

Horizon

Integrator Microsoft Outlook Add-in Guide



Contents

Contents	2
Introduction	3
<i>Microsoft Outlook 2000 – 2013 32bit & Microsoft Outlook 2010 – 2013 64bit Add-in Guide.....</i>	<i>3</i>
Configuration	4
Testing.....	5
Dialling configuration	6
Functionality	7



Introduction

Microsoft Outlook 2000 – 2013 32bit & Microsoft Outlook 2010 – 2013 64bit Add-in Guide

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

Microsoft Outlook 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.

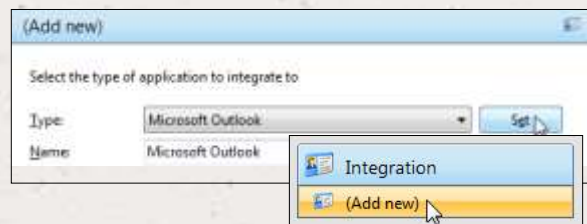
Information you'll need;

- ☐ Windows account username and password
- ☐ Outlook profile information, username and password (if password protected)



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



On Integrator's 'Configuration' group, you need to select the appropriate details from your Outlook profile. Most Outlook users will only have one profile so the '(Default)' option in the 'Outlook profile' dropdown box will be fine but users with multiple profiles will need to select the most appropriate one.



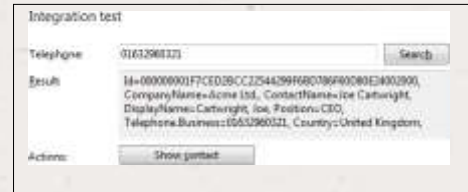
If you have also created your own Personal Folders file (.pst) in Outlook and store your contact data within those folders, you'll need to select your custom setup in the 'Information store' dropdown box. If you have not selected a profile other than '(Default)' in the 'Outlook Profile' dropdown box, the 'Information store' box will not show your custom folders. Those users who do not use custom personal folders e.g. contact data is stored in 'Contacts', will be able to use the '(Default)' option in this dropdown box.

Users who have selected the '(Default)' options so far can usually also select the '(Default)' options for the 'Contacts folder' and 'Appointments' dropdown boxes. If you use a custom setup and have selected the appropriate profile and information store in the previous steps, the dropdown boxes will list the folders within your custom setup. In the 'Contacts folder' dropdown box, select the folder where your contact data is stored and select the location of your appointment data in the 'Appointments' dropdown box. 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 Outlook account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

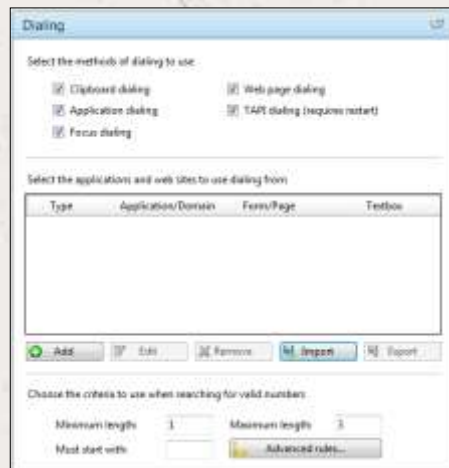
The test area results should look similar to the results showing in the figure to the right. If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.



The screenshot shows a web interface titled "Integration test". It has a "Telephone" input field containing "01613968121" and a "Search" button. Below this, the "Result" section displays contact details for "Acme Ltd.":
Id=000000001F7CEDBCC2254289F680386F40080E4002900
CompanyName=Acme Ltd., ContactName=ice Cartwright,
DisplayNames=Cartwright, ice, Positions=CEO,
Telephone.Business=01613968121, Country=United Kingdom
At the bottom, there is an "Actions" section with a "Show contact" button.

Dialling configuration

To dial out from within Outlook, dialling needs to be configured correctly.



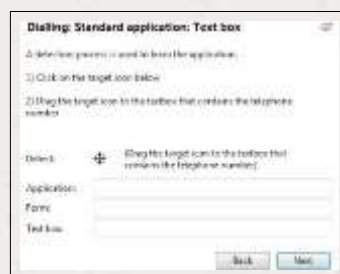
Right-click Integrator's tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'Configuration' screen. In the 'General' group, click on the 'Dialling' option.

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.

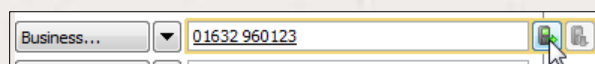


Open Outlook and navigate to a screen that has a telephone number in a textbox you'd like to dial from. Back in Integrator's wizard, click and hold the target icon, drag it over the textbox containing the telephone number and then let go.

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

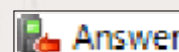


You can also pop recognised callers' contact records by clicking the 'Outlook' button on the 'Phone Window'.



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.

