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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.

| | Maximizer Connections | | |
|----------------------|-------------------------|--|--|
| 上 Arsenii Sosnovskyi | | | |
| X MY ACCOUNT | MAXIMIZER CONNECTIONS | | |
| H MANAGER | | | |
| 🔒 ADMIN | Maximizer Version 🕼 URL | | |
| E LOG OUT | | | |

- 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)

| ✓ Insights | | Mobile Access | | |
|-----------------------|---|---|--|--|
| | | Maximizer mobile web access gives you access to your contacts, opportunities, customer service cases, and calendar through your mobile devices. | | |
| 1mport | > | Mobile Access URL: https://cam.maximizercrmlive.com/ZitaAssociatesInc4 | | |
| දිරිූ} Administration | > | | | |





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×

CREATE

- 6. Click "Create" button
 - a. Example

| NEW CONNECTION | | | | | | |
|---------------------|---|--------------------------|--|--|--|--|
| Maximizer Version * | | Maximizer Live account * | | | | |
| Live | ~ | ZitaAssociatesInc4 | | | | |
| | | | | | | |

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



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.





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

