Maximizer CRM Partner Portal

Getting Started Guide

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Contents

Deployment

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" />
```

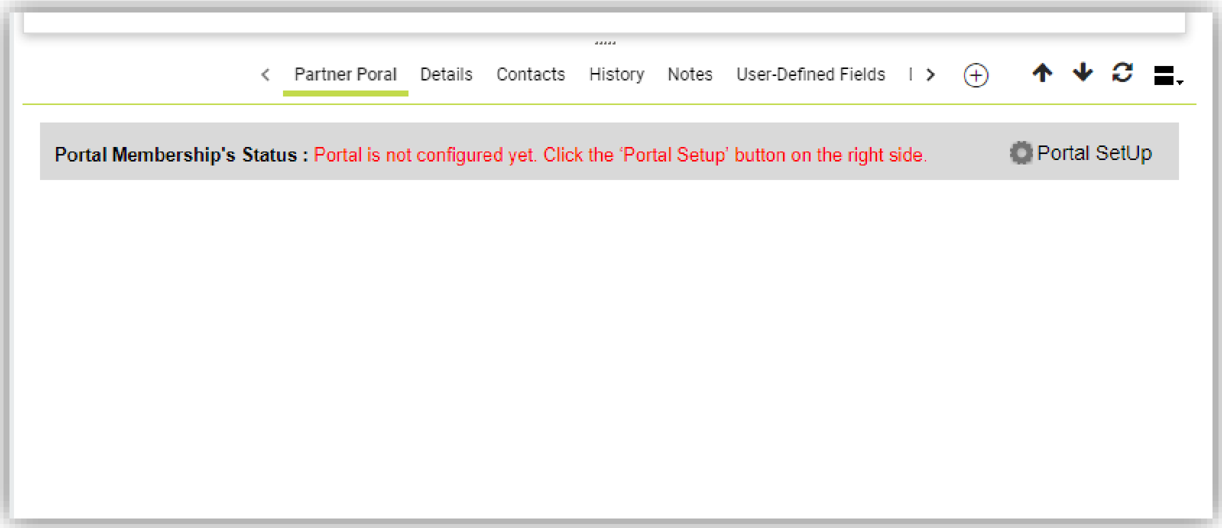
5) Configure the following windows setting xml (**C:\Program Files (x86)\Maximizer\Portals\Employee\Config\followingWindowSets.xml**) to add the Partner Portal following tab under `<followingWindowSet id="for-ab">`:

```
<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.

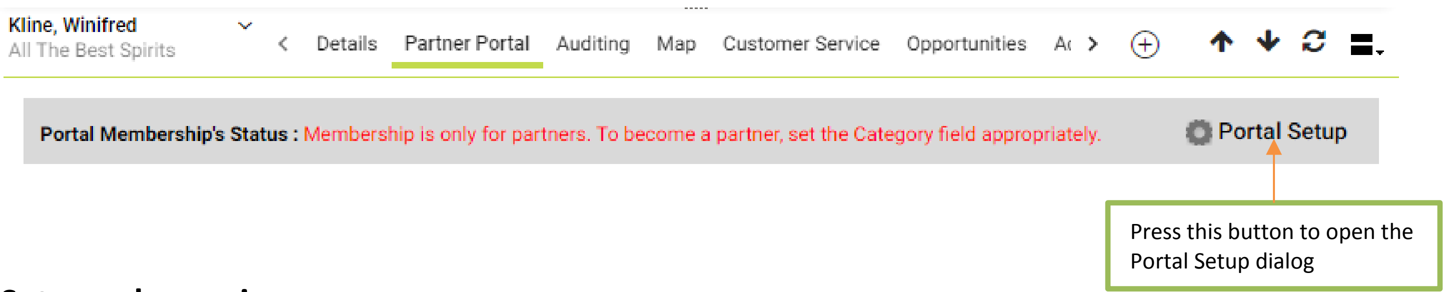
Chrome, Firefox, Microsoft Edge and Microsoft Internet Explorer 11 are the supported browsers. The Partner Portal also works in web browsers in mobile devices.

.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.

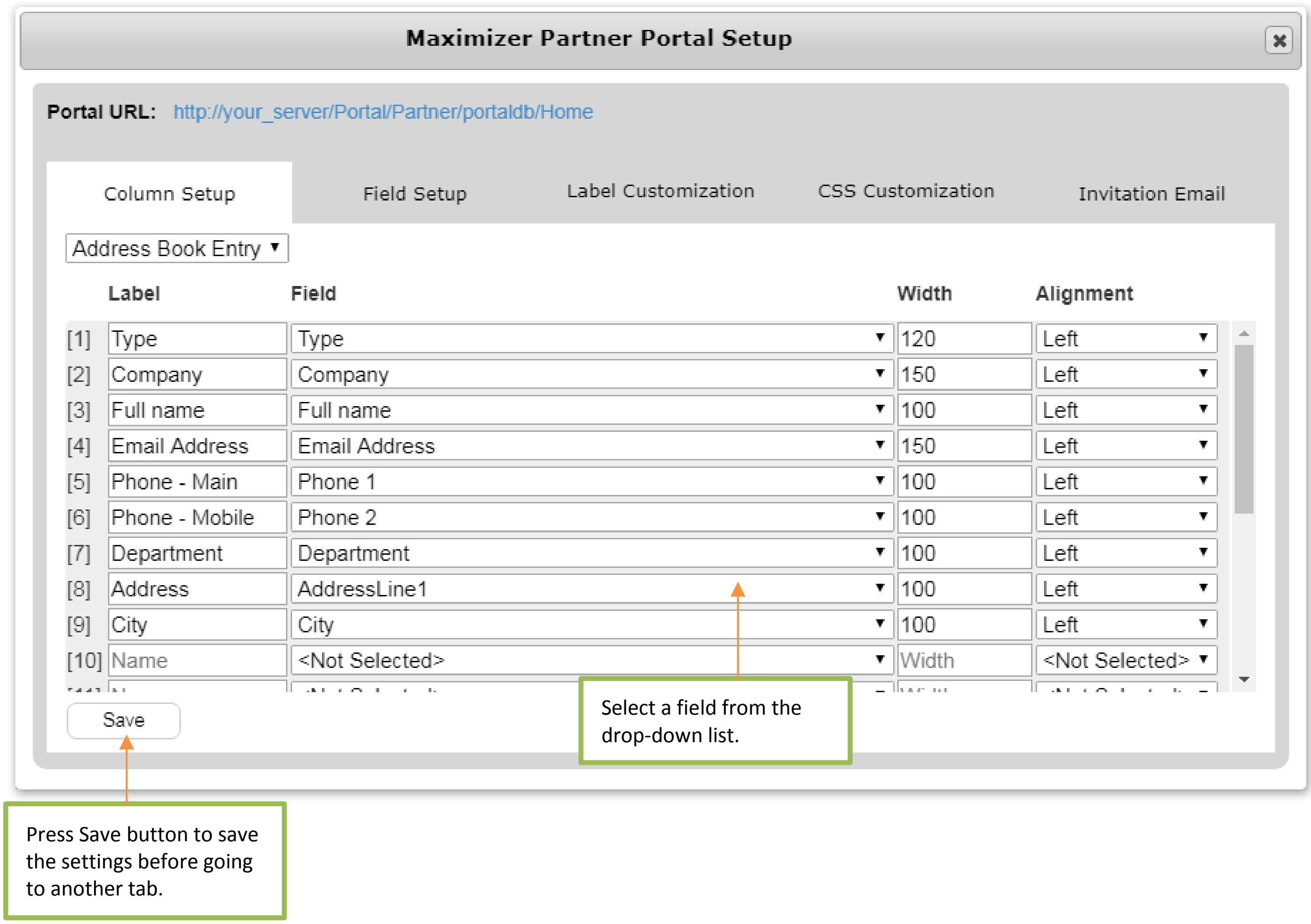
It is recommended that you make a backup of the codes in Label Customization, CSS Customization and Invitation Email tabs. If you make mistake when changing the code in these tabs and cause issues in partner portal, you can revert back to the original code.



Setup column view

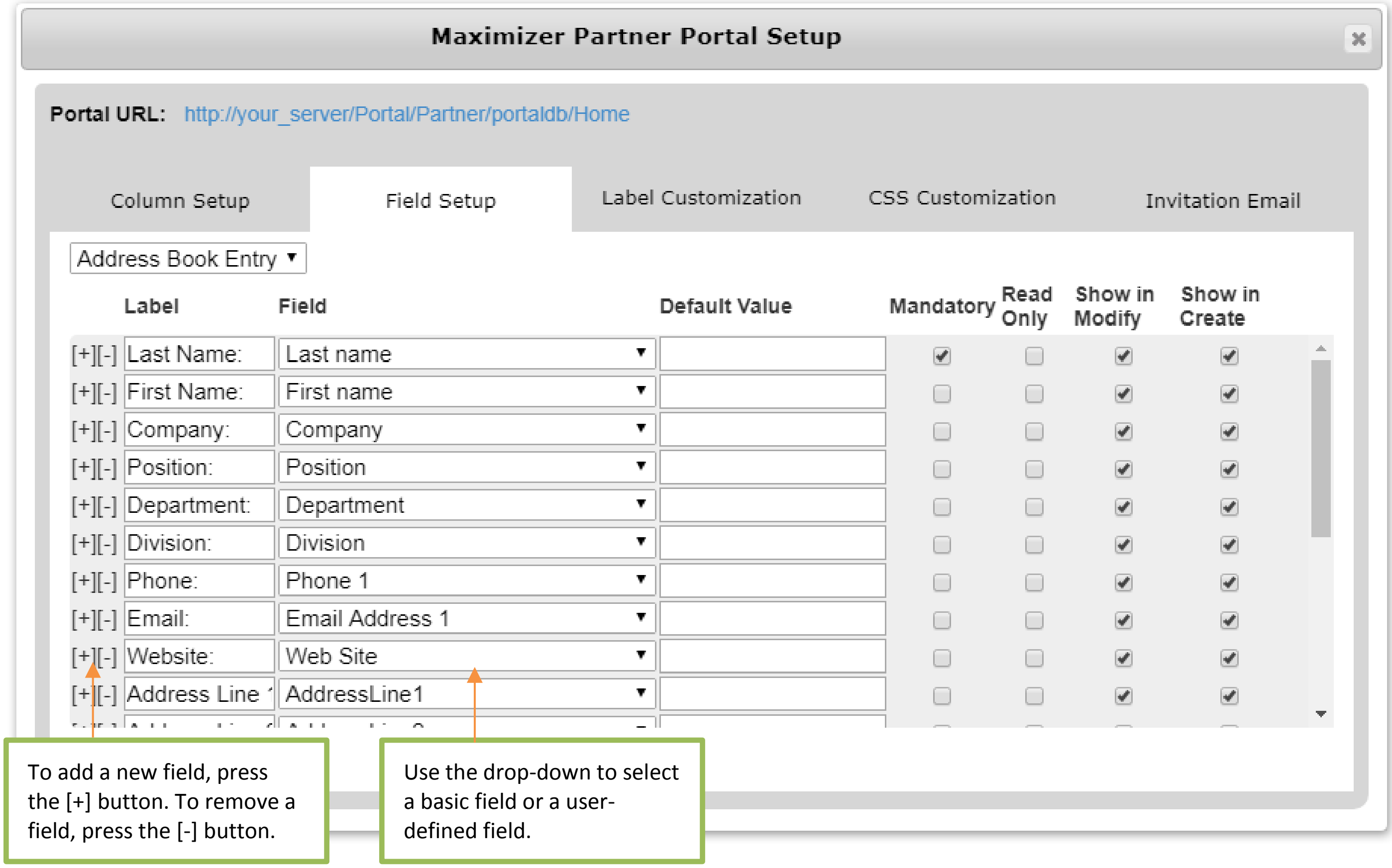
In Column Setup tab, create column views for Leads/Address Book and Opportunities modules.

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.



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.



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

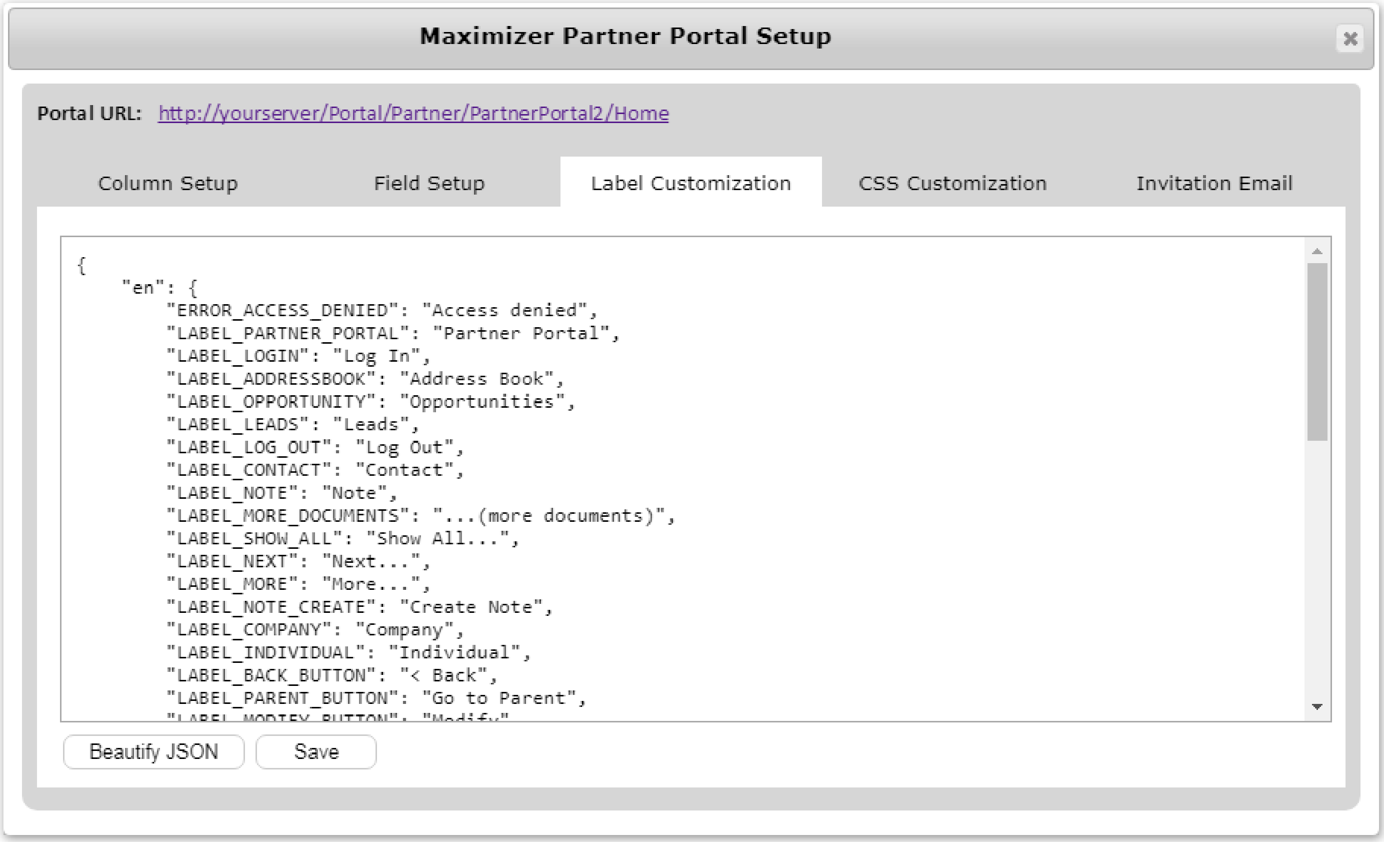
Identifier	**Fields**	**Read**	**Modify**
/AbEntry/FullName	Full name of the entry	Company - No Individual/Contact - Yes	No
/AbEntry/LastName	Last name	Company - No Individual/Contact - Yes	Company - No Individual/Contact - Yes
/AbEntry/MiddleName	Middle name	Company - No Individual/Contact - Yes	Company - 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.

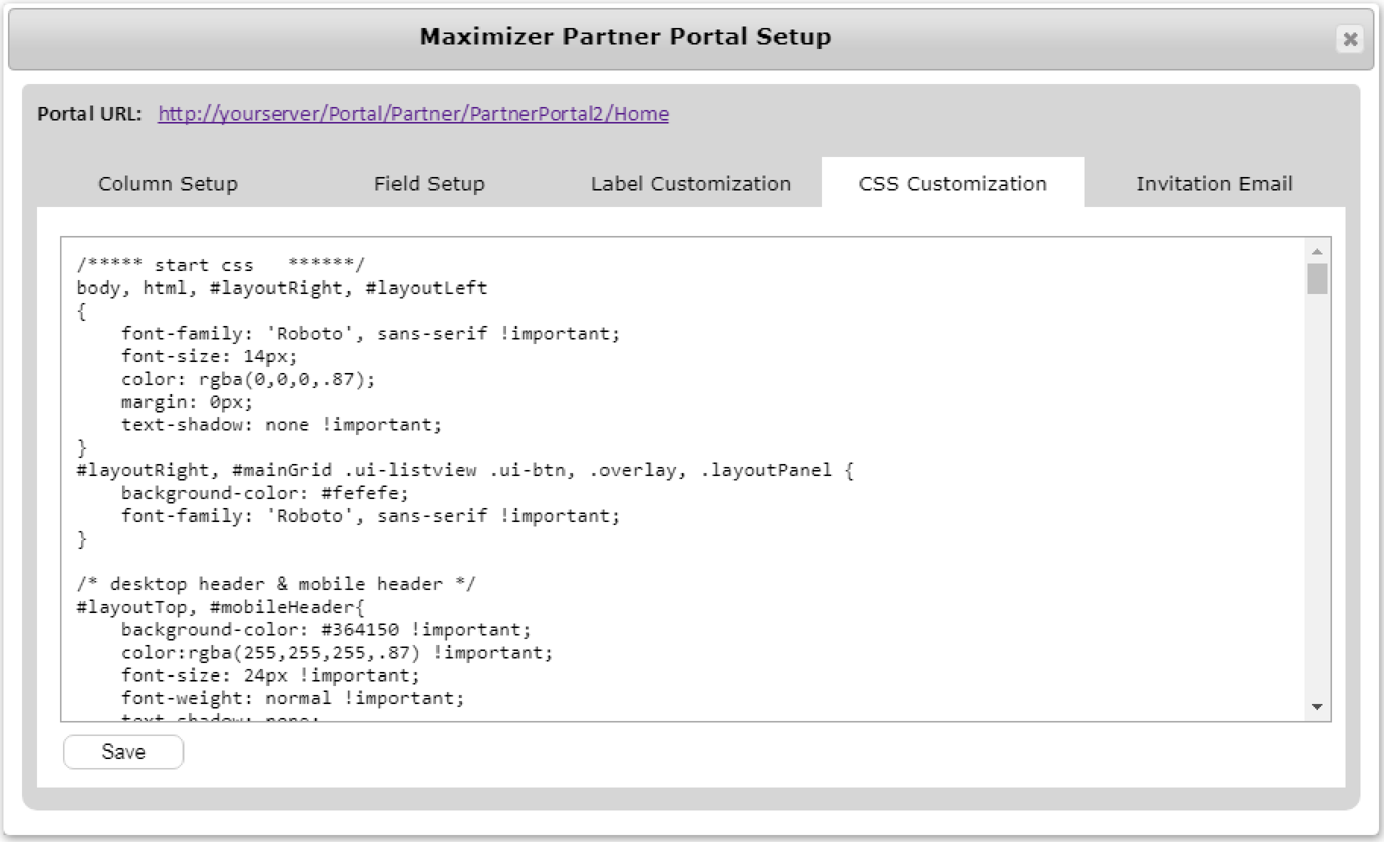
```
{
       "en": {
              "ERROR_ACCESS_DENIED": "Access Denied",
              "LABEL_PARTNER_PORTAL": "Maximizer Partner Portal",
              …
},
       "fr": {
              "ERROR_ACCESS_DENIED": "Accès refusé",
              "LABEL_PARTNER_PORTAL": "Portail des partenaires",
       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

This section customizes the labels in English.

This section customizes the labels in French.

CSS customization

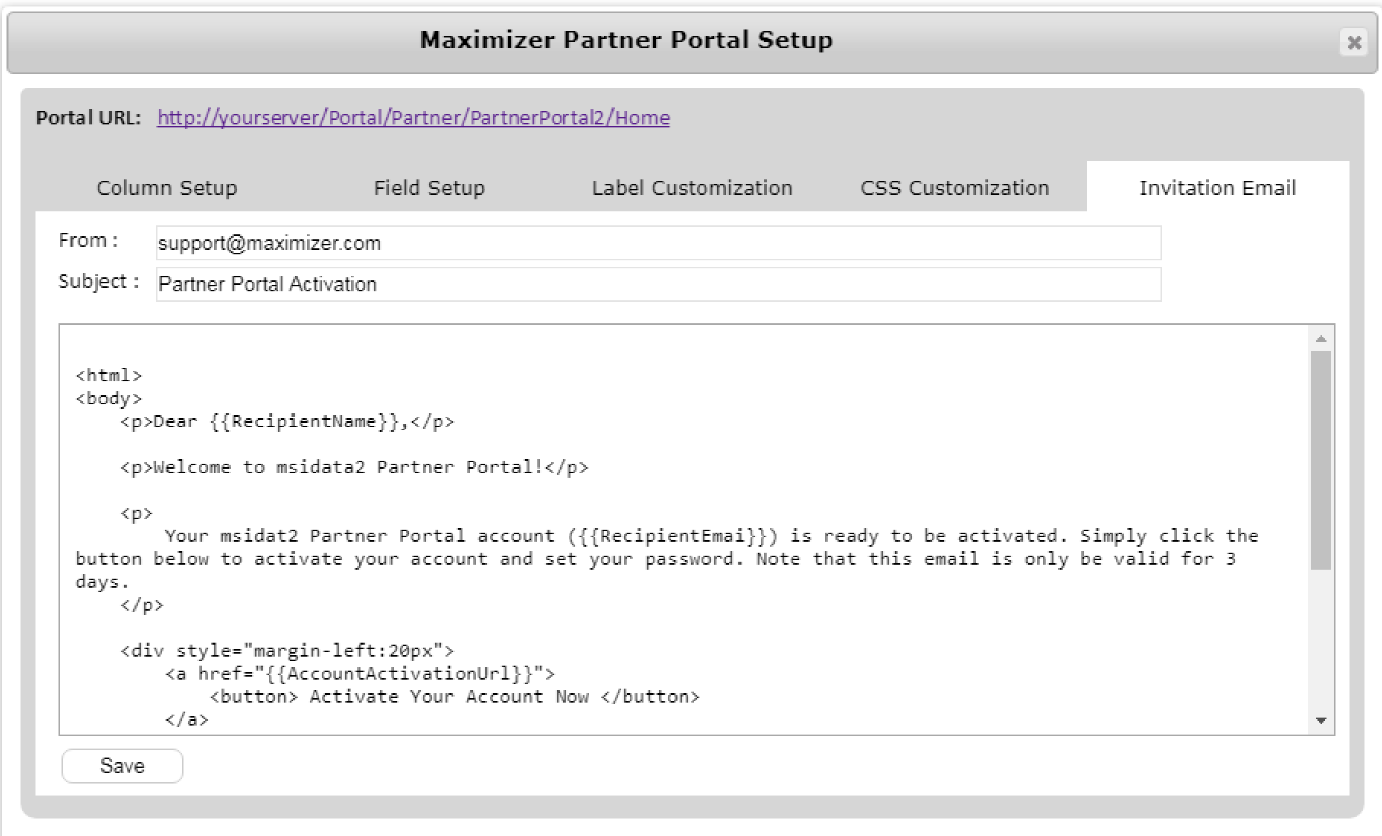
If you want your Partner Portal to have the same look and feel as your company website, you can customize the interface of the portal in CSS Customization tab.



Invitation email

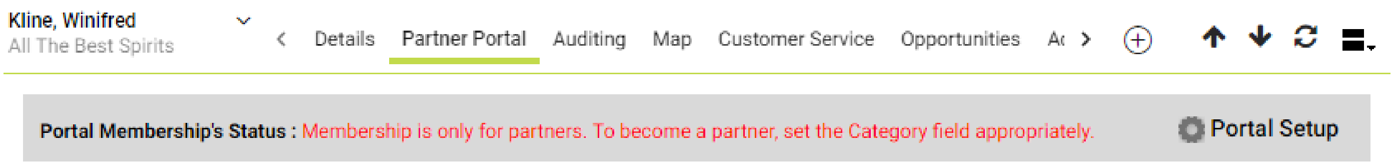
You need to send email to the partners to register for accessing the portal. In Invitation Email tab, you will design how the email will look like.

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
`{{RecipientEmai}}` - Recipient's email address
`{{AccountActivationUrl}}` - The URL that the partner should click in order to complete the registration process.

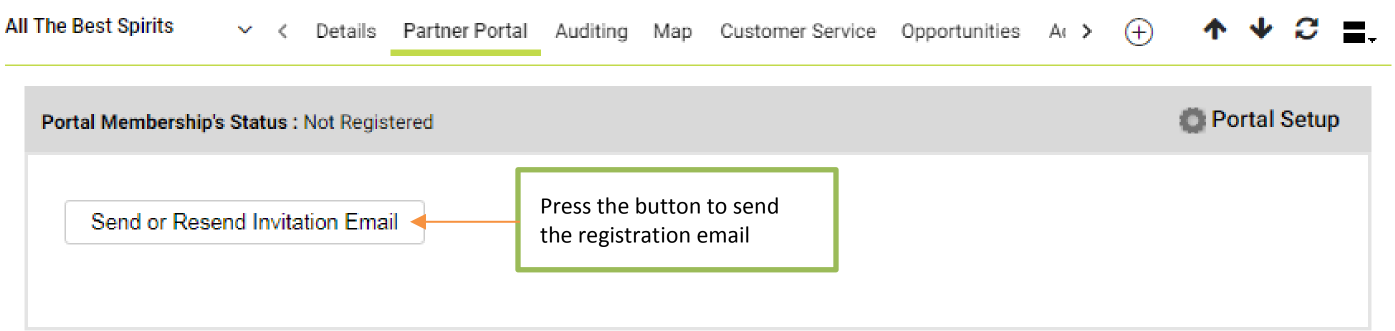


Allow Partners to Access the Portal

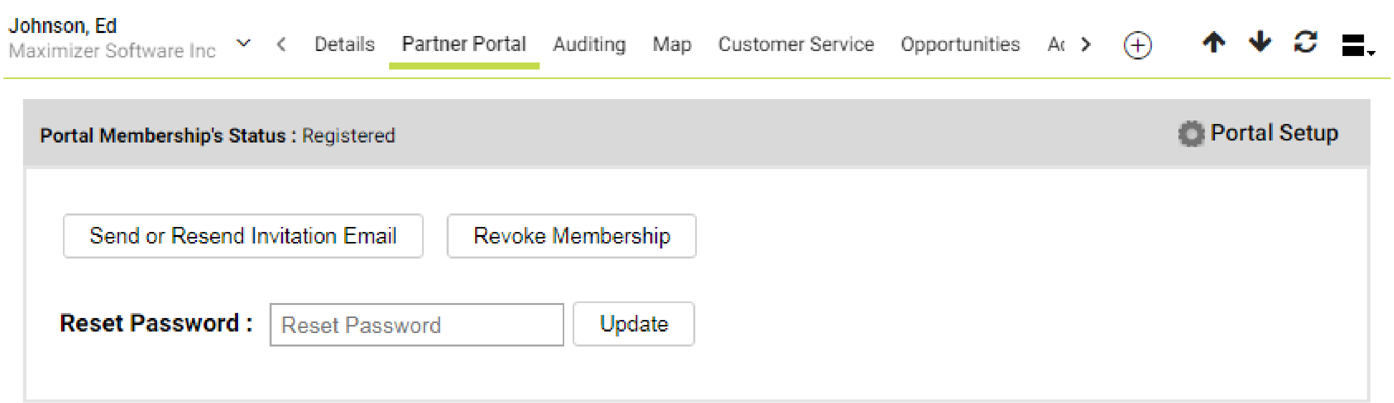
In Maximizer Web Access, select a contact. If the contact is not a partner (Category field doesn't include partner), the following message will be displayed in the Partner Portal tab. The contact cannot have access to the Partner Portal.



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

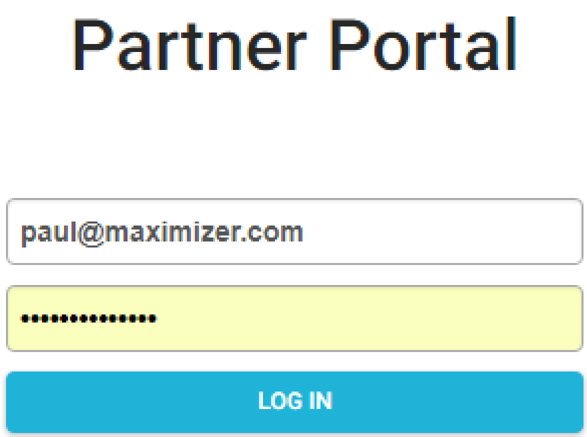
The partner's parent company must be a partner (Category field includes partner).

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.



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.

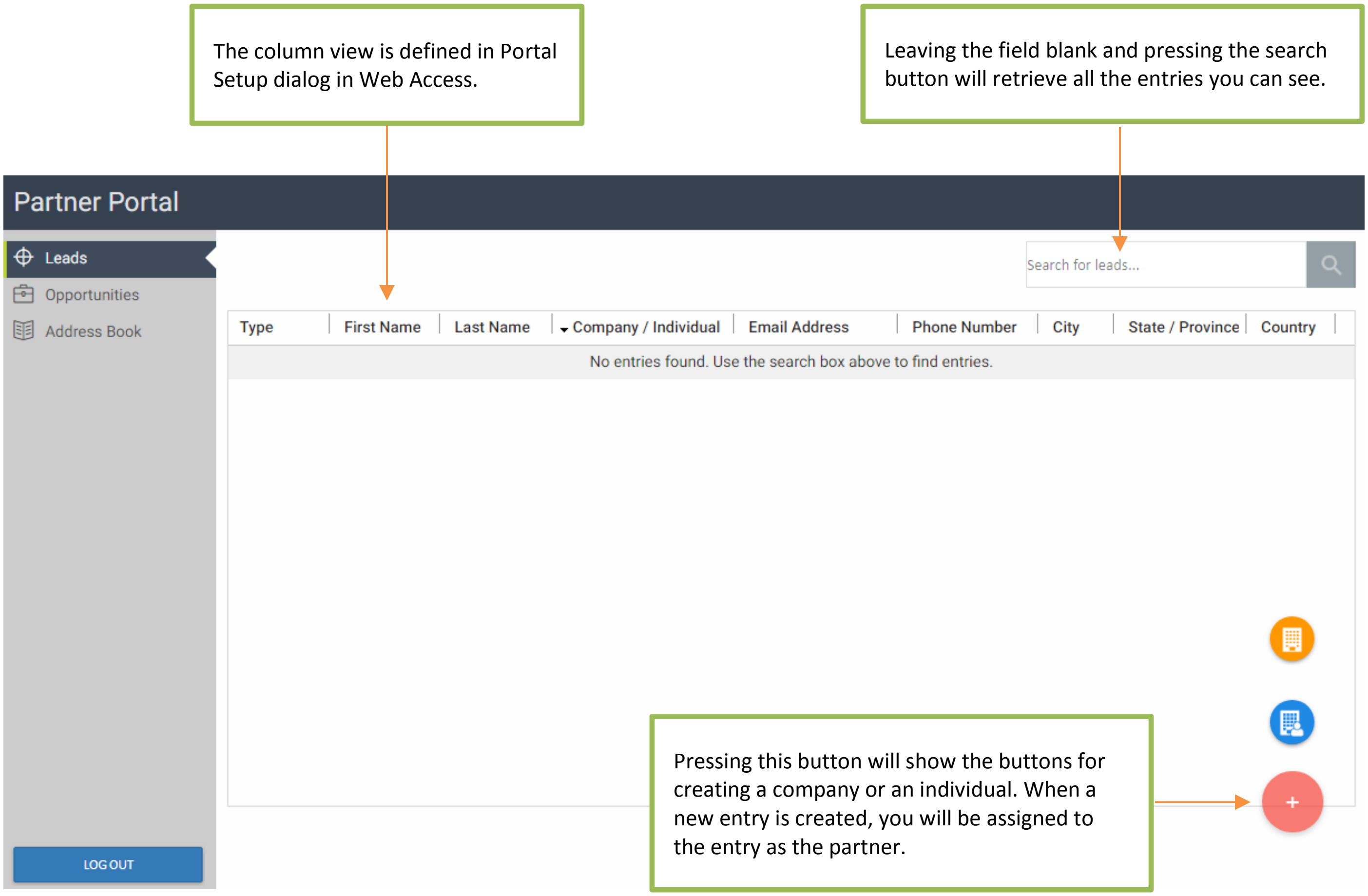
If a company has a partner assigned (per one of the conditions 1 & 2 above), all the contacts in that company will be visible regardless of whether the contacts have partner assigned or not.

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.

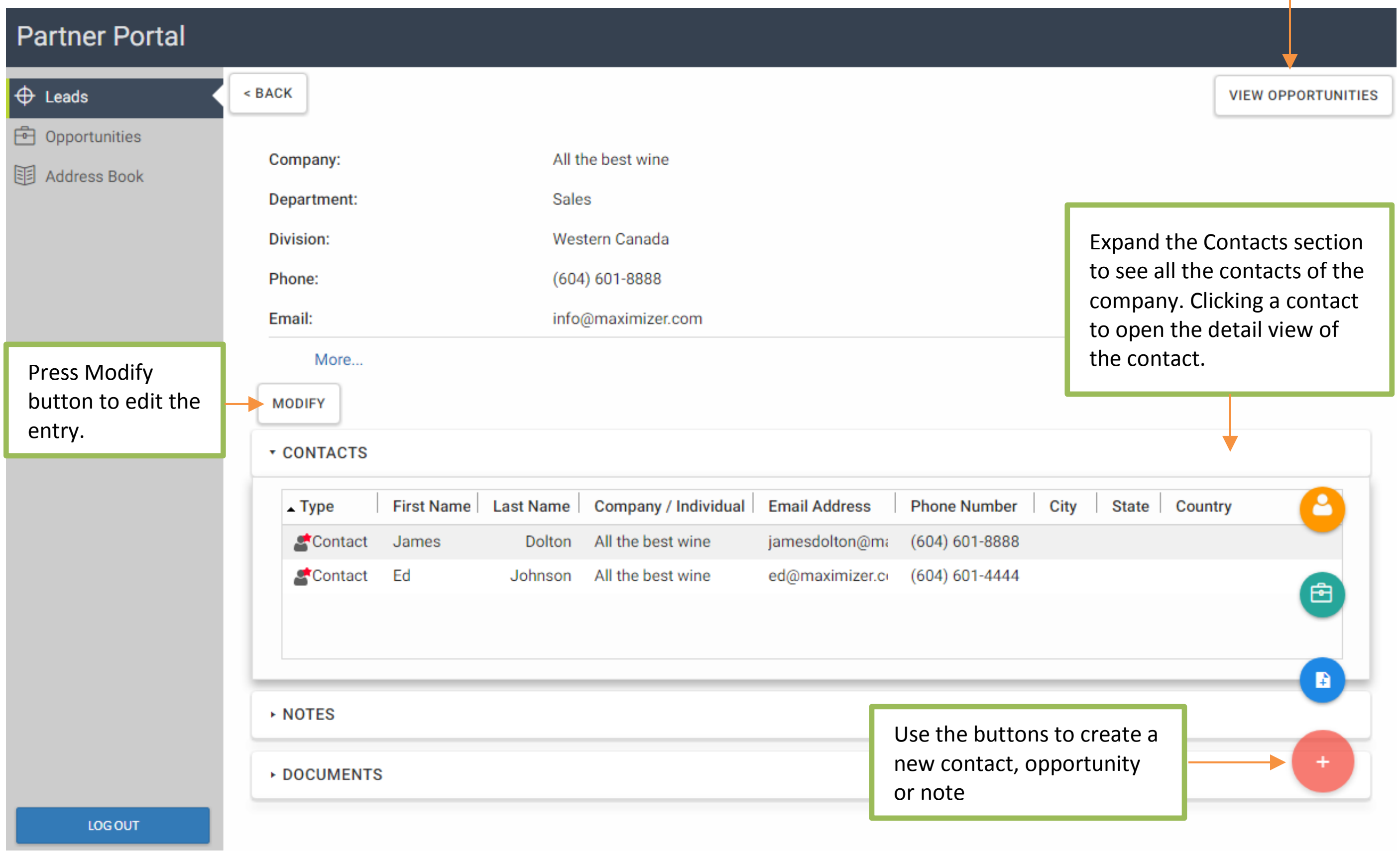


To search for particular entries, type in the name of the entry in the search field. You can also search entries by email address, phone number, city, state/province, country or zip / postal code. When a company is retrieved, all the contacts of the company will be retrieved.

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

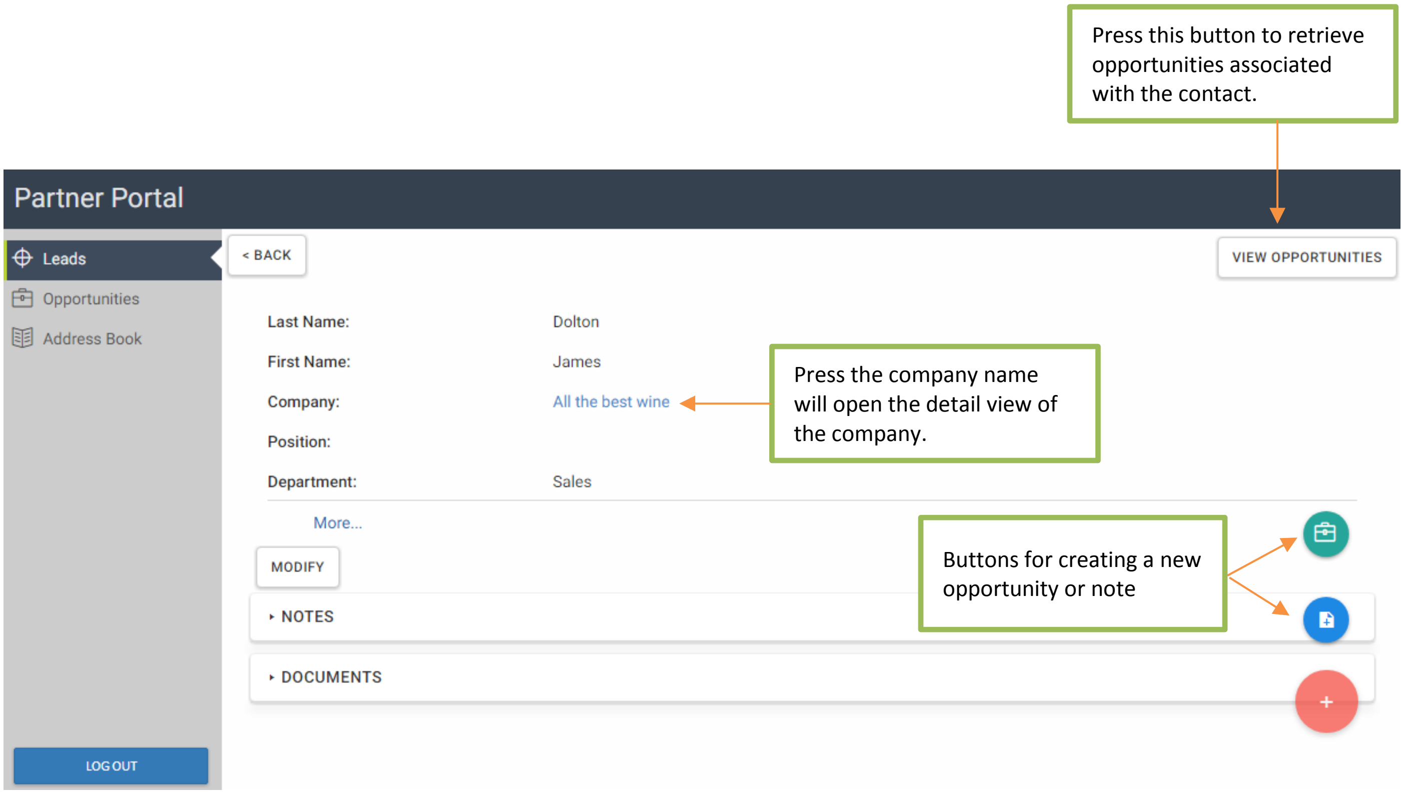


If the entry is a company or an individual, Contacts tab is available to display all the contacts. Clicking a contact will open the detail view of the contact. Expanding the Notes or Documents tab will show notes and documents in the respective tab.

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

Contact details

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



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

Working with Opportunities

Retrieving Opportunities

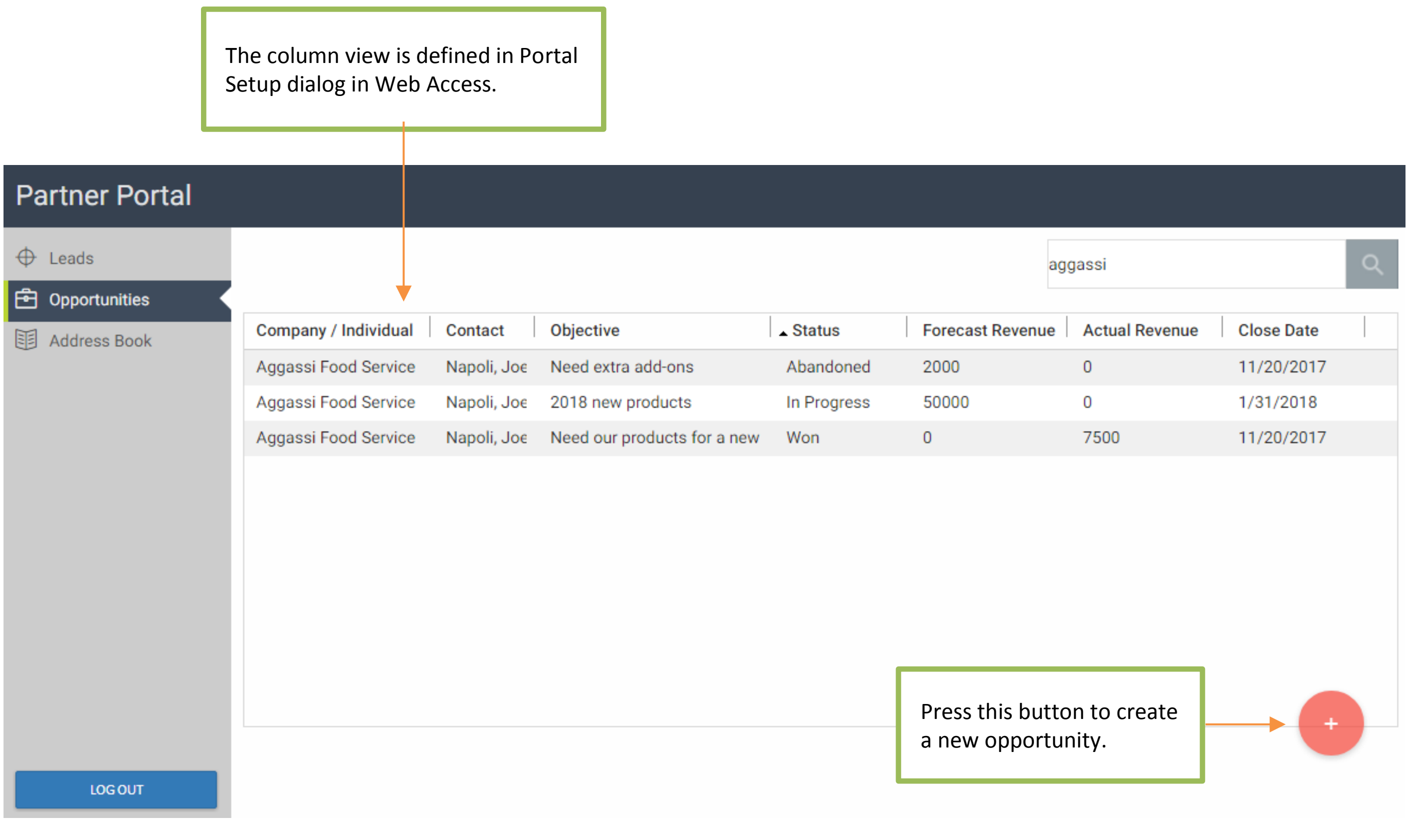
The partner will be able to see an opportunity if one of the following conditions is met:

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:

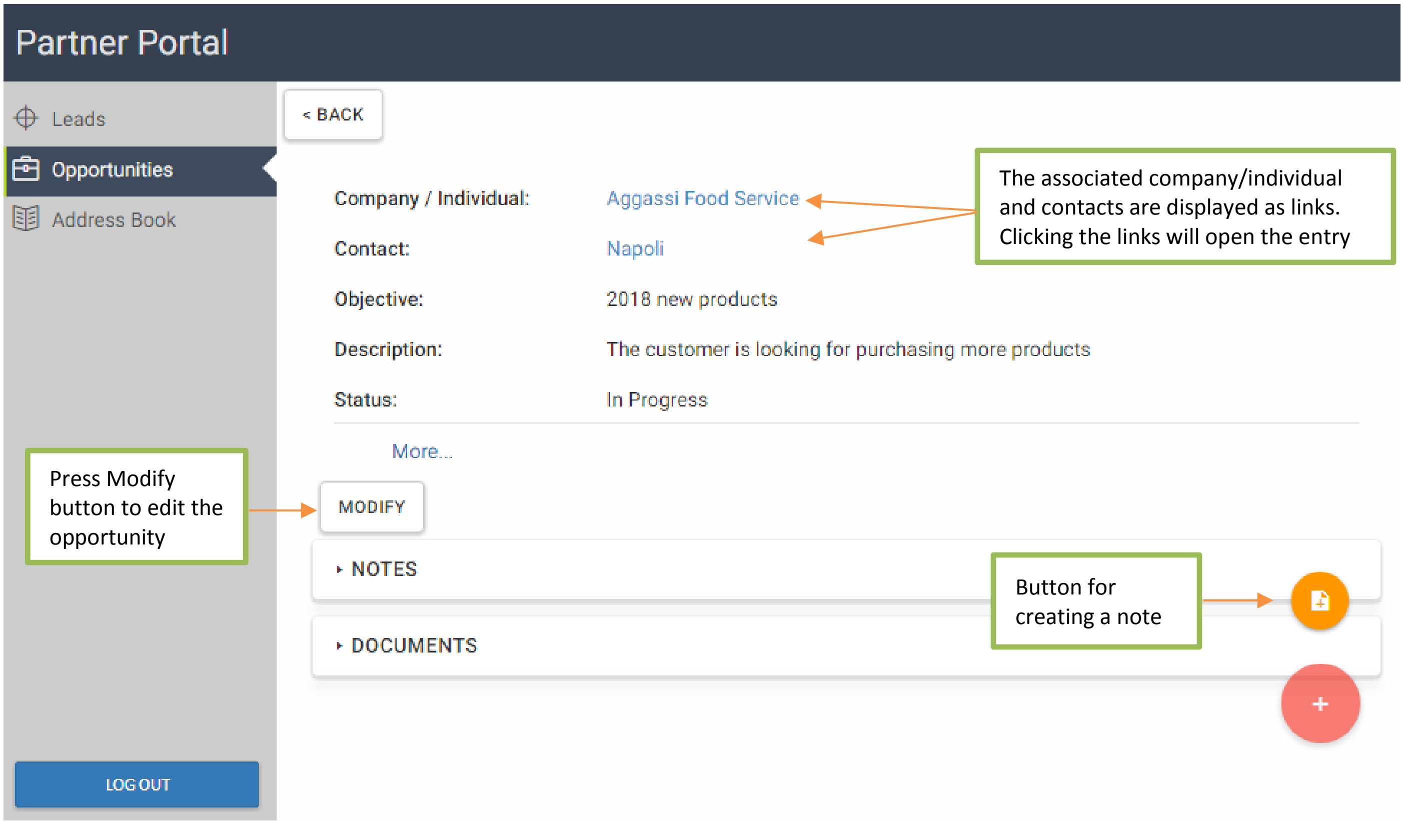
- Find the lead or Address Book entry, open it and press View Opportunities button.
- In Opportunities screen, enter the company/individual name in the search field and press the search button. It will retrieve opportunities associated with the company or individual. You can also search opportunities 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.



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 stab will show notes and documents in the respective tab. Press the round button to access the 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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