

Horizon

Integrator ConnectWise Add-in Guide



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Introduction

ConnectWise Add-in Guide

This document will guide you through configuration and basic use of Horizon Integrator's ConnectWise 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.

ConnectWise 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.

You will need to make sure that the short date setting in your Region and Language Settings screen is set to 4 digits for the year. If this is not done, it will cause problems later.

This can be set at:

Control Panel > Date and Time > Set the Date and Time > Change Date and Time > Change Calendar Settings

Information You'll Need;

- ConnectWise server URL
- ConnectWise company name
- ConnectWise Integrator Login Username and Password. (Note: This is an Integrator Login, not for your regular full login)



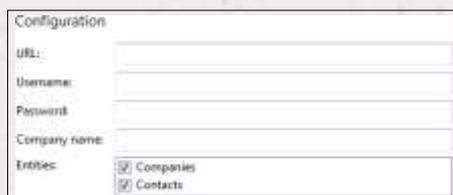
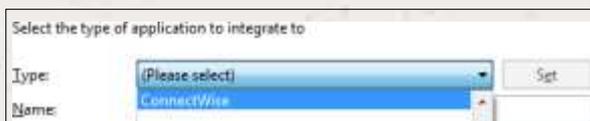
Configuration

In order to search through ConnectWise using the CTI, you will need to create a user with API access. The same user can be used for all installations at the same ConnectWise site. To do this, you will need to use the ConnectWise software on your PC (not the web portal) and select Setup, Setup Tables, and then search for integrator in the table field. From here you can add a new user or select an existing one.

To add a new user, click the new user button and type in your chosen username and password. Make sure that the access level is set to all records. Enable the Company API and the Contact API and save the user.

To use an existing user, you will need to select the user you want to log in as and make sure that the access level is set to all records. Enable the Company API and the Contact API and save the user.

Right-click the CTI client'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 ConnectWise from the Type dropdown box and then click the Set button.



On the Configuration group, enter your ConnectWise Server URL into the URL field, enter the username and password information that you created in ConnectWise as well as the company name from ConnectWise into the relevant boxes (your system administrator should know these if you don't).

In the Entities field, tick which boxes you would like the software to search.

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



Testing

To test if the configuration worked, enter a phone number from your ConnectWise 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.



The screenshot shows a web interface titled "Integration test". It contains a "Telephone:" input field with the number "0" and a "Search" button. Below this is a "Result:" section displaying the following text: "Id=Company-2, CompanyName=Your Company, ContactType=Company, Type=Partner, Market=Information Technology, Status=Active, Territory=Corporate, Website=www.YourCompany.com". At the bottom, there is an "Actions:" section with a "Show contact" button.

Dialling configuration

To dial out from within ConnectWise, 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.

Make sure the TAPI dialling (requires restart) option is ticked.

Click Save to store your settings.

Save to store your settings.

The screenshot shows a configuration window titled "Select the methods of dialling to use". It has four checked checkboxes: "Clipboard dialling", "Web page dialling", "Application dialling", and "TAPI dialling (requires restart)". Below this is a section titled "Select the applications and web sites to use dialling from" which contains an empty table with columns "Type", "Application/Domain", "Form/Page", and "Textbox". At the bottom of this section are buttons for "Add", "Edit", "Remove", "Import", and "Export". The final section is "Choose the criteria to use when searching for valid numbers" with input fields for "Minimum length:", "Maximum length:", and "Must start with:".



Then, in ConnectWise, open the Other section and click on My Account.

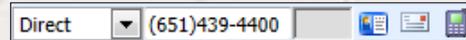
Navigate to the Preferences tab. Make sure that the TAPI tick box in the Phone Preferences section is ticked and that the UC Tapi Driver option has been selected in the dropdown box.

Click the save icon and then Close. You may need to restart the CTI client and ConnectWise before the settings take effect.

The screenshot shows the "Preferences" dialog box with several tabs: "Password", "Contact Info", "Delegation", "Skills", "Certification", and "Preferences". The "Preferences" tab is active. It is divided into three sections: "Member Preferences", "Company Preferences", and "Phone Preferences". "Company Preferences" includes radio buttons for "Company Activity Tab Format" (selected: "Show list in summary format"), "Invoice Time Tab Format" (selected: "Show list in summary format"), and "Invoicing Screen Default Tab" (selected: "Show Invoice Wizard Tab"). "Phone Preferences" includes radio buttons for "TAPI" (selected) and "Skype", and a dropdown menu for "TAPI Source" set to "UC Tapi Driver". "Other Preferences" includes a dropdown menu for "Time Zone" set to "US Pacific".

Functionality

To call one of your ConnectWise contacts, simply click the icon next to the number you want to dial.

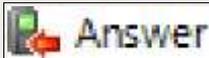


When a call comes in, the CTI client's Preview Window will pop up and display the phone number that is calling. If the caller is recognised as one of your contacts from ConnectWise, their details will also be displayed and you can 'pop' their contact record by clicking the ConnectWise button in the window.

You can also pop recognised callers' ConnectWise contact records by clicking the ConnectWise 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 or to complete the transfer, click Complete.



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