

Important Upgrade Information for Maximizer CRM 10 Entrepreneur Edition

Upgrading from a Previous Version of Maximizer

If you are currently running an earlier version of Maximizer and want to upgrade, it is strongly recommended that you install the new version without manually uninstalling the previous version.

When you install the new version, the setup will prompt you to uninstall the old version automatically. This method does not overwrite your Maximizer settings. Window layout, colors, fonts, and other Maximizer settings are carried over to the new version.

To upgrade to the new version of Maximizer

1. Back up your Maximizer Address Book. Refer to the instructions in the User's Guide for your previous version of the software.
2. If you have customized the dictionary, also back those files up separately before upgrading. For instructions, refer to "Backing up the Dictionary and Holidays Files in the User's Guide."
3. Uninstall Maximizer components such as MaxLink for Palm OS on your computer.
4. Install the new version of Maximizer.
5. Upgrade your Maximizer Address Book database to the new version, as described in the next section and in the User's Guide. If you have installed Maximizer CRM on the same computer as your previous version of Maximizer, simply select the Address Book you would like to upgrade from the list of available Address Books in the "Open Address Book" dialog box and click the "Open" button to upgrade it.

Upgrading or Converting an Address Book

You can also upgrade an Address Book by opening it in Administrator or Maximizer. Administrator also has a built-in utility to convert existing Maximizer databases from older versions to the current version, and to convert Maximizer Pervasive databases to Maximizer SQL databases.

After upgrading a database, you should always perform an Address Book validation and recovery. For further information, refer to "Verifying and Recovering Address Book Data" in the User's Guide.

To upgrade a Maximizer Address Book

1. Ensure Maximizer is closed before proceeding with the upgrade.
2. If you have an Address Book open in Administrator, select File > Close Address Book.
3. Select Utilities > Upgrade Maximizer Address Book.
4. Select Yes when prompted to continue.
5. If the Address Book does not appear in the list, click the "Browse" button to browse to the location of your Pervasive (Btrieve) Address Book files and click OK. Then, enter an Address Book name and click OK.
6. Select the Address Book from the available Address Book list, and click Open.

Answers to Frequently Asked Questions

Following are some of the frequently asked questions and answers to upgrading your software.

If you are unable to view your Address Book in the list...

After installing Maximizer CRM 10 Entrepreneur Edition, if you do not see your old Address Book listed in the "Open Address Book" dialog box or if you moved your old Pervasive database files (*.MAX or *.SAV) folder to the computer where Maximizer CRM 10 Entrepreneur Edition is installed, follow the instructions below:

1. Start Administrator. Make sure all Maximizer Address Books are closed.
2. Select the "Utilities" menu and the "Upgrade Maximizer Address Book..." menu.
3. Click the "Browse" button.
4. Browse to the location of your Pervasive database files (*.MAX or *.SAV) folder. Click OK.
5. Enter the new Address Book name. Click OK.
6. Finish the Address Book upgrade.

If you get a message that says the Pervasive database engine is required...

The Pervasive database engine is needed to upgrade your existing Address Books. You will get a message saying that the Pervasive database engine is required if you are dealing with a Maximizer database from a previous versions and the Pervasive Workgroup engine is no longer installed on the computer. To resolve this, install the Pervasive Workgroup engine on the computer by the instructions described in the following page:

http://www.maximizer.com/support/maxcrm/maxcrm100_pervasive.html

If you are unable to login after upgrading an Address Book...

Each time you upgrade Address Books from previous versions of Maximizer into Maximizer CRM 10 Entrepreneur Edition, you may notice irregularities in passwords for any User Ids which exist both in the newly upgraded Address Book and the pre-existing Address Book(s) (MASTER is a good example).

If the password for a common User ID is different for the newly upgraded Address Book than for pre-existing ones, you will initially be required to login twice for the newly upgraded Address Book. The FIRST password you should use is the password for the pre-existing Address Book(s), you will then be prompted for a second password and should enter the password for the newly upgraded Address Book. To permanently resolve this, you can then change the password for the common User ID in the newly upgraded Address Book to be the same as the pre-existing password. From this point on, all password changes will automatically be written for all common User IDs to all existing Address Books.

What are the limitations in Microsoft SQL Server Express and Maximizer CRM Entrepreneur Edition...

Microsoft SQL Server Express has a number of limitations including only single CPU support and a maximum memory usage of 1 GB. Please see the following URL for a complete list of limitations of Microsoft SQL Server Express:

<http://www.microsoft.com/sql/prodinfo/features/compare-features.msp>

The other limitation that may affect Maximizer customers is the database size limit of 4 GB. This means any user with Address Books larger than 4 GB will not be able to use Maximizer CRM 10 Entrepreneur Edition.

What if the Address Book you are upgrading is over 4 GB...

During the installation of Maximizer CRM 10 Entrepreneur Edition, the installation will first prompt the user to check the sizes of their databases before proceeding with the installation. This will give the user a chance to identify the potential issue before upgrading, and abort the installation at that point.

This database size check utility is also available as a standalone software program for checking existing databases prior to purchasing the upgrade.

If you have a database that is over 4 GB, the most likely reason is the number and sizes of documents stored in the Address Book. In such situation, you have the following options:

- Abort the installation, go back to your old version of Maximizer and use the built-in functionality to backup the original database, then purge documents and notes by date until the database size is below 4 GB. After that, install Maximizer CRM 10 Entrepreneur Edition and proceed with upgrading all your databases.
- Proceed with the installation, and deal with the documents during the Address Book upgrade process. Instead of storing the documents in the database, you may choose to store them as files in the file system. In such case, only the paths to the document files are needed to be stored in the database. As part of the database upgrade process, when you open the existing Address Book database in Maximizer CRM 10 Entrepreneur Edition, you will be prompted to upgrade and given the option to convert embedded documents to linked documents based on size. Adjust the size parameter until your converted database size become less than 4 GB.
- Upgrade to Maximizer CRM 10 Professional Edition or Enterprise Edition, which runs on Microsoft SQL Server version.
- Contact our technical support for further assistance.

What will happen when the database size exceeds the 4 GB limit...

Every time Maximizer CRM 10 Entrepreneur Edition is started, it will perform a check on the size of the database. A warning message will appear if the database being opened is close to the 4 GB limit.

Maximizer CRM 10 Entrepreneur Edition Administrator also provides a new feature to allow users to convert embedded documents to linked documents based on size. You may use this feature to reduce your database size as necessary.