

Horizon

Integrator CRM Dezrez Add-in Guide



Contents

Contents	2
Introduction	3
Information You'll Need	4
Testing	5
Dialing configuration	6



Introduction

This page will guide you through configuration and basic use of the Horizon Integrator Dezrez Addin. 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.

Dezrez 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.

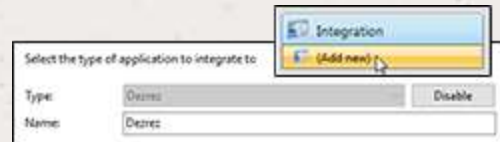


Information You'll Need

Dezrez server, username and password (if password protected)

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 'Dezrez' from the 'Type' dropdown box and then click the 'Set' button.



In the 'Configuration' area that appears below, enter the details of the database to which the client software should connect.

A screenshot of the 'Configuration' screen. The screen has a title bar 'Configuration'. Below the title bar, there are four text boxes: 'Server:', 'Username:', 'Password:', and 'Entities:'. The 'Entities:' box contains a list of checkboxes: 'Agents', 'Branches', 'Companies', and 'Customers'. Below the 'Password:' box, there is a note: 'Leave username and password blank to use Windows authentication'.

In the 'Server' text box, you need to enter the name of the server you access your Dezrez account on.

Enter your Dezrez database login information into the 'Username' and 'Password' textboxes.

In the 'Entities' group, select which of your Dezrez contact categories you want Horizon Integrator to use for searches and popping by checking the corresponding boxes.

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

IMPORTANT NOTE: For this integration to be successful, it is required that the CTI functionality has been enabled by Dezrez and that the Gold Package has been purchased from Dezrez. For dialing to be enabled, Dezrez needs to be involved and apply the correct view.

Testing

To test if the configuration worked, enter a phone number from your Dezrez 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 screenshot shows a web form titled "Integration test". It has a "Telephone:" label followed by a text input field containing "0203050025" and a "Search" button. Below this, a "Result:" label is followed by a text area displaying the following JSON-like data: `{Id:OCT000152, ContactType:Contact, CompanyName:Acme, Inc., ContactName:Joe Cartwright, Telephone>Main:0203050025, Address:Business, Pictures:OCT000152}`. At the bottom, an "Actions:" label is followed by a "Show contact" button.

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.

Dialing configuration

To dial out from within Dezrez, dialing 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 'Dialing' option.

Make sure the 'Web page dialing' box is ticked. This converts the telephone numbers identified on web pages into hyperlinks you can click to dial the number.

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 Dezrez, for example on the new contact page, we need to carry out some further configuration. Click the 'Add' button to start the Dialing wizard.

Select the methods of dialing to use:

☐ Clipboard dialing ☐ Application dialing

☐ Focus dialing ☒ Dialing handlers...

Select the applications and web sites to use dialing from:

Type	Application/Domain	Form/Page	Textbox
------	--------------------	-----------	---------

Choose the criteria to use when searching for valid numbers:

Minimum length: Maximum length:

Must start with:

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.

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.

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

Open your Dezrez 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.



Dialling: Internet application

You can configure dialling from a web browser for two types of presentation: Read only telephone numbers such as might appear in a list or directory and text boxes such as might appear in a CRM package.

Select the type that you would like to configure. Please note, using these methods, only Internet Explorer is supported at present:

☐ Read only telephone numbers (hyperlinks)

☒ Text boxes

Back Next

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.



Dialling: Internet application: Text box

A detection process is used to learn the application. This should also confirm that it is possible to dial from the application.


To proceed, then:

- 1) Load the application and get it to a stage where you can see the text box you would like to dial from
- 2) Enter the telephone number that presently appears in the application's text box into the space below
- 3) Press 'Detect'

Number to search for:

Back Detect

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. Refresh the page in Dezrez to see it in action.



Configure Dialling

Dialling: Internet application: Text box

Please wait while detection proceeds.

Searching for: 1223415574

Completed

Result:

Domain:	crm-pc
Page:	/index.php
Text box:	exec[bel_work]

Back Next