

Horizon

Integrator CRM PCHomes Add-in Guide



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Introduction

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

PCHomes 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.

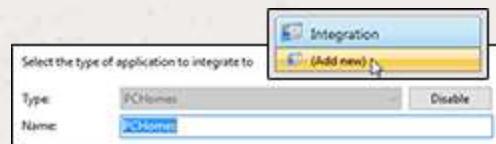


Information You'll Need

PCHomes ODBC data source and login credentials

Configuration

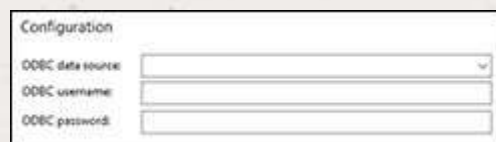
Right-click the Horizon Integrator tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'configuration' screen. In the 'Integration' area, click the 'Add new' button, select 'PCHomes' from the 'Type' dropdown box and then click the 'Set' button.



On the 'Configuration' group, you need to enter the details of your PCHomes database.

In the 'ODBC data source' text box, you need to enter the data source you access your PCHomes account on.

Enter your PCHomes database login information into the 'Username' and 'Password' textboxes.



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

IMPORTANT NOTE: PCHomes software manufacturer will need to set up the ODBC connection. This integration requires version 6.5 or newer.

Testing

To test if the configuration worked, enter a phone number from your PCHomes 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.

Dialing configuration

On each individual PC within PCHomes, select menu option System Setup -> 10 SMS -> 3:Phone to enable the 'Show Phone Dialling Button'.

Select the 'Shell Execute' option in the 'Dialling Method' dropdown box and select the 'dial:_PHONENUMBER_' option in the 'Dialling Template' dropdown box.

