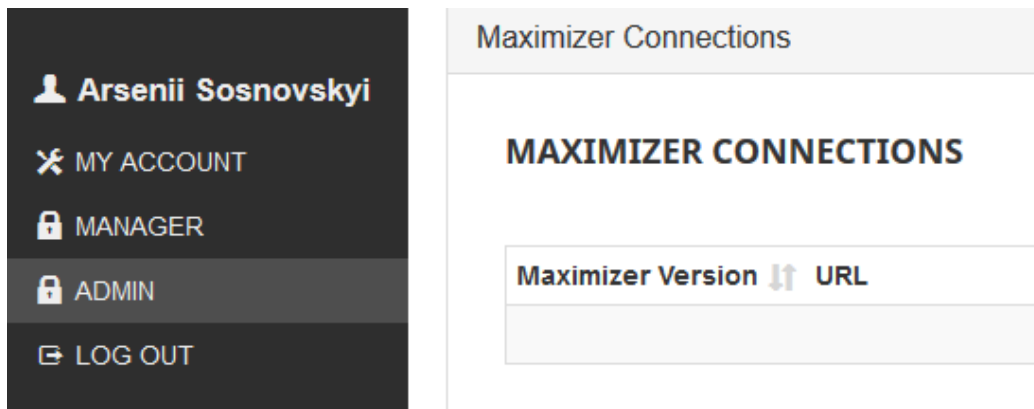# Maximizer CRM (cloud) to SystemX - Setup Procedure

As of 2021.05.04

The following procedure describes steps required to connect SystemX environment to Maximizer CRM

1. Log in to your SystemX environment (user must have Administrator role enabled)

2. Go to: Admin page -> Maximizer CRM Connections.

3. Click "+New Connection" button

4. Selected "Live" Maximizer CRM Version

5. Input Your Maximizer CRM account name

   a. It can be found in your Maximzier CRM -> Administrator -> Desktop and Mobile Setup ->

      Mobile access -> last part of the Mobile Access URL

   b. Example (see highlighted)
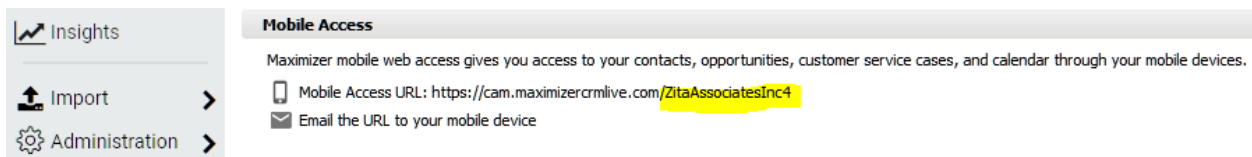
6. Click "Create" button

    a. Example

NEW CONNECTION

Maximizer Version *

Live

Maximizer Live account *

ZitaAssociatesInc4

CREATE

7. You will be redirected to the Maximizer OAuth 2.0 login page

MAXIMIZERCRM

SystemX is requesting authorization to
access your Maximizer Address Book. Please
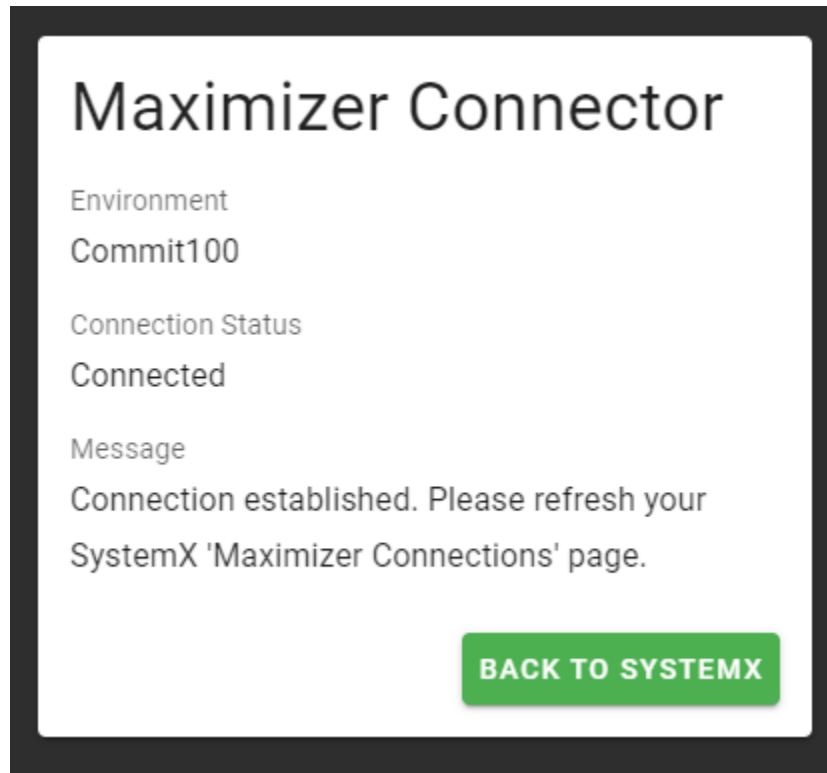log in below.

Log in to:
Zita Associates Inc

User ID:

Password:

Log In

8. Log in with Maximizer credentials.

a. Once logged in, you will be redirected SystemX Maximizer Connector page

b. Notification message should appear.

9. Click on 'Back to SystemX' to redirect you back to your SystemX environment.

10. Find newly created connection in the "Maximizer Connections" table

MAXIMIZER CRM CONNECTIONS
            + NEW CONNECTION

Maximizer Version	URL	Database Name	Status	Actions
Live	ZitaAssociatesInc4	06527459f9ec4e49b8fc95fdbb2d6edb	Connected.	TEST REAUTHORIZE DELETE

11. Click "Test" button to confirm connection to Maximzier CRM.

12. Click 'Reauthorize' button if you want to use different username.

13. Click 'Delete' if connection is no longer needed.

Should you have questions or concerns, please email us at support@systemx.net.