

## Maximizer CRM (on-premises) to SystemX - Setup Procedure

As of 2021.05.07

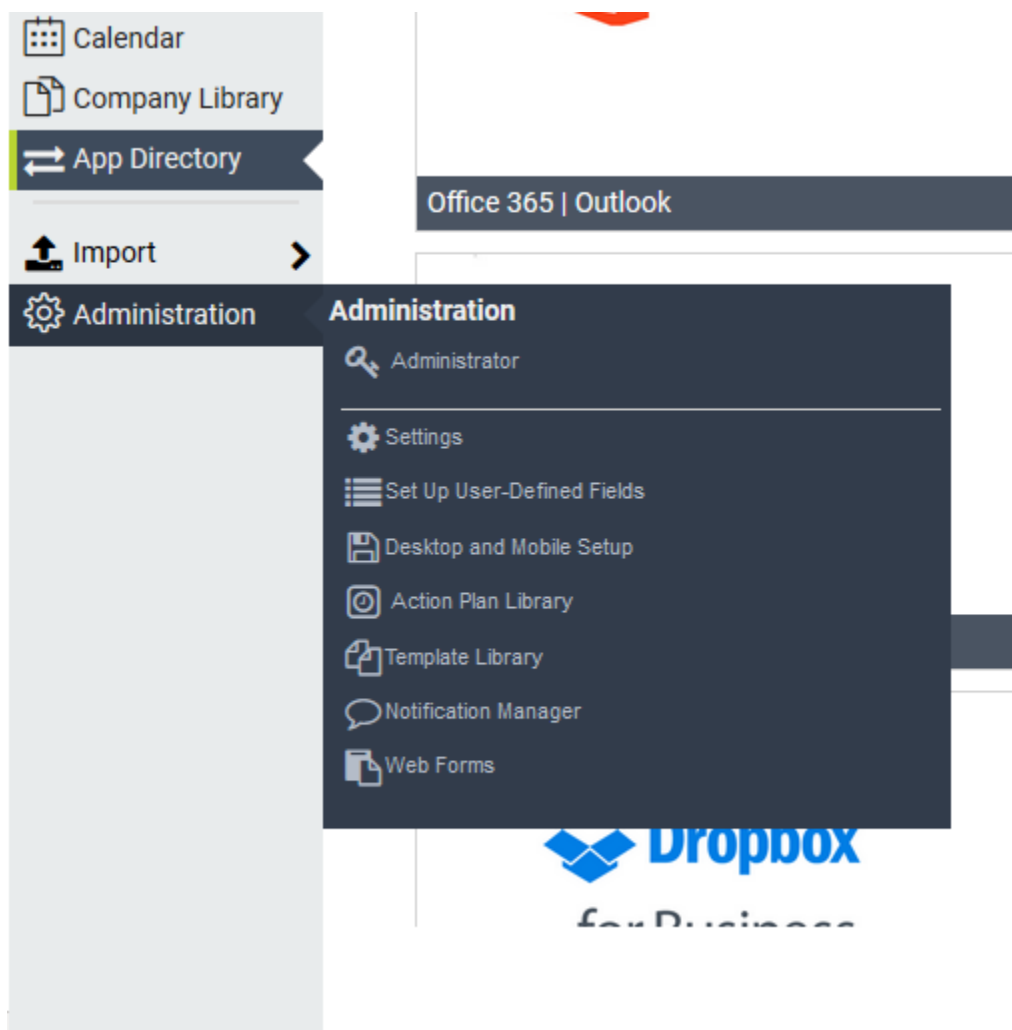
The following procedure describes steps required to connect SystemX environment to Maximizer CRM (Maximizer CRM on-premises server).

There are two parts to this procedure:

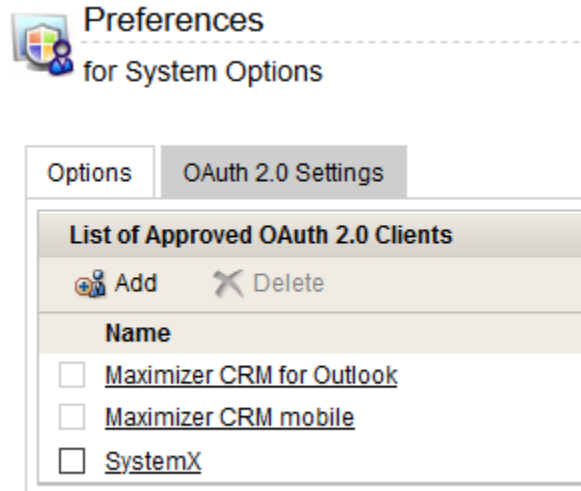
- Setup 'OAuth 2.0 settings' in Maximzier CRM
- Setup Maximizer CRM connector in SystemX

### Part 1 - Setup OAuth connector in Maximzier CRM

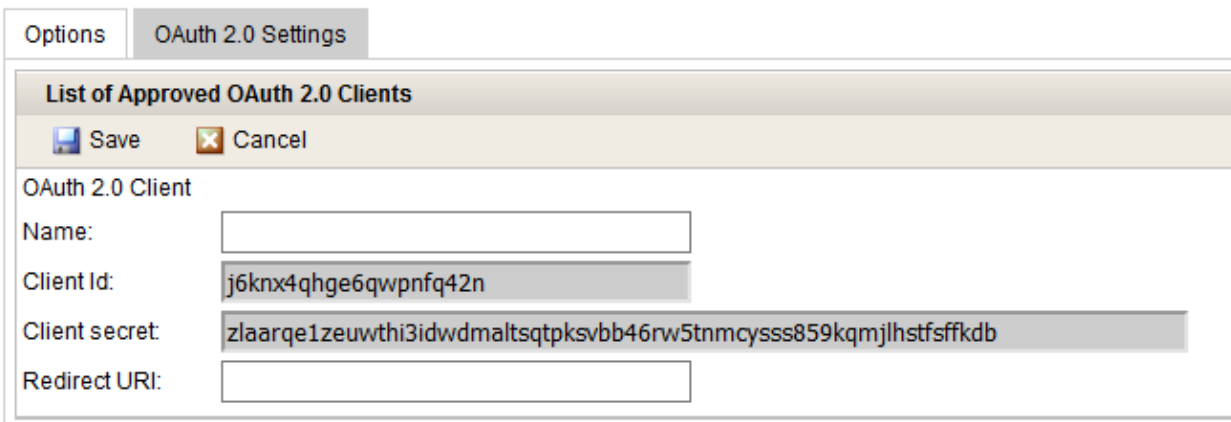
1. Log in to Maximizer CRM on-premises server
2. Go to: Administration -> Administrator



3. Go to: Home -> Preferences -> System Options -> OAuth 2.0 Settings tab



4. Click "Add" button and fill the form

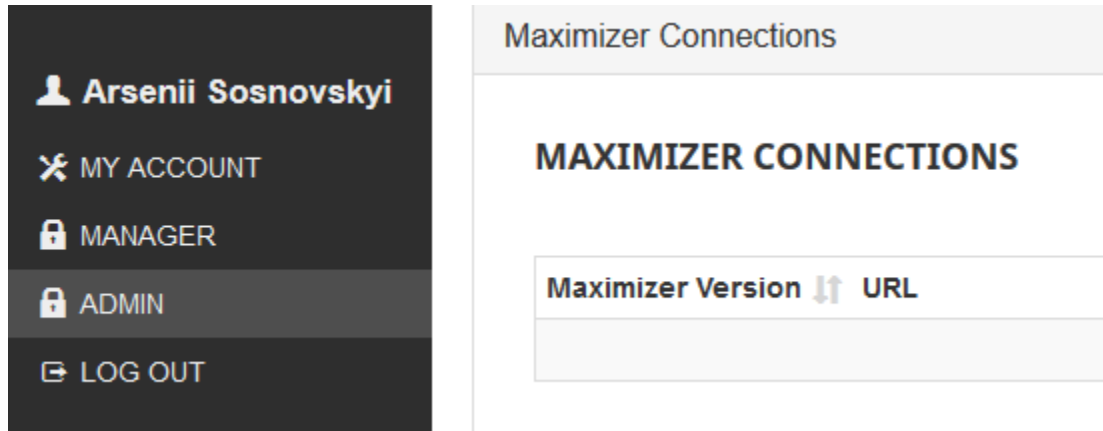


1. Enter "SystemX" in the "Name" field
2. Enter "https://core.systemx.net/maximizer" in "Redirect URI"
3. Record "Client Id" and "Client Secret" values, they will be needed in Part 2 of this procedure.
4. Enter 'https://core.systemx.net/maximizer' in the Redirect URI field

5. Hit "Save" button

## Part 1 - Setup Maximizer CRM connector in SystemX

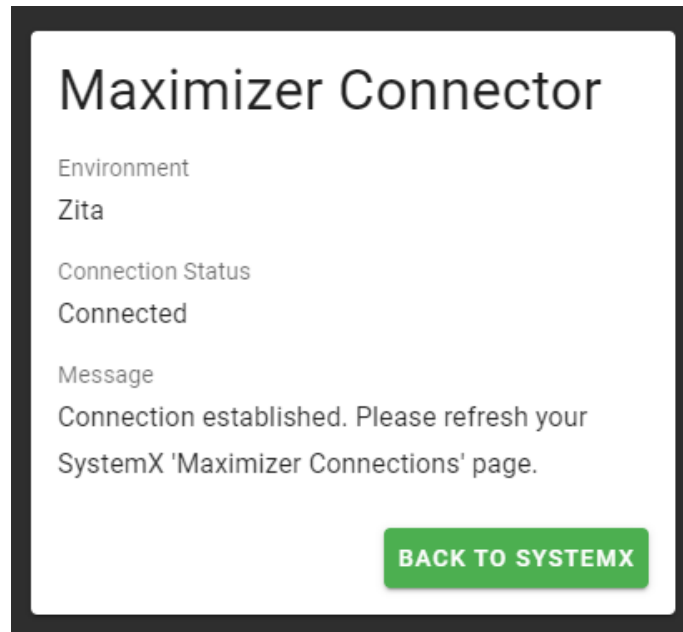
1. Log in to your SystemX environment (user must have Administrator role assigned)
2. Click on ADMIN menu option.
3. Open 'Maximizer CRM Connections' accordion section



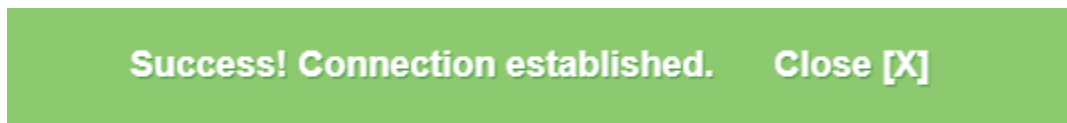
4. Click "New Connection" button
5. Fill out 4 fields:
  - Maximizer version: On-Premise
  - URL: Enter your Maximizer CRM server URL (example: <https://crm.zita.ca/>)
  - Client ID: Enter value you recorded in the Part 1, Step 4.3
  - Client Secret: Enter value you recorded in the Part 1, Step 4.3
6. Once you click on "Create" button You will be redirected to the Maximizer OAuth 2.0 login page

The image shows the Maximizer CRM OAuth 2.0 login page. At the top is the Maximizer CRM logo. Below it is a message: 'SystemX is requesting authorization to access your Maximizer Address Book. Please log in below.' The login form has three fields: 'Log in to:' with the value 'ClientDocs', 'User ID:' with the value 'MASTER', and 'Password:' with masked characters. A 'Log In' button is at the bottom.

7. Select your Maximzier Database name and Log in with Maximizer credentials
8. Once logged in, you will be redirected 'SystemX Maximizer Connector' page



9. This means that SystemX / Maximizer CRM connection has been established
10. Once you click on 'Back to SystemX' button, you will get redirected back to your SystemX environment.
11. You will be able to see newly created connection in the "Maximizer CRM Connections" list
12. Click "Test" button.
2. Click "Test" button to confirm connection to Maximzier CRM. If test is successful, you will see a green bar



3. Click 'Reauthorize' button if you want to use different username in connection to Maximizer.
4. Click 'Delete' if connection is no longer needed.

Should you have questions or concerns, please email us at [support@systemx.net](mailto:support@systemx.net).

