you get started. Maximizer will not provide any support for third party products and is not responsible for changes in Azure AD or other third-party identity providers being used for SSO. Please consult with your systems administrator or Microsoft documentation for further details.

Follow the steps below to configure Microsoft Azure Active Directory as an Identity Provider (IDP) to let users log in to your Maximizer site using their Azure AD credentials.

1) Go to Enterprise Applications, click **New application**. In the Browse Azure AD Gallery screen, click **Create your own application**. Give it a name and make sure the radio button is set to “Integrate any other application you don't find in the gallery (Non-gallery)” and click **Create**. Your application name will be displayed in the screen below.

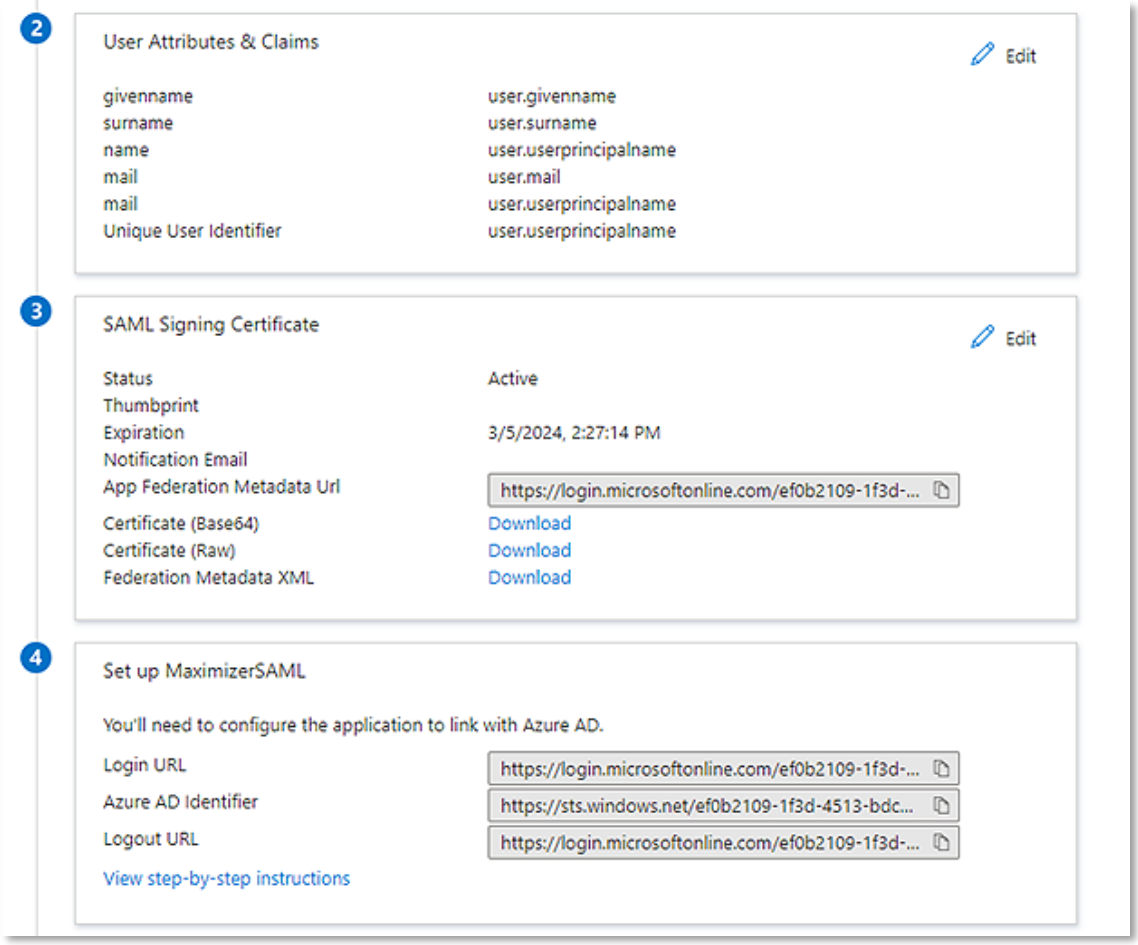


2) Click the name of your application and click **Set up single sign on.** On the next screen, click **SAML**. You will see the Set up Single Sign-on with SAML screen.

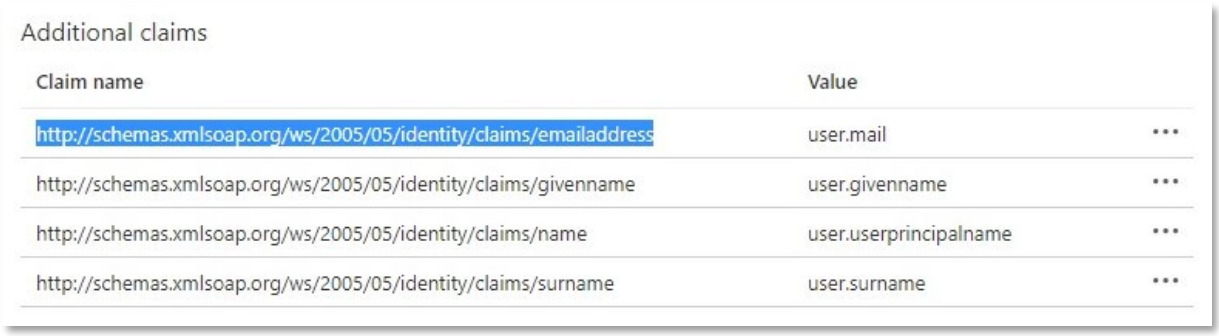


Set up Single Sign-on with SAML

You will get data from this screen and enter them into Maximizer when you set up Maximizer to use Azure AD for authentication. It is recommended that you copy the data to a text file and later copy them into Maximizer fields.



3) Under “User Attributes & Claims” click **Edit** and copy the “Claim name” from the Value “user.email”. This will be used later for the “Claim” field in your Maximizer database when setting up Maximizer to use Azure AD for authentication.



Click on the “SAML-based Sign-on” link at the top of the page to go back.

4) Under “Set up <Enterprise Application name>” click the **Copy to clipboard** icon for “Azure AD Identifier”. This will be used later for the “Identity Provider Entity ID” field in your Maximizer database when setting up Maximizer to use Azure AD for authentication. Repeat this for the “Login URL” which maps to the Maximizer “Identity Provider URL” and the “Logout URL” which maps to the Maximizer “Identity Provider Logout URL”.

5) Go to Maximizer > Icon Bar > Administration > Settings > Single Sign-On screen, click **Add Identity Provider**, and enter the data from Azure AD into the Maximizer fields. **Save** the changes.

   The chart below maps the Maximizer fields for setting up SAML SSO to the Azure AD data described above. Use the Maximizer SAML SSO SETUP Guide for details about how to set up SAML SSO in Maximizer.

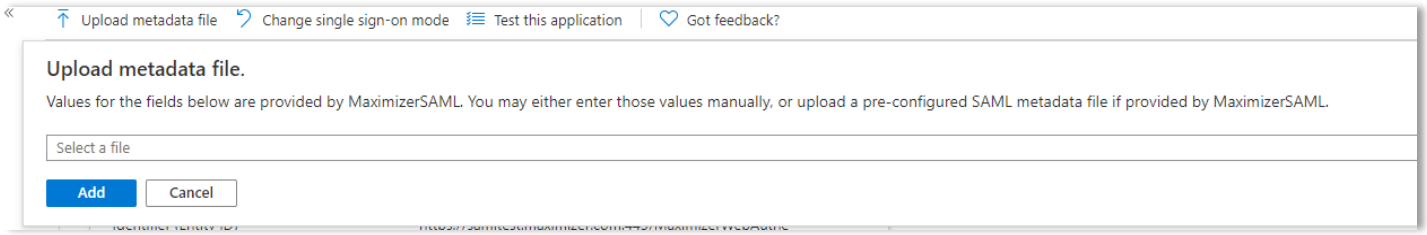
   Note
   If you have not uploaded Maximizer Service Provider Metadata to Azure, do not copy the SAML Signing Certificate from Azure to Maximizer. Enter a string as placeholder into Identity Provider Certificate field. Follow the instruction in the follow steps. You will find the information about how to copy Azure SAML Signing Certificate to Maximizer in step 8.

Maximizer Fields	Values for the fields
Identity Provider Entity ID	Enter the Azure AD Identifier copied in step 4
Identity Provider Name	Enter a friendly name for Azure AD.
Identity Provider Certificate	Enter a string as placeholder if Maximizer Service Provider Metadata has not been uploaded to Azure AD. Follow step 6, 7 and 8 to get the certificate from Azure AD and enter it into this field.
Identity Provider URL	Enter Login URL copied in step 4
Identity Provider Logout URL	Enter Logout URL copied in step 4
HTTP Binding Type	Select HTTP-POST
Service Provider Entity ID	**On-Premise:** This field will be populated automatically. **CRM Live:** You need to manually enter the URL of your CRM Live site. See details in Maximizer SAML SSO SETUP Guide
Request Signing Certificate	You need to create the certificate, sign with the supported signing algorithm, copy and paste the certificate into this field. See details in Maximizer SAML SSO SETUP Guide
Signing Algorithm	Select SHA 256
Assertion	Select Email
Claim	Enter the value copied in step 3
Service Provider Metadata URL	The field is blank by default. Follow step 6 and 7 to display the URL and add Maximizer as a Service Provider in Azure AD.

6) Open the Maximizer Identity Provider settings screen again. You will find the Service Provide Metadata URL is displayed. Copy the URL to clipboard.

7) Back in Azure, on top of the Set up Single Sign-On with SAML screen, click **Upload metadata file**. In the dialog for browsing a file, enter the Maximizer Service Provider URL into the File Name field and click **Open**.

Once the file is found and downloaded, click **Add** button.

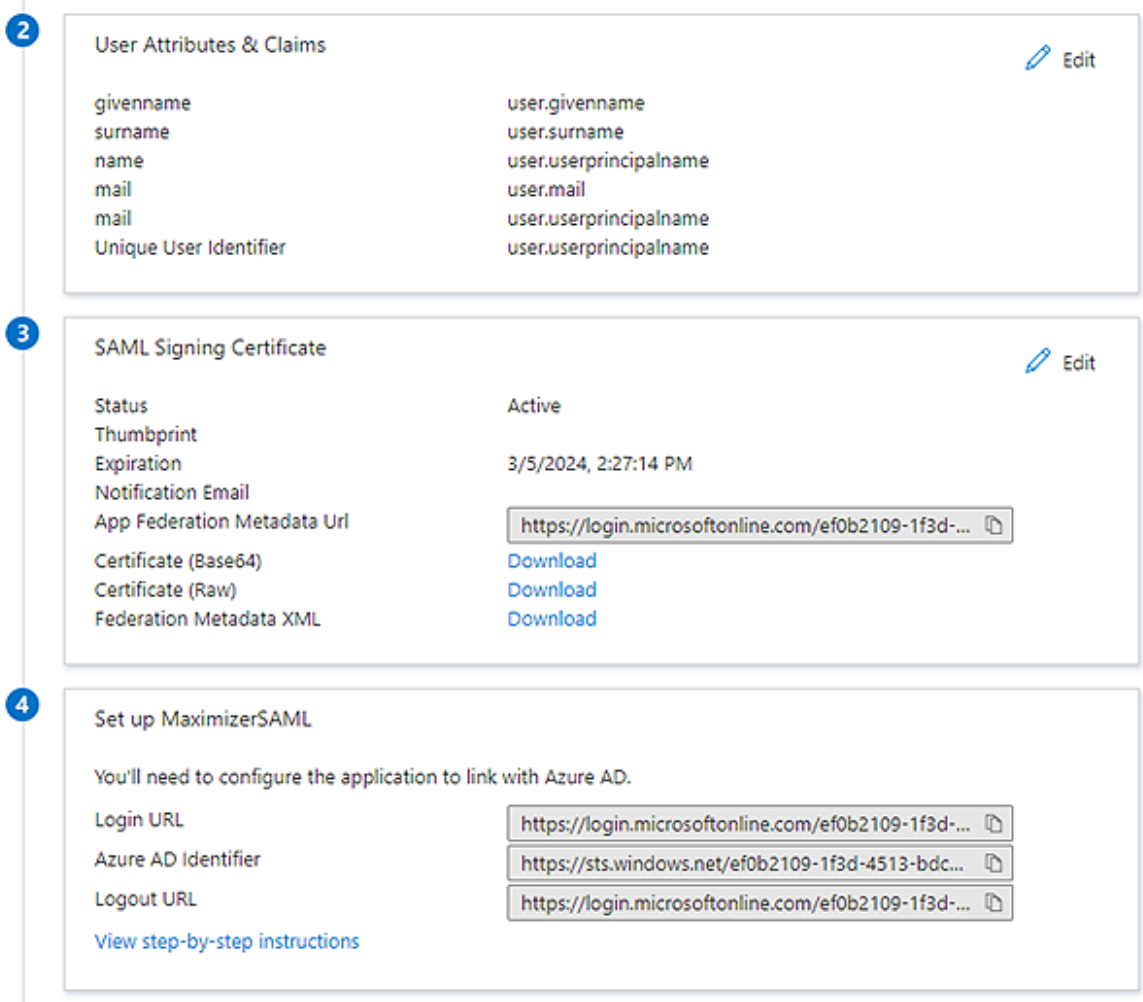


You will see the Maximizer information being retrieved in the right-hand side panel. Click **Save** button. Now it is ready to download the certificate from Azure.

8) Go to SAML Signing Certificate section, click the **Download** link beside “Certificate (Base64)” and save the certificate to a location on your local machine.

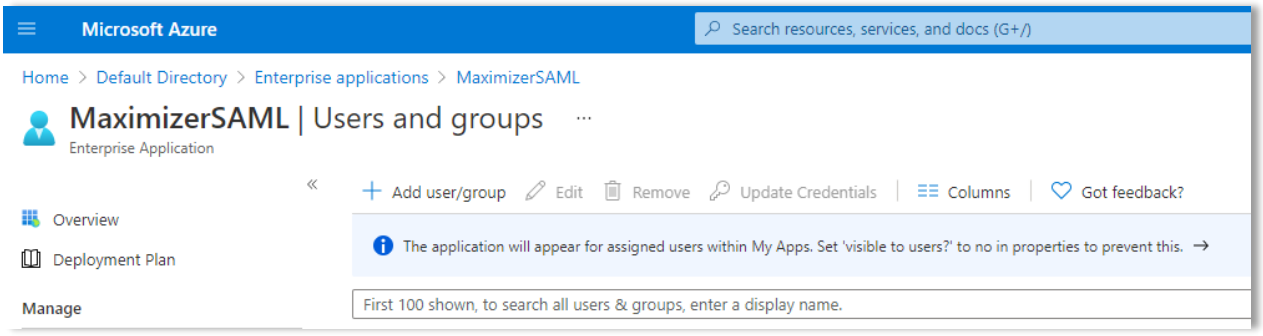
You can open the downloaded file with Windows Notepad and copy the string between the “-----BEGIN CERTIFICATE-----" and “-----END CERTIFICATE-----” tags. This will be used later for the “Identity Provider Certificate” field in your Maximizer database when setting up Maximizer to use Azure AD for authentication.

Note
Make sure the certificate is a valid X509 Certificate.



Go back to Maximizer > Settings > Single Sign-On screen, open the settings of the Identity Provider you just created. Paste the Azure certificate you have created in step 8 into Identify Provider Certificate field.

9) Lastly, in Azure on the left click on **Users and groups**. Click on **Add user/group**. Add any users or entire groups of users from your Azure AD that will be logging into Maximizer.



Please see Microsoft documentation for further details on these settings.

MAXIMIZERCRM

Experience MAXIMIZER™CRM

MAXIMIZER™CRM helps small and medium-sized teams consistently overachieve their business goals with centralized, easy-to-use and powerful views of their business data - all in one tab.

Contact Us