

Phone Manager Application Support - Maximizer

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APPLICATION SUPPORT



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Maximizer

Overview

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

Supported Versions

Version	Supported
2015 (v13.0) Desktop Client	

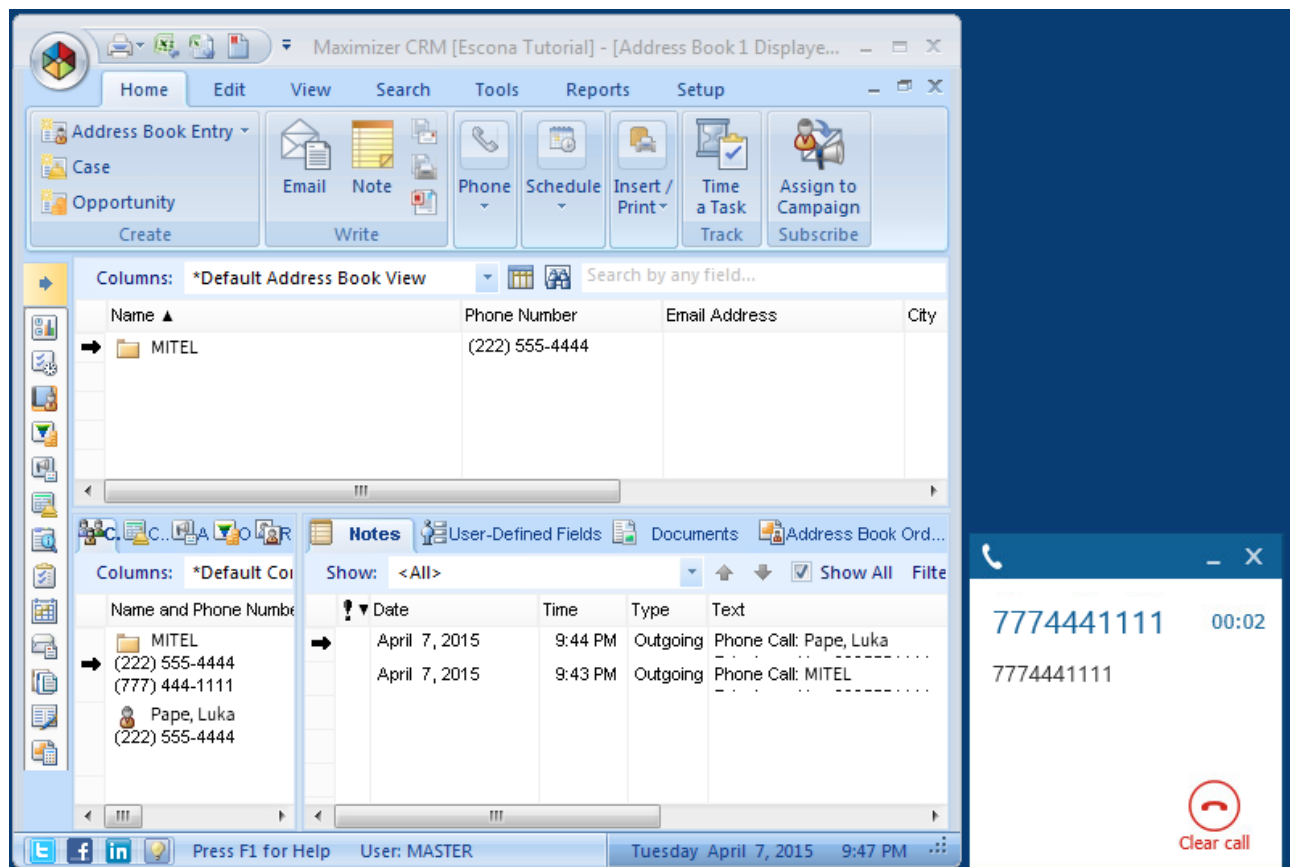
Features

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' tab, with a search filter applied to '(222) 555-4444'. A 'Screen pop' window is overlaid on the right side of the application, showing a call log for the number 7774441111. The call log indicates an outgoing call to 7774441111 on April 7, 2015, at 9:43 PM, with the text 'Phone Call: MITEL'. Below the call log, there is a 'Clear call' button.

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