

Phone Manager Application Support - Maximizer

DECEMBER 2016

DOCUMENT RELEASE 5.0

APPLICATION SUPPORT



NOTICE

The information contained in this document is believed to be accurate in all respects but is not warranted by Mitel Networks™ Corporation (MITEL®). The information is subject to change without notice and should not be construed in any way as a commitment by Mitel or any of its affiliates or subsidiaries. Mitel and its affiliates and subsidiaries assume no responsibility for any errors or omissions in this document. Revisions of this document or new editions of it may be issued to incorporate such changes.

No part of this document can be reproduced or transmitted in any form or by any means - electronic or mechanical - for any purpose without written permission from Mitel Networks Corporation.

TRADEMARKS

The trademarks, service marks, logos and graphics (collectively "Trademarks") appearing on Mitel's Internet sites or in its publications are registered and unregistered trademarks of Mitel Networks Corporation (MNC) or its subsidiaries (collectively "Mitel") or others. Use of the Trademarks is prohibited without the express consent from Mitel. Please contact our legal department at legal@mitel.com for additional information. For a list of the worldwide Mitel Networks Corporation registered trademarks, please refer to the website: <http://www.mitel.com/trademarks>.

Windows and Microsoft are trademarks of Microsoft Corporation.

Other product names mentioned in this document may be trademarks of their respective companies and are hereby acknowledged.

Mitel Phone Manager
Release 5.0 - December, 2016

®,™ Trademark of Mitel Networks Corporation
© Copyright 2016 Mitel Networks Corporation All rights reserved

Maximizer

Overview

This describes the features that are available when integrating with Maximizer.

Supported Versions

Version	Supported
2015 (v13.0) Desktop Client	

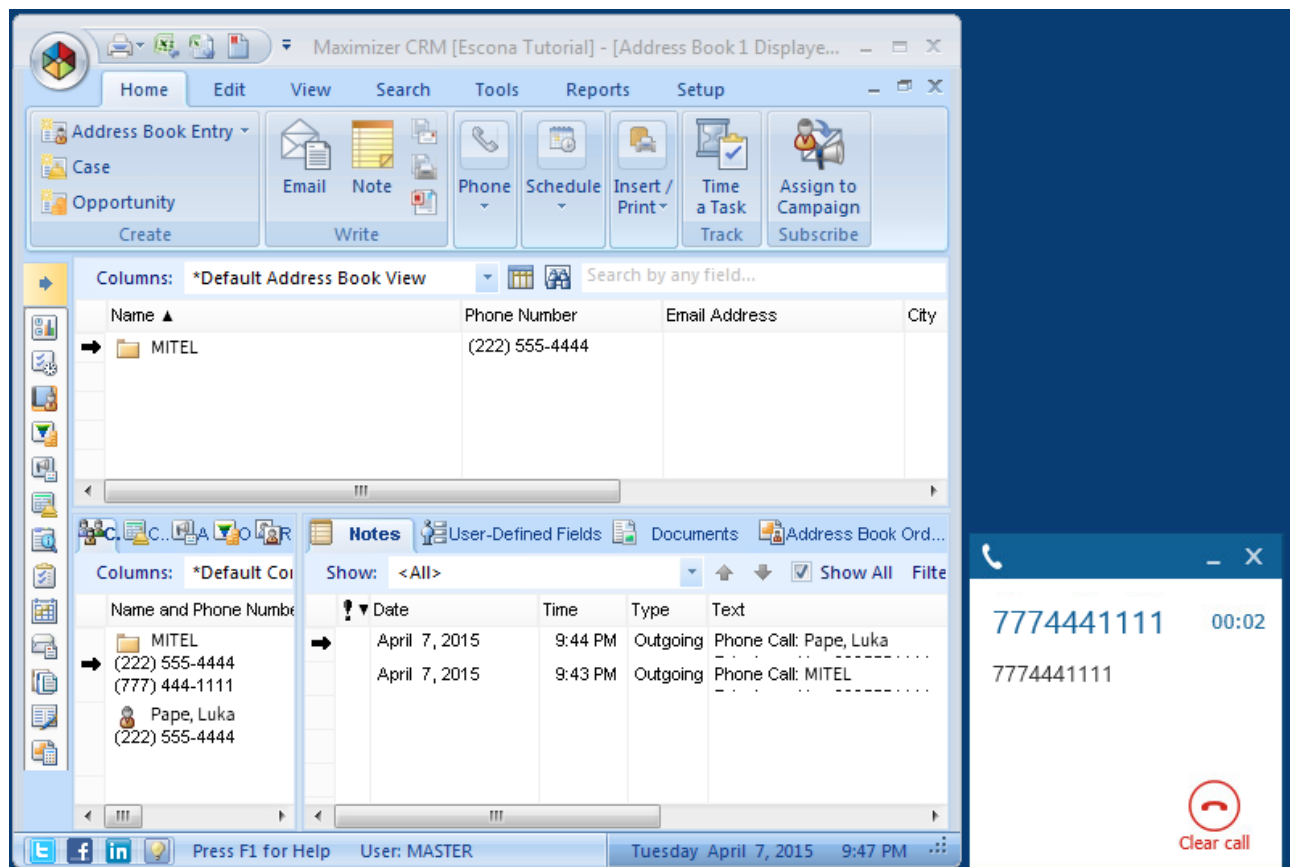
Features

Integration with Maximizer supports the features listed below:

- [Screen pop](#)
- [Automatic call history entry](#)

Screen pop

Company, *Individual* and *Company Contact* records can be screen popped directly within Maximizer when an incoming call is received using the caller id or from an outgoing call using the dialed number. The telephone number is then used to find any matching records that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have this telephone number. A matching *Company* entity was found and the associated record was automatically displayed within Maximizer.



The screenshot displays the Maximizer CRM desktop application. The main window shows a list of contacts under the 'Address Book Entry' tab. A 'Screen pop' window is overlaid on the right side, displaying the phone number '7774441111' and a duration of '00:02'. Below the number, there is a 'Clear call' button with a red phone icon. The background application window shows a list of contacts with columns for Name, Phone Number, Email Address, and City. The 'Notes' tab is also visible, showing a list of notes with columns for Name and Phone Number, Date, Time, Type, and Text.

If multiple matches are found then the *Multiple Matches* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching records, a *Company Contact*, *Company* and *Individual* record that have this telephone number.



The correct record can then be highlighted and then clicking on the *Display* button will open this associated record.

Automatic call history entry

The plugin supports the ability to be able to automatically create a Maximizer "Phone Call" Note. The record to associate this with is found using the caller id received or the number dialled.


The record is automatically created with the information relating to the call entered into the relevant fields.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

Configuration

Authentication

The database authentication details used to connect to the Maximizer database are configured on the *Authentication* tab.

**Maximizer®**

Details Authentication **Records**

Logon Details

Enter a Maximizer username and password


Username

Password

Enter a valid Maximizer **Username** and **Password** into the relevant fields.

Records

The type of records to include when performing a search can be controlled on the *Records* tab.

**Maximizer®**

Details Authentication **Records**

Search Records

Select the type of entities to include when searching

Companies
Individuals
Contacts
Individual Contacts
Alternate Contacts
Alternate Individuals