Horizon

Integrator LotusNotes Add-in Guide

Contents

Introduction

Lotus Notes 7 – 8.5 Add-in Guide

This document will guide you through configuration and basic use of Horizon Integrator's Lotus Notes 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-in. See the full user guide for these topics.

Lotus Notes 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;

☐   IP Address of the Server.

☐   Windows account username and password if required.

☐   Lotus Notes database name and filepath*, username and password (if password protected)
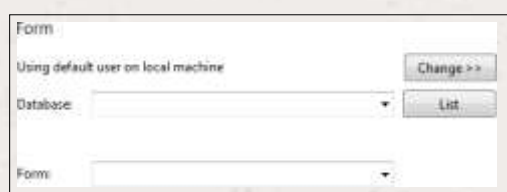

📣   **Instructions on where to find this information are given below if required**

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

On Integrator's 'Configuration' group, you can choose to use the default user login details for Lotus Notes or you can use any other Lotus Notes user details that you have by clicking the 'Change>>' button.

New textboxes will be displayed for you to enter the username and password into and you will also need to enter the IP or location of the server. If you don't know this, consult your system administrator.

If you have a default configuration of Lotus Notes, you should select 'names.nsf' in the 'Database' dropdown box. If you cannot see anything in there to be selected, click the 'List' button and have another go.

If your Lotus Notes has been customised and uses a database other than 'names.nsf' to store contact details, you should select your custom database from the 'Database' dropdown box instead.

Again, if you have a default configuration of Lotus Notes, select 'My Contacts' in the 'Form' dropdown box. If you usually use a customised view, select it instead of 'My Contacts'. Please note that the popping of incoming callers will only occur if you are using the view selected here in Lotus Notes and provided that the view is setup in the same way as the 'My Contacts' view i.e. have the same fields in the same order.

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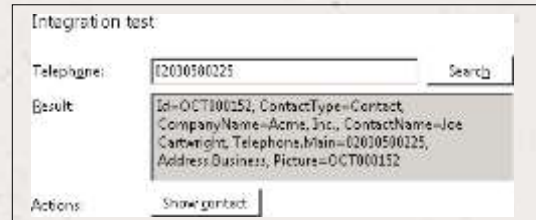
Testing

To test if the configuration worked, enter a phone number from your Lotus Notes account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.
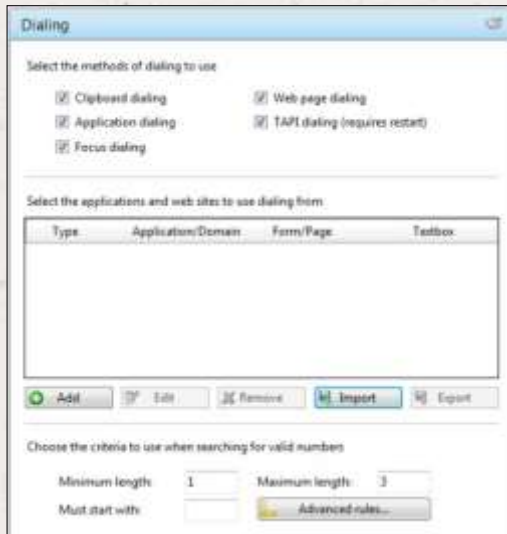
The test area results should look similar to the results showing in the figure above. If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Dialling configuration

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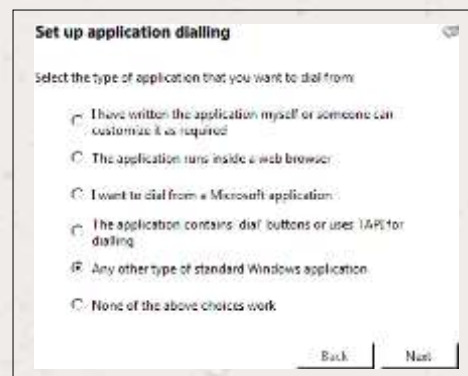
Open Lotus Notes and navigate to a screen that has a telephone number you'd like to dial. Back in Integrator's wizard, click and hold the target icon, drag it over the textbox containing the telephone number and then let go.

The wizard recognises that you are setting up dialling with Lotus Notes CRM 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.

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. Once you have added a textbox, it works across all of your contacts i.e. you don't need to add the same textbox for each contact.
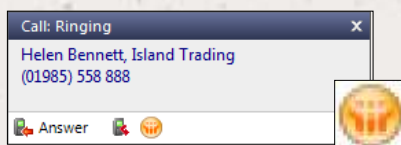
Click 'Save' to store your settings and you're ready to go.
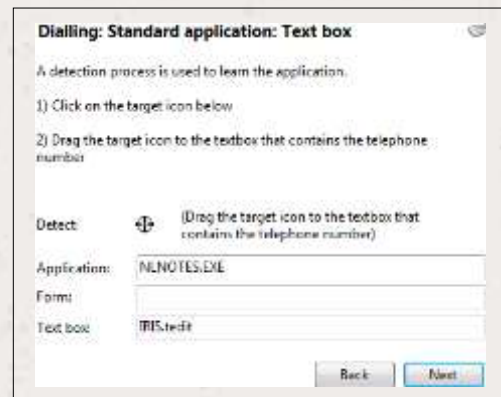
Now, when the cursor hovers over any of the textboxes you have configured icons will appear at the end. Click on them to dial the number in the textbox or hang up.
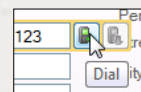
Functionality

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 Lotus Notes, their details will also be displayed and you can 'pop' their Lotus Notes contact record by clicking the 'Lotus Notes' button in the window.

You can also pop recognised callers' Lotus Notes contact records by clicking the 'Lotus Notes' button on the 'Phone Window'.
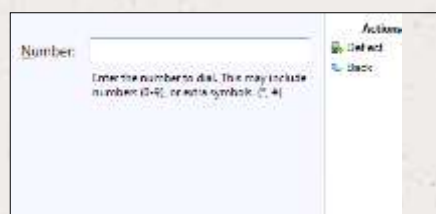
Calls can be deflected to another extension before answering them by clicking the 'Deflect' button, entering the extension number and clicking 'Deflect' again.

To answer a call on either the 'Preview' or 'Phone' window, you just need to click the 'Answer' button.
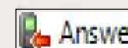
To speak to a colleague during an active call, click the 'Consult' button, enter the extension number and click 'Consult' again; the active call is automatically held. To end the call to your colleague and resume the held call, click 'Cancel'.

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