



# Setting Up Max4Advisors™

## Prerequisites

- ❑ Maximizer CRM 10.x must be installed and working properly before installing Max4Advisors.
- ❑ You must be logged into Windows with local Administrator privileges to perform the install. The Max4Advisors installer will halt if this is not the case.

## Installing Max4Advisors

- ❑ Ensure that Maximizer and all related modules are closed before installing Max4Advisors.
- ❑ Run the Max4Advisors installer. Read and accept the License Agreement. Verify the installation folder.
- ❑ The next time you launch Maximizer, you should see three new tabs in the lower-right pane of Maximizer's Address Book window. The tabs are named "Annual", "Insurance", and "Investments".

**Users of Windows Vista and Windows 7 please note:** When you launch Maximizer for the first time after installing Max4Advisors you should right-click the Maximizer icon and choose "**Run as administrator**". This is often necessary to allow Maximizer to register the Max4Advisors components. After Maximizer has loaded and you confirm that the "Annual", "Insurance", and "Investments" tabs are visible you should shut Maximizer down and start it normally before continuing with the following steps.

## Configuring an Address Book for Max4Advisors

- ❑ An address book must be configured for Max4Advisors before you can use it. Configuration creates the user-defined fields (UDFs) and other internal entries that are required by Max4Advisors.
- ❑ You must have the address book open in Maximizer before you can configure it.
- ❑ To configure the address book for Max4Advisors, run the Max4Advisors Configuration Utility (Start > All Programs > Max4Advisors > Configuration Utility) and click the "**Configure the current Address Book for Max4Advisors**" button.



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## Registering Max4Advisors

- ❑ Evaluation copies of Max4Advisors have no time limit: they function indefinitely with minor functionality removed. For example, data can be entered but not modified. When you purchase a license, the registration process will unlock all features.
- ❑ If you have a shared Address Book with three (3) machines accessing the Address Book you must purchase three (3) Max4Advisors licenses and perform the registration steps on each of those three (3) machines.
- ❑ Registration codes are specific to a particular machine. If you purchase a new computer or make major changes to your existing machine, you will need to get a new registration code for it (additional fees may apply). Also, please make sure that you don't get your registration codes mixed up: a code generated for **Machine A** will not work on **Machine B**.
- ❑ You need to be logged into Windows with sufficient privileges to make changes to the "Program Files" folder. Local administrator privileges are best. "Power User" privileges under Windows 2000 or Windows XP should work, too.

**Users of Windows Vista and Windows 7 please note:** Whenever you launch the Max4Advisors registration utility you must right-click its icon and choose "**Run as administrator**". This is true even if you are already logged-in as a user with Administrator privileges on that machine.

- ❑ To register a copy of Max4Advisors, run the registration utility (Start > All Programs > Max4Advisors > Registration). You will see a dialog box that looks like this:

A screenshot of the Max4Advisors registration utility dialog box. The window title is "CODE-LOCK" and it has a blue header bar. Below the header, there is a "User Data:" label and a text box containing a long alphanumeric string: "5D7DF921BE6D4F8E47AB7744FE61F3B16E". Below that is a "Name:" label and a text box containing "Gord Thompson". Below that is a "Registration Code:" label and a large empty text box. At the bottom of the dialog, there are two buttons: "Register" and "Exit".



- ❑ Copy the **entire** “User Data” field and paste it into an Email message. Do the same for the “Name” field. After purchasing your licenses, e-mail the “User Data” information to us at [m4aregistration@max4advisors.ca](mailto:m4aregistration@max4advisors.ca) and we will generate a “Registration Code”. The code you receive will look like this:

```
=====  
REGISTRATION KEY  
=====  
Ib9XKECWU9Ph7h+lGWrwn7nLc4Zt3a  
xHXHVS6tL7Y4jykXeHEiYNI1+3ete0  
MrfXA0aqz37DHZHxblzd72MtJsyoqB  
2Qj6/mYKu7O6Wy4L3gZcbStt+mvi69  
4SPJFmMTe5S12D1D10zgHRynUXjkqK  
uSYJuIeThisCodeIsBogus+8r7N1Cz  
hob3RIYTDII+mmylyiAIIId5thR+QuY  
RSr7aj66URz/UEtuYKLzszLAs50t4x  
8SQNbFL4wxq8J2GFSOIiFA84NJr79S  
CMIDQYNg==  
=====  
DO NOT ALTER KEY  
=====
```

- ❑ Copy the **entire** registration code into the box in the registration utility and click “OK”. You should be immediately presented with a message saying “Please wait while your program is being registered...”. If you do not see that message, please try again and ensure that
  - You are using the correct registration code for that particular machine.
  - You right-click the “Registration” icon and select “Run as administrator” if you are running Windows Vista or Windows 7.
  - The user or company name in the “Name:” field matches the one you submitted to request your registration code.
  - You copy and paste the entire registration code into the dialog box.

## Troubleshooting

- ❑ To view the status of Max4Advisors, right-click any one of the Max4Advisors tabs (Annual, Insurance, or Investments) and select “About...”. The status box in the “About Max4Advisors” dialog will show you the current state of Max4Advisors.

## For users without local Administrator privileges

- ❑ Max4Advisors requires that a user have at least “Power User” privileges under Windows 2000 and Windows XP.



### **Special considerations for Windows Vista and Windows 7**

- ❑ If you will be running Maximizer and Max4Advisors under a regular (non-privileged) user account, be sure to open the address book at least once while still logged in as an administrator before attempting to open it as a regular user. The first time Max4Advisors connects to an address book database it may need to create an ODBC connection (DSN) for that database, and regular Vista logins may not have sufficient privileges to do that.
- ❑ In Max4Advisors Explorer, the “New Folder” button in the “Browse for Folder” dialog is labeled “Current User”. The button does work, however. We are investigating the cause and will try to address it in a future release of Max4Advisors.
- ❑ If you find that the Search feature in Max4Advisors is not working, go into Maximizer’s File > Preferences dialog, select the “System Defaults” tab, and in the section for “General options” uncheck the box for “Enable OrderDesk”. Then close and re-open Maximizer.