

MaxMobile Lite Installation QuickStart

1. If you are synchronizing with a BlackBerry device, install BlackBerry Desktop Software 4.0.2 or higher on the desktop computer.
If you are synchronizing with a Smartphone or Pocket PC device, install Microsoft ActiveSync 4.5 or higher (if your computer is running an operating system other than Windows Vista), or Windows Mobile Device Center 6.1 or higher (if your computer is running Windows Vista) on the desktop computer.
2. Install Maximizer CRM 10.
3. Ensure your device is connected to the desktop computer. Install MaxMobile Lite 10 on the device with which you are going to synchronize. Follow the on-screen instructions to finish installing MaxMobile Lite on your device.
4. Launch the Administrator module. Open the Address Book you want to synchronize with the device.
5. Under the Reports menu, select Current Users. In the lower section of the Current Users dialog box, the following license information is displayed:
Total number of applied Mobile Lite license(s) is: 1
If you have installed additional MaxMobile Lite licenses, the corresponding number of applied licenses is displayed. If the displayed license information is not displayed, contact Maximizer Customer Service. If you would like to obtain more licenses, contact Maximizer Sales.
6. From the File menu, select Users.
7. In the Users dialog box, select the user who will be synchronizing their data with the device.
8. Click the Properties button.
9. In the General tab of the User Properties, select Mobile Lite in the Module Login section, then select Enabled from the drop-down list. Close all dialog boxes.
10. Log into Maximizer as the enabled MaxMobile Lite user.
11. In the Address Book window, create a Favorite List for entries you want to synchronize to the device (e.g., Mobile_AB_FAV).
12. From the File menu, select Preferences and open the MaxMobile Settings tab.
13. Select the data types you want to synchronize such as the Address Book Favorite List (i.e., Mobile_AB_FAV), notes, and appointments based on the age, type, or size. Close the Preferences dialog box.
14. Make sure your device is connected to the desktop computer.
15. In Maximizer, make sure the MaxMobile icon (with Synchronize with MaxMobile tooltip) is enabled in the toolbar. Click on this icon to start the synchronization process. Alternatively, you can select "Synchronize with MaxMobile" from the Tools menu.
16. After the synchronization is finished, open MaxMobile on the device. If Address Book security is enabled, you will be prompted for a password in the Login dialog box. Otherwise, the Home page would be displayed directly.

For more information, see the MaxMobile Lite Getting Started Guide.