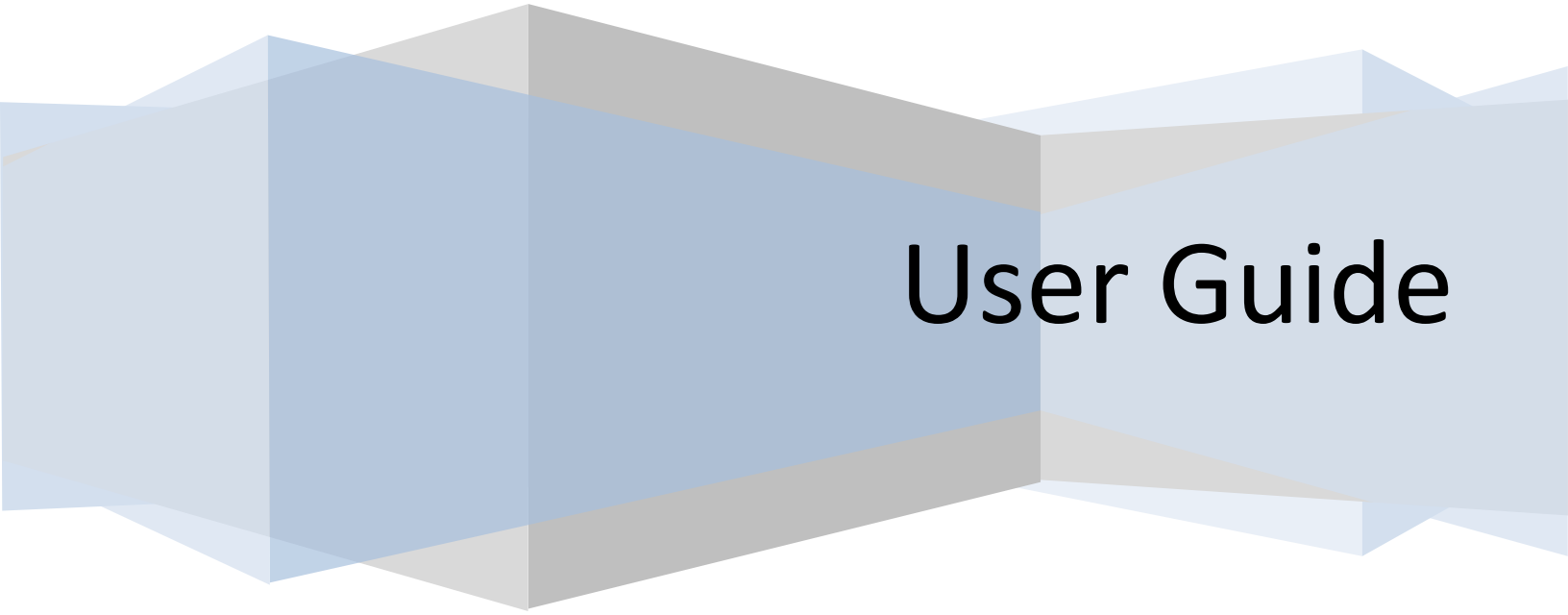
Balance Point Technologies, Inc.
www.maxtoolkit.com

MAX Workbench



User Guide

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Publication Date January 2017

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Purpose

MAX Workbench will manage the authorization configuration of applications developed by Balance Point on Company or User/Company levels. It will provide the users with ability to create their own work environment and those who are desegnated as managers will be able to configure or modify work environments for the regular users.

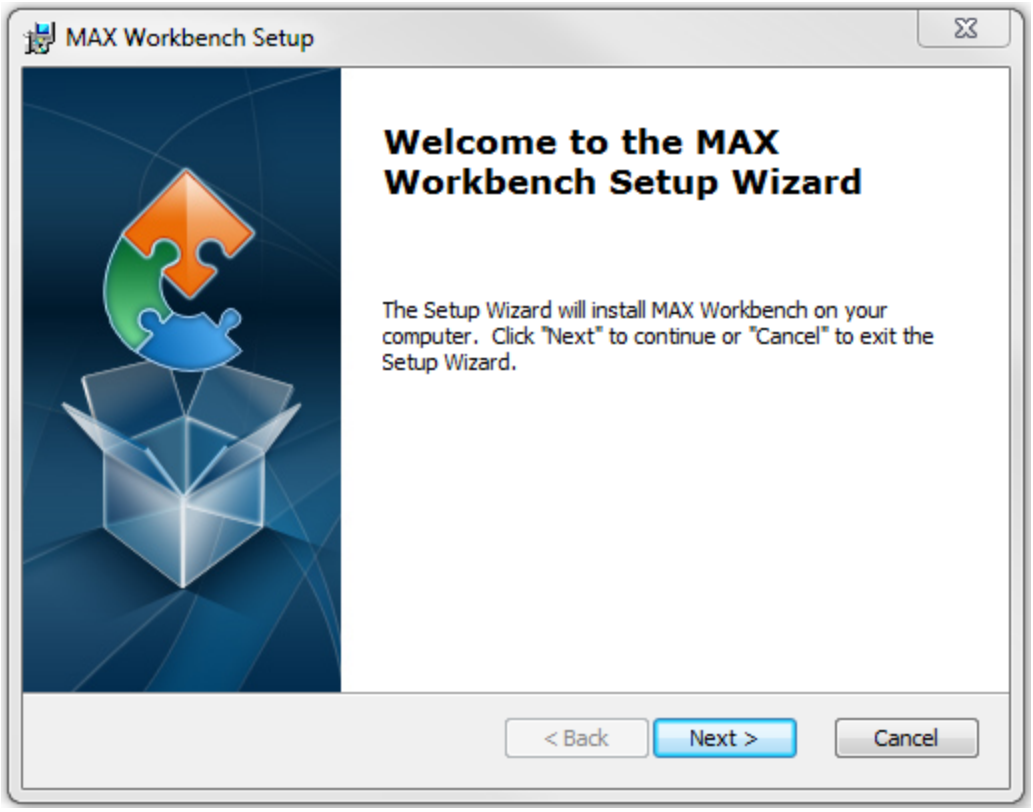
Minimum System Requirements

- .NET Framework 4.5
- EXACT MAX Software v5
- SQL Server 2008
- Internet connection

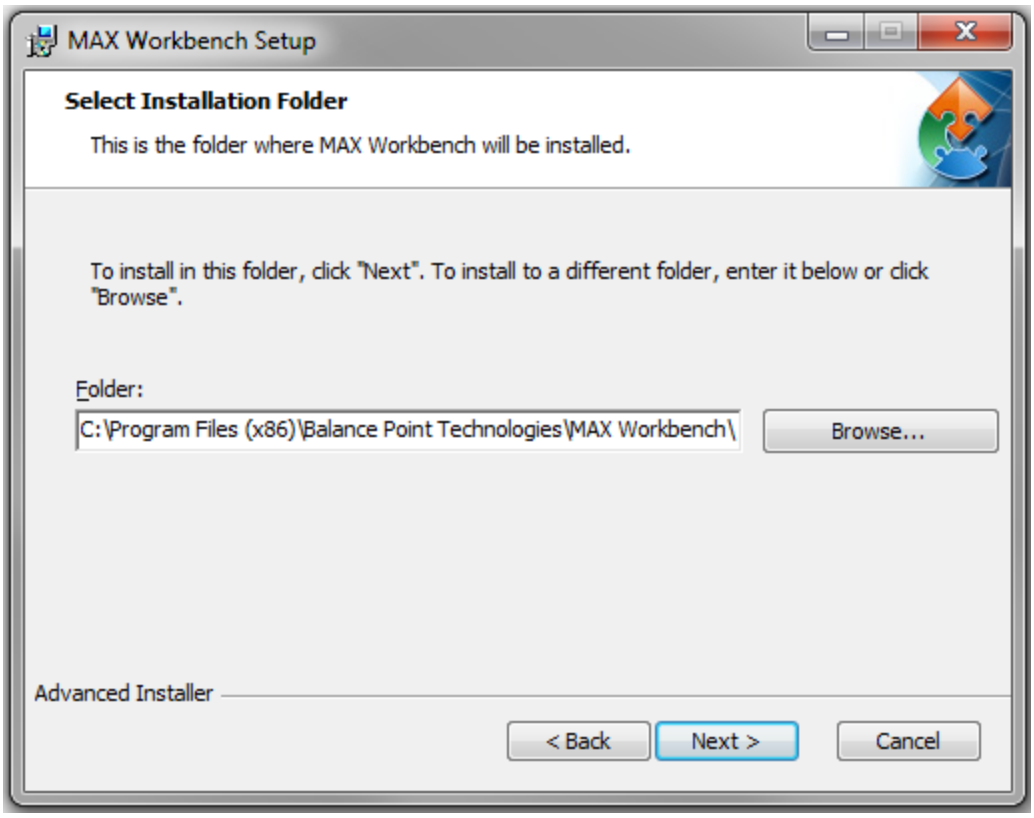
Installation

- MAX Workbench can be installed on a user workstation or on a server as long as the Exact MAX Client is installed on the same system. Also, all of the system requirements mentioned above must be met in order for MAX Workbench to function properly.

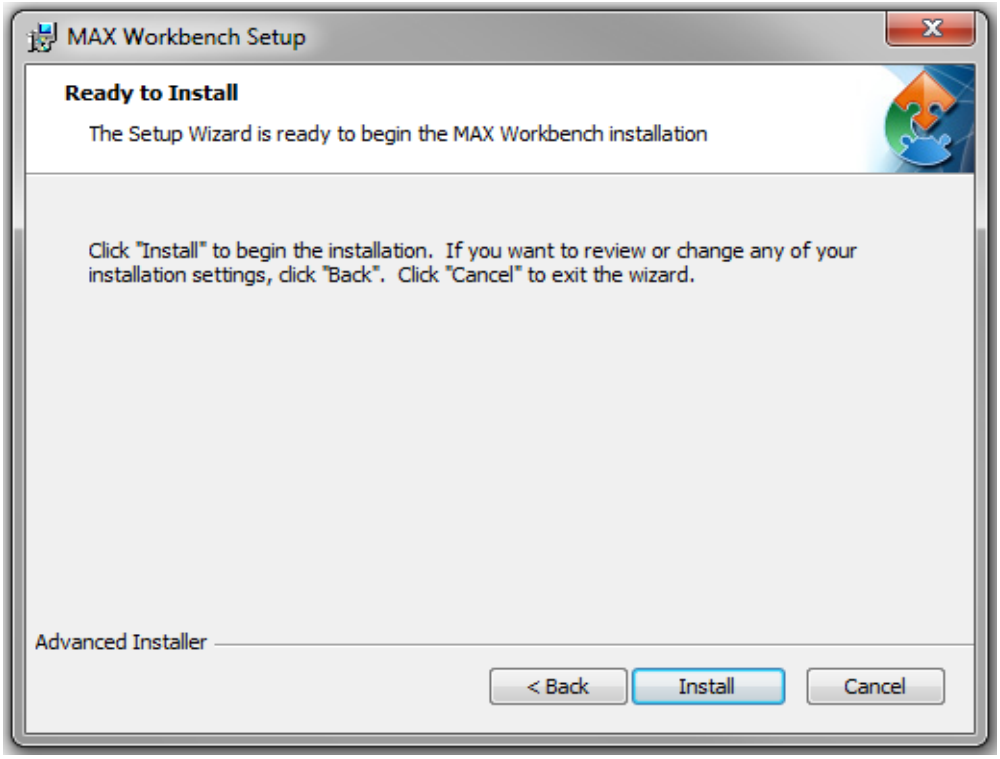
- Run MAXWorkbenchInstaller.msi



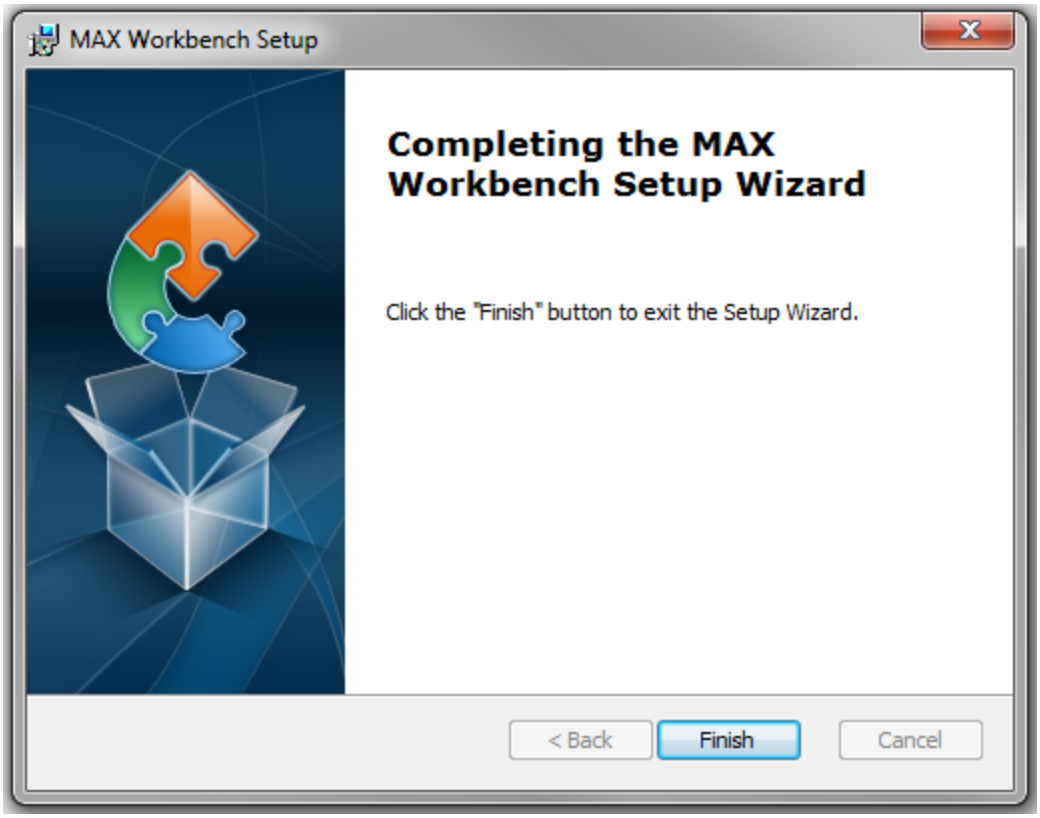
- Click Next
- Select the Installation Folder and click Next



- Click Install



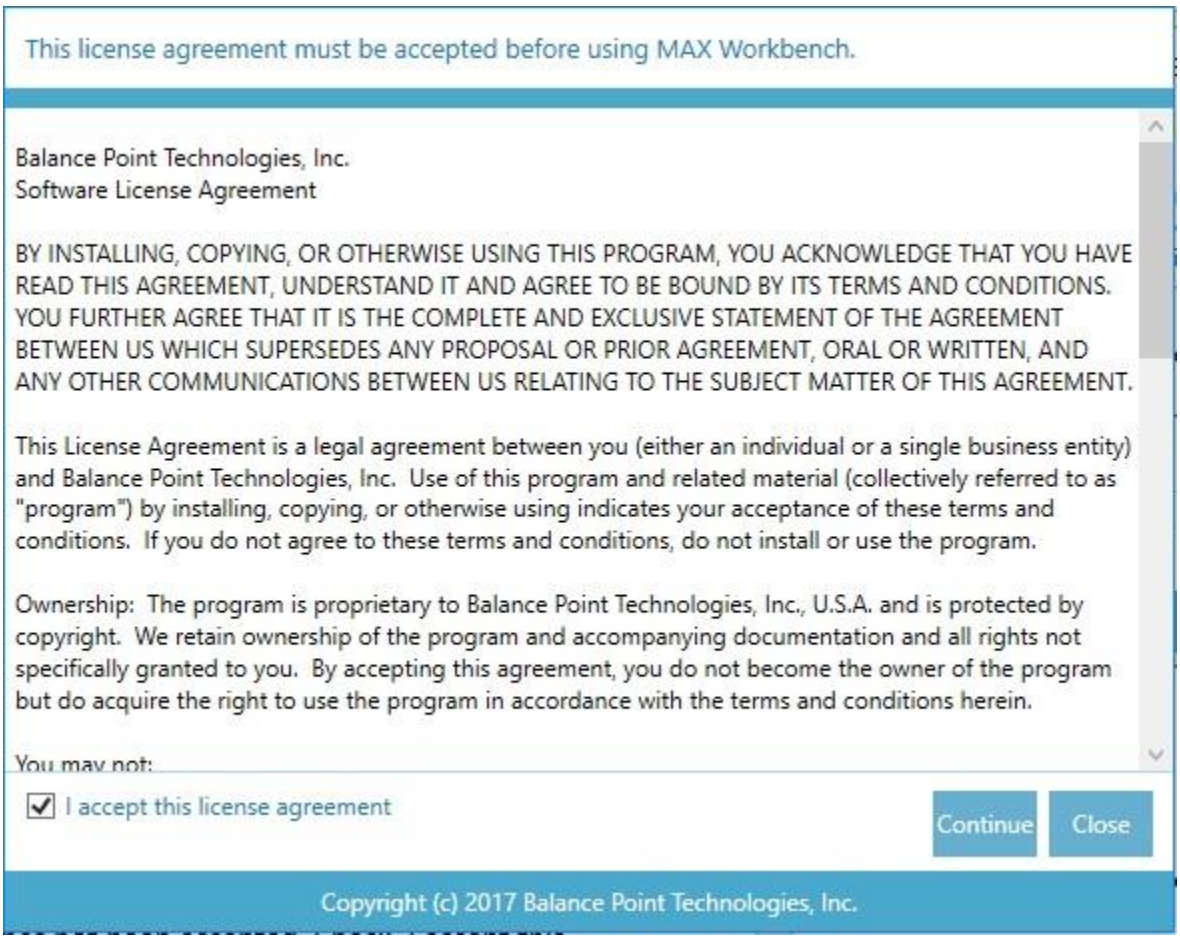
- Click Finish



- Shortcuts will be placed on the Desktop and in the Start Manu under Programs - > Balance Point Technologies - > MAX Workbench

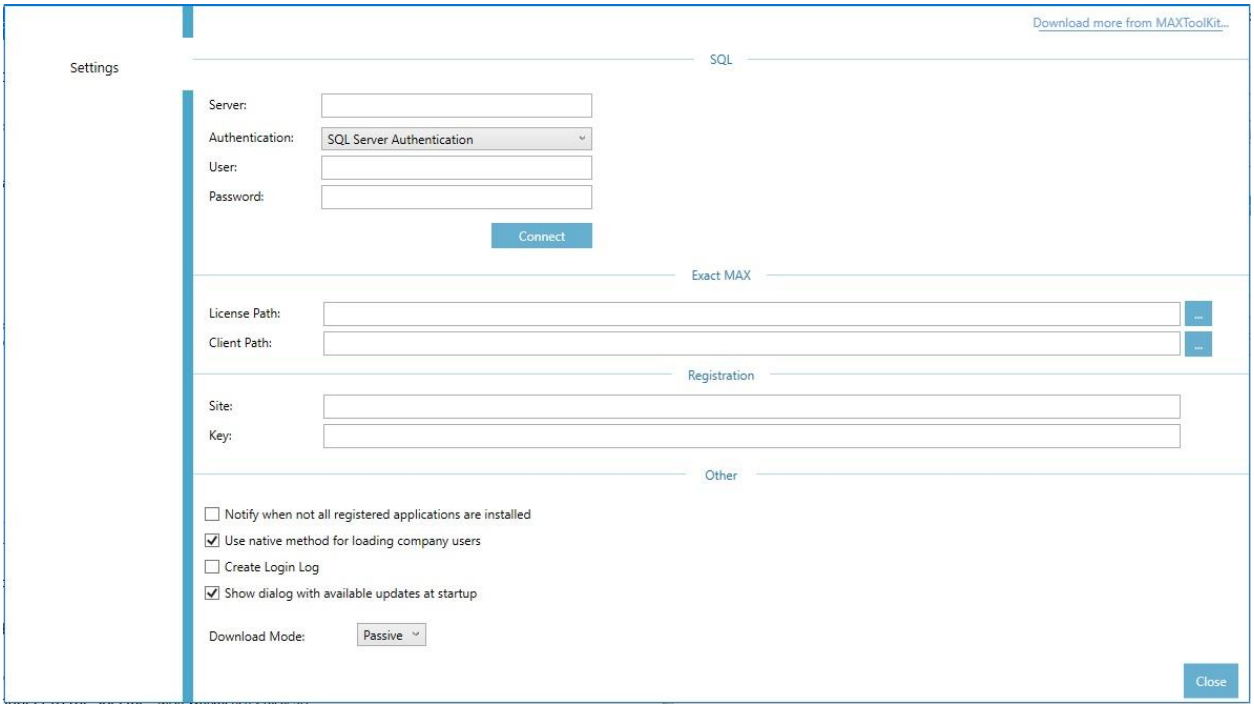
Settings Configuration

- Launch MAX Workbench
- The Software License Agreement window will be displayed when MAX Workbench is started for the first time or if the agreement has not been accepted. Check 'I accept this license agreement' check box and Click Continue.

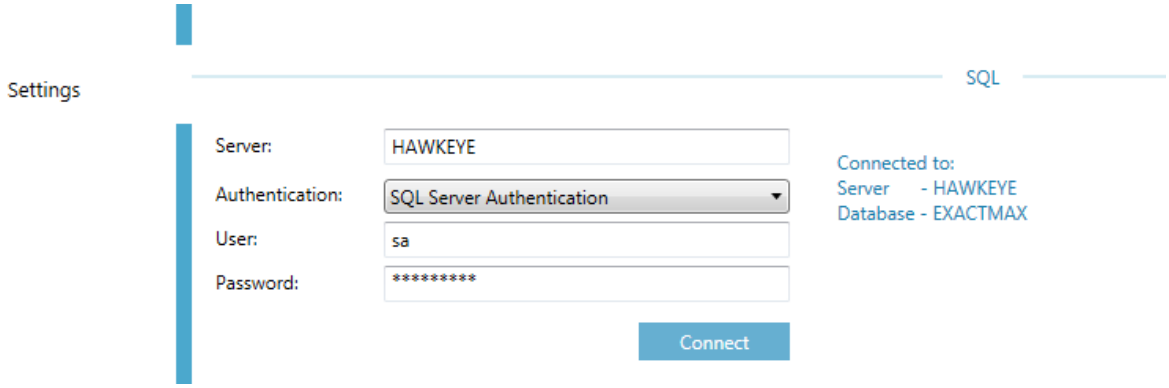


- Click the Setup button on the Authentication window

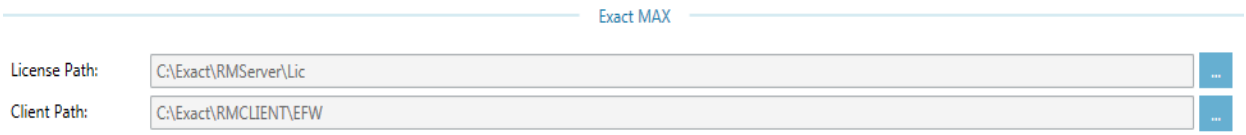
- SQL Settings
  - The EXACTMAX database must be present on the SQL Server that MAX Workbench will be connected to.
  - The User that will be specified in the window below must have the 'sysadmin' and 'public' roles assigned. This will be the User Account that MAX Workbench will use to connect to the specified SQL Server and perform any necessary actions.



- Specify SQL Server Name, Authentication Type, User, Password and click Connect



- Specify the Client and License Paths Of Exact MAX

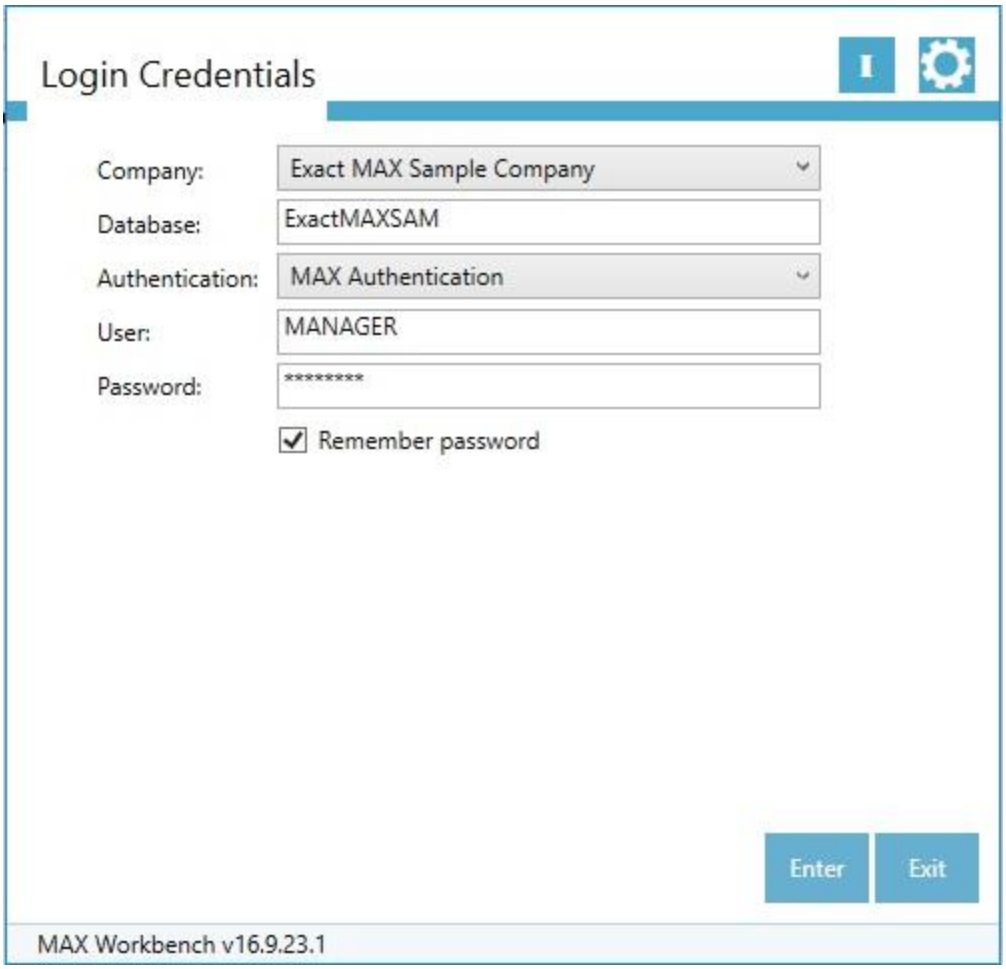


- Specify the registration Site and Key

- Configure other options as needed

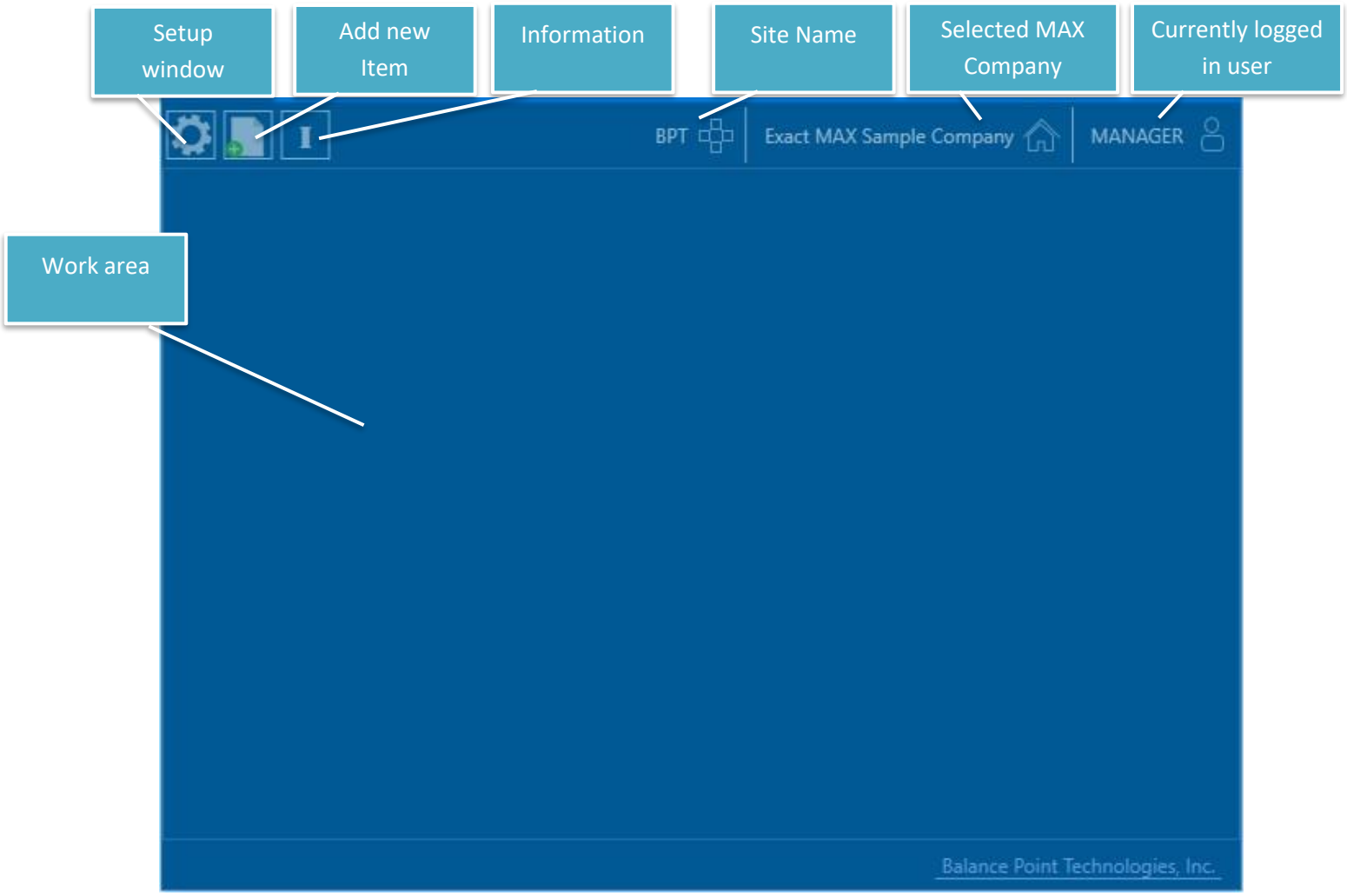
  - If 'Notify when not all registered applications are installed' option is checked, at initial user login, the Workbench will display a list of registered applications that are not installed.
  - If 'Use native method for loading company users' option is checked, MAX Workbench will use MAX dll files to load a list of company users. This feature causes problems and stalls the launch of MAX Workbench after initial user login. Unchecking this option will allow MAX Workbench to manually query the list of company users directly from the database.
  - If 'Create Login Log' option is checked, MAX Workbench will record the entire loin process step by step in a log file which will be located in C:\Program Files (x86)\Balance Point Technologies\MAX Workbench\Logs
  - If 'Show dialog with available updates' option is checked, MAX Workbench will display a dialog with available updates at startup immediately after initial user login.
  - The purpose of the Download Mode is to allow the workbench to download updates by using a Passive or Active mode. The default is Passive mode. If for some reason the Workbench is not able to download in Passive mode, switch to Active mode.

- Click Close



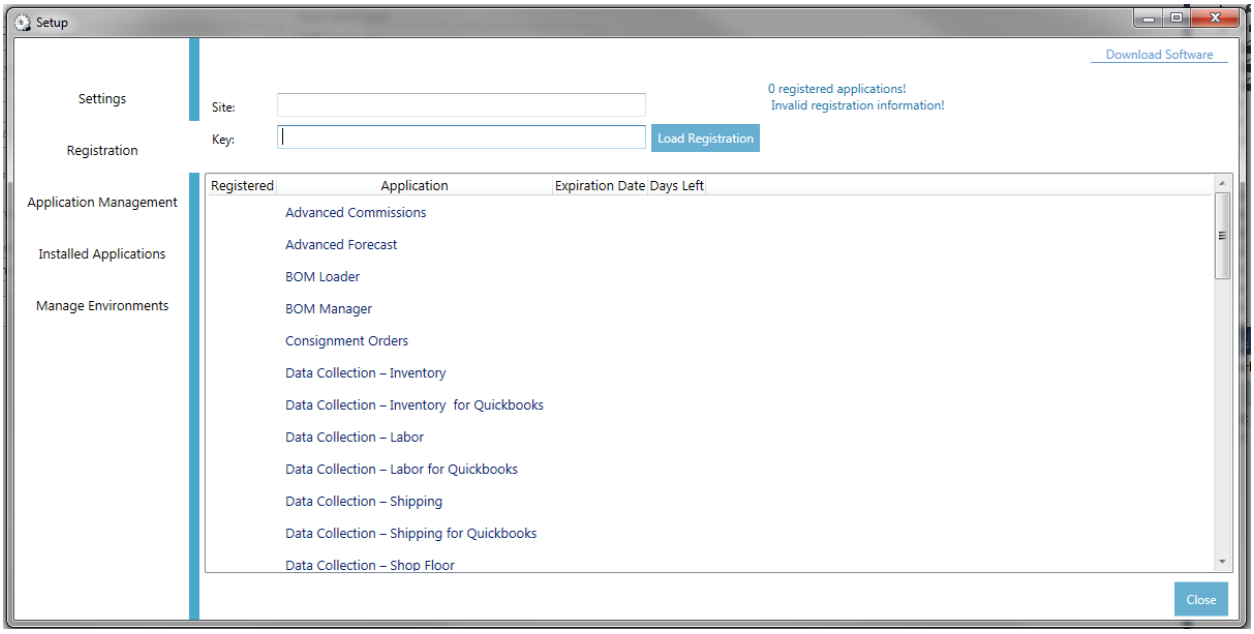
- Select a Company from the Company dropdown
- Select Authentication Type from the Authentication dropdown
- Enter the MAX User and Password
- Click Enter

Main Window



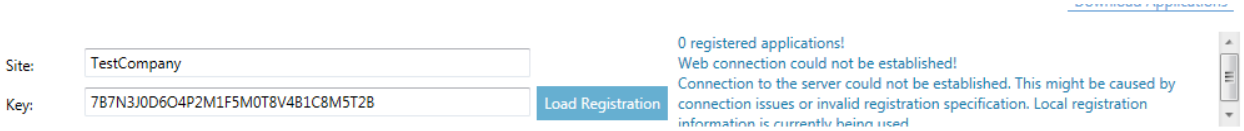
- Click on the Setup button at the top left corner to open the Setup window. By default, only the Settings tab will be available for regular users.
- The rest of the configuration settings will be made available only to users that are designated as Supervisors in Exact MAX.

Registration Configuration

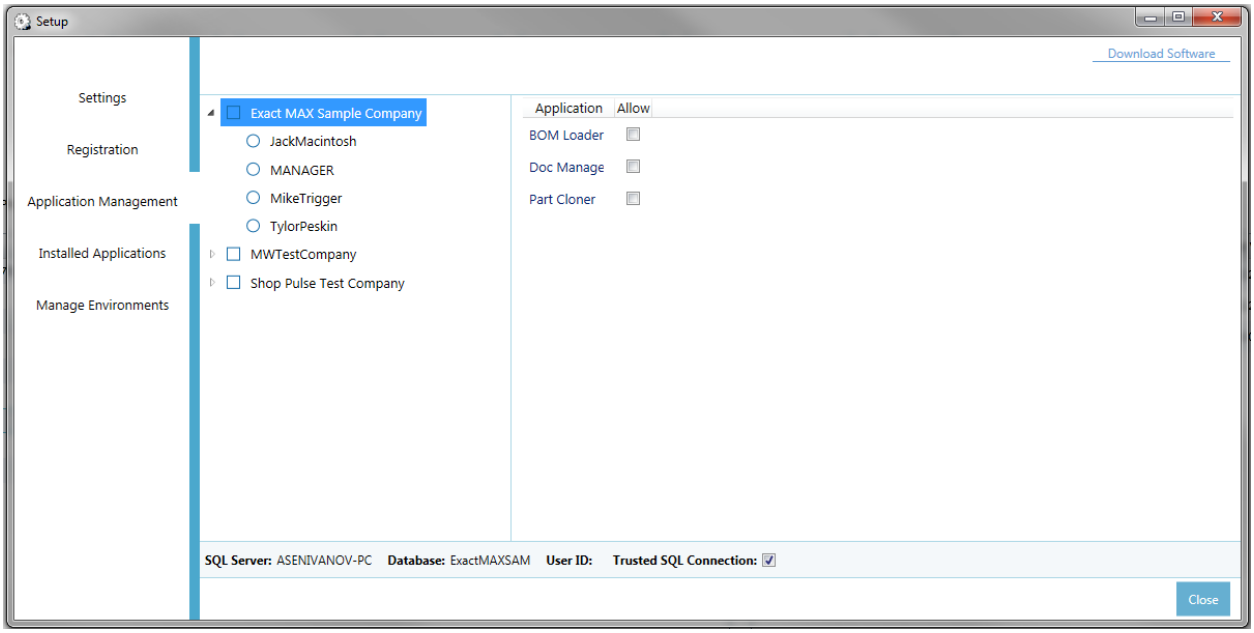


- The Registration configuration tab will contain a list of all available applications for purchase. The Site and Key will be provided by Balance Point and they are required in order to use purchased applications. To load or refresh registered applications do the following:
  - Enter the Site and Key provided by Balance Point
  - Click Load Registration
- Information on this window will be loaded successfully only if a connection to the internet is available.
- Some of the common errors on this window are shown below
  - Invalid Site or Key

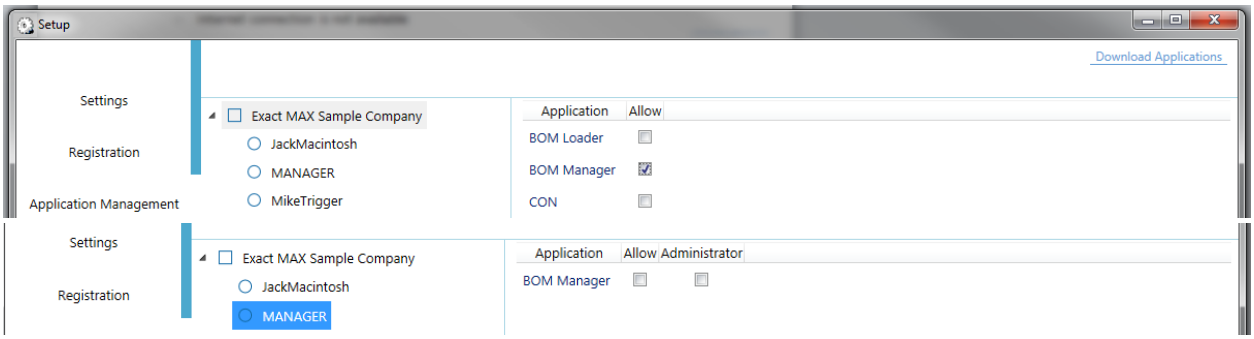
- Internet connection is not available



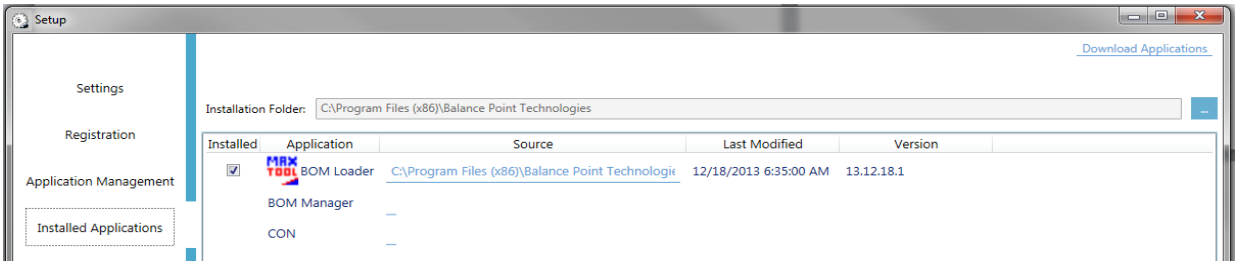
Application Management



- All MAX Companies and their users will be listed on this tab. Clicking on the company name will give us a list of all applications included in the purchased Site and Key
- An application will have to be allowed for a company before it becomes available on a user level.



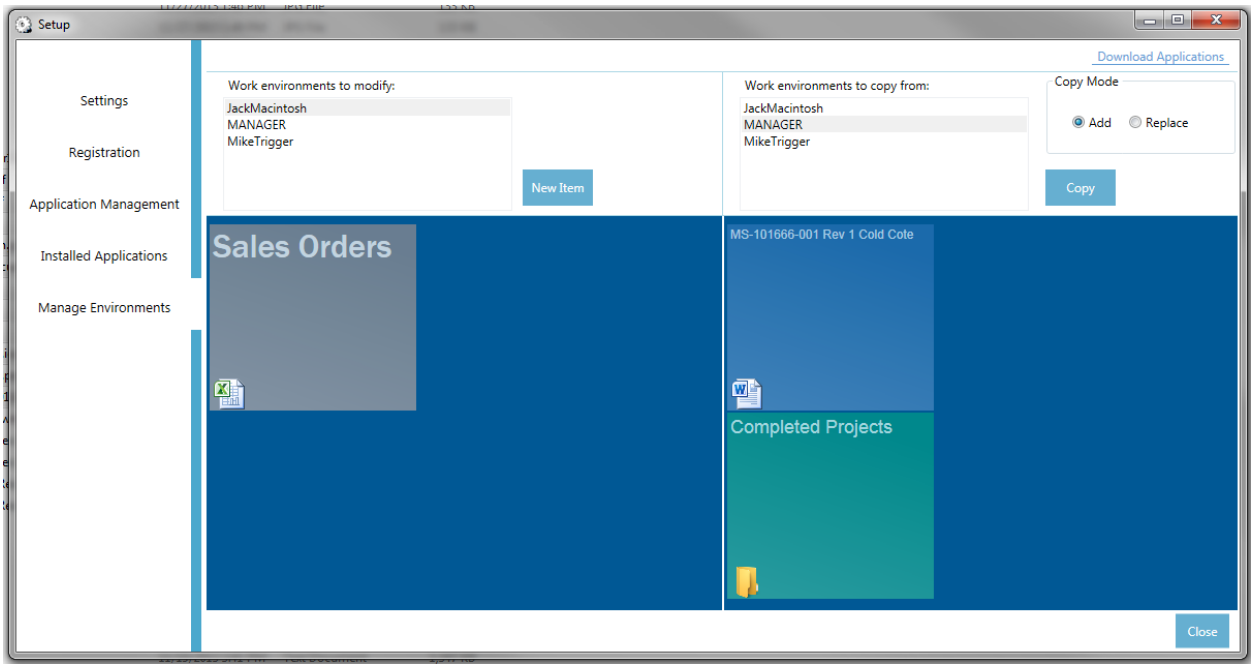
Installed Applications



- The purpose of this tab is to provide a quick and easy way of detecting which of the purchased applications have been installed and which have not been installed.

- Click the Browse button and specify the installation folder of all registered application. The applications will have to installed in the same folder, otherwise, not all of them will be displayed in the list of installed application.

Manage Environments

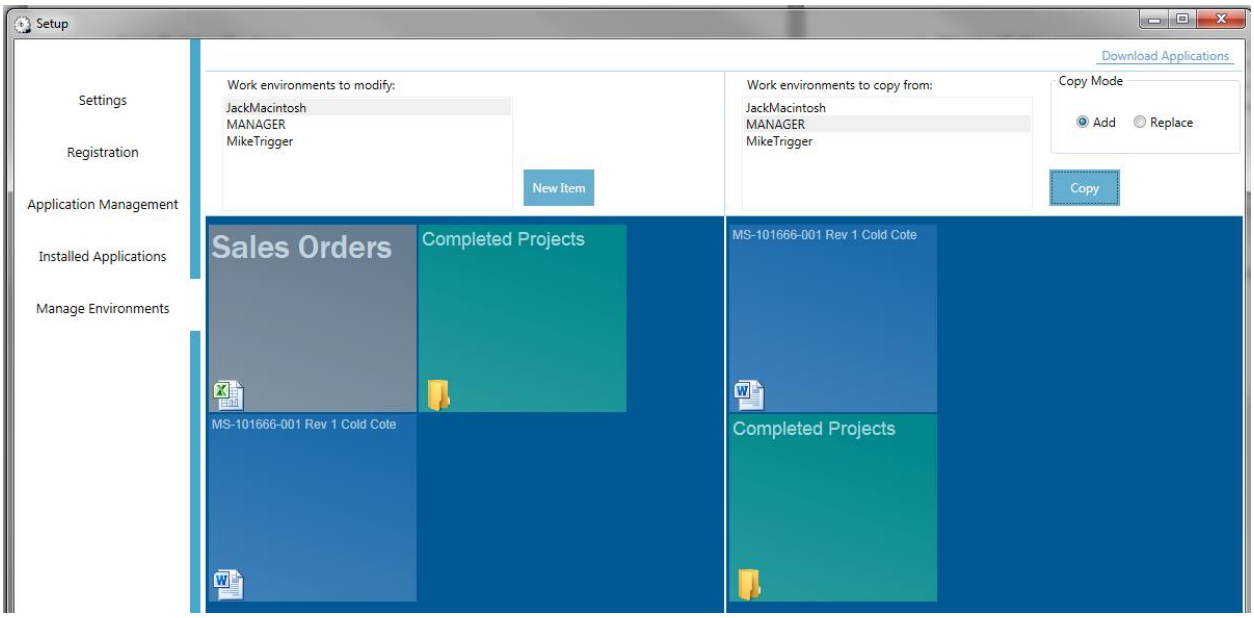


- This tab will allow managers to configure or simply jump start the work environment of users in the current Company. Left side of the window is the target work area or the work area that needs to be modified. The right side of the window is where items will be

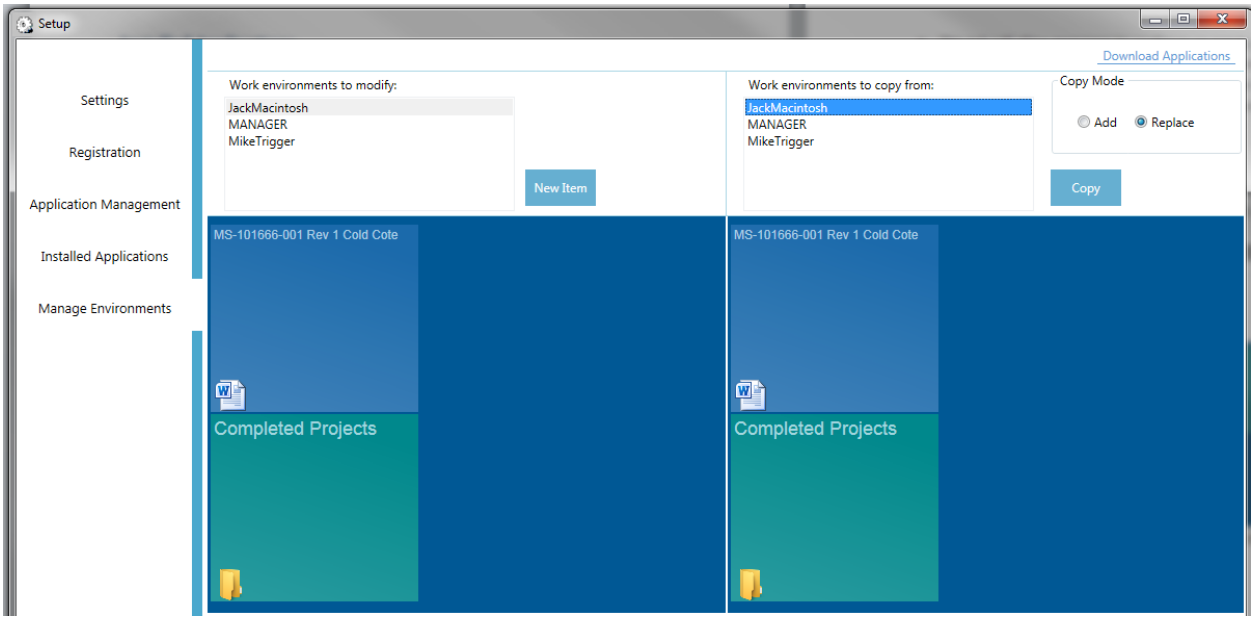
copied from. Both sides contain the same list of users with the exception that only the work environments on the left side are editable.

- There are two copy modes – Copy and Replace.

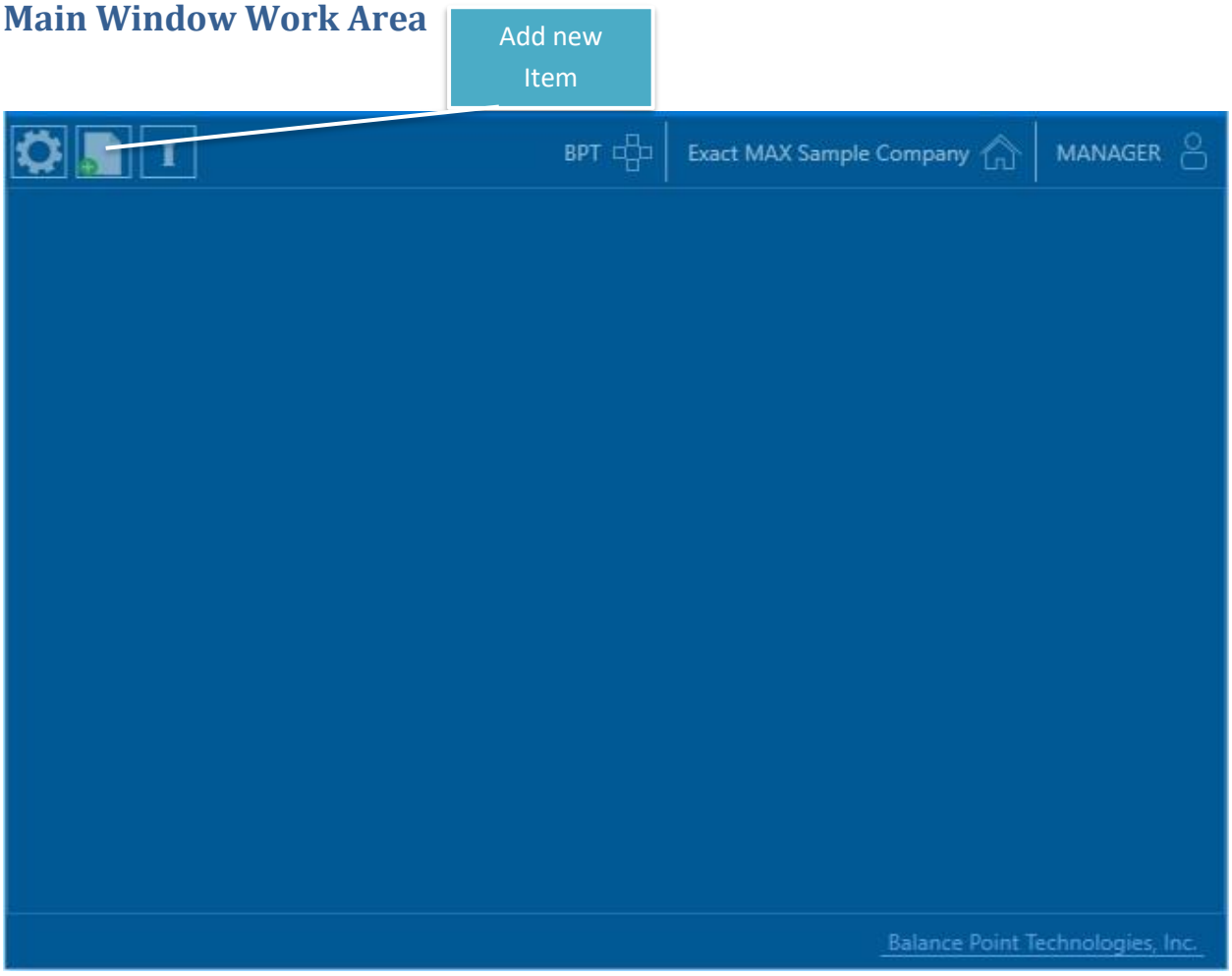
  - Copy mode will copy everything from the selected user on the right to the selected user on the left by adding the items without erasing any of the already included items.



  - Replace mode will erase all existing items in the user on the left and will add the items from the user on the right side.

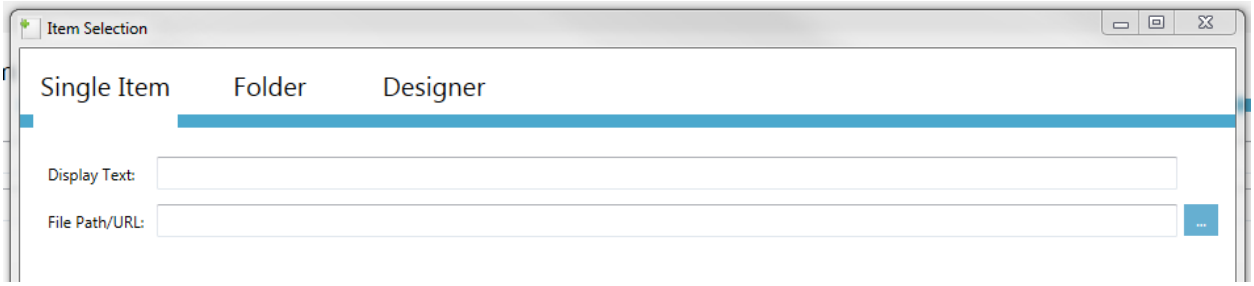


Main Window Work Area



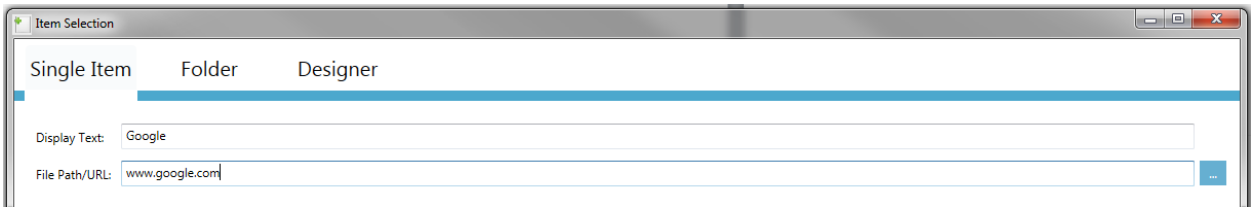
- Click on the Add New Item button
- Right Click on the Main Window to change the window mode.
- There are two types of item

  - Single Item

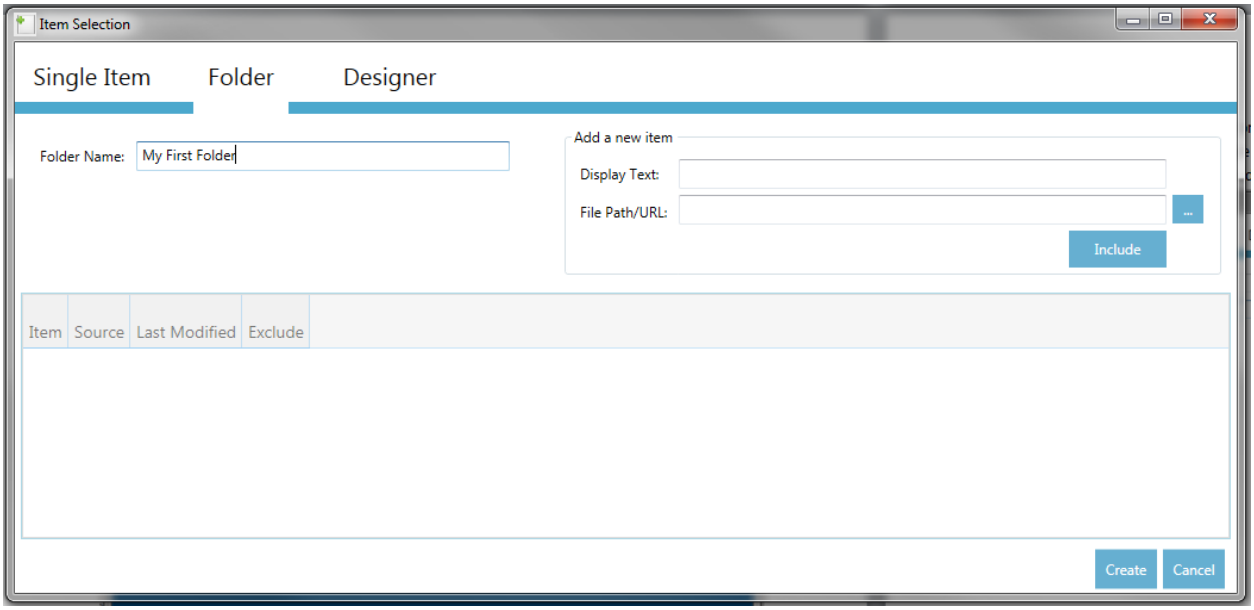


a) The value of Display Text is user defined
b) The value of File Path/URL could be a path to a file or an URL for opening web links.

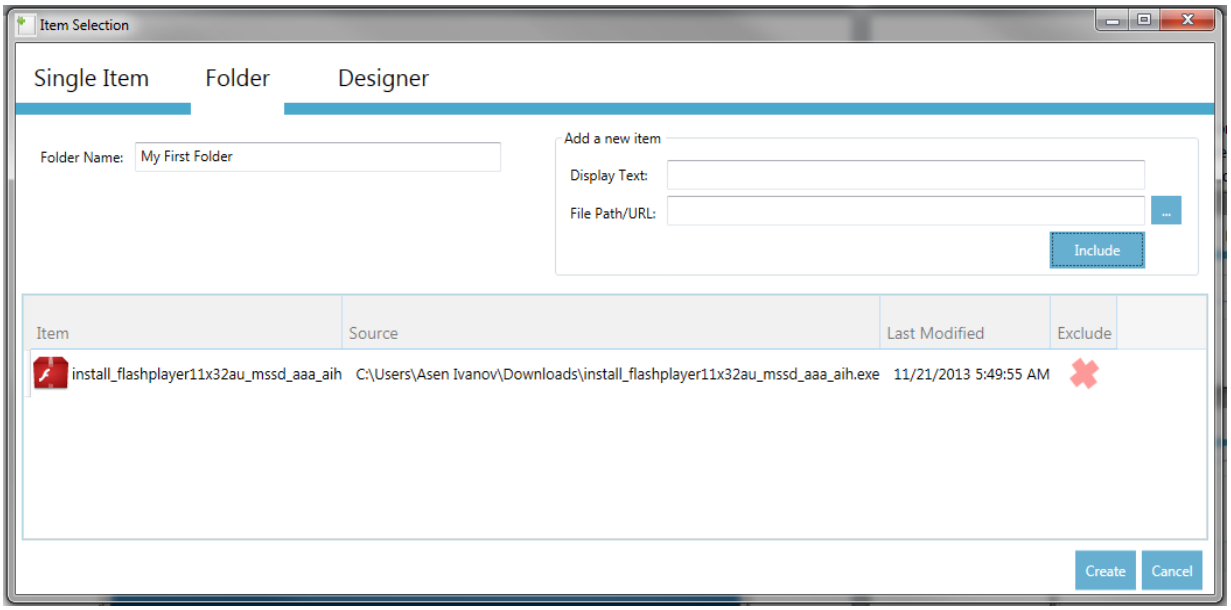
1. To specify a file click on the Browse button, select a file ad click OK.
2. To specify a URL, type in the name of the web site in the Display Text text field and type in the web address of the web site.



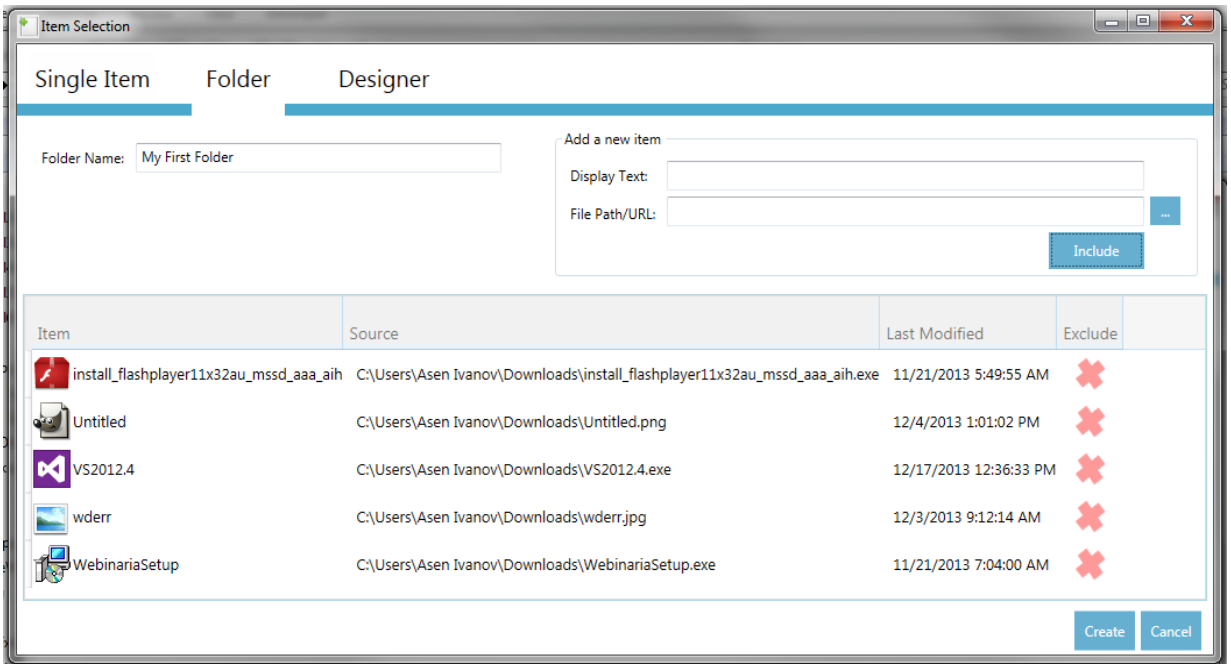
- Folder



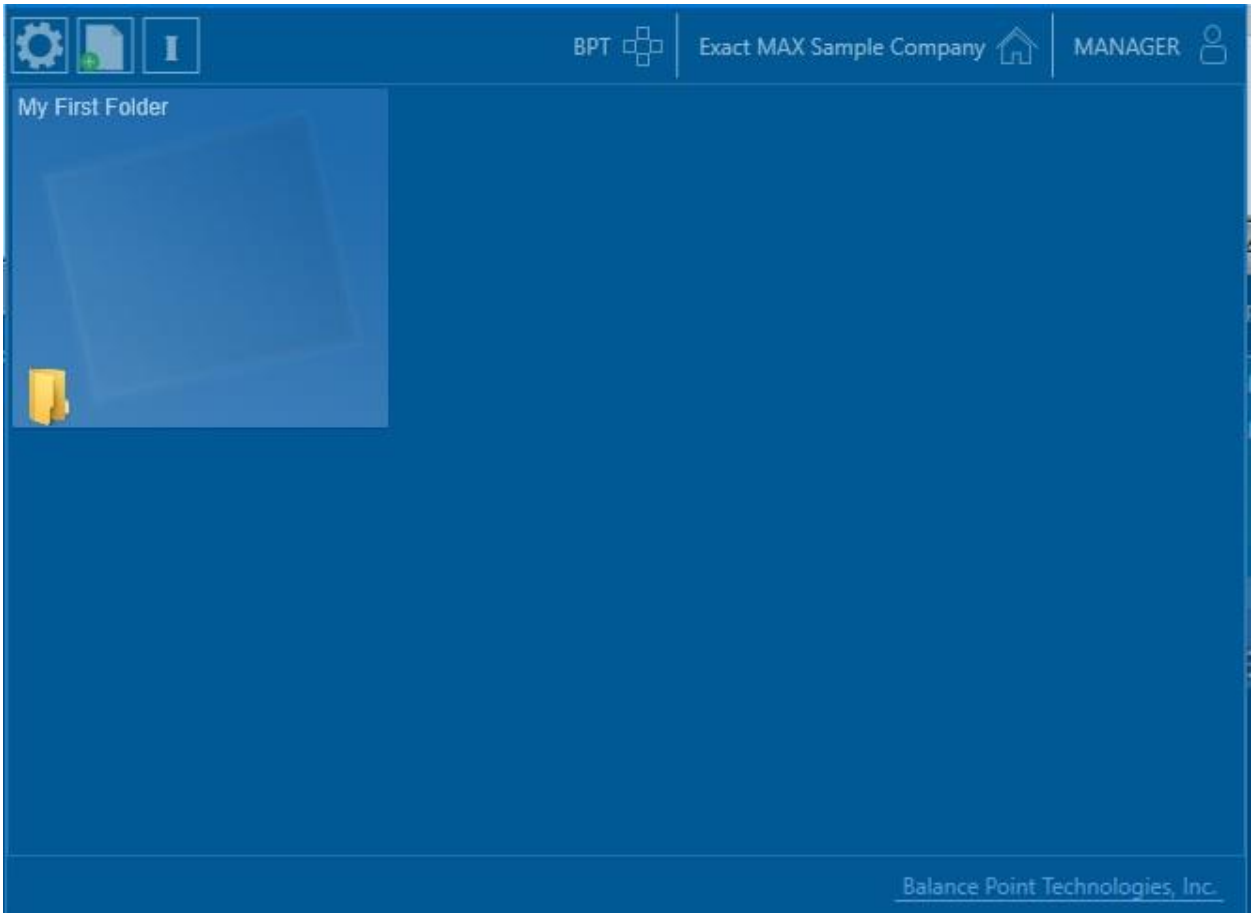
a) Folder name is required
b) Items can be added individually by using the Add a new item group box
   1) Click on the Browse button, select a file, click OK, click Include



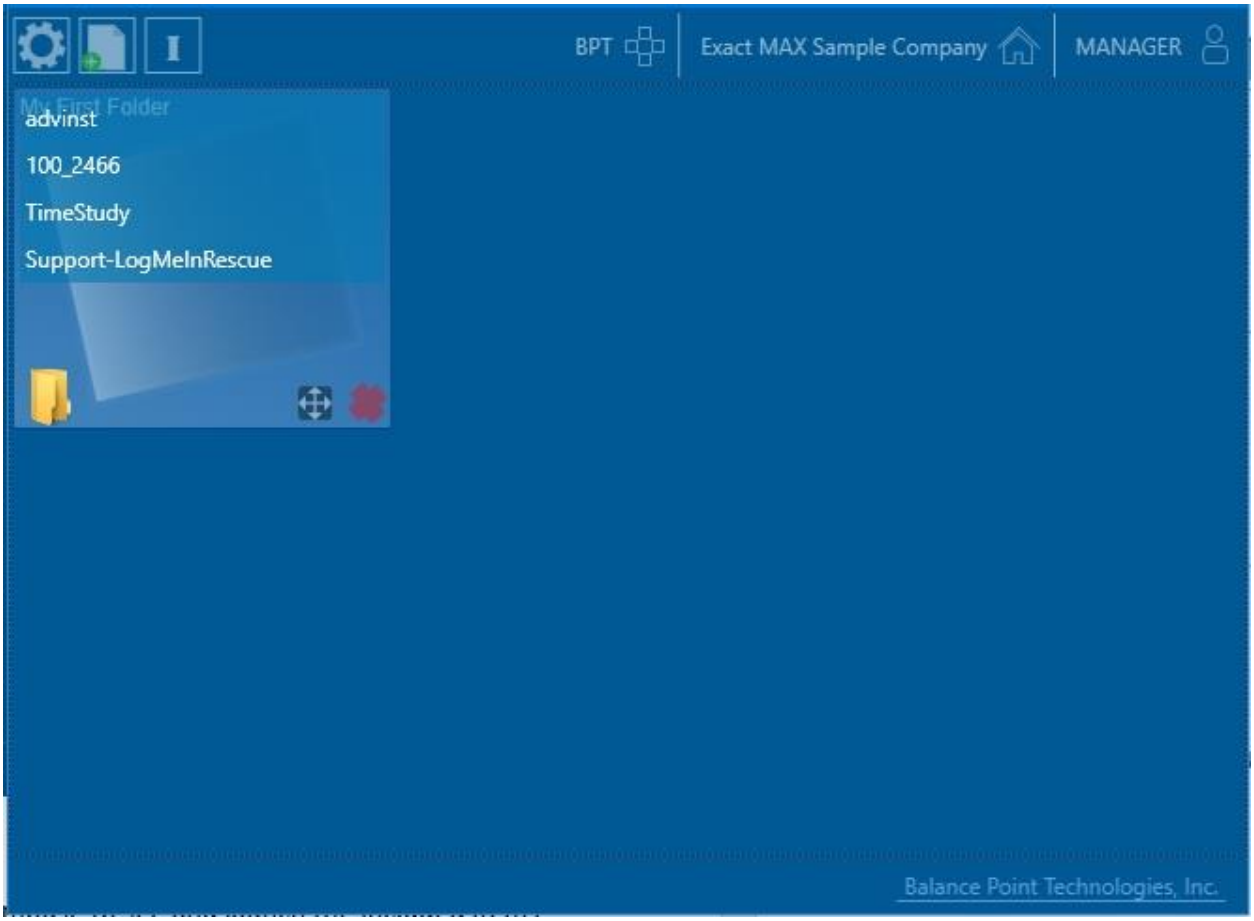
c) Multiple Items can also be added by dragging and dropping them into the data grid on the screen.



- Click Create to create the new Item.

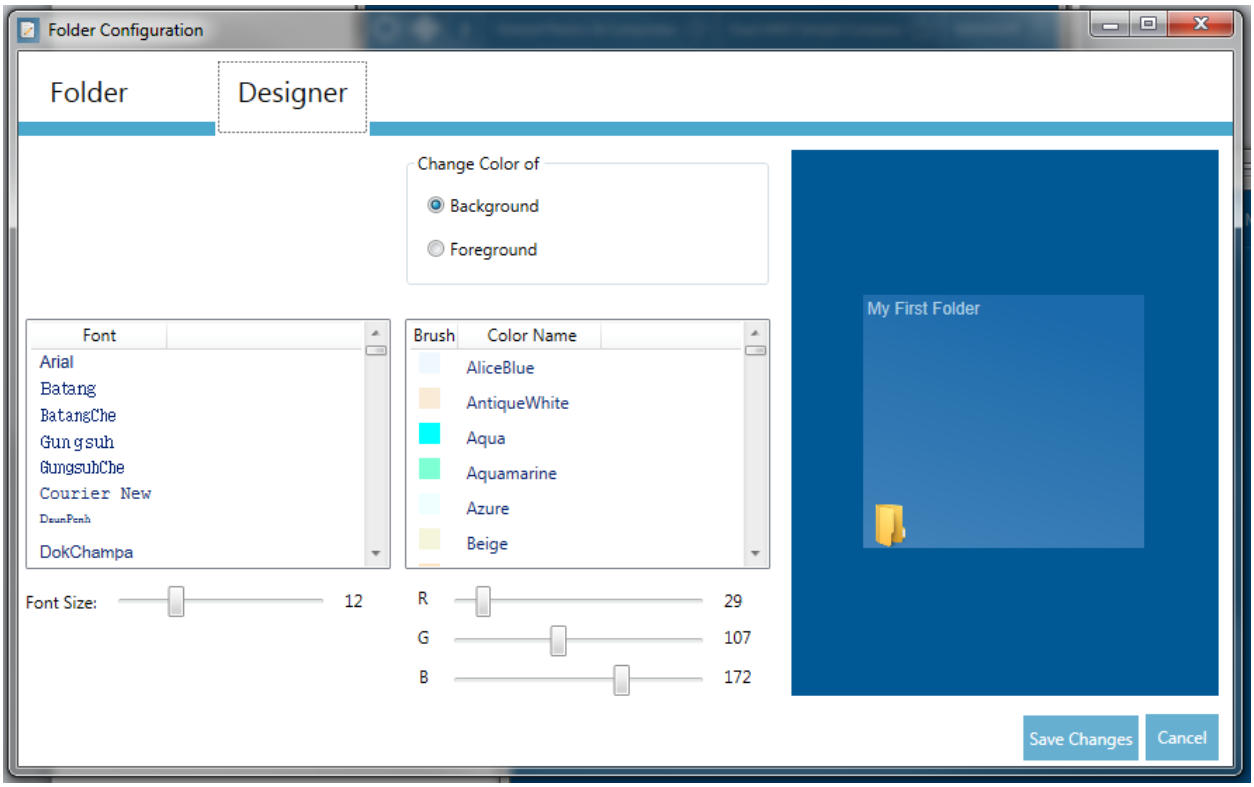


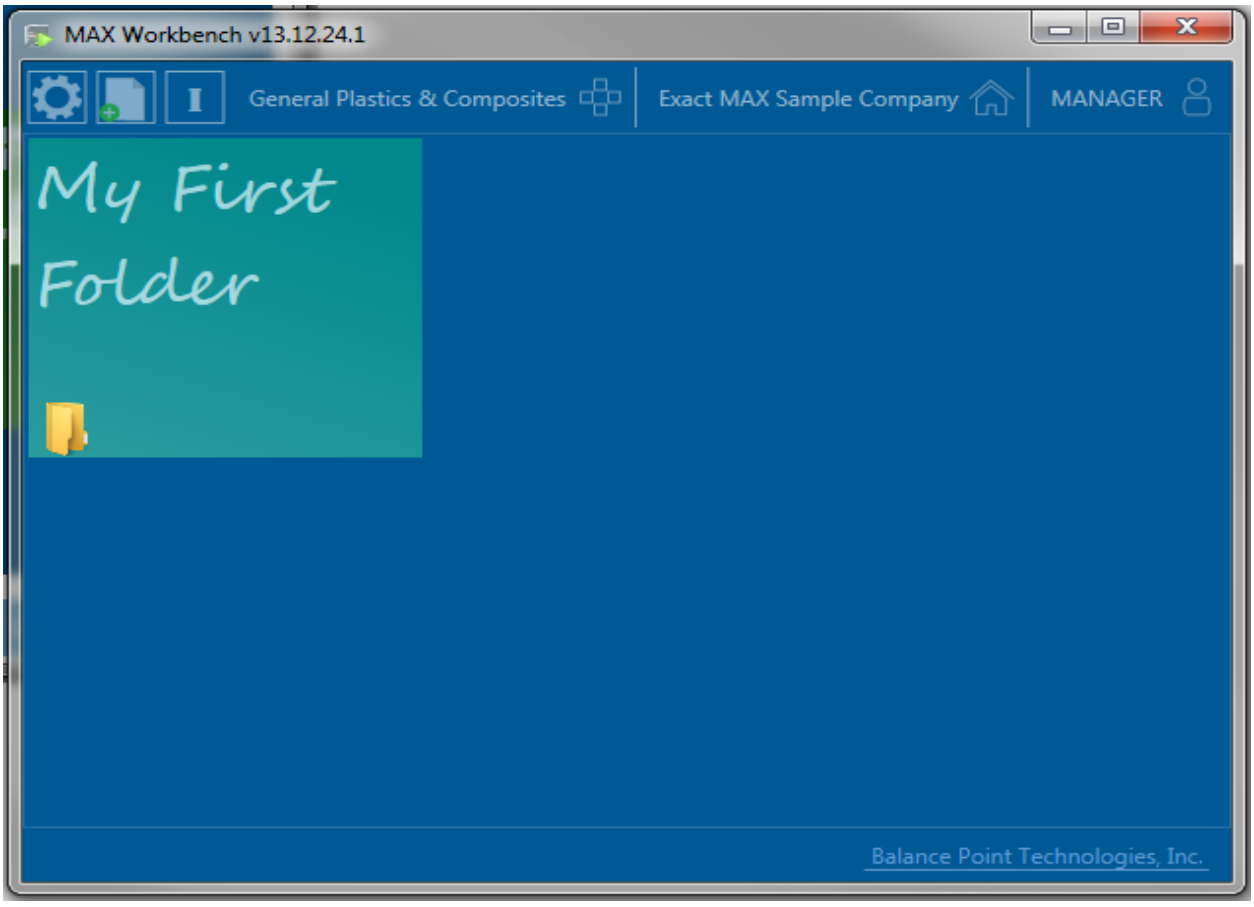
- Hover over the item with the mouse to see and launch the included items
- Only Items that are folders support that capability.



Item Designer

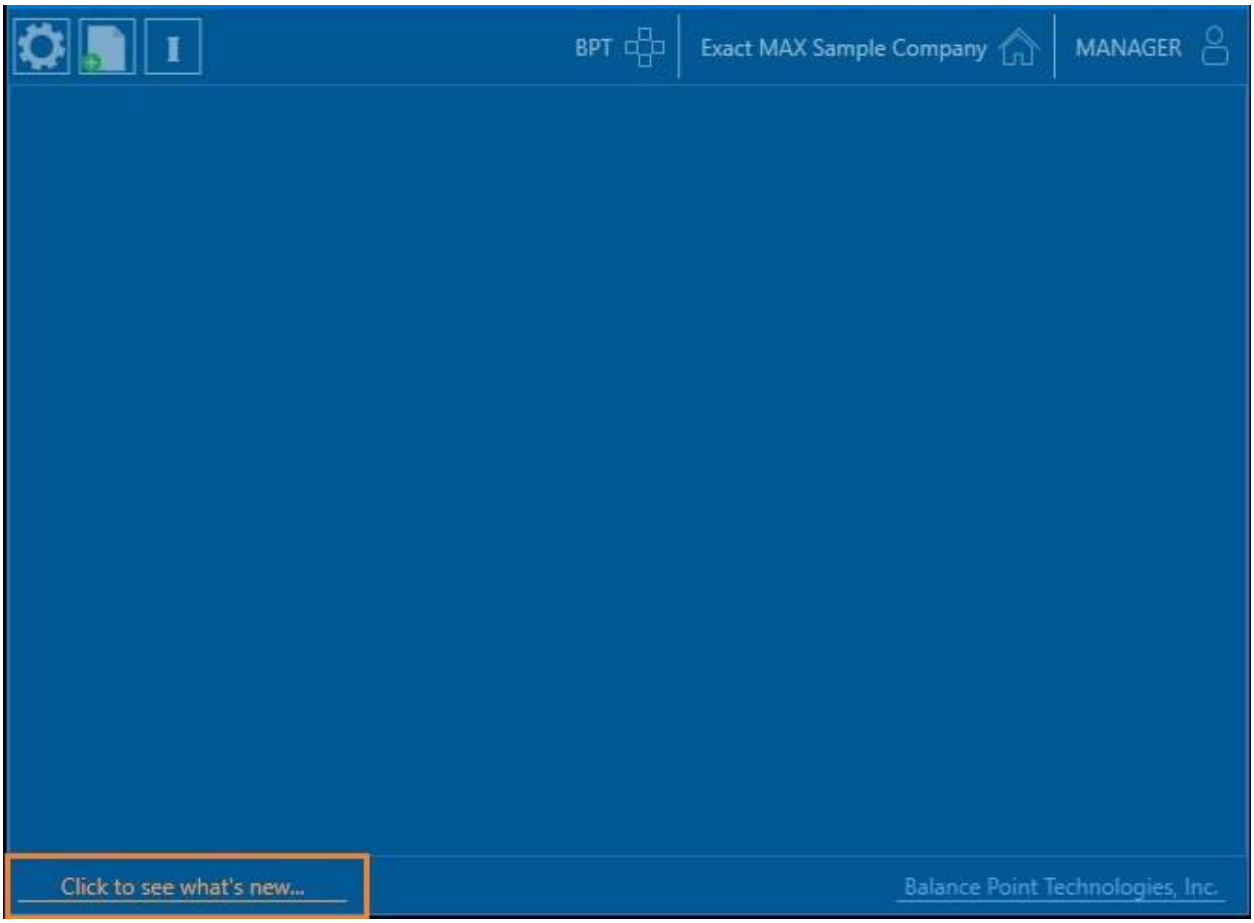
- Item Designer can be accessed by right-clicking on any item on the Main Window
- Right-clicking on an item will also allow changing the Display Text, modifying the source of a Single Item or modifying the contents of a Folder.
- The Item Designer will allow the user to personalize the items by changing the font, color or size of the text and changing the background color of an item.
- Click Save Changes to save and apply the new appearance of the item.

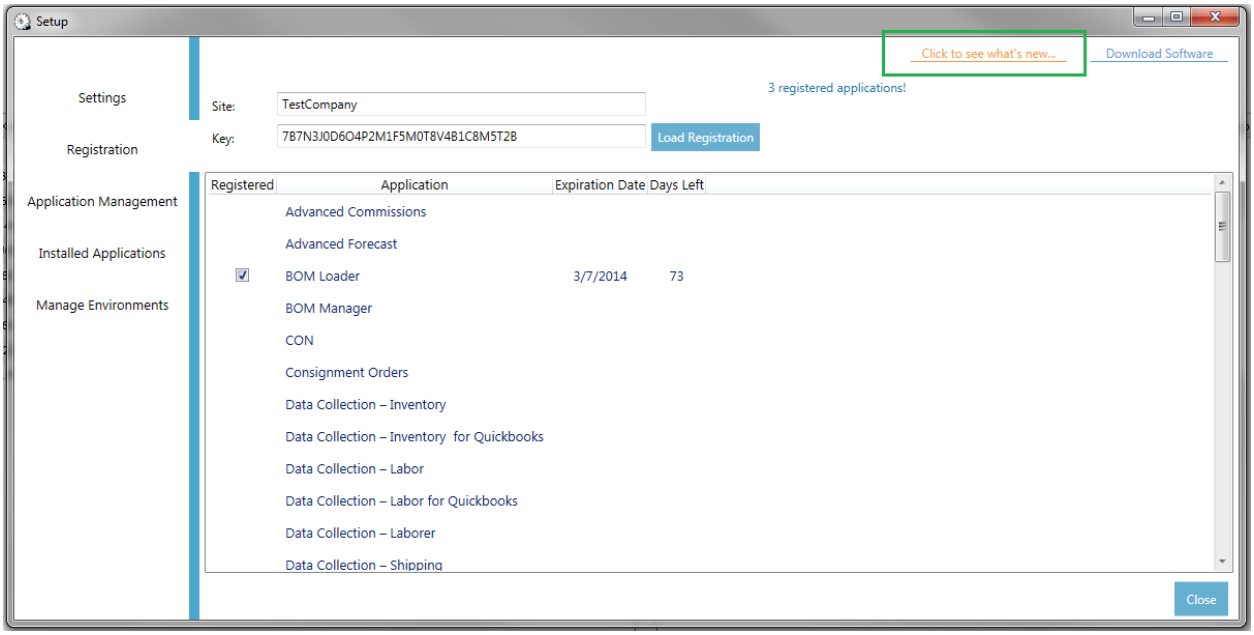

Folder Configuration
Folder
Designer
Change Color of
Background
Foreground
Font
Arial
Batang
BatangChe
Gungsuh
GungsuhChe
Courier New
DaunPenh
DokChampa
Brush
Color Name
AliceBlue
AntiqueWhite
Aqua
Aquamarine
Azure
Beige
Font Size:
12
R
29
G
107
B
172
My First Folder
Save Changes
Cancel


MAX Workbench v13.12.24.1
General Plastics & Composites
Exact MAX Sample Company
MANAGER
My First Folder
Balance Point Technologies, Inc.

Software Updates

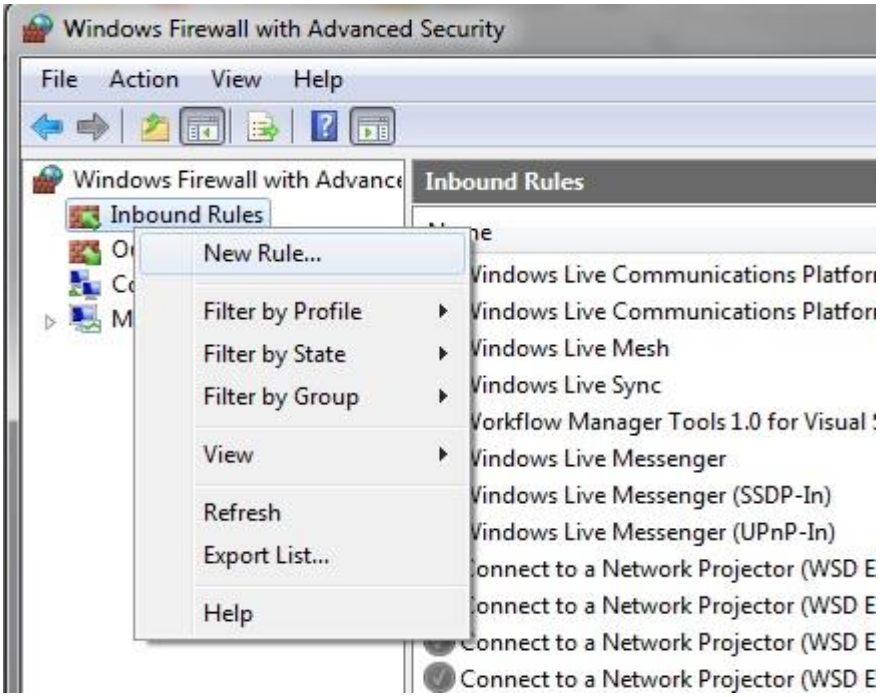
- MAX Workbench will notify when a new version of MAX Workbench or a registered application is available. The new version will be automatically downloaded, installed and added to the main application window only if the Application Management tab on the Setup window has been properly configured.
- In case there is an available update, MAX Workbench will display an indicator on the following places:



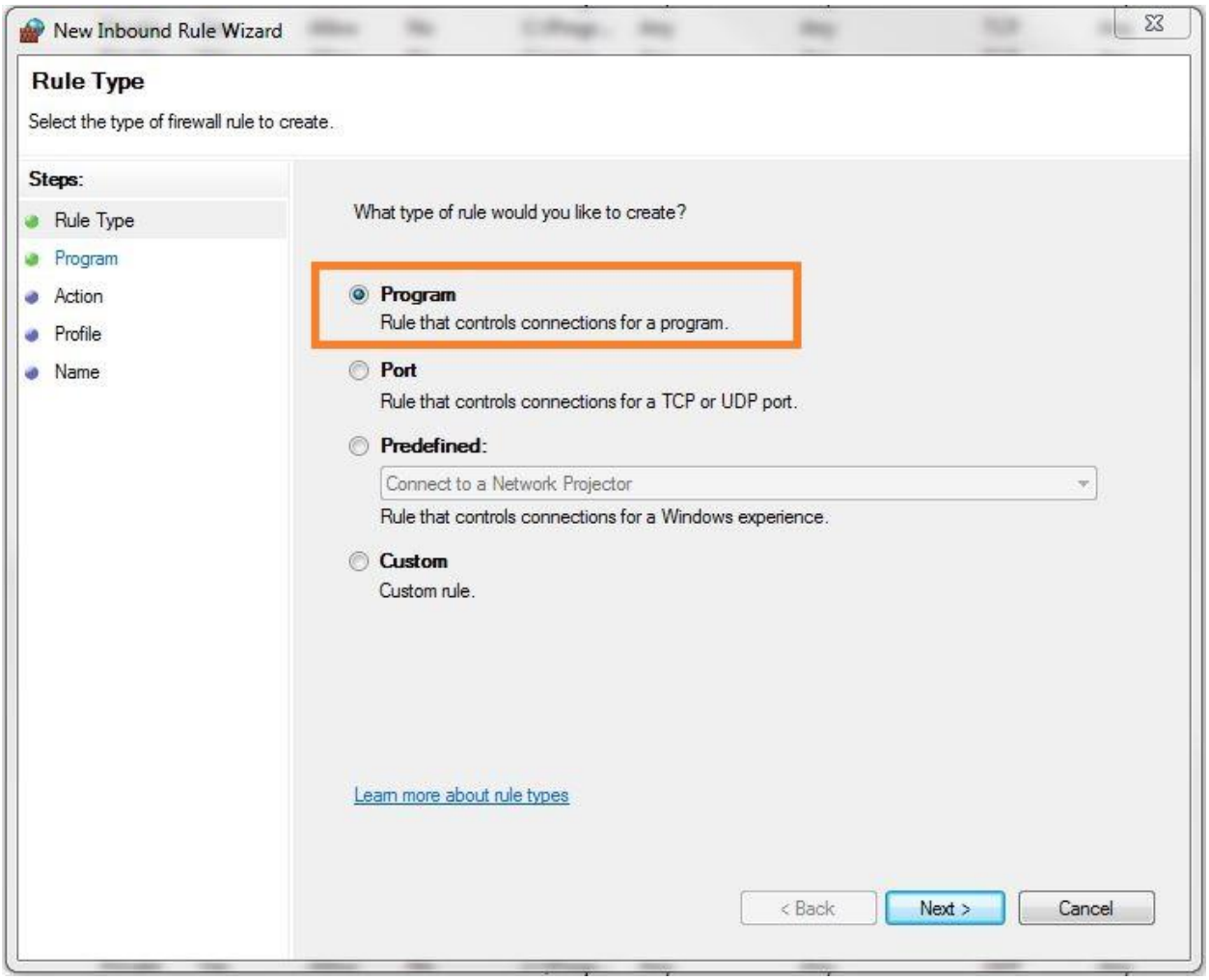

Setup
Click to see what's new...
Download Software
3 registered applications!
Settings
Registration
Application Management
Installed Applications
Manage Environments
Site:
TestCompany
Key:
7B7N3J0D6O4P2M1F5M0T8V4B1C8M5T2B
Load Registration
Registered
Application
Expiration Date
Days Left
Advanced Commissions
Advanced Forecast
BOM Loader
3/7/2014
73
BOM Manager
CON
Consignment Orders
Data Collection – Inventory
Data Collection – Inventory for Quickbooks
Data Collection – Labor
Data Collection – Labor for Quickbooks
Data Collection – Laborer
Data Collection – Shipping
Close

Firewall configuration

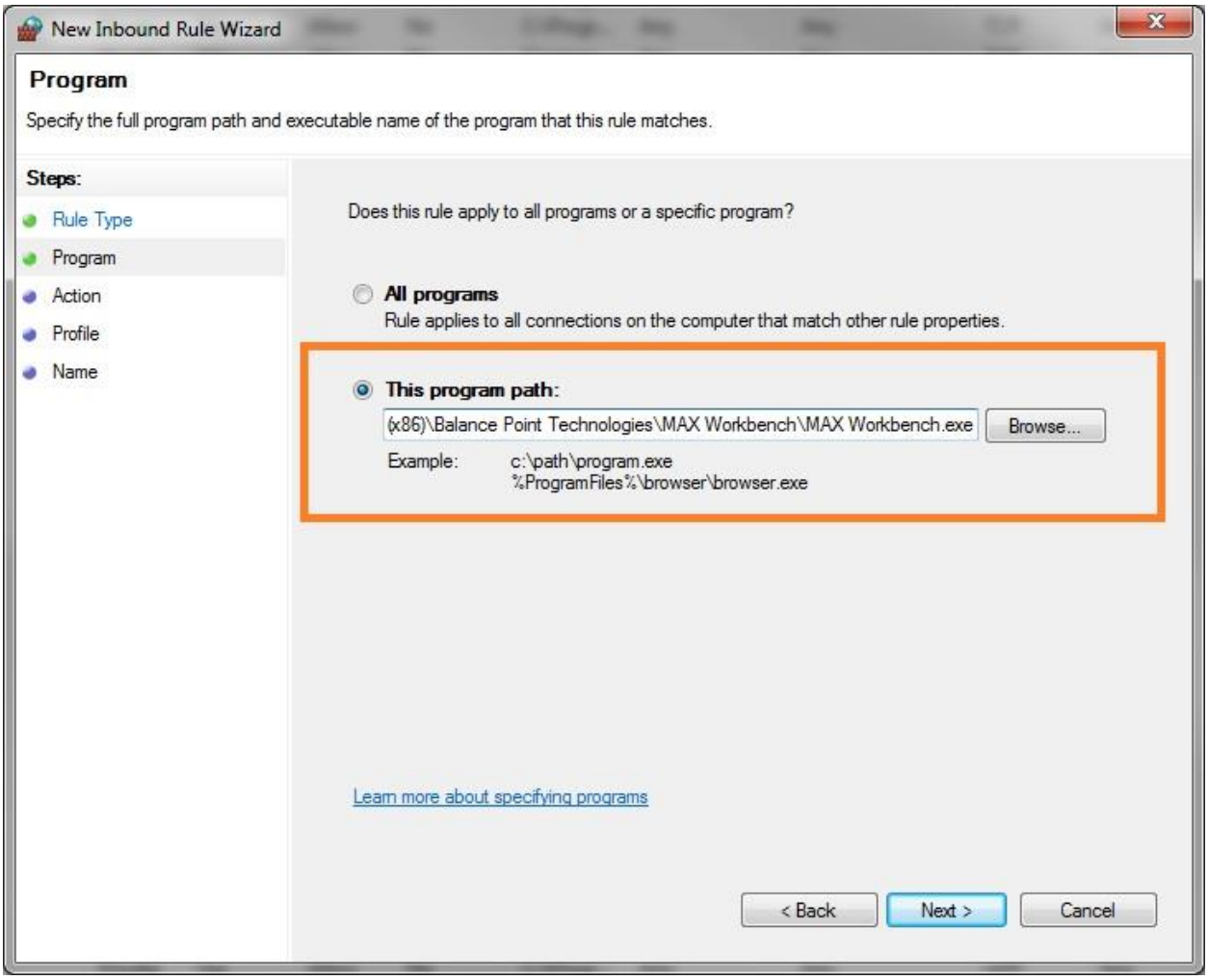
- In some cases, MAX Workbench downloads might be blocked by the Firewall.
- Follow the steps described below to allow MAX Workbench downloads
  - Open Control Panel - > Windows Firewall
  - Click Advanced Settings. The Windows Firewall Advanced Settings dialog displays
  - Right Click on Inbound Rules and select New Rule



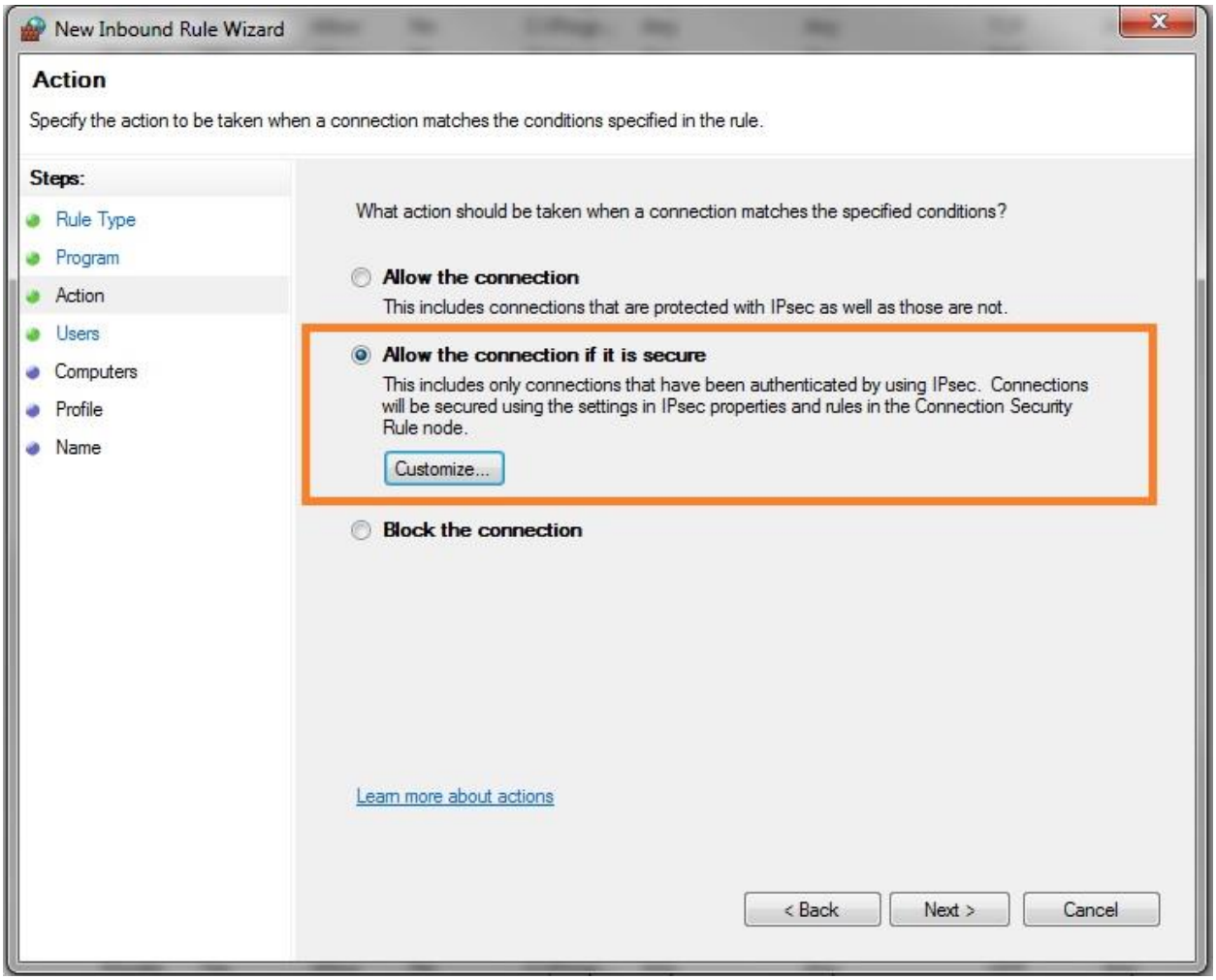
- The New Inbound Rule Wizard displays. Check the Program option. Click Next



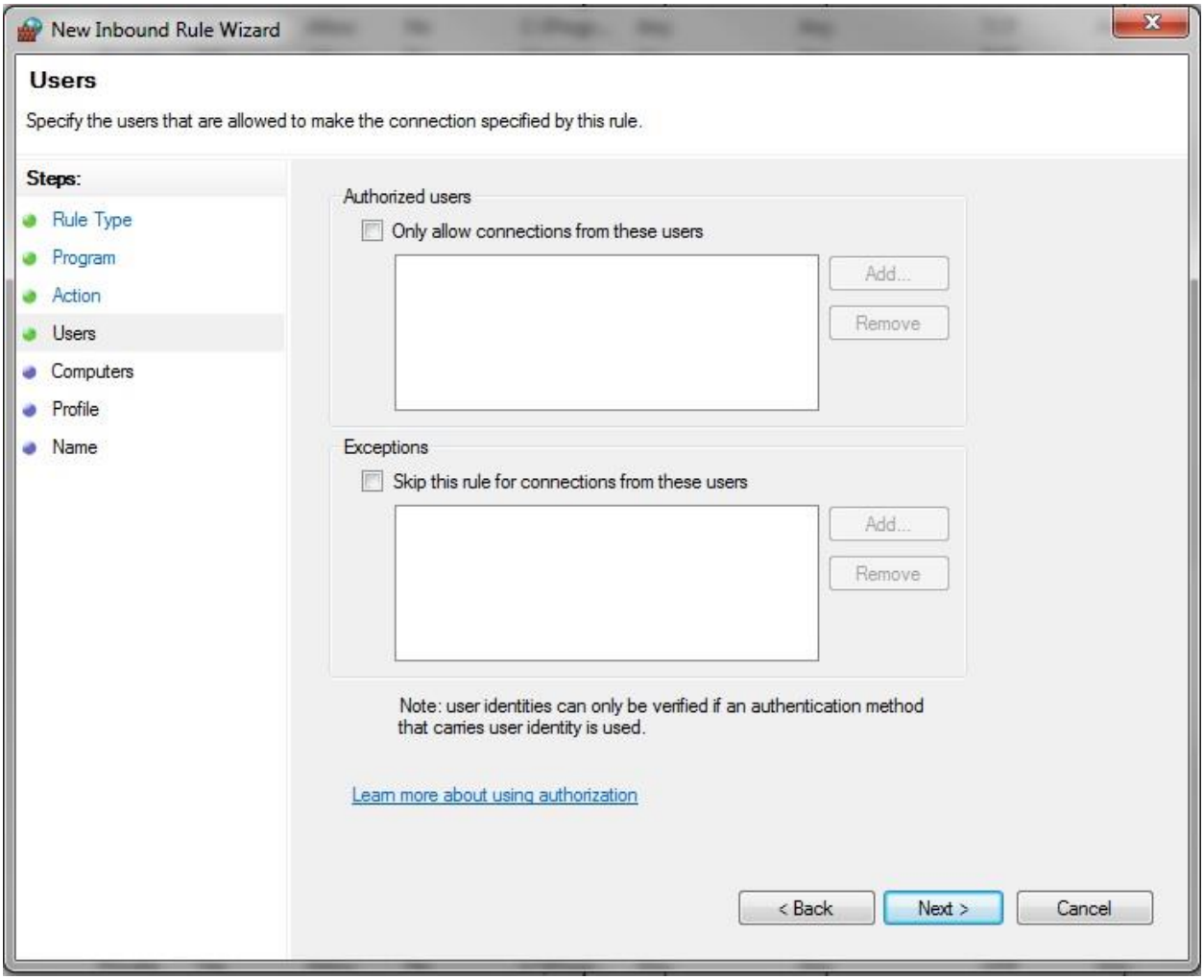
- Check This program path option
- Browse to the installation folder of MAX Workbench
- Select MAX Workbench.exe and click Open
- Click Next



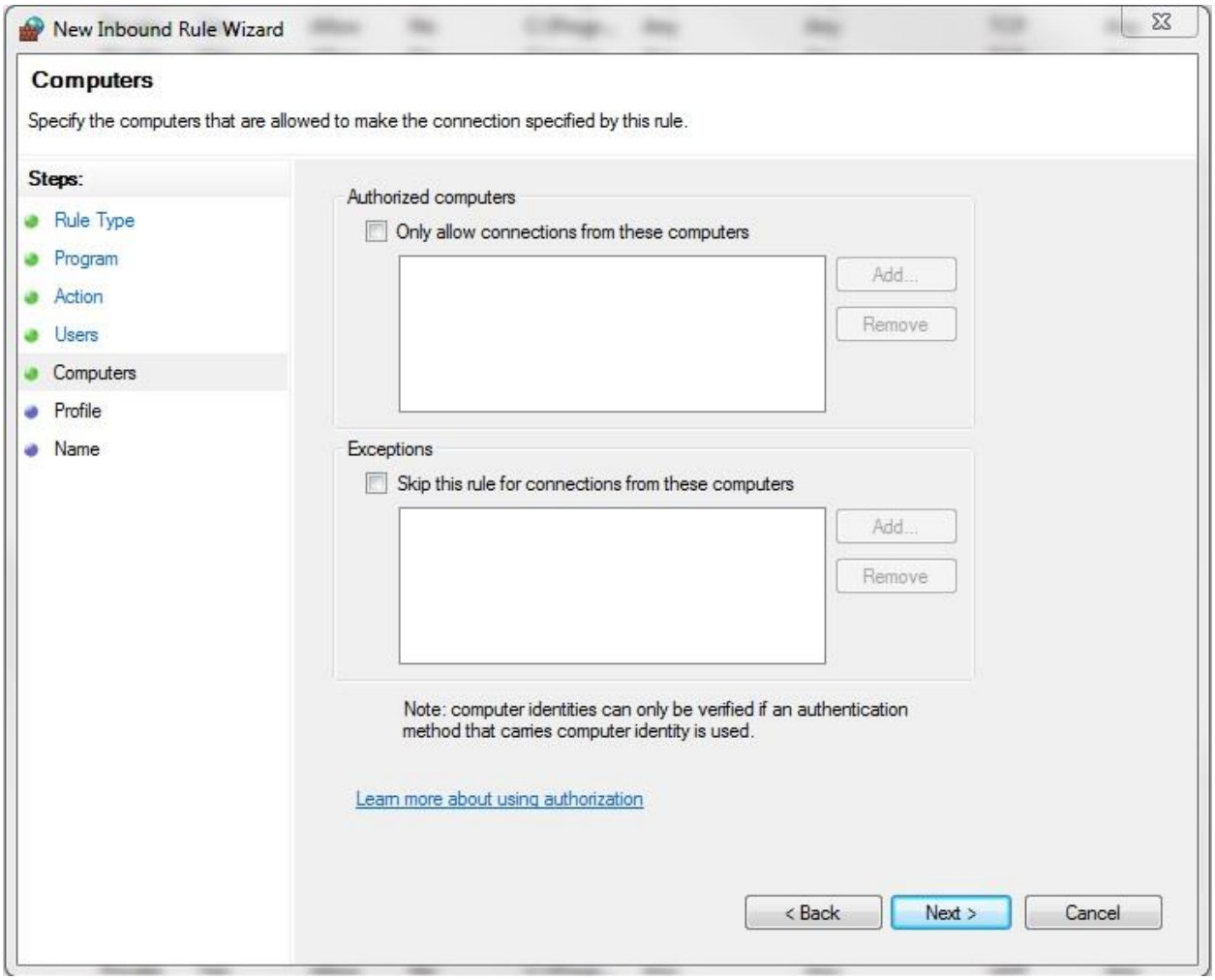
- Check Allow the connection if it is secure option and Click Next



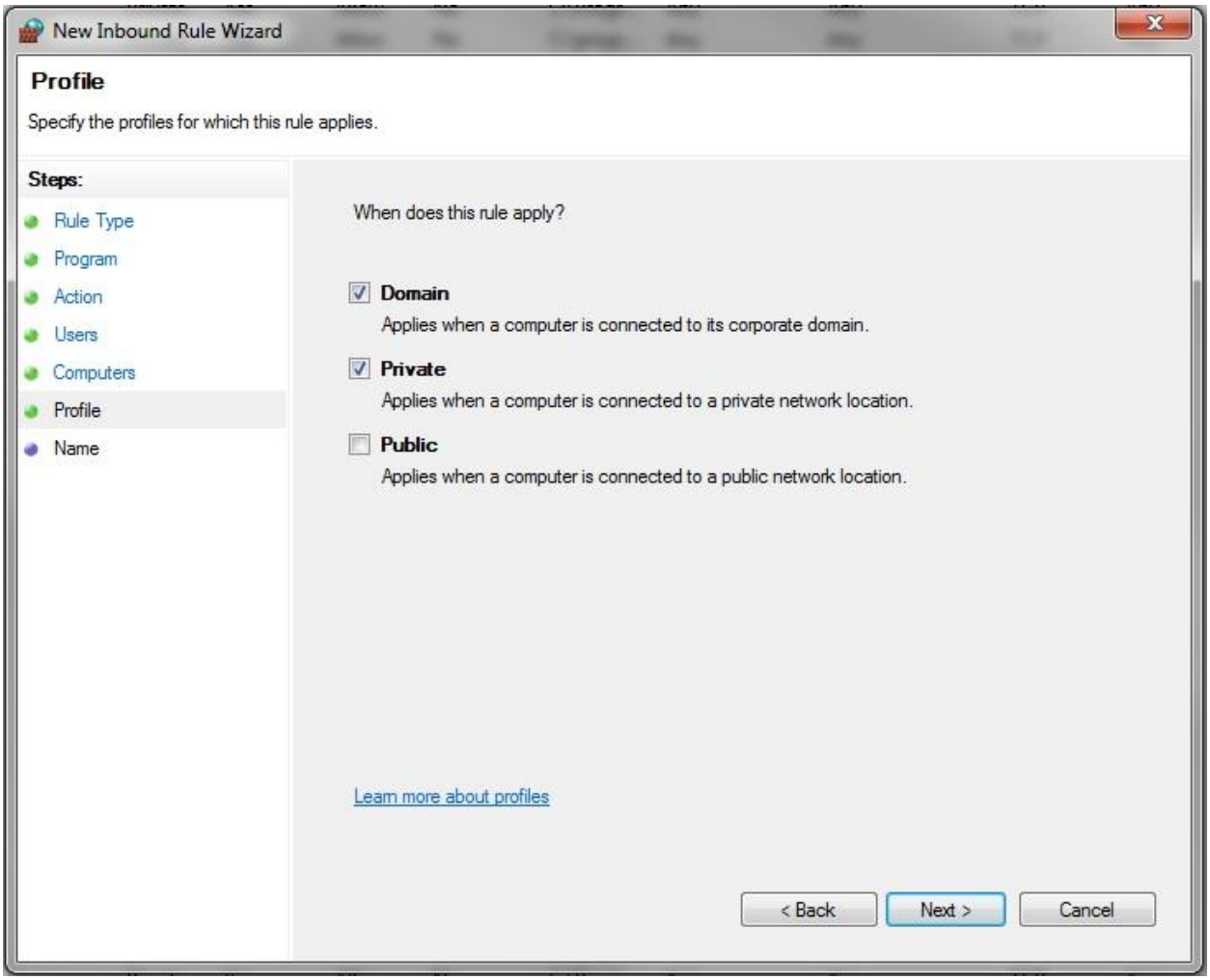
- If needed, specify the users that are allowed to use the connection
- Click Next



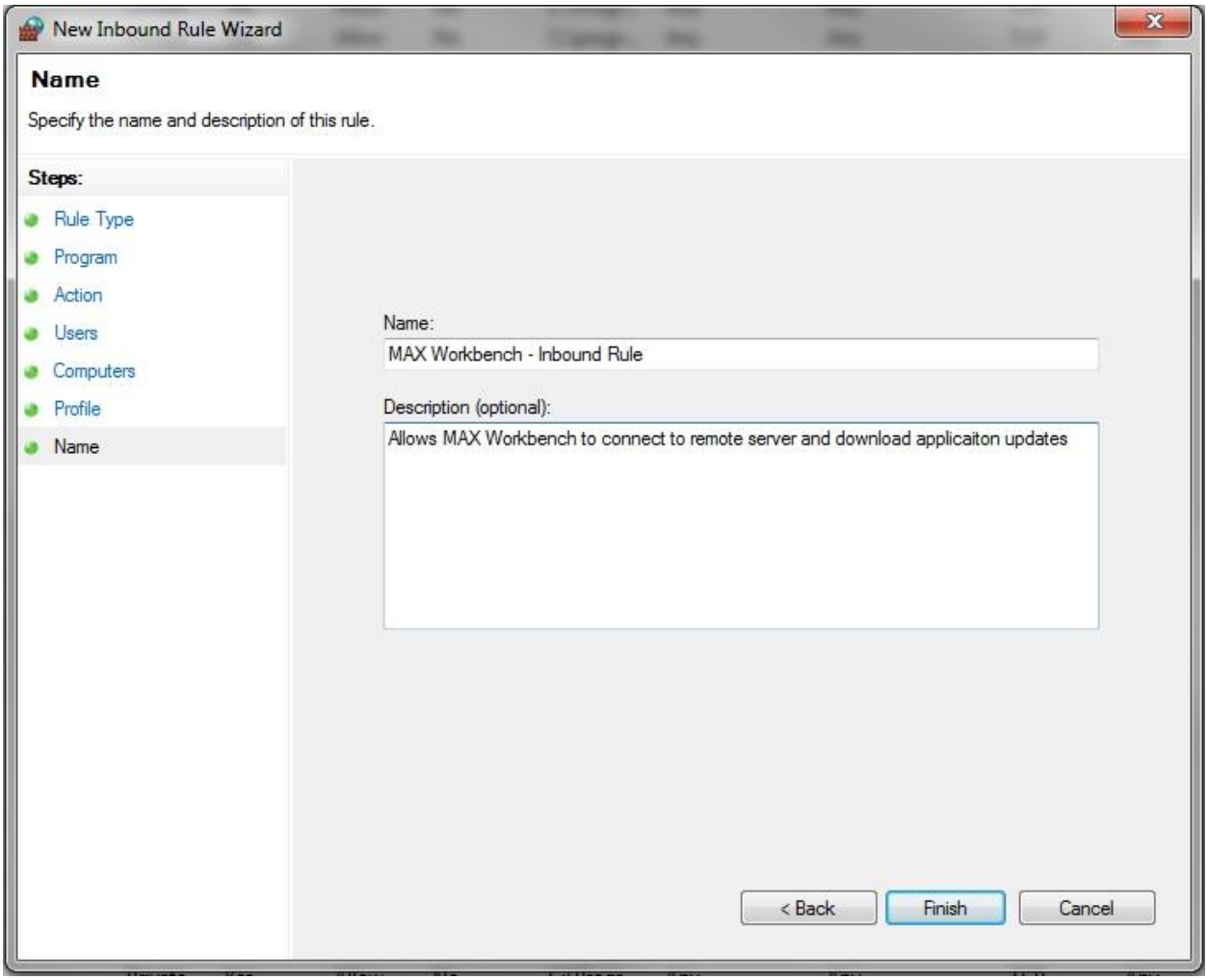
- If needed, specify the computers that are allowed to use the connection
- Click Next



- Select when to apply the rule and Click Next



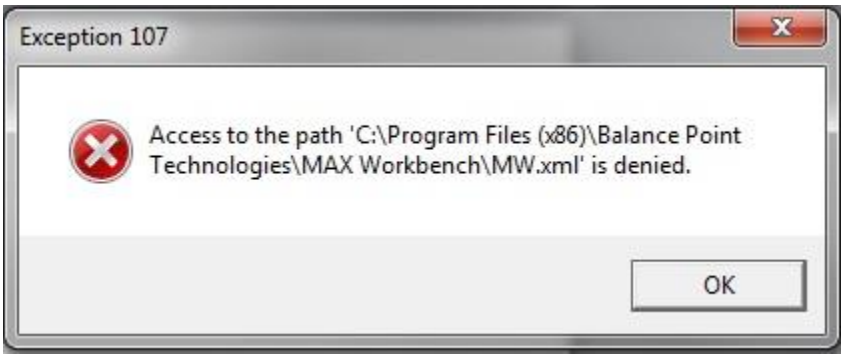
- Specify the name and description of the rule and Click Finish



- MAX Workbench should not be able to download application updates. In case there is a problem downloading, contact your system administrator.

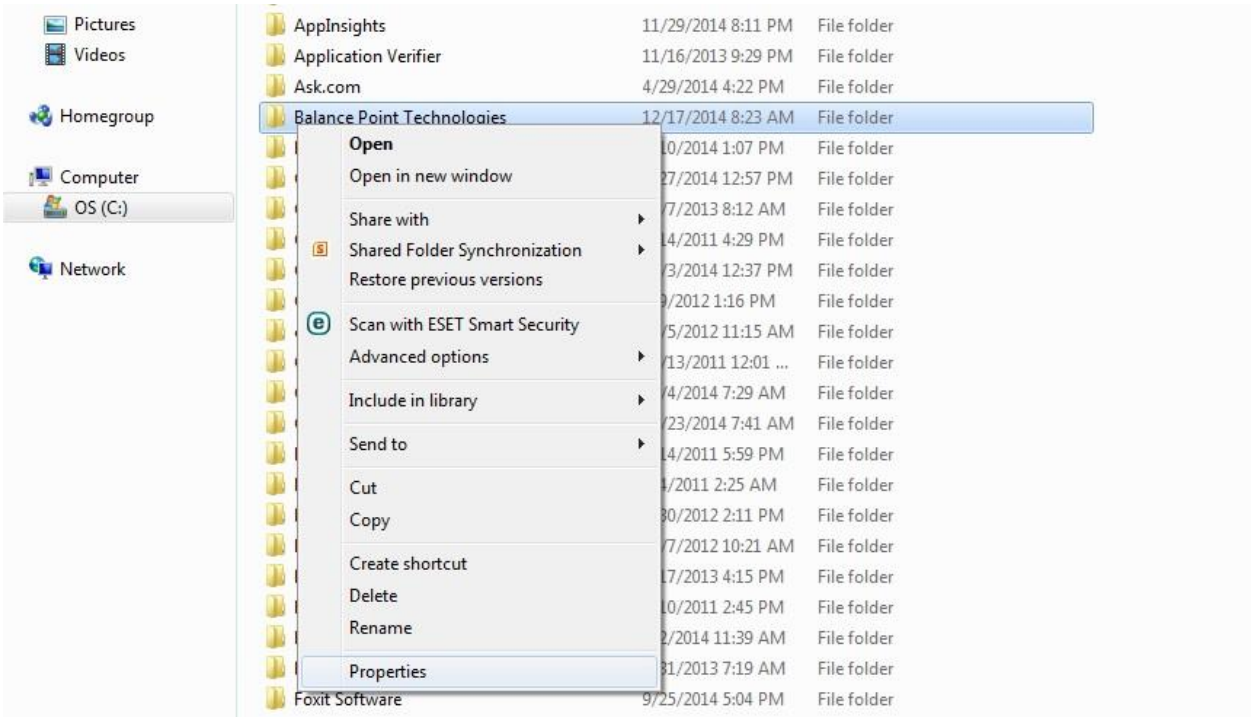
Exception handling

Exception 107

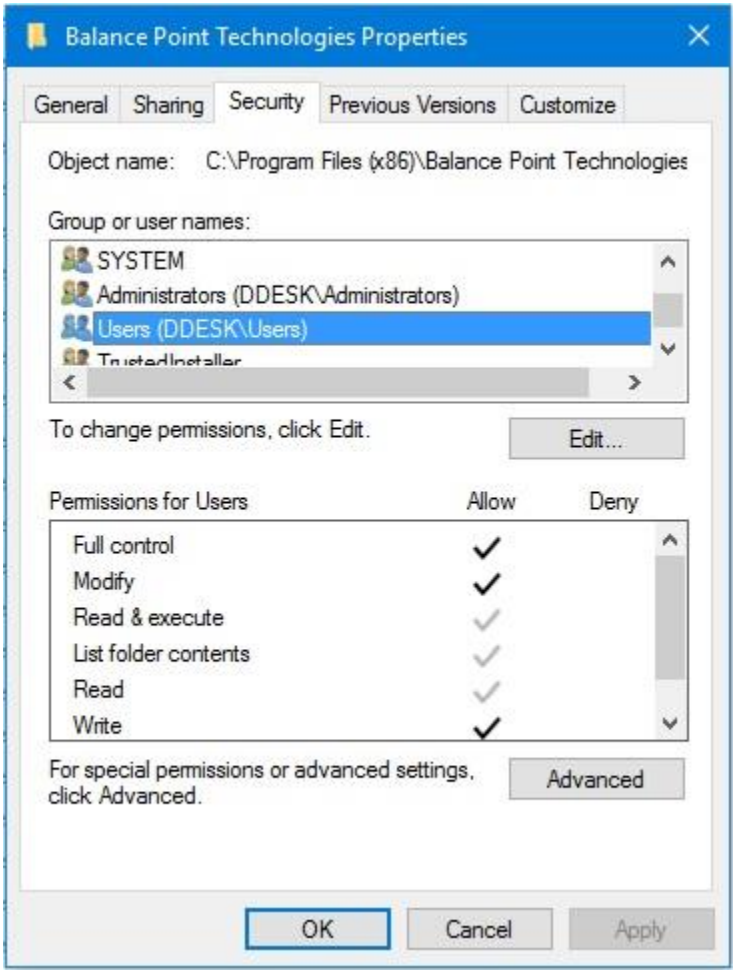


Exception 107 is caused because of permission issues. The user launching MAX Workbench must have Read/Write permissions to the Balance Point Technologies folder. To enable user Read/Write permissions, closely follow the instructions below.

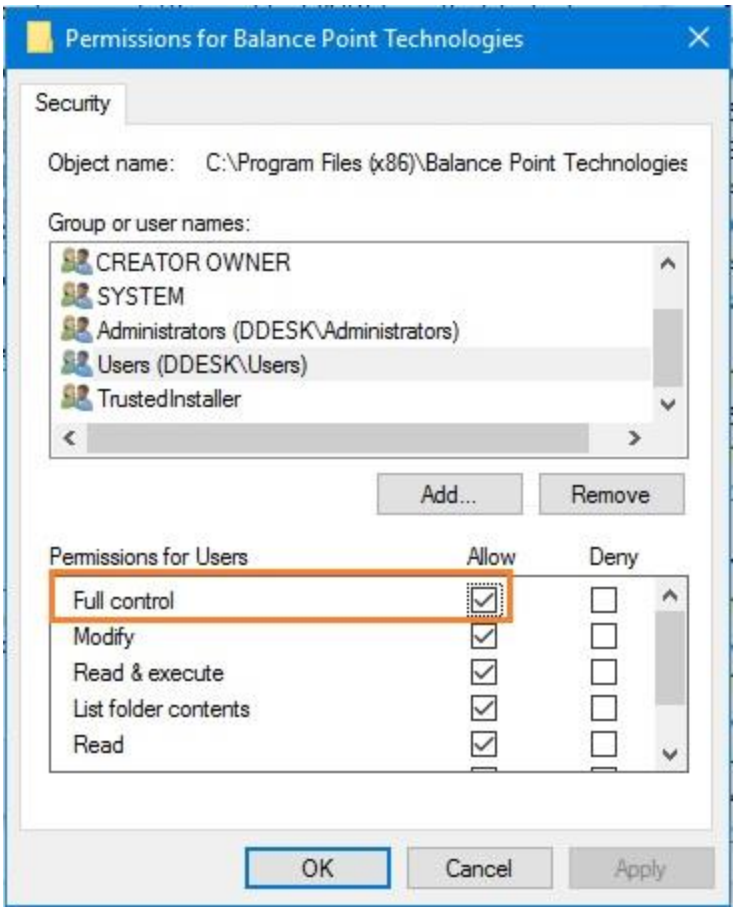
- Right click on the Balance Point Technologies folder and click Properties.



- Click on the Security Tab and **highlight** the user or group of user that will be launching MAX Workbench. The Users group will be used for this example.



- Click Edit…. and one more time **highlight** the user or group of user that will be launching MAX Workbench.



- Make sure Full Control permission checkbox has been checked and click Apply, then, click OK until you exit the properties window.