Horizon

Integrator Maximizer Add-in Guide

Contents

Introduction

Maximizer CRM Add-in Guide

This document will guide you through configuration and basic use of Horizon Integrator's Maximizer CRM Add-in. It is expected that you are already familiar with the Address Book, Call History and Preview window, and the basic concepts of integration and screen popping using the Add-ins. See the full user guide for these topics.

Maximizer CRM and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the full user guide or consult your Horizon administrator.

Information You'll Need;

- ☐ Windows account username and password

- ☐ Maximizer CRM database name and filepath*, username and password (if password protected)
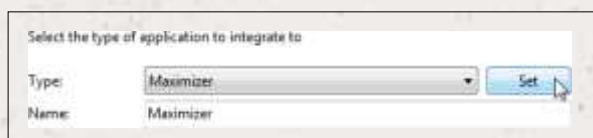
📢 **Instructions on where to find this information are given below if required**

Configuration

Right-click Integrator's tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up. In the 'Integration' area, click the '(Add new)' button, select 'Maximizer CRM' from the 'Type' dropdown box and then click the 'Set' button.

On the 'Configuration' group, select your Maximizer database connection in the 'Connection' dropdown box. If you're not sure what your connection is called, you can find out by logging in to Maximizer, opening the 'File' menu and clicking the 'Open Address Book' option.

On the window that opens, select and highlight the address book you use from the list of available address books. The name of the database connection is then displayed in the 'Location of Address Book' text box; you're looking for the line that begins with "DSN:". The text that follows "DSN:" is the name of the database connection that you need to select in the 'Connection' dropdown box.
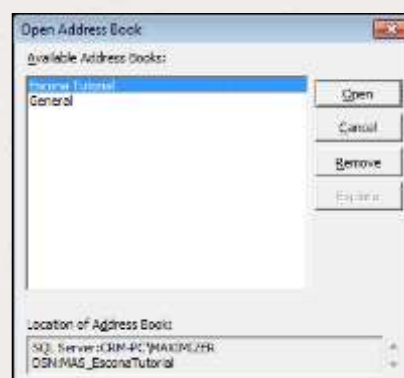
Back on the 'Configuration' group; enter your Maximizer account login information into the 'Username' and 'Password' textboxes.

'Companies', 'Contacts' and 'Individuals' are the categories of record in Maximizer that can be looked up in searches and popped; select any or all of them by ticking the corresponding boxes to include them.
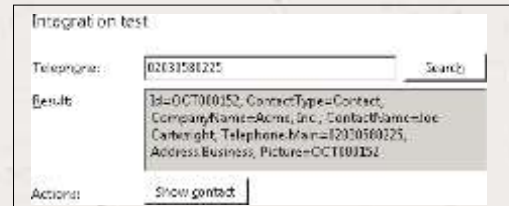
Click the 'Save' button once you have finished entering the required information.

Testing

To test if the configuration worked, enter a phone number from your Maximizer CRM account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

The test area results should look similar to the results showing in the figure above. If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Dialling configuration

To dial out, dialling needs to be configured correctly. Right-click the tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up. In the 'General' group of the 'Configuration' screen, click the 'Dialling' option and make sure that the 'TAPI dialling (requires restart)' option is ticked. Click the 'Save' button to store any new settings.
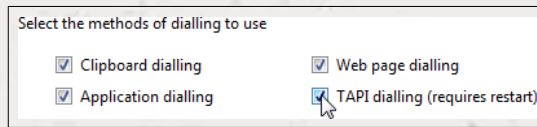

In Maximizer, open the 'File' menu, click the 'Preferences' option and then click on the 'Dialing' tab. Select the 'TAPI' option in the 'Method' section and then click the 'Device…' button. Select the 'UC Tapi Driver' option in the 'Line' dropdown box and then click 'OK'.
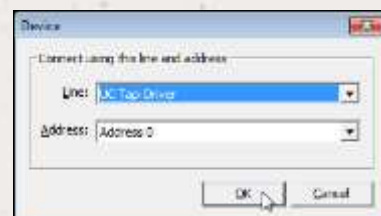
Functionality

To make a call from within Maximizer, you can click on a contact to highlight them and then click the 'Phone' button.
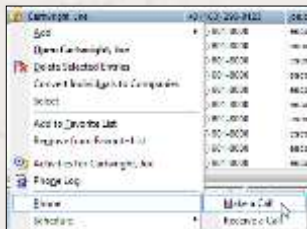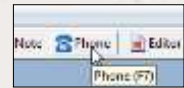
Alternatively, you can right-click on a contact, select the 'Phone' option and then click the 'Make a Call' option on the pop up menu.

Either way, the 'Phone' window will be opened.

Here you can select a subject for the phone record and select which number to dial if the contact has multiple numbers on record. When ready, click the 'Dial' button to make the call.
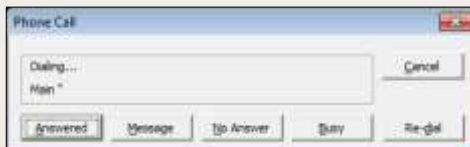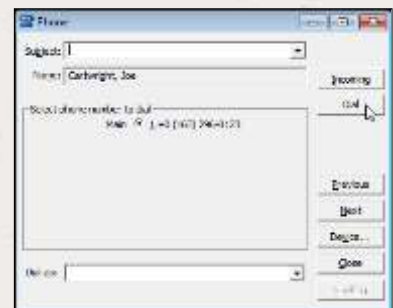
Depending on what happens, you can click one of the buttons along the bottom of the 'Phone Call' window to record the call status.

If the call is answered and you click the appropriate button, a new window is opened where you can record notes on the call.

Note: Apart from dialling out from Maximizer other call control functionality is not available within this window, for these please use the CTI client call control options.
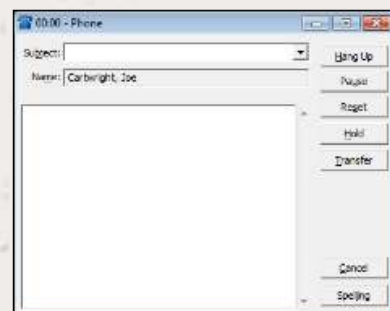
When a call comes in and the caller is a contact in Maximizer, click the Maximizer icon in the preview window to pop the caller's contact record.

Then, in Maximizer, you can either click the 'Phone' button or right-click on the contact, select the 'Phone' option and then click the 'Receive a Call' option on the pop up menu; as with dialing, the 'Phone' window will be opened either way.
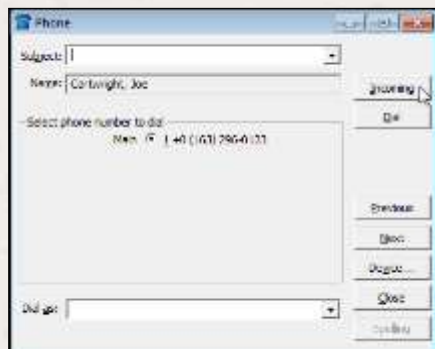
Again, in much the same way as dialing, you can select a subject for the phone record. However, this time, click the 'Incoming' button.

A new window is opened where you can record notes on the call and perform some call control functions.

To end the call and save the record, click the 'Hang Up' button.