

How to configure caller recognition and screen-pop for:

Maximizer CRM

Contact replication method: ODBC

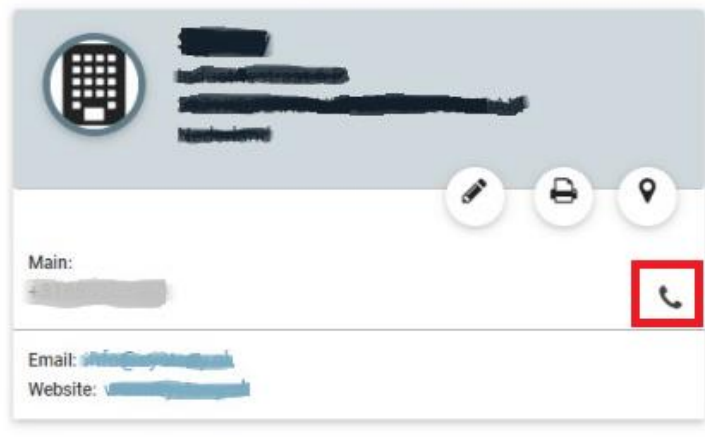
Screen pop method: Custom binary to generate the contact URL

Prerequisites

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

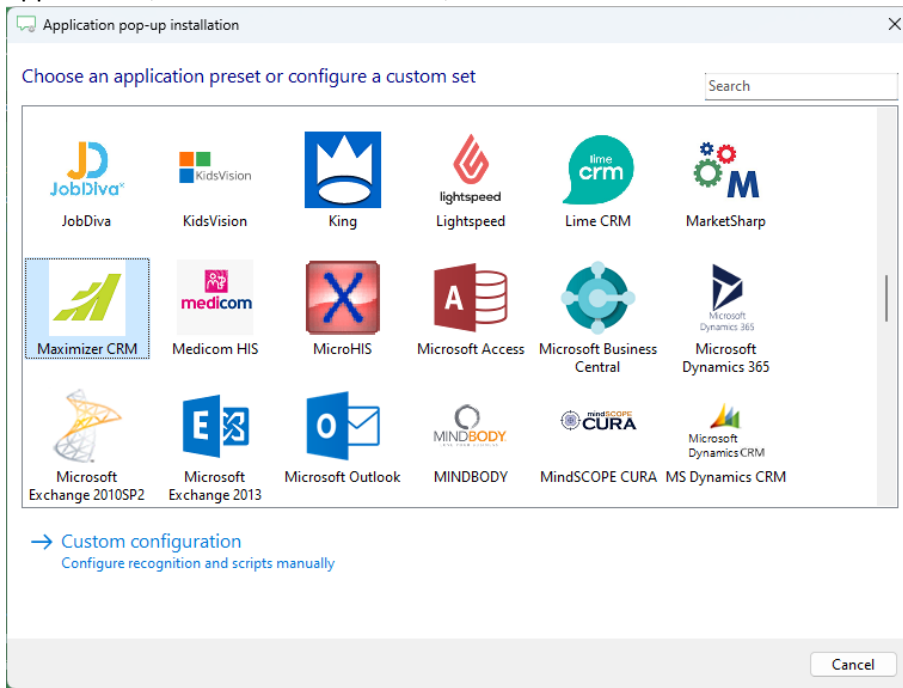
Notes

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.

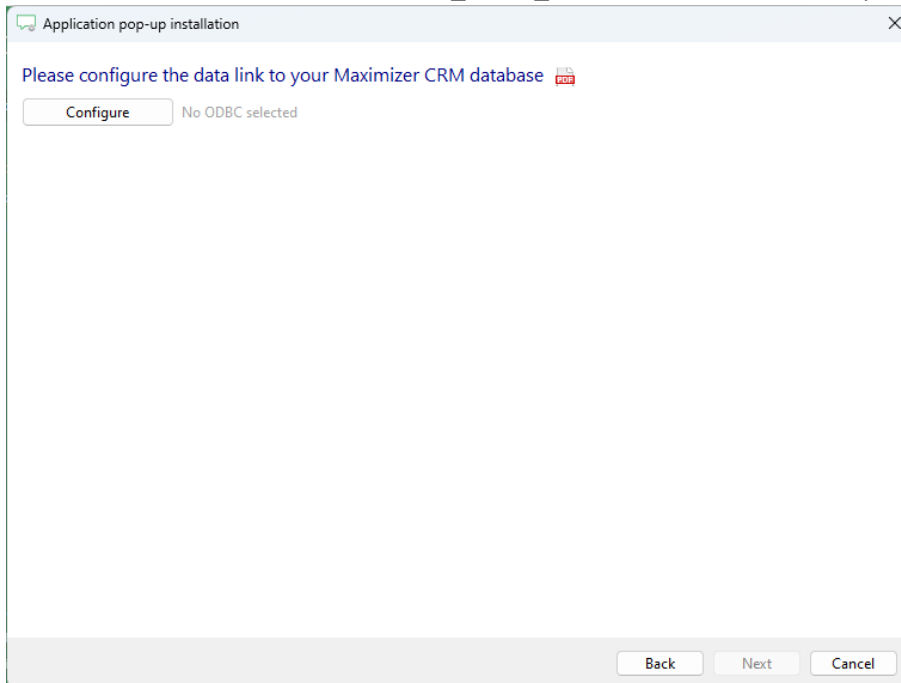


Configuraton steps

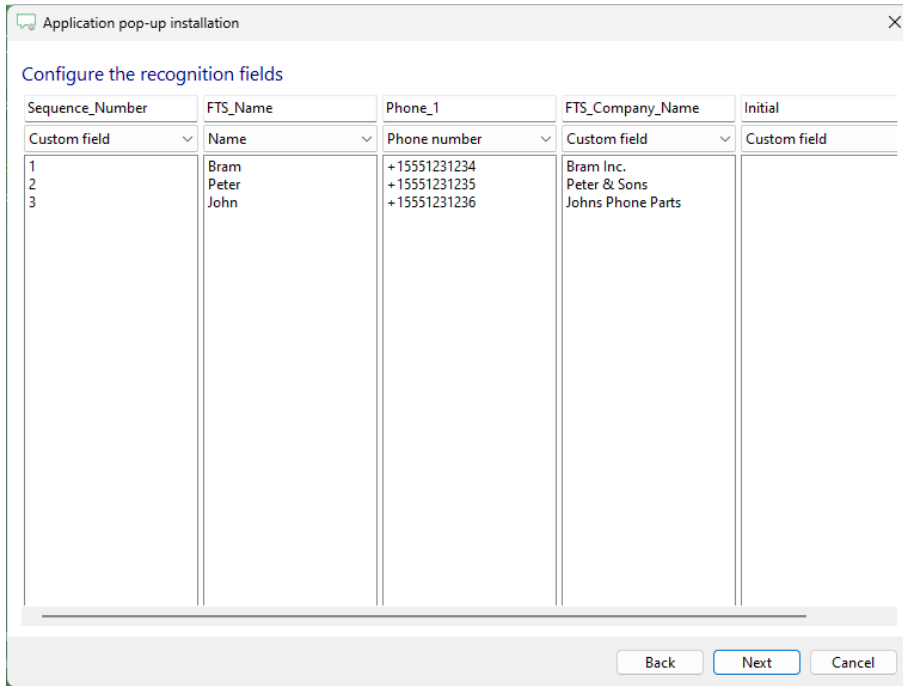
- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Maximizer CRM, as shown below.



- 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.

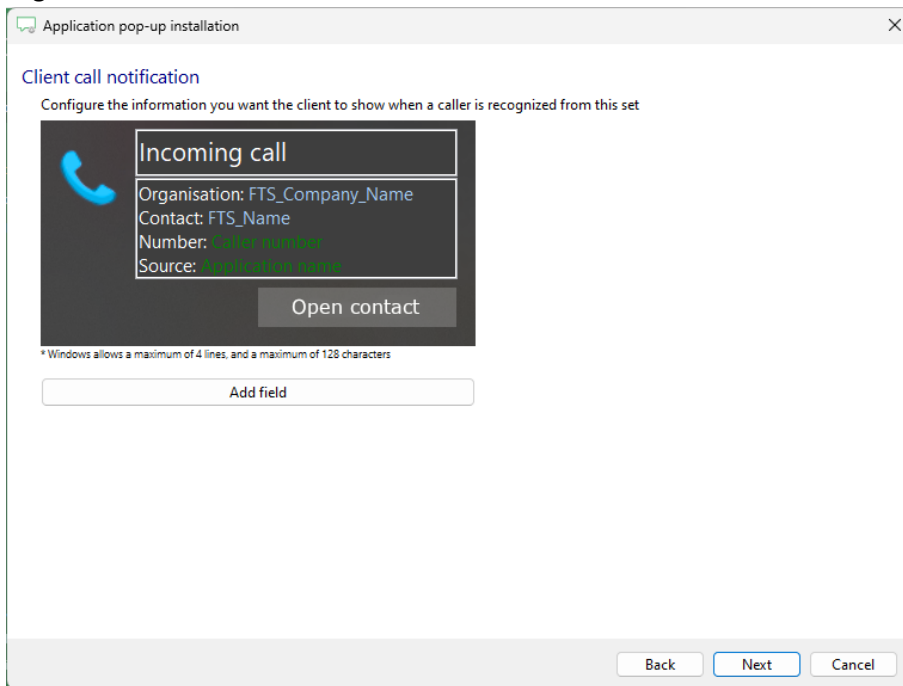


The screenshot shows a dialog box titled "Application pop-up installation" with a sub-header "Configure the recognition fields". It contains a table with five columns: Sequence_Number, FTS_Name, Phone_1, FTS_Company_Name, and Initial. Each column has a dropdown menu above it. The data in the table is as follows:

Sequence_Number	FTS_Name	Phone_1	FTS_Company_Name	Initial
1	Bram	+15551231234	Bram Inc.	
2	Peter	+15551231235	Peter & Sons	
3	John	+15551231236	Johns Phone Parts	

At the bottom of the dialog box are three buttons: "Back", "Next", and "Cancel".

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.



The screenshot shows a dialog box titled "Application pop-up installation" with a sub-header "Client call notification". Below the sub-header is the text "Configure the information you want the client to show when a caller is recognized from this set".

There is a preview window showing a call notification card with a blue phone icon and the following text:

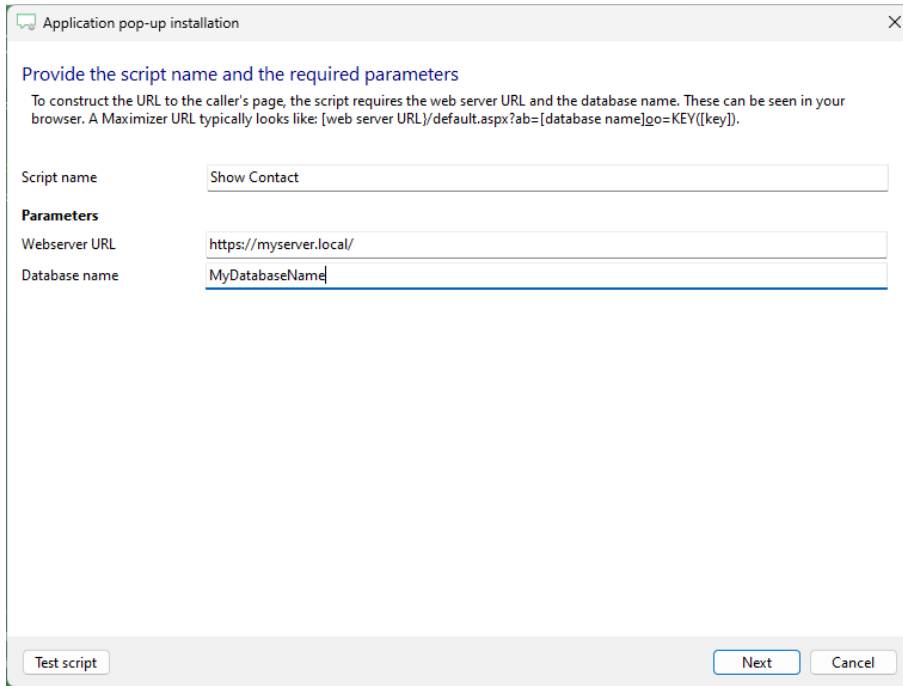
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Incoming call
Organisation: FTS_Company_Name
Contact: FTS_Name
Number: Caller number
Source: Application name
Open contact
  
```

Below the preview window is a note: "* Windows allows a maximum of 4 lines, and a maximum of 128 characters". Below that is an "Add field" button.

At the bottom of the dialog box are three buttons: "Back", "Next", and "Cancel".

5) Fill in the webservice 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]&go=KEY([key]).

Script name: Show Contact

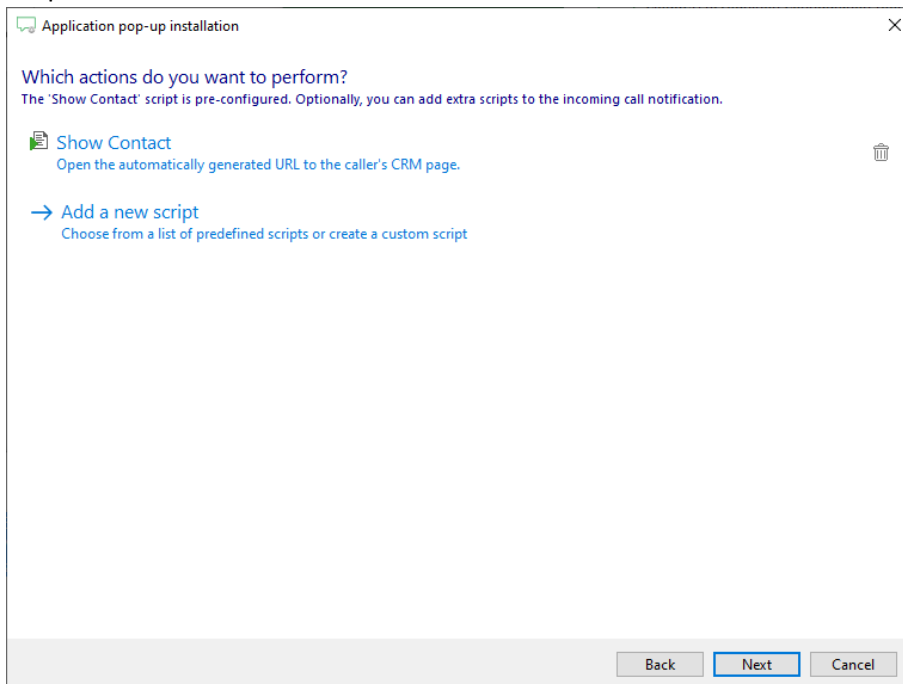
Parameters

Webservice URL: https://myserver.local/

Database name: MyDatabaseName

Buttons: 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

Buttons: Back, Next, Cancel

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

