

Horizon

Integrator CRM InfusionSoft Add-in Guide



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Introduction

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

InfusionSoft 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

InfusionSoft URL username and password.

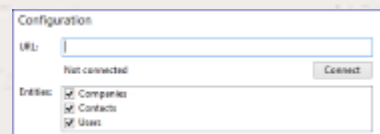
Configuration

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

On the Configuration group, enter InfusionSoft URL to login to InfusionSoft.



Then click 'Connect', this creates the API Key to allow integration with InfusionSoft. On the window that appears enter the user name and password for InfusionSoft. Then click the 'Login' button. On the next window that appears click 'Allow'.

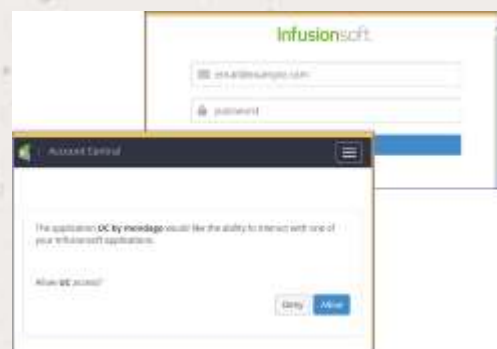


Enter your InfusionSoft CRM username into the 'Username' text boxes.

The 'Configuration' group should now display 'Connected'. This is required to allow integration with InfusionSoft.

In the Entities section, 'Companies', 'Contacts' and 'Users' are the categories of records in InfusionSoft that can be looked up in searches and popped. Select one or more required categories by checking the corresponding boxes to include them.

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 InfusionSoft account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

A screenshot of the 'Integration test' form. It has a 'Telephone' input field with a 'Search' button to its right. Below this is a 'Result' section with a large empty text area. At the bottom, there is an 'Actions' section with 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.

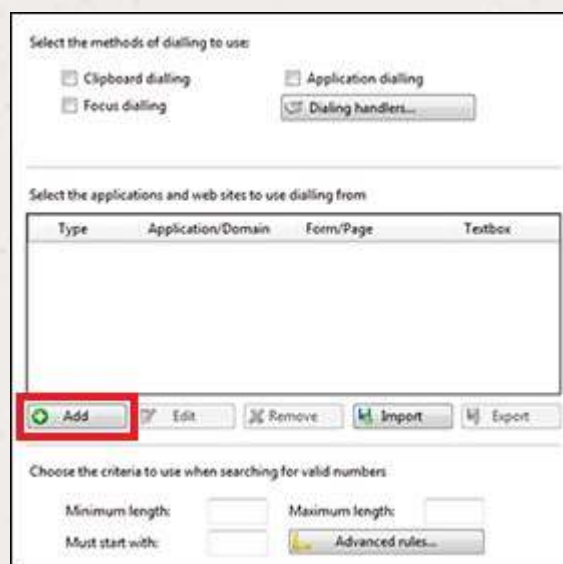
Dialing configuration

To dial out from within InfusionSoft, 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.

Please see the following link to make sure that the web dialing feature is enabled before progressing:

<http://integrator.unlimitedhorizon.co.uk/help/help.php?item=1119&lang=uk>

A screenshot of the 'Dialing configuration' screen. It has two main sections. The first section, 'Select the methods of dialing to use:', contains checkboxes for 'Clipboard dialing', 'Focus dialing', 'Application dialing', and a 'Dialing handlers...' button. The second section, 'Select the applications and web sites to use dialing from:', contains a table with columns 'Type', 'Application/Domain', 'Form/Page', and 'Textbox'. Below the table are buttons for '+ Add', 'Edit', 'Remove', 'Import', and 'Export'. The '+ Add' button is highlighted with a red box. Below the table is a section 'Choose the criteria to use when searching for valid numbers' with input fields for 'Minimum length', 'Maximum length', and 'Must start with', and an 'Advanced rules...' button.

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 InfusionSoft, 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.

A screenshot of the 'Set up application dialing' wizard. It has a title bar and a close button. The main text says 'Select the type of application that you want to dial from:'. Below this are six radio button options: 'I have written the application myself or someone can customize it as required', 'The application runs inside a web browser' (which is selected), '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', and 'None of the above choices work'. At the bottom right are 'Back' and 'Next' buttons.

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 InfusionSoft 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 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.