



Maximizer CRM Partner Portal

Getting Started Guide

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1. Copy installation

- 1) Download and extract the zip file
- 2) Create a folder "PartnerPortal" under C:\Program Files (x86)\Maximizer\
- 3) Copy the extracted files to the folder
- 4) In IIS Manager, Add a new application to the Default Web Site. Set the alias to **Portal**, set the physical path to **C:\Program Files (x86)\Maximizer\PartnerPortal**.
- 5) Edit the permission of the above folder to make sure the following groups have enough permission to read the files:
 - Users
 - NETWORK SERVICE

2. Maximizer system level configuration

- 1) Log in to Maximizer Administrator.
- 2) Create a service user. Make sure the user has full access right to modify any record in Maximizer. The easier way to do this is by copying the security settings from MASTER during user creation. Make sure that the user should have **Service Access** and don't have other accesses.
- 3) Set the service user's password.
- 4) Edit **C:\Program Files (x86)\Maximizer\PartnerPortal\Web.Config** to set the Database ID (not the name), service user ID and password:

```
<Databases>
  <Values>
    <add Database="YourDatabaseID_1" UID="PARTNER" Password="control"/>
    <add Database="YourDatabaseID_2" UID="PARTNER" Password="control"/>
    <add Database="YourDatabaseID_3" UID="PARTNER" Password="control"/>
  </Values>
</Databases>
```

You can set up Partner Portal in multiple databases. But each database can have only one Partner Portal.

You need to setup web data URL in Web.Config file. Replace **localhost** with your server name.

```
<add key="WebDataURL" value="http://localhost/MaximizerWebData/data.svc" />
```

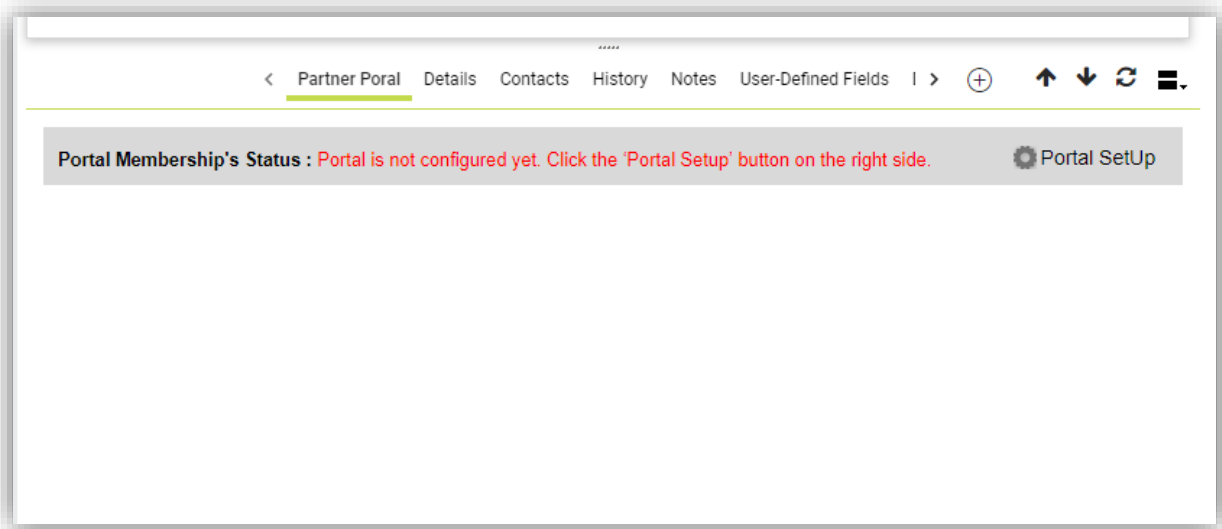
- 5) Configure the following windows setting xml (**C:\Program Files (x86)\Maximizer\Portals\Employee\Config\followingWindowSets.xml**) to add the Partner Portal following tab under `<followingWindowSet id="for-ab">`:

```
<tab id="partnerPortal">
  <title>Partner Portal</title>
  <url>../../Portal/Tab/Tab.aspx</url>
  <visible>Yes</visible>
  <showindicator>Yes</showindicator>
  <showPersonalOrMultiABEntryMSG>No</showPersonalOrMultiABEntryMSG>
</tab>
```

- 6) Make sure Web.Data API is enabled.
- 7) Make sure email service is configured and working.

3. Partner portal following tab

- 1) Go to Maximizer Web Access and login as an Administrator user.
- 2) From Address Book module, go to **Partner Portal** following tab. You will see a message displayed in the tab.



CHECK: If the following tab doesn't look like this, there is probably a mistake made in setting the permissions of the **PartnerPortal** folder to allow IIS Manager to read all its content.

- 3) Click "Portal Setup" on the top right hand corner.
- 4) Once the Portal Setup dialog is open, 3 special user-defined fields will be created automatically under **Portals/Partner** folder, and set the default column view, fields, css and email template.
- 5) Make note of the Partner Portal URL on top of the Portal Setup dialog. This is the URL for the partners to access the portal.
- 6) See next Sections on how to configure the settings for Partner Portal.

System Requirement

The Partner Portal only works with Maximizer CRM 2018 R2.

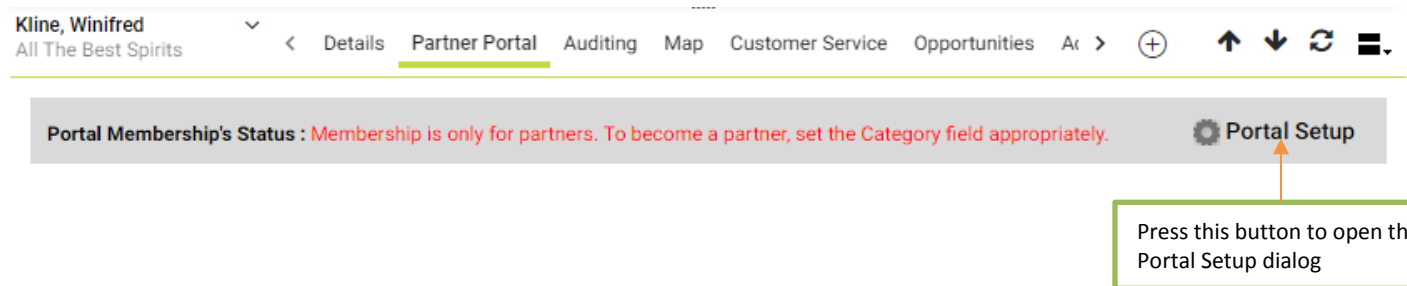
Chrome, Firefox, Microsoft Edge and Microsoft Internet Explorer 11 are the supported browsers. The Partner Portal also works in web browsers in mobile devices.

.NET 4.5 is required to deploy the Partner Portal.

Partner Portal Setup

Log in to Web Access as an Administrator user. Go to Partner Portal tab and open the Portal Setup dialog.

It is recommended that you make a backup of the codes in Label Customization, CSS Customization and Invitation Email tabs. If you make mistake when changing the code in these tabs and cause issues in partner portal, you can revert back to the original code.

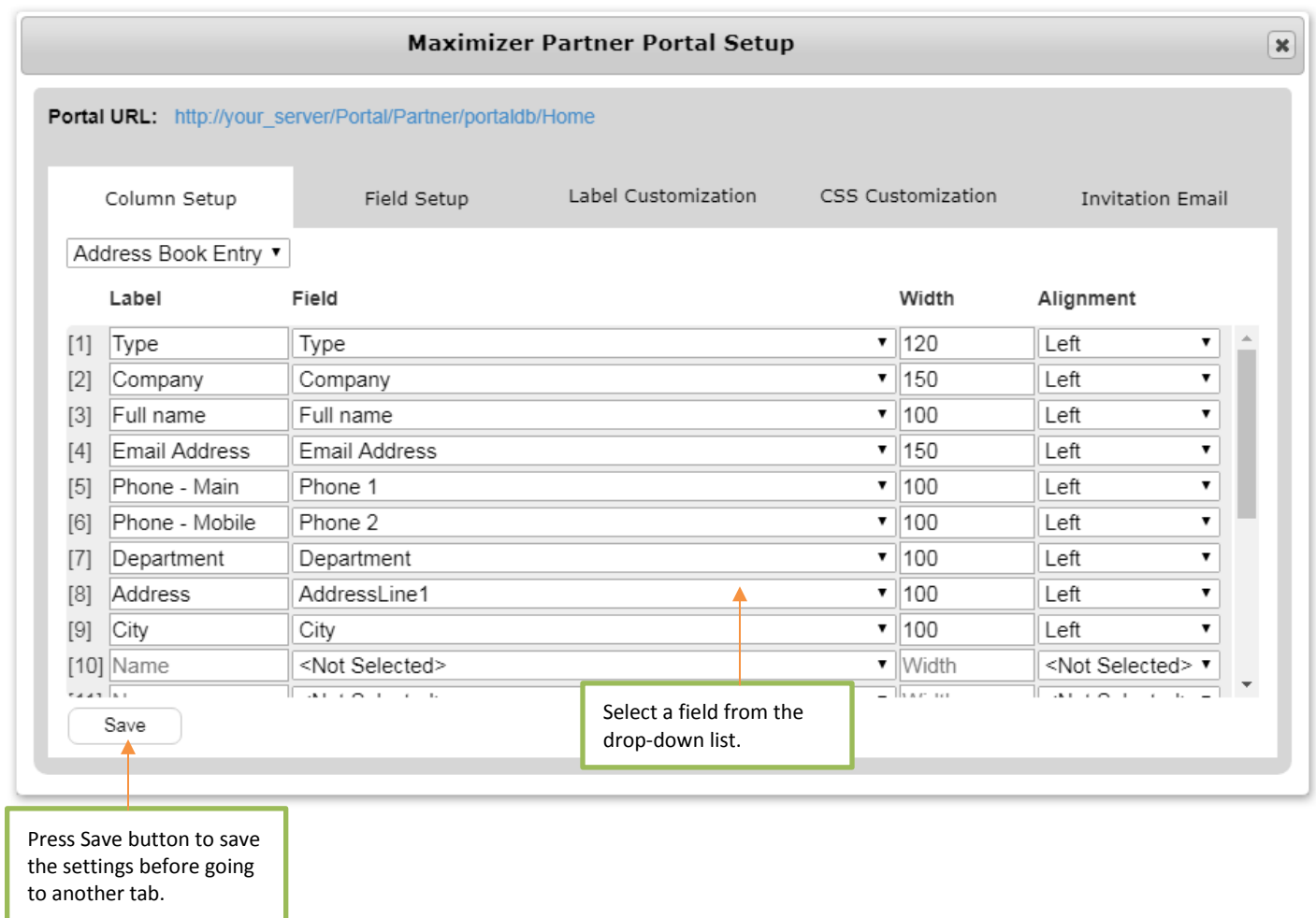


The screenshot shows the application's top navigation bar with the user 'Kline, Winifred' and the 'Partner Portal' tab selected. Below the navigation bar, a status message reads: 'Portal Membership's Status : Membership is only for partners. To become a partner, set the Category field appropriately.' To the right of this message is a 'Portal Setup' button. A green callout box with an arrow pointing to the button contains the text: 'Press this button to open the Portal Setup dialog'.

Setup column view

In Column Setup tab, create column views for Leads/Address Book and Opportunities modules.

From the Field column, select the fields from the drop-down list. You can select up to 20 fields for each column view. The label of a field will be added automatically. You can manually modify the label. You can also specify width and alignment for each column.



The screenshot shows the 'Maximizer Partner Portal Setup' dialog box with the 'Column Setup' tab selected. The 'Portal URL' is set to 'http://your_server/Portal/Partner/portaldb/Home'. Below the tabs, a dropdown menu shows 'Address Book Entry'. A table lists fields for the column view:

	Label	Field	Width	Alignment
[1]	Type	Type	120	Left
[2]	Company	Company	150	Left
[3]	Full name	Full name	100	Left
[4]	Email Address	Email Address	150	Left
[5]	Phone - Main	Phone 1	100	Left
[6]	Phone - Mobile	Phone 2	100	Left
[7]	Department	Department	100	Left
[8]	Address	AddressLine1	100	Left
[9]	City	City	100	Left
[10]	Name	<Not Selected>	Width	<Not Selected>

A 'Save' button is located at the bottom left. A green callout box with an arrow pointing to the 'Field' column contains the text: 'Select a field from the drop-down list.' Another green callout box with an arrow pointing to the 'Save' button contains the text: 'Press Save button to save the settings before going to another tab.'

Specify fields for viewing, adding or editing entries

In Field Setup tab, specify the fields that will be available in the screen for viewing, creating or editing entries in Partner Portal.

Maximizer Partner Portal Setup

Portal URL: http://your_server/Portal/Partner/portaldb/Home

Column Setup | **Field Setup** | Label Customization | CSS Customization | Invitation Email

Address Book Entry ▾

Label	Field	Default Value	Mandatory	Read Only	Show in Modify	Show in Create
[+][-] Last Name:	Last name ▾		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[+][-] First Name:	First name ▾		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[+][-] Company:	Company ▾		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[+][-] Position:	Position ▾		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[+][-] Department:	Department ▾		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[+][-] Division:	Division ▾		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[+][-] Phone:	Phone 1 ▾		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[+][-] Email:	Email Address 1 ▾		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[+][-] Website:	Web Site ▾		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[+][-] Address Line	AddressLine1 ▾		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To add a new field, press the [+] button. To remove a field, press the [-] button.

Use the drop-down to select a basic field or a user-defined field.

For each field, there are several attributes that control how the field will behave.

Default value determines the default value that will be set in the screen for creating a new entry. Note that it is possible that the field is not shown in the screen, but the default value is still set. For example, if you want to assign opportunities created by partners to the channel management team, you can set the default sales team to channel management team and not make the sales team field visible in the partner portal.

Note: To customize the default value for a date field, you must specify the date in ISO format (YYYY-MM-DD). Default value for "AbEntry", "Contact" and "Leader" fields are not supported for opportunities.

Mandatory determines whether the field is mandatory or not when adding or editing an entry. For example, if you would like to ensure that phone number is always entered, you can make Phone Number field as mandatory. Or if you would like to ensure that the opportunity age is calculated correctly, you can make Start Date field as mandatory.

When a field is set as mandatory, a star will be displayed besides the field.

Read only determines if the field is read only or not.

Shown in modify determines if the field will be shown in the screen for modifying an entry.

Shown in create determines if the field will be shown in the screen for creating a new entry.

Supported Address Book Entry fields

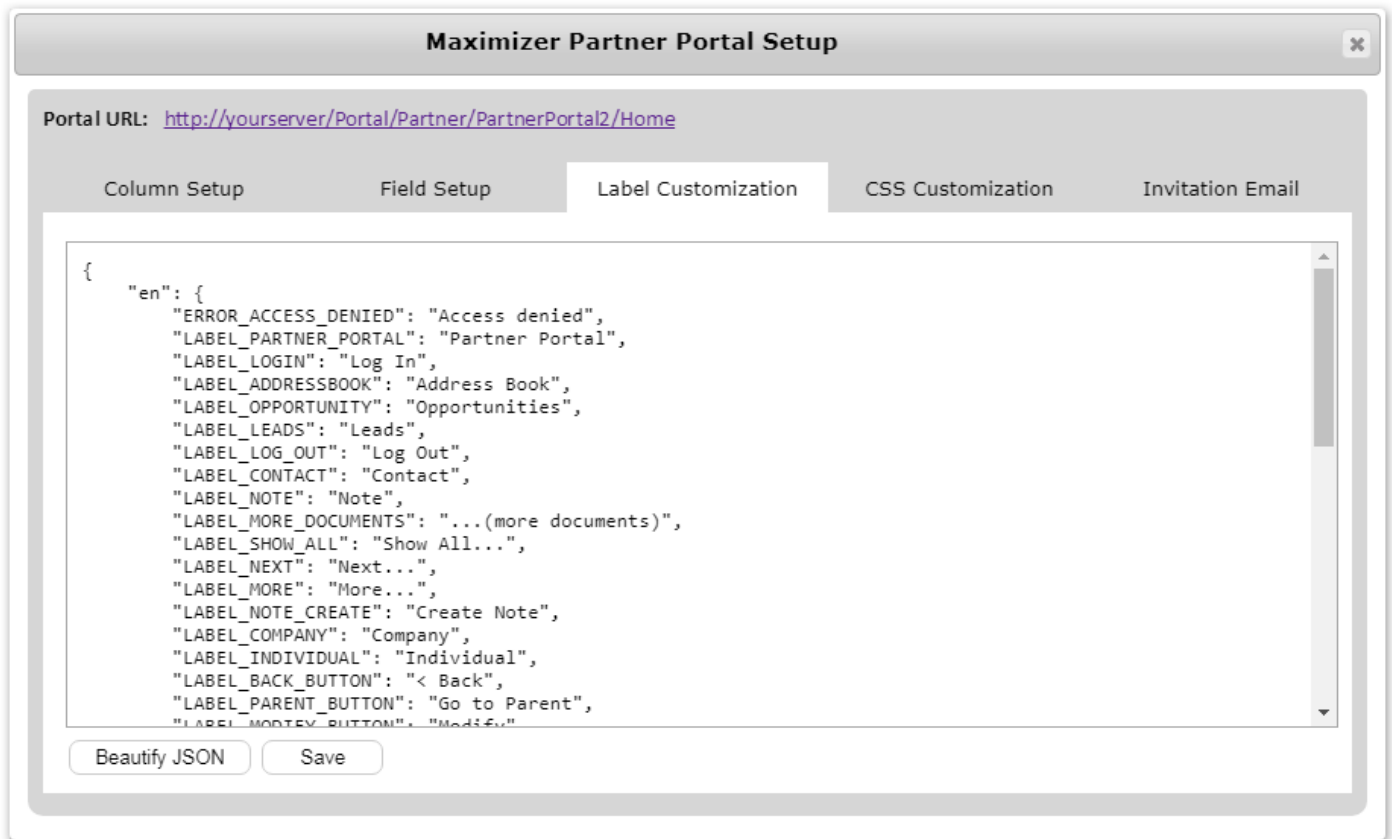
Identifier	Fields	Read	Modify
/AbEntry/FullName	Full name of the entry	Company - No Individual/Contact - Yes	No
/AbEntry/LastName	Last name	Company - No Individual/Contact - Yes	Company - No Individual/Contact - Yes
/AbEntry/MiddleName	Middle name	Company - No Individual/Contact - Yes	Company - No Individual/Contact - Yes
/AbEntry/FirstName	First name	Company - No Individual/Contact - Yes	Company - No Individual/Contact - Yes
/AbEntry/CompanyName	Company name	Yes	Company/Individual - Yes Contact - No
/AbEntry/Type	Address Book entry type	Yes	No
/AbEntry/Phone1	Phone number 1	Yes	Yes
/AbEntry/Phone2	Phone number 2	Yes	Yes
/AbEntry/Phone3	Phone number 3	Yes	Yes
/AbEntry/Phone4	Phone number 4	Yes	Yes
/AbEntry/Email1	Email address 1	Yes	Yes
/AbEntry/Email2	Email address 2	Yes	Yes
/AbEntry/Email3	Email address 3	Yes	Yes
/AbEntry/LastModifyDate	Last modified date	Yes	No
/AbEntry/CreationDate	Creation date	Yes	No
/AbEntry/Lead	Sales lead	Yes	Yes
/AbEntry/Department	Department	Yes	Yes
/AbEntry/Division	Division	Yes	Yes
/AbEntry/WebSite	Website	Yes	Yes
/AbEntry/DoNotSolicitBy	Do not solicited by	Yes	Yes
/AbEntry/LastContactDate	Last contact date	Yes	Yes
/AbEntry/Salutation	Salutation	Company - No Individual/Contact - Yes	Company - No Individual/Contact - Yes
/AbEntry/Position	Position	Company - No Individual/Contact - Yes	Company - No Individual/Contact - Yes
/AbEntry/MrMs	Mr. / Ms.	Company - No Individual/Contact - Yes	Company - No Individual/Contact - Yes
/AbEntry/ModifiedBy	Modified by	Yes	No
/AbEntry/Creator	Creator	Yes	No
/AbEntry/AddressLine1	AddressLine1	Yes	Yes
/AbEntry/AddressLine2	AddressLine2	Yes	Yes
/AbEntry/City	City	Yes	Yes
/AbEntry/Country	Country	Yes	Yes
/AbEntry/StateProvince	State / province	Yes	Yes
/AbEntry/ZipCode	Zip / postal code	Yes	Yes
/AbEntry/Partners	Partner	Yes	No
/AbEntry/AccountManager	Account manager	Yes	No
/AbEntry/Territory	Territory	Yes	No
/AbEntry/TerritoryStatus	Territory status	Yes	No
/AbEntry/Category	Category	Yes	Yes

Supported Opportunity fields

Identifier	Fields	Read	Modify
/Opportunity/AbEntry	Company/individual	Yes	No
/Opportunity/Contact	Contact	Yes	Yes
/Opportunity/Objective	Objective	Yes	Yes
/Opportunity/Description	Description	Yes	Yes
/Opportunity/Status	Status	Yes	Yes
/Opportunity/Cost	Cost	Yes	Yes
/Opportunity/ActualRevenue	Actual revenue	Yes	Yes
/Opportunity/ForecastRevenue	Forecast revenue	Yes	Yes
/Opportunity/StartDate	Start date	Yes	Yes
/Opportunity/CloseDate	Close date	Yes	Yes
/Opportunity/Creator	Creator	Yes	No
/Opportunity/CreationDate	Creation date	Yes	No
/Opportunity/ModifiedBy	Last modified by	Yes	No
/Opportunity/LastModifyDate	Last modify date	Yes	No
/Opportunity/Leader	Leader	Yes	No
/Opportunity/SalesTeam	Sales team	Yes	Yes
/Opportunity/SalesProcess	Sales process	Yes	No
/Opportunity/CurrentSalesStage /Description	Current stage name	Yes	No
/Opportunity/CurrentSalesStage /TargetAge	Target age of current stage	Yes	No
/Opportunity/CurrentSalesStage /ProbabilityClose	Probability of close	Yes	No
/Opportunity/Category	Categories	Yes	Yes
/Opportunity/Product	Products/services	Yes	Yes
/Opportunity/Partners	Partners	Yes	No

Label customization

In Label Customization tab, you can change the labels to fit your business needs. For example, you can change the Address Book to Clients or Documents to Files.



Label customization also allows you to customize the portal into multiple languages. The language being displayed will be based on the locale setting of your web browser.

```
{
  "en": {
    "ERROR_ACCESS_DENIED": "Access Denied",
    "LABEL_PARTNER_PORTAL": "Maximizer Partner Portal",
    ...
  },
  "fr": {
    "ERROR_ACCESS_DENIED": "Accès refusé",
    "LABEL_PARTNER_PORTAL": "Portail des partenaires",
    ...
  }
}
```

Annotations:

- This section customizes the labels in English.
- This section customizes the labels in French.

CSS customization

If you want your Partner Portal to have the same look and feel as your company website, you can customize the interface of the portal in CSS Customization tab.

Maximizer Partner Portal Setup

Portal URL: <http://yourserver/Portal/Partner/PartnerPortal2/Home>

Column Setup

Field Setup

Label Customization

CSS Customization

Invitation Email

```
/****** start css *****/
body, html, #layoutRight, #layoutLeft
{
    font-family: 'Roboto', sans-serif !important;
    font-size: 14px;
    color: rgba(0,0,0,.87);
    margin: 0px;
    text-shadow: none !important;
}
#layoutRight, #mainGrid .ui-listview .ui-btn, .overlay, .layoutPanel {
    background-color: #fefefe;
    font-family: 'Roboto', sans-serif !important;
}

/* desktop header & mobile header */
#layoutTop, #mobileHeader{
    background-color: #364150 !important;
    color:rgba(255,255,255,.87) !important;
    font-size: 24px !important;
    font-weight: normal !important;
    text-shadow: none;
}
```

Save

Invitation email

You need to send email to the partners to register for accessing the portal. In Invitation Email tab, you will design how the email will look like.

In the template, you need the following merge fields. These special strings will get converted to their corresponding values before sending to the recipient.

{{RecipientName}} - Recipient's name

{{RecipientEmail}} - Recipient's email address

{{AccountActivationUrl}} - The URL that the partner should click in order to complete the registration process.

Maximizer Partner Portal Setup

Portal URL: <http://yourserver/Portal/Partner/PartnerPortal2/Home>

Column Setup Field Setup Label Customization CSS Customization **Invitation Email**

From:

Subject:

```
<html>
<body>
  <p>Dear {{RecipientName}},</p>

  <p>Welcome to msidata2 Partner Portal!</p>

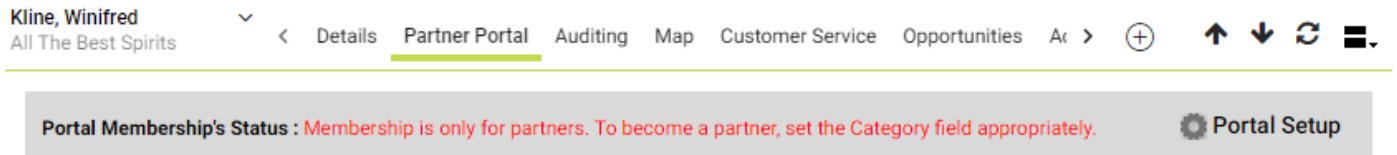
  <p>
    Your msidata2 Partner Portal account ({{RecipientEmail}}) is ready to be activated. Simply click the
    button below to activate your account and set your password. Note that this email is only be valid for 3
    days.
  </p>

  <div style="margin-left:20px">
    <a href="{{AccountActivationUrl}}">
      <button> Activate Your Account Now </button>
    </a>
  </div>
</body>
</html>
```

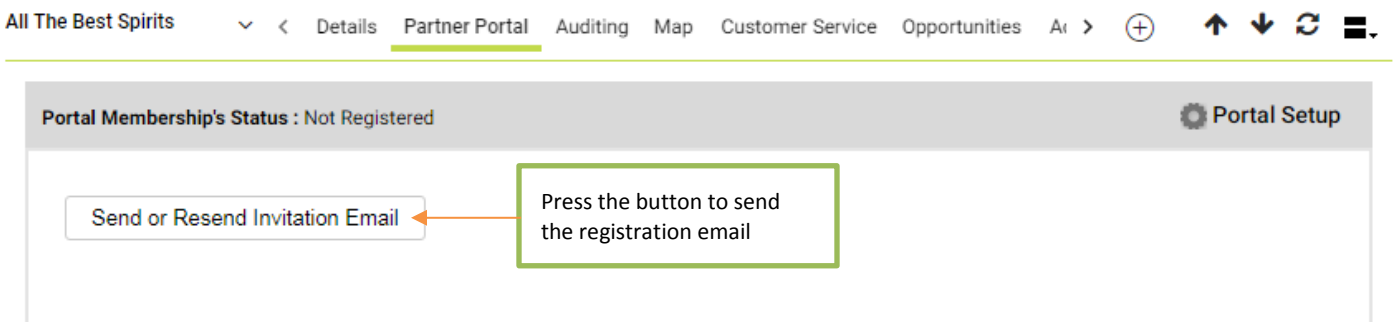
Save

Allow Partners to Access the Portal

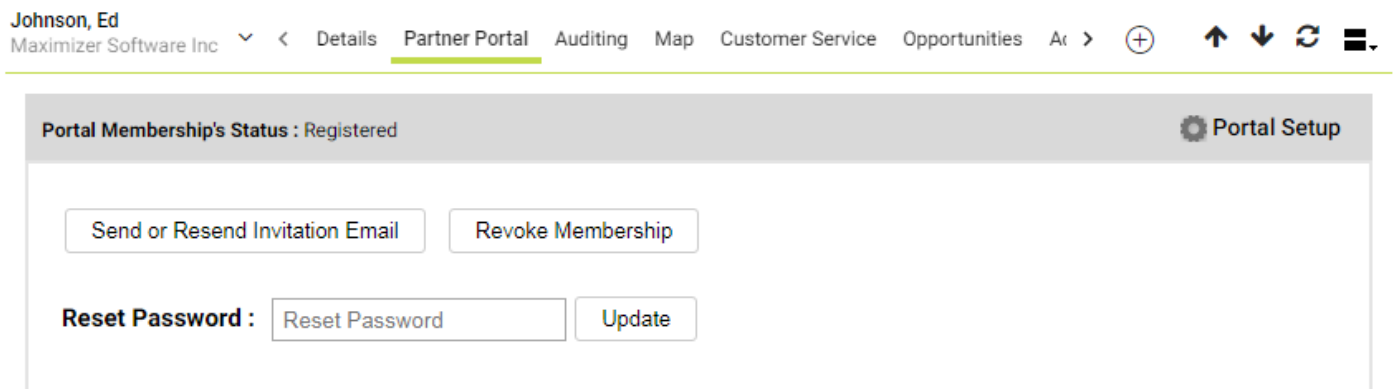
In Maximizer Web Access, select a contact. If the contact is not a partner (Category field doesn't include partner), the following message will be displayed in the Partner Portal tab. The contact cannot have access to the Partner Portal.



If the contact is a partner (Category field includes partner), press the button to send the registration email. Upon receiving the email, the partner needs to click the activation link in the email and will be prompted to create a password.



After the partner completes the registration process and gets access to the Partner Portal, the following buttons and field will be available in the Partner Portal tab.



Note

The partner's parent company must be a partner (Category field includes partner).

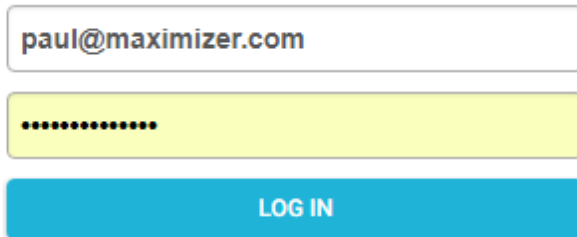
Only the users with Administration role can send the registration email or modify the password.

Working in Partner Portal

Login to the portal

The partners use their email address as the ID for logging into the portal.

Partner Portal

A login form for the Partner Portal. It consists of three vertically stacked rectangular boxes. The top box is white with a thin grey border and contains the email address 'paul@maximizer.com'. The middle box is yellow with a thin grey border and contains a series of black dots representing a password. The bottom box is blue with a thin grey border and contains the text 'LOG IN' in white capital letters.

paul@maximizer.com

.....

LOG IN

Working with Leads and Address Book entries

Once logging in, the partners will see Leads, Opportunities and Address Book modules. The Leads module shows the entries that are sales leads. The Address Book module shows the entries that are none-leads.

Retrieving leads or Address Book entries

The Address Book entries or leads will be visible to the login partner, if:

1. The login partner is assigned as partner.
2. The login partner's company or any of the company's staff member is assigned as partner.

If a company has a partner assigned (per one of the conditions 1 & 2 above), all the contacts in that company will be visible regardless of whether the contacts have partner assigned or not.

If the company has no partner assigned, but one of the contacts in that company has a partner assigned (per one of the conditions 1 & 2 above), the company and all of its contacts will be visible.

When an entry is visible, it is also editable. The Partner Portal doesn't follow the Full Access or Read Access rights of the Address Book entries.

Leads / Address Book screen

In Leads or Address Book screens, you can retrieve the entries that are visible to you. You can also create new entries.

The column view is defined in Portal Setup dialog in Web Access.

Leaving the field blank and pressing the search button will retrieve all the entries you can see.

Pressing this button will show the buttons for creating a company or an individual. When a new entry is created, you will be assigned to the entry as the partner.

Type	First Name	Last Name	Company / Individual	Email Address	Phone Number	City	State / Province	Country
No entries found. Use the search box above to find entries.								

To search for particular entries, type in the name of the entry in the search field. You can also search entries by email address, phone number, city, state/province, country or zip / postal code. When a company is retrieved, all the contacts of the company will be retrieved.

Partner Portal

Leads

Opportunities

Address Book

all the best

Type	First Name	Last Name	Company / Individual	Email Address	Phone Number	City	State / Province	Country
Contact	James	Dolton	All the best wine	jamesdolton@maxin	(604) 601-8888			
Contact	Ed	Johnson	All the best wine	ed@maximizer.com	(604) 601-4444			
Company			All the best wine	info@maximizer.con	(604) 601-8888			

View details of an entry

When an entry is open, the fields specified in Portal Setup dialog in Web Access will be displayed. You can edit the entry, or create notes or opportunities for the entry.

Company / Individual details

The screenshot displays the 'Partner Portal' interface. On the left is a sidebar with 'Leads', 'Opportunities', and 'Address Book' tabs. The main area shows details for a company named 'All the best wine', including its department (Sales), division (Western Canada), phone number, and email. A 'VIEW OPPORTUNITIES' button is in the top right. Below the company details is a 'CONTACTS' section with a table of two contacts: James Dolton and Ed Johnson. At the bottom are sections for 'NOTES' and 'DOCUMENTS', and a red circular button with a plus sign. Five callout boxes provide instructions: 1. 'Press Modify button to edit the entry.' points to the 'MODIFY' button. 2. 'Press this button to retrieve opportunities associated with this entry.' points to the 'VIEW OPPORTUNITIES' button. 3. 'Expand the Contacts section to see all the contacts of the company. Clicking a contact to open the detail view of the contact.' points to the 'CONTACTS' section header. 4. 'Use the buttons to create a new contact, opportunity or note' points to the red plus button. 5. A 'LOG OUT' button is at the bottom left.

Partner Portal

Leads < BACK

Opportunities
Address Book

Company: All the best wine
Department: Sales
Division: Western Canada
Phone: (604) 601-8888
Email: info@maximizer.com
More...

MODIFY

VIEW OPPORTUNITIES

Press Modify button to edit the entry.

Press this button to retrieve opportunities associated with this entry.

Expand the Contacts section to see all the contacts of the company. Clicking a contact to open the detail view of the contact.

Use the buttons to create a new contact, opportunity or note

LOG OUT

Type	First Name	Last Name	Company / Individual	Email Address	Phone Number	City	State	Country
Contact	James	Dolton	All the best wine	jamesdolton@m	(604) 601-8888			
Contact	Ed	Johnson	All the best wine	ed@maximizer.c	(604) 601-4444			

NOTES

DOCUMENTS

If the entry is a company or an individual, Contacts tab is available to display all the contacts. Clicking a contact will open the detail view of the contact. Expanding the Notes or Documents tab will show notes and documents in the respective tab.

Press the round button to access to the buttons for creating contact, opportunity or note.

Contact details

Expanding the Notes or Documents tab will show notes and documents in the respective tab. Press the round button to access to the buttons for creating opportunity or note.

The screenshot shows the 'Partner Portal' interface. On the left is a sidebar with 'Leads' (selected), 'Opportunities', and 'Address Book'. The main area displays contact details for 'James Dolton' at 'All the best wine' in the 'Sales' department. Annotations include: a green box pointing to the 'VIEW OPPORTUNITIES' button with the text 'Press this button to retrieve opportunities associated with the contact.'; a green box pointing to the company name 'All the best wine' with the text 'Press the company name will open the detail view of the company.'; and a green box pointing to a cluster of three circular buttons (green with a briefcase icon, blue with a document icon, and red with a plus icon) with the text 'Buttons for creating a new opportunity or note'. Other UI elements include a '< BACK' button, a 'LOG OUT' button, and expandable sections for 'NOTES' and 'DOCUMENTS'.

Partner Portal

Leads < BACK VIEW OPPORTUNITIES

Opportunities

Address Book

Last Name: Dolton

First Name: James

Company: All the best wine

Position:

Department: Sales

More...

MODIFY

▸ NOTES

▸ DOCUMENTS

LOG OUT

Buttons for creating a new opportunity or note

Press this button to retrieve opportunities associated with the contact.

Press the company name will open the detail view of the company.

When creating an opportunity from the contact screen, the company and contact will be assigned to the opportunity automatically.

Working with Opportunities

Retrieving Opportunities

The partner will be able to see an opportunity if one of the following conditions is met:

1. If the opportunity's company/individual field is assigned to an Address Book entry accessible by the partner (per the rule for retrieving Address Book entries described above)
2. Or if the opportunity's partner field is assigned to the partner, the partner's company or any of the company's staff member.

When an Opportunity entry is visible, it is also editable.

To retrieve opportunities, you can do one of the following:

- Find the lead or Address Book entry, open it and press View Opportunities button.
- In Opportunities screen, enter the company/individual name in the search field and press the search button. It will retrieve opportunities associated with the company or individual. You can also search opportunities by objective to description.
- In Opportunities screen, leave the search field blank and press the search button. This will retrieve all opportunities that the login partner is able to see.

The column view is defined in Portal Setup dialog in Web Access.

Partner Portal

Leads

Opportunities

Address Book

LOG OUT

aggassi

Company / Individual	Contact	Objective	Status	Forecast Revenue	Actual Revenue	Close Date
Aggassi Food Service	Napoli, Joe	Need extra add-ons	Abandoned	2000	0	11/20/2017
Aggassi Food Service	Napoli, Joe	2018 new products	In Progress	50000	0	1/31/2018
Aggassi Food Service	Napoli, Joe	Need our products for a new	Won	0	7500	11/20/2017

Press this button to create a new opportunity.

View details of an opportunity

When an opportunity is open, the fields specified in Portal Setup dialog in Web Access will be displayed. The login partner can edit the opportunity or create a note for the opportunity.

Expanding the Notes or Documents tab will show notes and documents in the respective tab. Press the round button to access the button for creating a note.

The screenshot displays the 'Partner Portal' interface. On the left is a sidebar with navigation links: 'Leads', 'Opportunities' (selected), and 'Address Book'. At the bottom of the sidebar is a 'LOG OUT' button. The main content area shows the details of an opportunity. At the top right of this area is a '< BACK' button. The details are listed as follows:

- Company / Individual: [Aggassi Food Service](#)
- Contact: [Napoli](#)
- Objective: 2018 new products
- Description: The customer is looking for purchasing more products
- Status: In Progress

Below these details is a 'More...' link. Further down is a 'MODIFY' button. At the bottom of the main content area are two expandable tabs: 'NOTES' and 'DOCUMENTS'. To the right of these tabs is a circular orange button with a document icon, which is used for creating a new note. A red circular button with a plus sign is located at the bottom right of the interface.

Annotations in the image include:

- A box pointing to the 'MODIFY' button with the text: 'Press Modify button to edit the opportunity'.
- A box pointing to the 'Aggassi Food Service' and 'Napoli' links with the text: 'The associated company/individual and contacts are displayed as links. Clicking the links will open the entry'.
- A box pointing to the orange document icon button with the text: 'Button for creating a note'.

About Maximizer

Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.



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