

# Horizon

## Integrator Microsoft Access Add-in Guide



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# Introduction

## Microsoft Access 2000 – 2013 Add-in Guide

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

Access 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;

- ☐ Windows account username and password
- ☐ MS Access database name and filepath, username and password (if password protected)
- ☐ Name of the MS Access database table/query containing contact data
- ☐ List of fields in the MS Access database table/query and what they relate to



# 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 'Microsoft Access' from the 'Type' dropdown box and then click the 'Set' button.



The Access Add-in configuration is split into three groups: Database, Field mapping, and Show Contact.

## Database



On Integrator's 'Database' group, first use the 'Browse...' button to select the Access database you wish to integrate with. You can select .mdb and .accdb files.

If you want to use a Custom workgroup file just tick the box and select the file from the dropdown list.

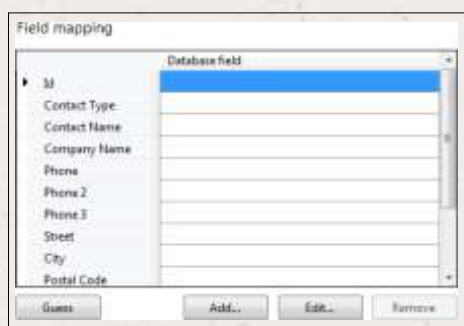
If the database is password protected, enter the username and password to use to open the database.

From the 'Table/Query' list, select which table or query contains the contact data you wish to use. You can use the 'Guess' button to have the Add-in try to guess the correct table or query (based on the name of the table or query).

If you need to you can enter your own custom SQL statement in the 'Advanced' box. Usually though, you would create a query in Access and just select the query from the dropdown list.

If you want to check that you have selected the correct table or query, you can click the 'Sample' button to see the first few records from the table or query that you selected.

## Field mapping



On the 'Field' mapping group, you will tell the Add-in what the fields in your Access database represent. For example, the field in your Access database named ACCOUNT\_NUMBER might represent the unique Id of the contact.

To map a field, double-click it in the list (or highlight the field and click the 'Edit...' button). From the list that pops up, select which field in the database corresponds to the field you selected, and click 'OK'.

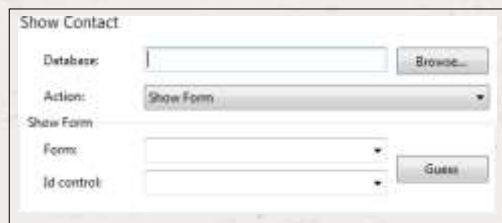
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The only fields you need to map are 'Id', 'Contact Name' and/or 'Company Name', and as many 'Phone' fields as you have in your database. You can also optionally map the 'City' and 'Email' fields so that they appear in search results.

If your contacts have more than 3 phone numbers, you can add extra phone fields using the 'Add...' button and selecting a 'Type of Phone' number.

The 'Guess' button will attempt to guess which fields in your database map to which fields in the Add-in (based on the name of the field).

## Show contact



So far, you have configured the ability to search for contacts from the Address Book and to see the name of people calling you in the Preview window.

In order for screen popping to work, so that you can actually go to the contact in your database from the Preview window or the Address Book, you need to

configure an action to tell the Add-in what to do when you want to show the contact.

You can either show a form contained in your database, or run a VBA procedure that you have stored in a module in your database.

If you want to show a form, the form needs to contain a control that holds the unique id of the contact (the field that you have mapped to the Id field in the Add-in). This control needs to be visible and enabled. Select 'Show Form' from the 'Action' box, and choose the name of the form in the 'Name' text box and the name of the control that contains the unique id in 'Id control'. If you press the 'Guess' button, the Add-in will load the database in Access and attempt to guess the correct form and control.

If you want to run a procedure, select 'Run Procedure' from the 'Action' box, and choose the name of the procedure to run in the 'Procedure' text box. You can send arguments to the procedure by filling in the 'Arguments' text box (usually you will want to send the id, by entering %Id%).

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

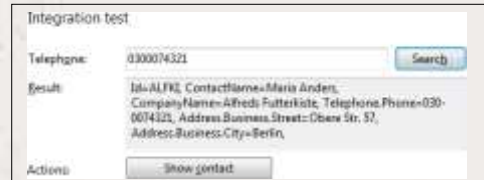


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# Testing

To test if the configuration worked, you can either enter a phone number in the 'Telephone' box of the 'Integration test' area in the Microsoft Access Add-in configuration page, or use the Address Book window to search for a name or number.

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 dialog box titled "Integration test". It has a "Telephone" input field with the value "0300074321" and a "Search" button. Below this, the "Result" section displays the following information: "Id=ALFKI, ContactName=Alfred Andersen, CompanyName=Alfreds Futterkiste, Telephone.Phone=030-0074321, Address.BusinessStreet=Obere Str. 57, Address.Business-City=Berlin". At the bottom, there is an "Actions" section with a "Show contact" button.

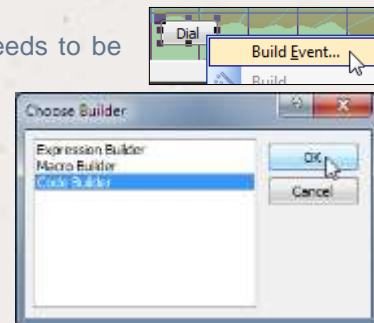
# Dialling configuration

To dial out from a form in Access, you need to add a button that runs Integrator's 'PhoneHelper.exe' app to the form(s) you want to dial out from. There are different ways to achieve this with differing levels of complexity but the method that follows is quite straightforward and can be easily expanded upon by an Access developer if required.



Open the appropriate form in 'Design' view and click the 'Command Button' button in the 'Toolbox'. The mouse cursor will change to a button icon with a '+' sign and you should click on the form approximately where you want the button to be. If the 'Command Button Wizard' pops up, just press the 'Cancel' button.

Make whatever cosmetic modifications to the button that needs to be made e.g. size, label, position, text colour etc. Remember to give each new button a memorable and relevant unique name like 'DialButton1' or 'btnDialler01' to make debugging easier but be aware that the button's name is different to its caption; the name is how the button will be referred to in the code you will write to tell the button what to do, the caption is simply the text which is displayed on the button.



Make a note of the name of the control that displays the contact's telephone number (phone number control) as you'll need it when you add the code. You will also need to know the filepath to Integrator.

Right-click on the new button and click the 'Build Event...' option, then select the 'Code Builder' option in the 'Choose Builder' window and click 'OK'.

Access will create a new subroutine framework for you to add your own code to that would read something like this for a button called 'DialButton':

```
Private Sub DialButton_Click()  
  
End Sub
```

Add the code highlighted in bold below replacing the square brackets [] and text within them with the correct information where indicated:

---

```
Private Sub [insert button name here]_Click()
```

```
On Error GoTo Err_[insert button name here]_Click ' Button runs PhoneHelper and dials specified number
```

```
Dim NumberToDial As String
```

```
NumberToDial = [insert phone number control name here].Value
```

```
Call Shell("[insert filepath here]\PhoneHelper.exe" & " dial(" & NumberToDial & ")", vbNormalFocus)
```

```
Exit_[insert button name here]_Click:
```

```
Exit Sub
```

```
Err_[insert button name here]_Click:
```

Open the 'File' menu, click the 'Save' option and then click the 'Close and Return to Microsoft Office Access' option. Then, in the 'View' menu, click the 'Form view' option to see the completed button.

When you click on the button, Access will execute your code and run PhoneHelper using the number specified.

