

# Horizon

## Integrator CRM Autodesk Add-in Guide



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# Introduction

This page will guide you through configuration and basic use of the Horizon Integrator Autotask 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 'User Guide' for these topics.

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

Horizon Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the 'Technical Installation Guide' or consult your system administrator.



# Information you will need

- Autotask URL
- Username
- Password

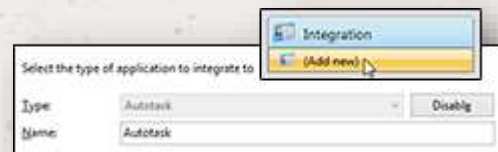
## Configuration

Right-click the Horizon Integrator 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 'Integration' area, click the 'Add new' button, select 'Autotask' from the 'Type' dropdown box and then click the 'Set' button.

On the 'Configuration' group, enter your Autotask account login information.

In the 'URL' text box, you need to enter the unique web address you go to access your Autotask account online.



Configuration

URL:

Username:

Password:

Entities:

- ☒ Accounts
- ☒ Contacts
- ☒ Resources



**IMPORTANT:** If popping of Resources (also known as 'Co-Workers') is required then enter the URL of the 'Co-Workers' page which can be found by first clicking on 'Directory' from the Autotask menu, then select 'Co-Workers'.

On the 'Co-Workers' page hover the mouse pointer over a name, then copy the web address displayed in the bottom left hand corner of the window, or if displayed, the URL address in the web browser up to 'Profile.aspx'. For example, for this installation the web address would be:

['https://ww4.autotask.net/Autotask35/grapevine/'](https://ww4.autotask.net/Autotask35/grapevine/).



Autotask needs to be made a trusted site and allow popups.

To check the web browser is configured for Autotask, please check the browser details from your Autotask login screen by clicking the link:

'Check my browser settings'

This will be highlighted in red



Please ensure that 'A pop-up blocker is enabled' is set to pass.

If the 'A pop-up blocker is enabled' option is set to 'Fail' please click the 'Learn more' link (highlighted right) which will provide instruction to enable pop ups for Autotask for your web browser.



Select which of your Autotask 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.



Note: Please be aware that Autotask has an API Call Threshold which may affect the integration. Please contact Autotask for details of the API Call Threshold.



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# Testing

To test if the configuration worked, enter a phone number from your Autotask 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 image here. 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.



The screenshot shows a web interface titled "Integration test". It contains a "Telephone:" label followed by a text input field containing the number "01632960321" and a "Search" button. Below this is a "Result:" label followed by a text area displaying the following information: "ContactName=Mr. Joe Cartwright, ContactType=Contact, Id=ContactsId1f26e-061c-821f-8044-4e7734e9289d, ShowUrl=http://www.sugarcrm.com/onuse/3532/index.php?action=DetailView&module=Contacts&recordId=1f26e-". At the bottom, there is an "Action:" label followed by a "Show contact" button.



# Dialling configuration

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

Right-click the Horizon Integrator 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.

Make sure the dialling handler for your internet browser is enabled. This converts the telephone numbers identified on web pages into hyperlinks you can click to dial the number. For more information on enabling dialling handlers, click [here](#).

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.

If you would like to be able to dial directly when you are entering new information in Autotask, for example on the new contact page, we need to carry out some further configuration. Click the 'Add' button to start the Dialing wizard.

The first question in the wizard asks you about the type of Application you want to dial from. Select the 'The application runs inside a web browser' option. Click the 'Next' button

Select the methods of dialling to use:

☐ Clipboard dialling ☐ Application dialling

☐ Focus dialling ☒ Dialing handlers...

Select the applications and web sites to use dialling from:

Type	Application/Domain	Form/Page	Textbox
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**Add** Edit Remove Import Export

Choose the criteria to use when searching for valid numbers:

Minimum length:  Maximum length:

Must start with:  **Advanced rules...**

**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

Back Next

We've already covered converting identified numbers into hyperlinks so select the 'Text boxes' option on the second screen of the wizard and click the 'Next' button.



Open your Autotask account in Internet Explorer and find the text box you want to dial out from, it needs to have a number in it already so add a temporary one if you need to. Copy or make a note of the telephone number currently displayed in the text box and leave the web page open.

Back in the wizard, paste or type the number into the 'Number to search for' box and click the 'Detect' button.



The wizard recognises that you are setting up dialling with Autotask and asks you if you would like to use the default settings for it. These are fine for most users so click 'Yes'.

If you want to dial from a text box not included in the default settings, you will need to add it manually. Follow the instructions above starting with clicking the 'Add' button again and working through as before but click 'No' if asked whether you want to setup default settings.

The wizard will search the current web page for the telephone number you entered and, once found, display the details. 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.

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.