

Horizon

Integrator CRM RPM Add-in Guide



Contents

Contents.....	2
Introduction	3
Information You'll Need.....	4
Dialing configuration	5



Introduction

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

RPM 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

RPM server, username and password (if password protected)

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



In the 'Configuration' area that appears below, enter the details of the database to which the client software should connect.

A screenshot of a 'Configuration' window. It has a title bar 'Configuration'. Inside, there are two text input fields. The first is labeled 'SQL server:' and the second is labeled 'SQL database:'. Both fields are currently empty.

In the 'Server' text box, you need to enter the name of the server you access your RPM account on.

In the 'SQL server' text box, enter the name or IP address of the server your RPM database is stored on. Then enter the name of your RPM database in the 'SQL database' text 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 RPM account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

A screenshot of an 'Integration test' window. It has a title bar 'Integration test'. Inside, there is a 'Telephone:' label followed by a text input field containing '9203658025' and a 'Search' button. Below this is a 'Result:' label followed by a text area displaying the following JSON-like data: 'Id=OCT000152, ContactType=Contact, CompanyName=Acme, Inc., ContactName=Joe Cartwright, Telephone Main=9203658025, Address.Business, Pictures=OCT000152'. At the bottom, there is an 'Actions:' label followed by a 'Show contact' button.

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.



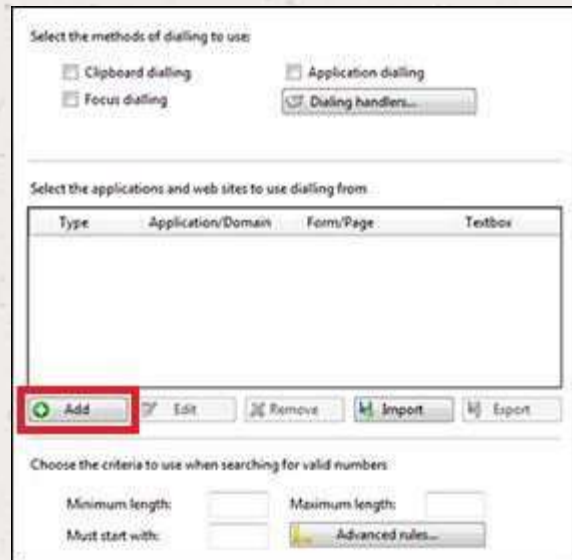
Dialing configuration

To dial out from within RPM, dialing needs to be configured correctly.

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 'General' group, click on the 'Dialing' 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 the Horizon Integrator dialing wizard.

The screenshot shows the 'Dialing' configuration window. At the top, there's a section 'Select the methods of dialing to use:' with checkboxes for 'Clipboard dialing', 'Application dialing', and 'Focus dialing'. A 'Dialing handlers...' button is also present. Below this is a table titled 'Select the applications and web sites to use dialing from:'. The table has four columns: 'Type', 'Application/Domain', 'Form/Page', and 'Textbox'. Below the table are buttons for 'Add', 'Edit', 'Remove', 'Import', and 'Export'. The 'Add' button is highlighted with a red box. At the bottom, there's a section 'Choose the criteria to use when searching for valid numbers' with input fields for 'Minimum length:', 'Maximum length:', and 'Must start with:', along with an 'Advanced rules...' button.

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, then press Next.

The screenshot shows the 'Set up application dialing' wizard. It asks to 'Select the type of application that you want to dial from:'. There are six radio button options: 'I have written the application myself or someone can customize it as required', 'The application runs inside a web browser', 'I want to dial from a Microsoft application', 'The application contains 'dial' buttons or uses TAPI for dialing', 'Any other type of standard Windows application' (which is selected and highlighted with a red box), and 'None of the above choices work'. At the bottom, there are 'Back' and 'Next' buttons.

Open RPM and navigate to a screen that already has a telephone number in a textbox you'd like to be able to dial. Back in the Horizon Integrator wizard, click and hold the target icon, drag it over the textbox containing the telephone number and then let go. This can be made easier if you have the wizard and RPM side-by-side on your screen.

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.

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.

Note: RPM application dialling works only from the details page but not the listing grid.

Dialling: Standard application: Text box

A detection process is used to learn the application.

1) Click on the target icon below

2) Drag the target icon to the textbox that contains the telephone number

Detect:



(Drag the target icon to the textbox that contains the telephone number)

Application:

Form:

Text box:

Back

Next