How to configure caller recognition and screen-pop for:

Maximizer CRM

Contact replication method: ODBC
Screen pop method: Custom binary to generate the contact URL

Prerequisites

Credentials to a SQL account from the Maximizer database with reading privileges.

Notes

Maximizer has a feature that facilitates click-to-call. To enable it go to Administration/Administrator and then choose 'Preferences/System Options'. This has a section 'VOIP/IM Integrations'. Modify an option and set the URL to tel://[PhoneNumber]. With this setting, clicking the phone icon will automatically initiate a call to the contact's number.
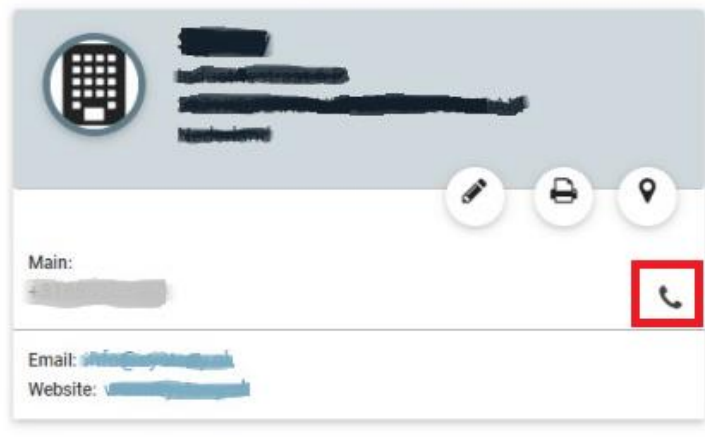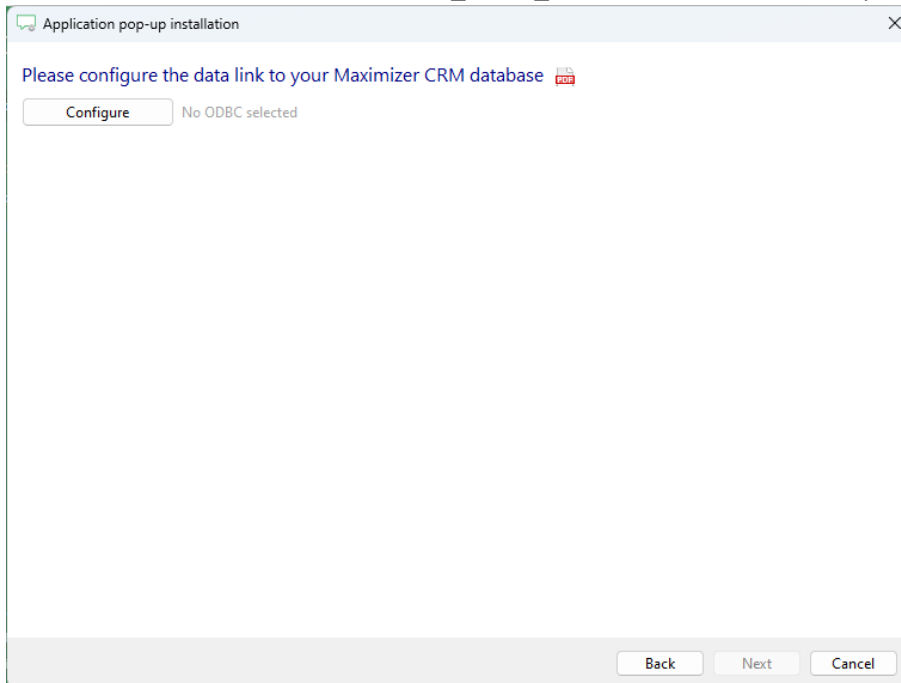
Configuraton steps
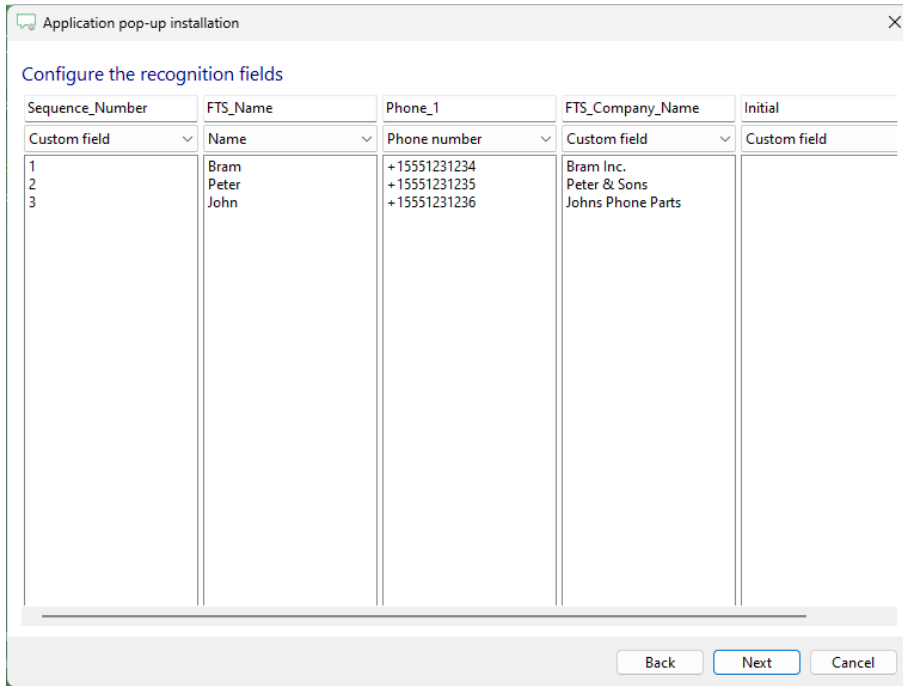
1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Maximizer CRM, as shown below.
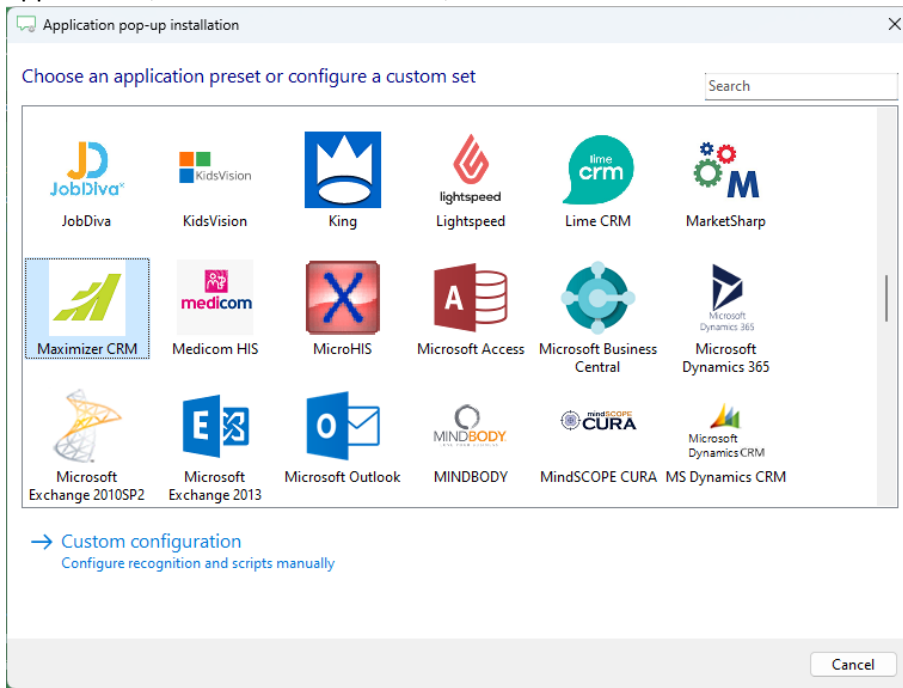
2) To configure the data link to your SQL database, specify the server name and valid credentials. To authorize access from the Recognition Update Service it is required to check 'Allow saving passing'. Select the Maximizer CRM database from the dropdown box. After pressing 'OK' the wizard will show a list of tables. The table 'AMGR_Client_Tbl' should contain all the phone numbers.

3) Verify all the phone number fields have the type 'Phone number' selected from the dropdown list.
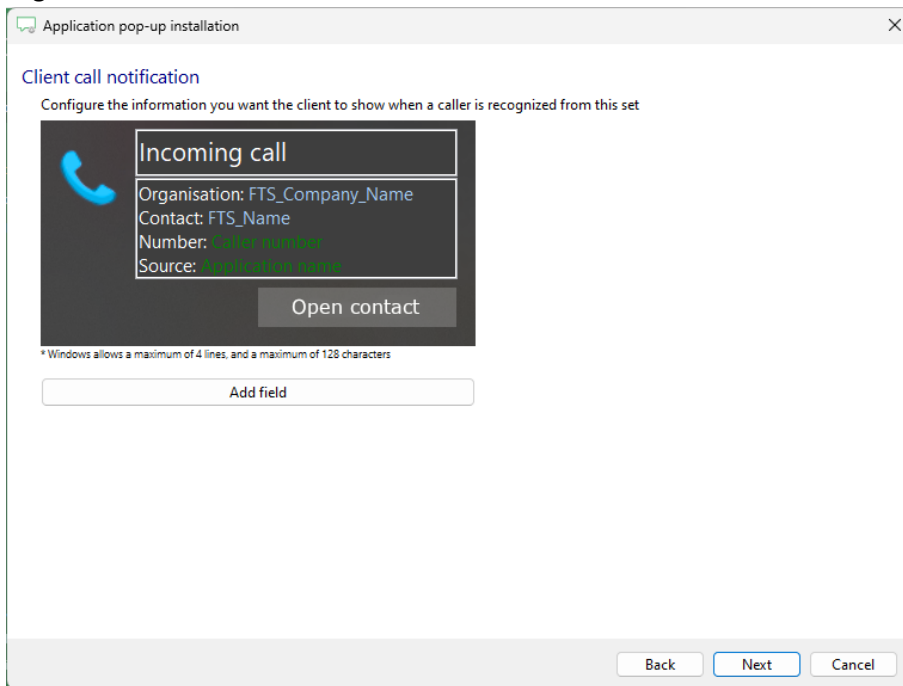

4) Choose which fields to display in the call notification on an incoming call. By default these are the organization and contact from the standard database names.
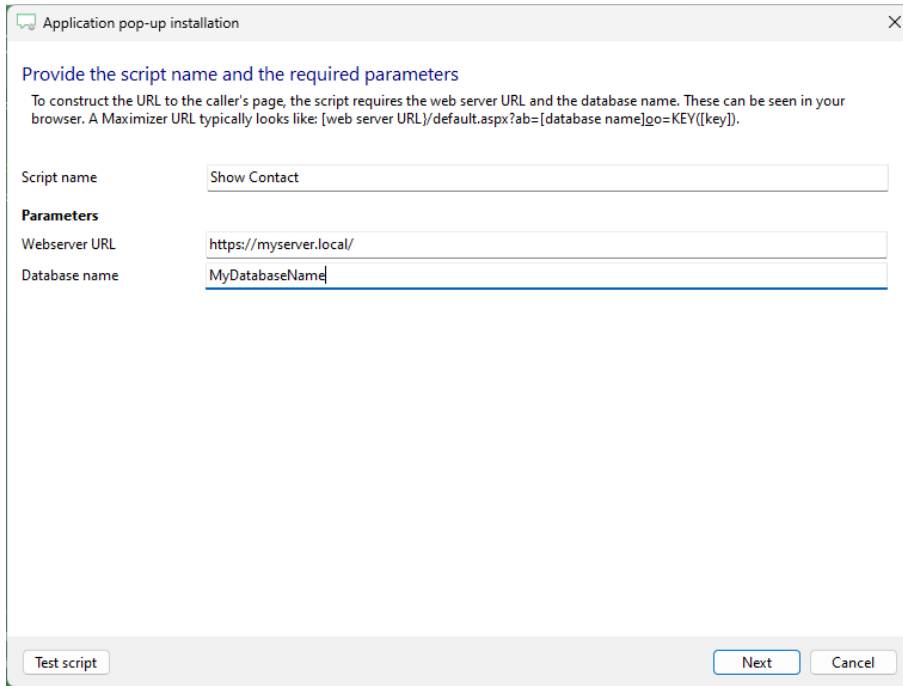
5) Fill in the webserver URL and database name in the 'Show Contact' script configuration.

Application pop-up installation   ✕

Provide the script name and the required parameters

To construct the URL to the caller's page, the script requires the web server URL and the database name. These can be seen in your browser. A Maximizer URL typically looks like: [web server URL]/default.aspx?ab=[database name]oo=KEY([key]).
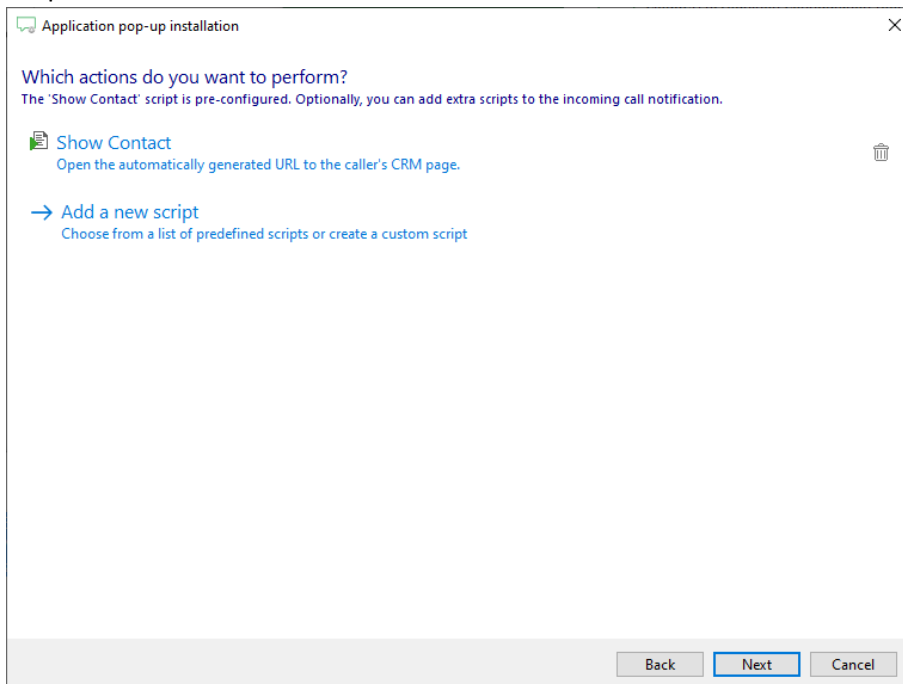
Script name	Show Contact
Parameters	
Webserver URL	https://myserver.local/
Database name	MyDatabaseName

Test script   Next   Cancel

6) The 'Show Contact' script is preconfigured. You can add extra scripts or replace the 'Show Contact' script.

Application pop-up installation   ✕

Which actions do you want to perform?

The 'Show Contact' script is pre-configured. Optionally, you can add extra scripts to the incoming call notification.

📄 Show Contact   🗑
    Open the automatically generated URL to the caller's CRM page.

→ Add a new script
    Choose from a list of predefined scripts or create a custom script

Back   Next   Cancel

7) Check the configuration summary and click 'Finish' to add the integration with the application.

Application pop-up installation   ✕

Summary

Application

Maximizer CRM

Recognition

Recognition from ODBC table ContactTable

Scripts

Show Contact:

Back   Finish   Cancel