Setup Guide R2 2021

MAXIMIZERCRM ON-PREMISE

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About This Guide

The **Maximizer CRM On-premise 2021 R2 Setup Guide** provides instructions for setting up and using Maximizer CRM R2, as well as the new Word Add-in. This guide assumes that you have familiarity working with Maximizer CRM.

Who Should Read This Guide

The **Maximizer CRM On-premise 2021 R2 Setup Guide** is primarily intended for administrators tasked with setting up Maximizer CRM. Users who create workflows with Maximizer CRM will also find this guide useful.

Typographic Conventions

In this guide, you might encounter the following conventions:

Convention	Explanation
Note	Information, supplementary in nature, which must be highlighted. Notes usually appear in a green box.
Text appearing in bold	The names of menu items.
Blue text	A hyperlink to a section within this document or a Web site.

Installation of Maximizer CRM 2021 R2

This section contains instructions for installing or upgrading to Maximizer CRM 2021 R2.

Before you Begin

Before performing this procedure, ensure that:

- Your system meets the minimum requirements. The system requirements can be found at https://www.maximizer.com/support/documentation/

- Microsoft SQL Server is installed and ready for use. Although not required, we recommend that you install the SQL Server on an independent server.

- You set up the Linux server in an independent environment, if either of the following statements is applicable to you:

  o You do not want to upgrade the Windows Server on which Maximizer CRM will be installed to version 2019

  o You plan to select *I'll manually install Linux services on a dedicated Linux server (Recommended)* at the time of installing Maximizer CRM

- The Maximizer CRM 2021 R2 installer is available on the server on which you plan to install it

- Open Maximizer CRM sessions if any, are closed

- The IIS server is set up, either on the same server where the Maximizer CRM Server components will be installed, or on an independent server. The IIS server installation decision will depend on your exact needs.

Installing Maximizer CRM 2021 R2

To install Maximizer CRM 2021 R2:

1 Double-click the Installer. On the first step of the wizard, click **Install Maximizer CRM Server**.

   The welcome window appears.

> ❶ **Note**: *If needed, use the links to access the Maximizer CRM server documentation.*
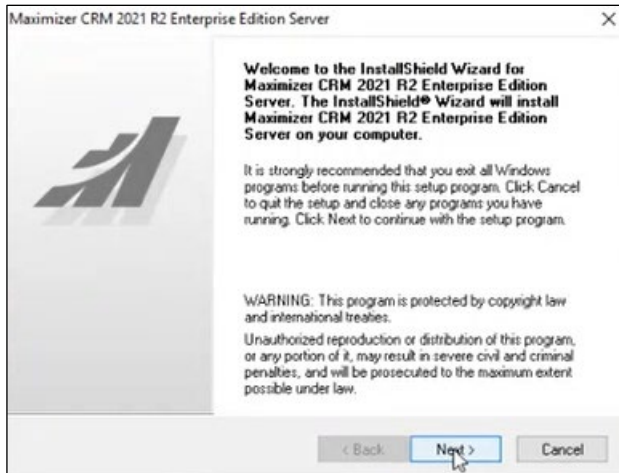
2   Click **Next**, and on the next step of the wizard, accept the End User License Agreement.

3   On the **Customer Information** window, provide the customer information, and then click **Next**.

The fields marked with an asterisk (*) are mandatory.

4   On the **Server Components** window, choose to install one or both the components:

- If you plan to install the Maximizer Server components and the Maximizer Components for the IIS server on the same server, and you already installed the IIS server on this server, select both the options.

- Select **Maximizer Server** to install the Maximizer Server components only.

- If you installed the IIS server on a separate server (independent of the server on which Maximizer Server is installed), then select **Maximizer Components for Microsoft IIS**.
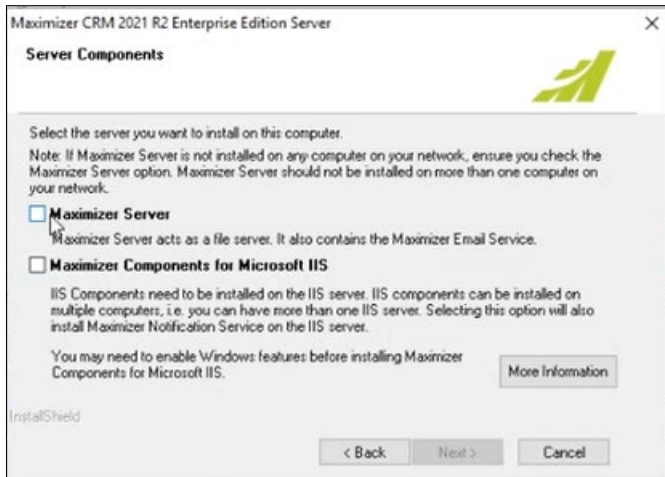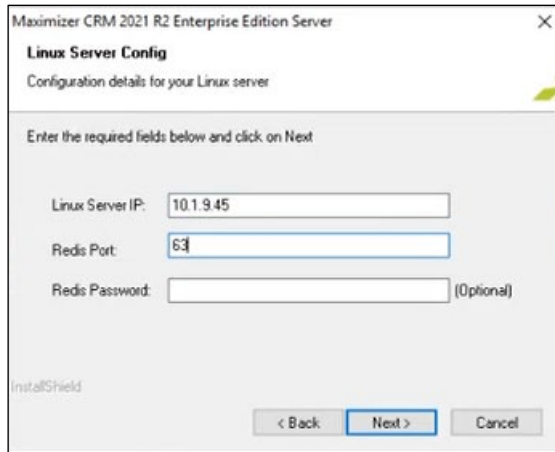
5 On the **Installation Config** window, select either of the following, and click **Next**:
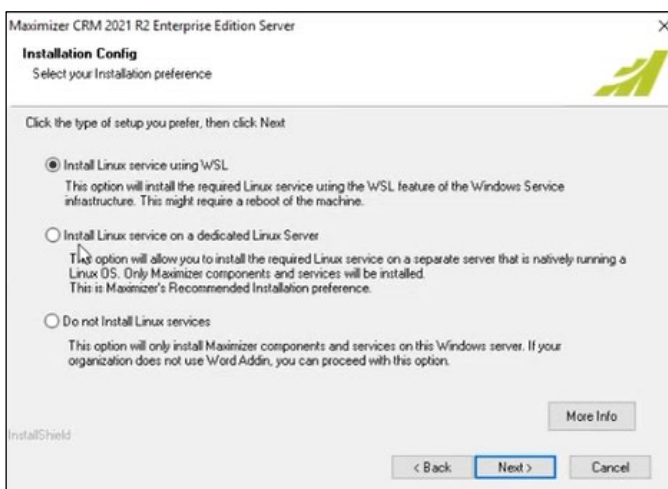
- **Install Linux Service using WSL**: This option is visible only if your Windows server version is 2019. Select this option if you want to run the Linux services necessary for the word Add-in in Windows Subsystem for Linux (WSL). Once you select this option, the installer will install the Linux server using WSL. **Skip to step 7**.

- **Install Linux service on a dedicated Linux Server**: Select this option if you set up an independent Linux server on which the Linux services will run. **Perform step 6**.

- **Do not install Linux services**: Select this option if you do not have Word Add-in installed or are not planning to install it. **Skip to step 7**.

6 (*Only if you selected* **Install Linux service on a dedicated Linux Server**) On the **Linux Server Config** window, provide the IP address, Redis port, and the password (if used) for the Linux server, and click **Next**.
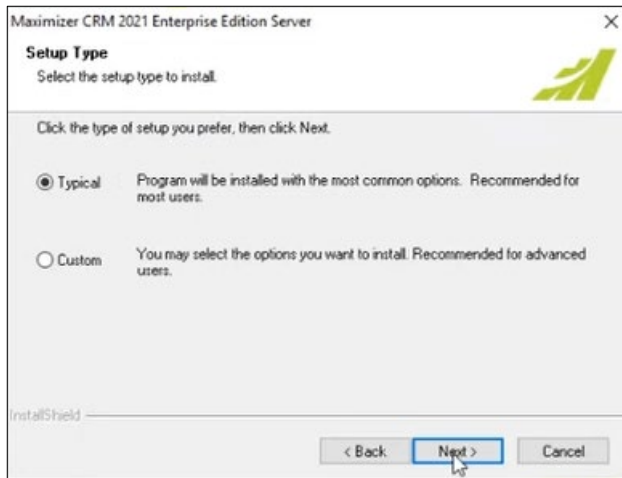
7   On the **Choose Destination Location** window, check the default installation folder. Change

the folder if needed and click **Next**.
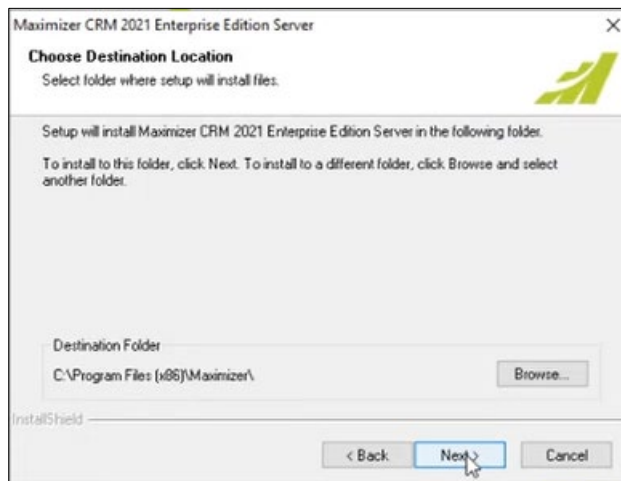
8   On the **Shared Configuration Information Folder** window, select a shared folder having

Read/Write rights, and click **Next**.
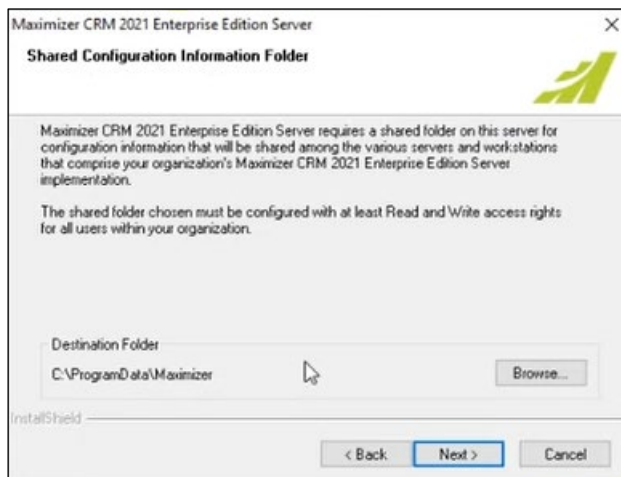
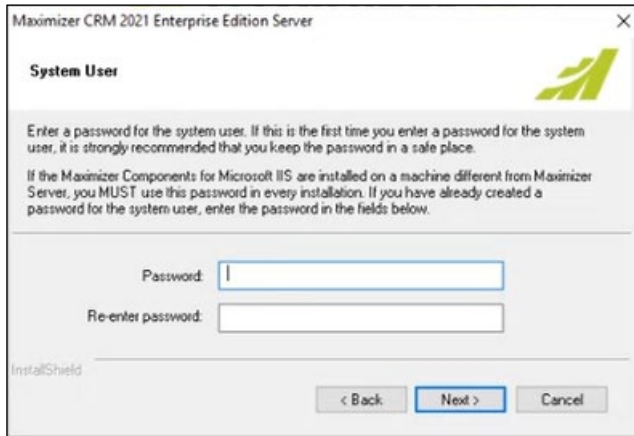9   On the **Setup Type** window, choose the type of setup:

- **Typical**: If you select this option, you will get a typical set of components is pre-selected for installation.
- **Custom**: If you select this option, you will be able to select the components to install.

10 On the **Microsoft SQL Server Name** window, provide the SQL server name, authentication, username, and password. Click **Next**.
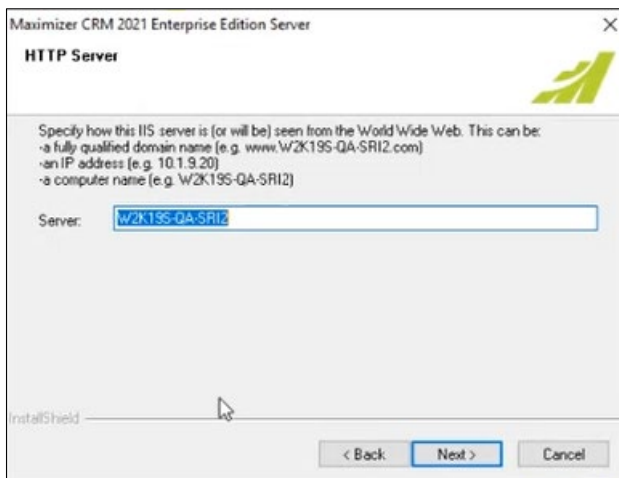

> ❶ **Note**: If a previous version of the Maximizer database is installed on the SQL server, a message box will appear indicating so. At this point, you can choose to use the same SQL server, and if you do, the installer will overwrite the existing database. However, your data will not be lost.

11   On the **System User** window, provide the password for accessing the Maximizer database. If your IIS server is on a separate server, you must specify the same credentials as these when you install Maximizer components on that server. Click **Next**.
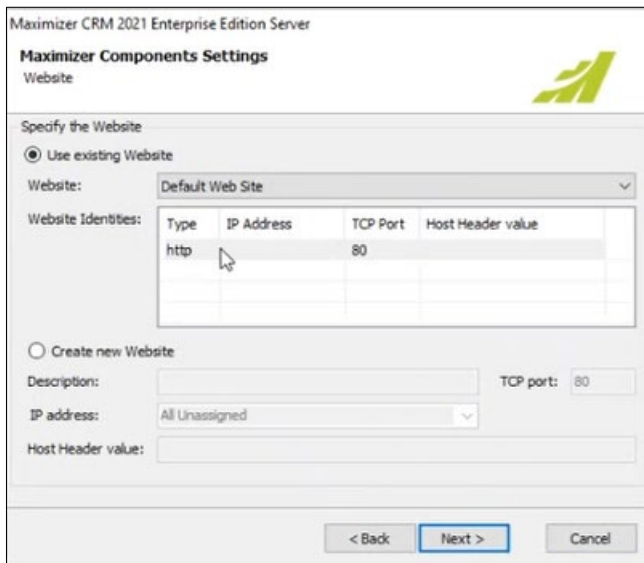

12   On the **HTTP Server** page, specify the official name of the Maximizer web server. Click **Next**.

> ℹ **Note**: This window will not appear if you selected to install Maximizer Server only.

13   On the **Maximizer Components Settings** window, do one of the following:

a.   Use the existing website:

   i.   In the **Website** list, ensure that **Default Web Site** is selected.

   ii.   Ensure that the values under **Website Identities** are as specified in the IIS Server bindings.

   iii.   Click **Next**.

b.   Create a new website:

   i.   Select **Create new Website**.

   ii.   Provide the following values:

Field	Description
Description	Enter a suitable description for your website.
TCP port	Enter the port number on which the web server will be accessible. The port number depends on the protocol you will be using for this website. ❶ **Note**: *We recommend that you use the HTTPS protocol for your website.*

IP address	If you want to make this an external facing website, then set the appropriate IP address. If you set this field to All Unassigned, the Maximizer web access will be set to the default website created within Internet Information Services (IIS) Manager.
Host Header value	Leave this blank.

    iii.   Click **Next**.

14   On the **Maximizer Components Settings** window, enable web access, web administrator, and mobile access for Maximizer if necessary. Click **Next**.
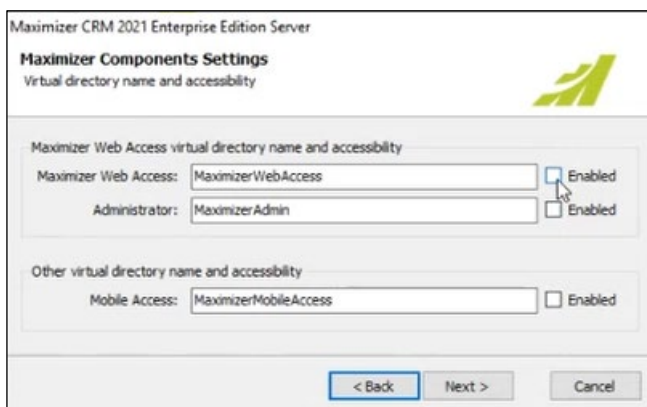
15   On the **SMTP Server Settings** window, provide the details for your SMTP server. The SMTP server details are necessary for your organization's outgoing mail. Click **Next**.
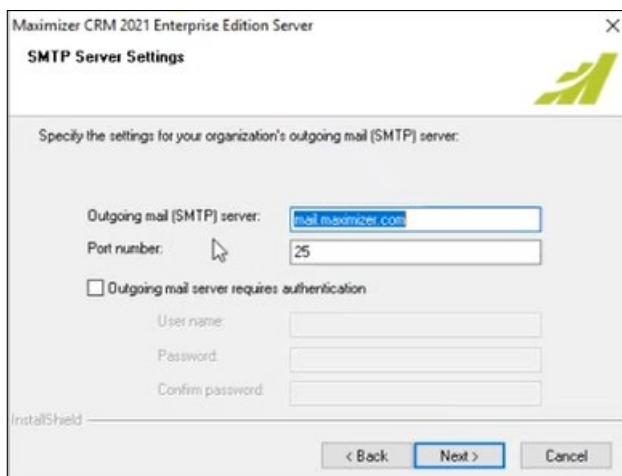
16   On the next step of the wizard, choose to create a shortcut. You can also opt to have your usage information shared with us. We use this information ONLY for the purpose of improving the Maximizer experience. Click **Next**.

17   On the last step, click **Next** to start the installation.

Once the installation completes, the installation successful message box will appear. You can now begin using Maximizer CRM.

Word Add-in Installation

This section described the steps you must follow to install and set up the Word Add-in.
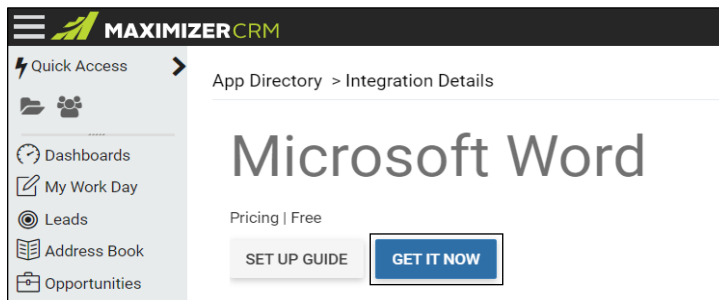
> **ⓘ Note:**
>
> If you have both the Outlook Add-in as well as the Word Add-in already installed, you must also upgrade the Outlook Add-in at the time of upgrading the existing Word Add-in to the new version of the Word Add-in.

Step I: Obtain and Install the Word Add-in

To obtain and install the Word Add-in:

1   Log on to Maximizer CRM.

2   Go to **App Directory** > **Microsoft Word** > **Get it Now**.

3   On the **Desktop and Mobile Setup** screen, click **Download Word Integration**.

4   (*Optional*) Click **View more information** for more information related to the Word Add-in.

5   Click **Download**.

6   Click **Run** and follow the steps in the installation wizard to complete the installation.

Step II: Validate with Maximizer CRM

To start using the Word Add-in to retrieve records from your Maximizer CRM web access sessions, you must first validate the Word Add-in with your Maximizer CRM setup.

To perform the validation:

1   Open Microsoft Word.

> **ⓘ Note**: *If this is the first time you open Microsoft word after installing the Word Add-in, the authentication window will appear automatically. If you want to validate the Word Add-in again, **perform step 2**.*

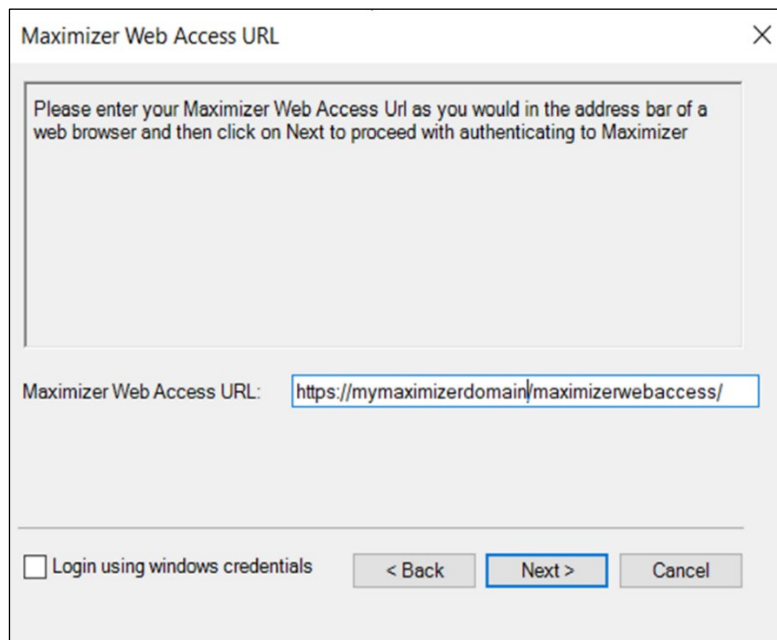2   (*For subsequent validation only*) Go to the Maximizer tab and click **Re-Authenticate**.

-OR-

Relaunch the Word Add-in.
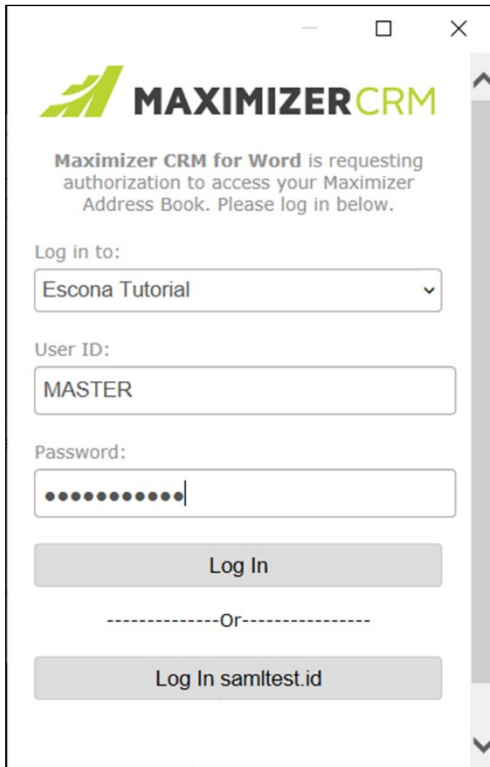
The authentication window appears.
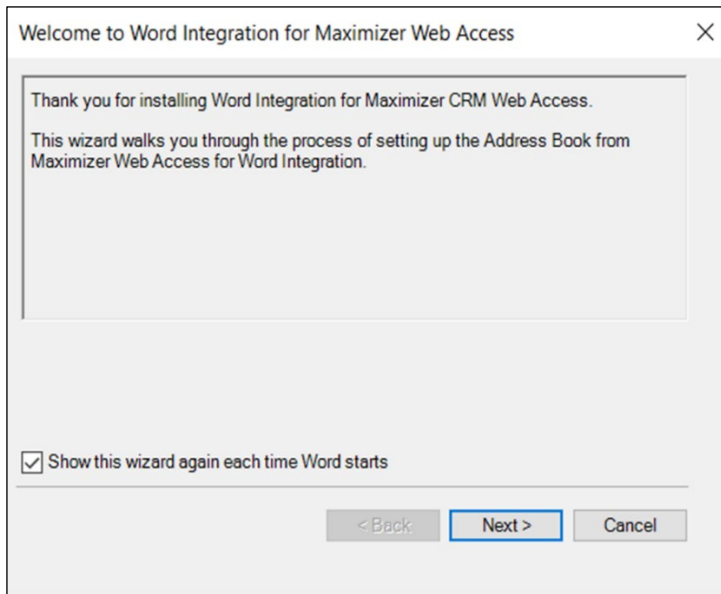
3   Log in to your account:

a.   Enter your Maximizer account URL and click **Next**. Example URLs are as follows:

- **Cloud**: *{caw|ukw}*.maximizercrmlive.com/*{AccountName}*

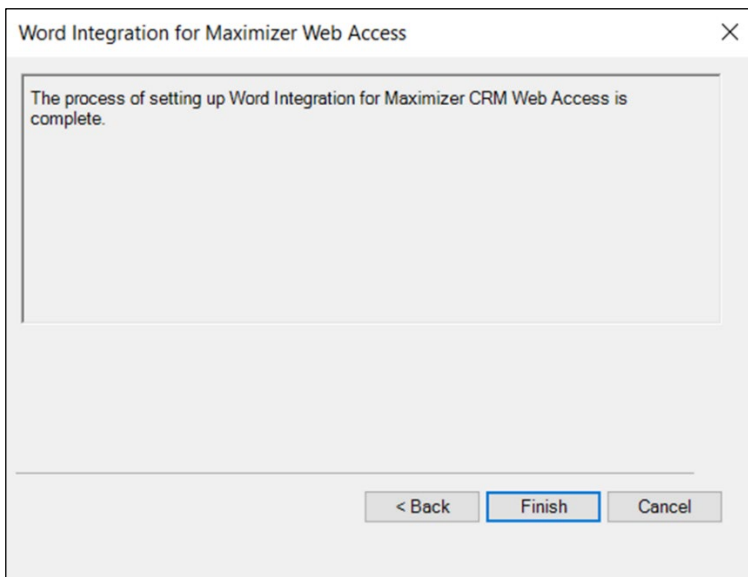- **On-Premise**: www.*{yourmaximizerdomain}*.com/maximizerwebaccess/

b.   If you have not set up SSO for your Maximizer setup, enter your username and password.

> $\boldsymbol{\textbf{ⓘ}}$ **Note**: If you have an On-premise setup, select your Address Book before entering your credentials. The address book appears under the **Log in to** list.

c.   If you have implemented SSO using SAML, the authentication window automatically directs you to your IDP provider.


4   Click **Finish** to complete the validation.

Step III: Select a Maximizer List

The Word Add-in earlier than version 2021 R2 used ActiveX controls of Internet Explorer to be able to interact with your Address Book, Opportunities, and Case records in real time. However, in the new Word Add-in, you must first select a Maximizer List, and a module from which you can retrieve records and merge them into your Word document.

To do that:

1   Check the Maximizer CRM setup and the user account used to validate the Word Add-in:

    a.   Open Microsoft Word.

    b.   In the menu bar, select the **Maximizer** tab, and click **Maximizer Info**.
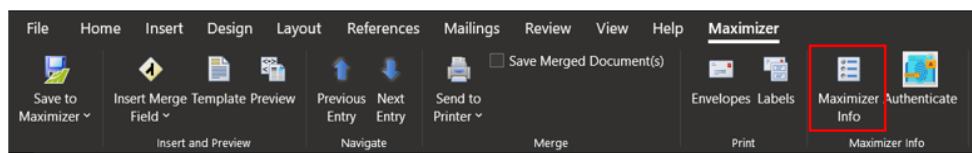

    c.   On the Maximizer CRM Connection window that appears, click the **Details** tab.
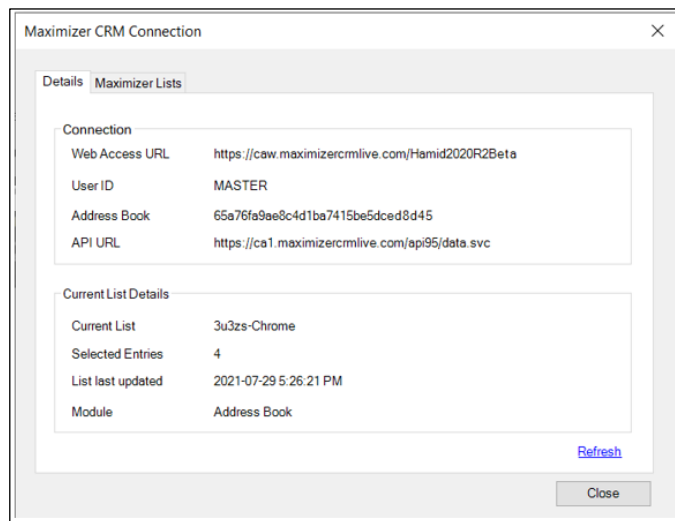
    d.   Under **Connection**, check **Web Access URL**, **User ID**, **Address Book**, and **API URL** that you used to validate the Word Add-in.

    e.   Under **Current List Details**, you will be able to identify the browser tab that you are currently using, the number of **Selected Entries**, the last time the Word Add-in retrieved details from Maximizer CRM, as well as **Module**.

    f.   Click **Refresh** to retrieve the latest **Connection** and the **Current List Details** information.

2   To set a list, in **Select Maximizer List** under **Maximizer Lists**, perform either step 3 or step 4. This is the list that will be associated with the Word Add-in.

> **ⓘ Note**: *If you have only a single Maximizer tab open, then the Word Add-in will automatically set the Maximizer List to the latest browser tab you are working on.*
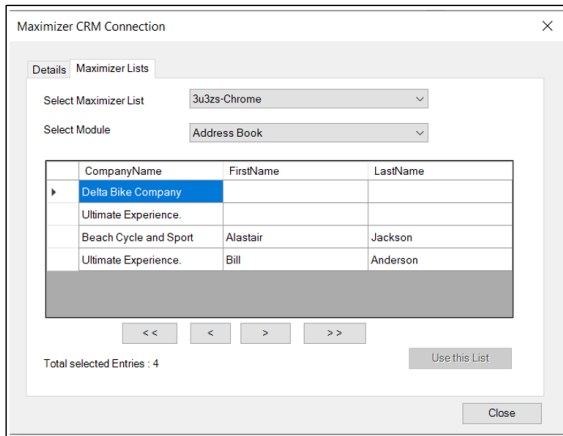

3   If you have multiple Maximizer tabs running on different browsers or on multiple machines and **you know which list you want to associate** with the Word Add-in, expand **Select Maximizer List**, and select the appropriate one.

4   If **you do not know the list you want to associate** with the Word Add-in, use the Maximizer CRM Web session to determine the Word Add-in:

   a.   In the current Maximizer CRM menu, hover over the Word icon.

   b.   Use the hint to determine the session to be used with the Word Add-in.

   c.   Use the string to identify the current Maximizer CRM list, and set it in the Word Add-in. In this example, the string "3u3zs" is used to uniquely identify the Maximizer CRM session.

d. On the Maximizer CRM Connection window, validate **Select Maximizer List**. In this example, this string appears as "3u3zs-Chrome".
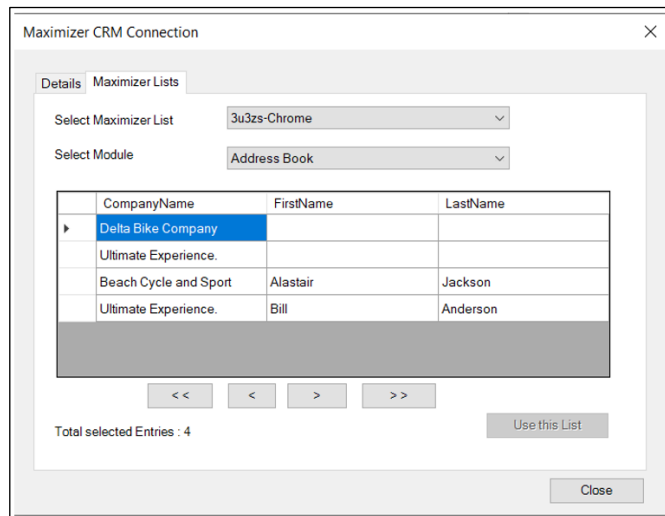
5 Select a module that you intend to work with in the **Select Module** list.

6 Click **Use This List**. The Word Add-in will use this list to access the records and populate the merge fields in your Word document.
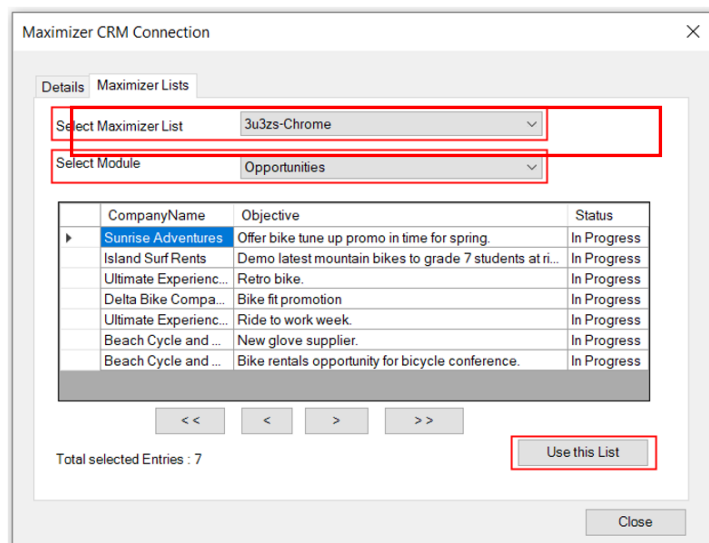
You can always switch between Maximizer Lists and subsequent modules to populate the values in the merge fields of your Word document. Based on the session and the module you select, the table displays a preview of the records that you have selected in the browser.

You can also launch a new Word document from the Maximizer CRM web session by clicking the Word icon in the Maximizer CRM module screen. This will automatically set the session and module to the Maximizer CRM browser tab from where the document was launched.

Contacting Support

If you have problems with or questions about Maximizer CRM or Maximizer CRM Live, contact the Maximizer Support team. In order to do that, you can use one of the following channels:

Phone

- **North America**: 1-866-275-1254 (Monday through Friday, 5:00 AM to 7:30 PM, PST; Sunday 11:00 AM to 7:30 PM, PST)

- **Europe, Middle East, Africa**: +44 13 4476 6904 (Monday through Friday, 9.00 AM to 5.30 PM, GMT)

- **Australia & New Zealand**: + 61 2 9957 2011 (Monday through Friday, 5:00 AM to 7:30 PM, PST; Sunday 11:00 AM to 7:30 PM, PST)

Email

Write to the support team at:

- **EMEA**: techsupport@maximizer.co.uk

- **Rest of the world**: support@maximizer.com

Chat

The chat window can be accessed from within Maximizer CRM. Go to **Help Center** > **Support Chat**.