Horizon

Integrator Microsoft Dynamics Add-in Guide

Contents

Introduction

Microsoft Dynamics NAV Add-in Guide

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

Microsoft Dynamics NAV 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

☐   NAV server*, database name*, company, username and password (if password protected)
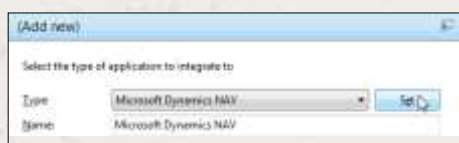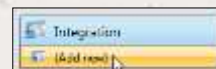

📢   **Instructions on where to find this information are given below if required**

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 'Microsoft Dynamics NAV' from the 'Type' dropdown box and then click the 'Set' button.

On the 'Configuration' group, select 'Microsoft SQL Server' from the 'Database type' dropdown box.
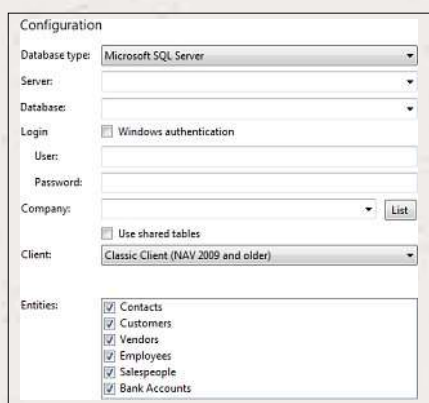
In the 'Server' text box, you need to enter the name of the server you access your NAV account on. You can find this by opening and logging in to NAV and clicking the File Menu > Database > Information option.

The 'Database Information' window shows you the name of the NAV server you use in the 'Server Name' textbox so make a note of it.

While you are here, also make a note of the text in the 'Database Name' textbox as you'll be needing that shortly too.

Leave NAV open but go back to Integrator and enter the server name into the 'Server' textbox and enter the database name you also noted down into the 'Database' textbox.

Tick the 'Windows authentication' box in the 'Login' section unless you need to use specific details to access the database. If you do need to use specific details, enter them into the 'Username' and 'Password' textboxes.

Click the 'List' button next to the 'Company' dropdown box to refresh the list in the 'Company' dropdown box then select the appropriate company from the list.

In 'Client' please select the type of client according to the version you are using, if your client is "Web Client (NAV 2013 or newer)" please add the URL within the next text box.

Note: that only popping the Web Client works. Popping the Role Tailored Client (and Classic Client) does not work on NAV 2013.

In the 'Entities' group, select which of your NAV contact categories you want Integrator to use for searches and popping by ticking the corresponding boxes in the 'Entities' section.

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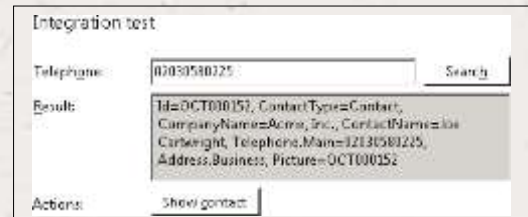
Testing

To test if the configuration worked, enter a phone number from your NAV account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

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.
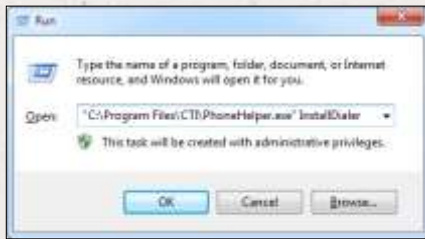
Dialling configuration

NAV lets the computer's operating system deal with the technical bit of the dialing process. To tell the operating system to use Integrator to do the dialing, you need to run Integrator's 'PhoneHelper.exe' program (located in the main program file directory) with the parameter 'InstallDialer'.

Sounds complicated doesn't it. It's not too bad really but you need to know the 'main program file directory' a.k.a. the filepath to where Integrator has been installed - your system administrator should know this if you don't, it will be something like 'C:\Program Files\HorizonIntegrator'. Press the Windows key and R together to open the 'Run' dialog box. Enter the following text into the 'Open' textbox substituting {main program file directory} with your filepath and then click 'OK': "{main program file directory}\PhoneHelper.exe" InstallDialer
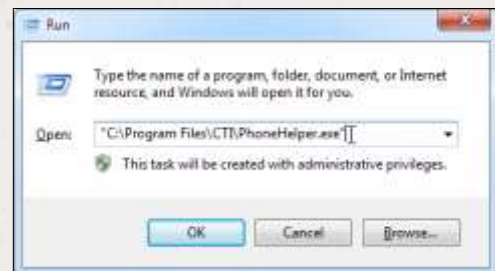
Alternatively, you can also use the 'Browse…' button to navigate to your main program file directory and select the 'PhoneHelper.exe' program. Once you have selected it, click just to the right of the second set of quotation marks so you can type text manually and add the ' InstallDialer' text at the end - don't miss out the space before the first letter.

Whichever way you tell it, the operating system will now use Integrator as the default dialer application when NAV asks it to make a call.

Functionality

To make a call from within NAV, click on the 'Communication' tab when viewing a contact's record and then click on the button at the end of the phone number box.

Fill in the appropriate details on the 'Make Phone Call' screen and then click the 'Next >' button. This is the point where the call is placed.

The next screen records some call outcome details. You can click 'Finish' to close the screen or click 'Next' to record some further optional details.

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

You can also pop recognised callers' NAV contact records by clicking the 'MS NAV' 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.