

# Horizon

## Integrator ACT! Add-in Guide



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# Introduction

## ACT! 2008 -2013 Add-in Guide

This document will guide you through configuration and basic use of Horizon Integrator's Act! add-in. It is expected that you are already familiar with the Address Book, Call History and Preview window, and the basic concepts of integration and screen popping using the add-ins. See the 'full user guide' for these topics.

Act! and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the 'full user guide' or consult your Horizon administrator.

Information You'll Need;

- ☐ Windows account username and password
- ☐ Act! database name and filepath\*, username and password (if password protected)

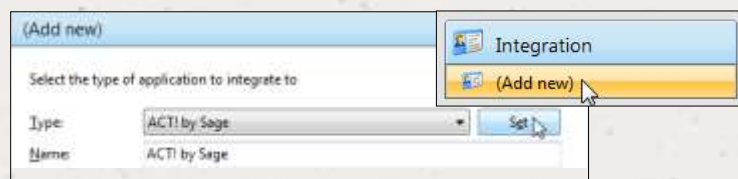


**Instructions on where to find this information are given below if required**



# Configuration

Right-click Integrator's tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up. In the 'Integration' area, click the '(Add new)' button, select 'ACT! By Sage' from the 'Type' dropdown box and then click the 'Set' button.

A screenshot of the 'Configuration' dialog box. It has fields for 'Database', 'Version' (set to 'ACT! 2013 or newer'), 'Username', and 'Password'. There is a 'Browse...' button next to the 'Database' field. Under the 'Entities' section, 'Contacts' and 'Companies' are both checked.

On the 'Configuration' group, you need to enter the details of your Act! database. To find out where it is stored, go into Act!, open the 'Tools' menu and click 'Preferences'.

A new window will open with lots of tabs so click on the 'General' tab if it is not already selected. In the 'Personal File Locations' section, select 'Databases' in the 'File type' dropdown box to display the location of your Act! database - make a note of it.

A screenshot of the 'Act! Preferences' dialog box, 'General' tab. It shows various settings like 'Always display country code in phone fields', 'Allow history editing', and 'Allow notes editing'. The 'Personal File Locations' section is expanded, showing 'File type' as 'Databases' and 'Location' as 'C:\Users\CRM\Documents\ACT\ACT For Windows 9\Databases'. There are 'Browse...' buttons for both 'File type' and 'Location'. Other sections include 'Names' and 'Duplicate checking'.

Back on Integrator's 'Configuration' group, click the 'Browse...' button, navigate to the location you just made a note of and then click on the Act! database you wish to integrate with; you're looking for a .pad file. If you're not sure which the correct file is, consult your system administrator.

If the database is password protected, enter the 'Username' and 'Password' to use to open the database.

Select which of your Act! contact types you want to be used by ticking the corresponding boxes in the 'Entities' section.

Click the 'Save' button to store the information you've entered and apply the configuration.



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# Testing

To test if the configuration worked, enter a phone number from your Act! account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

The test area results should look similar to the results showing in the figure above. If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Integration test

Telephone:

[Search](#)

Result:

Id=OCT000152, ContactType=Contact, CompanyName=Acme, Inc., ContactName=Joe Cartwright, Telephone.Main=02030580225, Address.Business, Picture=OCT000152

Actions:

[Show contact](#)



# Dialling configuration

**Dialing**

Select the methods of dialing to use

☒ Clipboard dialing    ☒ Web page dialing  
☒ Application dialing    ☒ TAPI dialing (requires restart)  
☒ Focus dialing

Select the applications and web sites to use dialing from

Type	Application/Domain	Form/Page	Textbox
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Choose the criteria to use when searching for valid numbers

Minimum length:  Maximum length:   
Must start with:

To dial out from within Act!, dialling needs to be configured correctly.

Right-click Integrator's tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'Configuration' screen. In the 'General' group, click on the 'Dialling' option.

You can refine the criteria used to identify telephone numbers. Enter the appropriate number of digits into the 'Minimum length' and 'Maximum length' text boxes and specify a prefix that identifies telephone numbers (if there is one) by entering it in the 'Must start with' box.

Click the 'Add' button to start Integrator's Dialling wizard.

The first question in the wizard asks you about the type of application you want to dial from. Select the 'Any other type of standard Windows application' option. Click the 'Next' button.

**Set up application dialling**

Select the type of application that you want to dial from:

☐ I have written the application myself or someone can customize it as required  
☐ The application runs inside a web browser  
☐ I want to dial from a Microsoft application  
☐ The application contains 'dial' buttons or uses TAPI for dialling  
☒ Any other type of standard Windows application  
☐ None of the above choices work

**Dialling: Standard application: Text box**

A detection process is used to learn the application.

1) Click on the target icon below  
2) Drag the target icon to the textbox that contains the telephone number

Detect: (Drag the target icon to the textbox that contains the telephone number)

Application:   
Form:   
Text box:

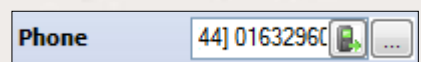
Open Act! and navigate to a screen that has a telephone number you'd like to dial. Back in Integrator's wizard, click and hold the target icon, drag it over the textbox containing the telephone number and then let go.

If the wizard finds a valid number, it will add the textbox to the configuration settings. Click 'Next' and then 'Close'.

You can add as many textboxes as you like, just start the process by clicking the 'Add' button and working your way through again. Click 'Save' to store your settings and you're ready to go.

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Now, a clickable icon is placed at the end of any textboxes you have configured and you just click on it to dial the number in the textbox.

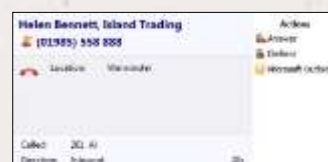


# Functionality



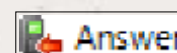
When a call comes in, Integrator's 'Preview Window' will pop up and display the phone number that is calling. If the caller is recognised as one of your contacts from Act!, their details will also be displayed and you can 'pop' their Act! contact record by clicking the 'Act!' button in the window.

You can also pop recognised callers' Act! contact records by clicking the 'Act!' button on the 'Phone Window'.



Calls can be deflected to another extension before answering them by clicking the 'Deflect' button, entering the extension number and clicking 'Deflect' again.

To answer a call on either the 'Preview' or 'Phone' window, you just need to click the 'Answer' button.



To speak to a colleague during an active call, click the 'Consult' button, enter the extension number and click 'Consult' again; the active call is automatically held. To end the call to your colleague and resume the held call, click 'Cancel'.

To transfer a call to another extension, click the 'Transfer' button, enter the extension number and click 'Transfer' again.

