

Horizon

Integrator Sage 50 Complete Accounting Add-in Guide



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Introduction

Sage 50 Complete Accounting (US Edition) Add-in Guide

This document will guide you through configuration and basic use of Horizon Integrator's Sage 50 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.

Sage 50 and the database used to store your contact data should already be installed and working normally before proceeding with this integration; see the Sage 50 Complete Accounting Setup section for more details on prerequisites.

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
- ☐ Sage 50 data source, username and password



Sage 50 Complete Accounting Setup

There are a few settings in or relating to Sage 50 that needs to be configured in a specific way to enable CTI functionality and we'll run through them now.

ODBC DSN Setup

An appropriate ODBC DSN that specifies which company data to use must have been setup; to do so if you don't already have one, follow these steps:

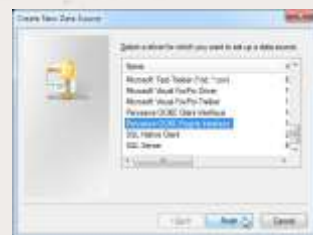
Open the Run window from the Windows Start Menu, type odbcad32 in the Open text box and click OK. Note for Windows 7 users: You need to navigate to the Windows\SysWoW64 folder on your Windows system drive (e.g. C:\) and double-click the odbcad32.exe file.



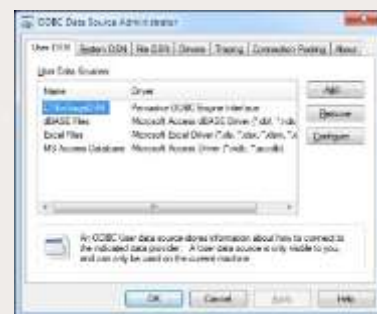
When the ODBC Data Source Administrator window appears, click the Add button on the User DSN tab.

For a standalone installation, complete steps 3 through to 5; skip to step 6 for network installations:

In the Create New Data Source window, select Pervasive ODBC Engine Interface from the list and click Finish.



When the Pervasive ODBC Engine DSN Setup window appears, enter a Data Source Name of your choice into the text box and select the appropriate option from the Database Name dropdown box; the database name appears as the company name from Sage 50. Click OK to store the details.

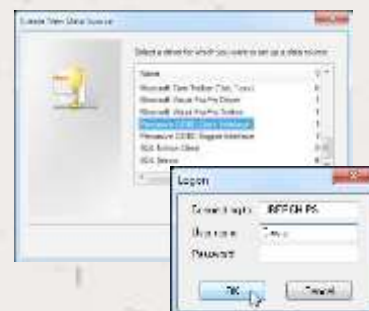


The Data Source Name you just added should now appear in the User Data Sources list on the ODBC Data Source Administrator window. Click OK, skip steps 6 to 11 and check the next section.

For a network installation, complete steps 6 through to 11:

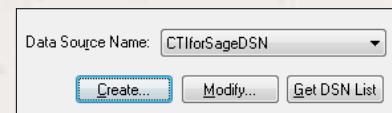
In the Create New Data Source window, select Pervasive ODBC Client Interface from the list and click Finish.

When the Pervasive ODBC Client DSN Setup window appears, enter a Data Source Name of your choice into the text box and the IP address or name of the server where the Sage 50 data is stored into the Address text box. Click the Create button to continue.



In the Logon window, enter the User Name and Password of the user that has access to the company data from Crystal Reports. If all users are allowed access, enter Crystal as the user name and leave the password blank. If access is restricted to one user only, enter their ID and password. Note: only the first eight characters of the user's password can be used when accessing Sage 50 data this way. Click OK to continue.

On the Create Engine DSN window, enter a Data Source Name and then select the Database Name from the dropdown box; the database name appears as the company name from Sage 50. Click OK to save the details.



The Data Source Name from the previous window will appear as the selected option in the Data Source Name dropdown box on the Pervasive ODBC Client DSN Setup window; click OK to continue.

The Data Source Name you just added should now appear in the User Data Sources list on the ODBC Data Source Administrator window. Click OK.



Sage 50 External Access Setup

Sage 50 needs to be configured to allow access to its data by the CTI client; follow these steps to do so:

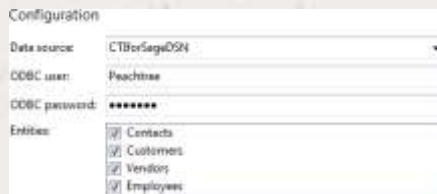
In Sage 50, open your company and then click on the Maintain menu, select Users and click the Set up security option.

On the User Security window, select the Crystal Reports/Data Access tab. In the Access from outside Sage 50 section, select the with the following login information option. If the Password is listed as blank, click the Change button to enter a new password and then enter it again for confirmation purposes.



Configuration

Right-click the CTI client'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 Sage 50 Complete Accounting from the Type dropdown box.



Configuration

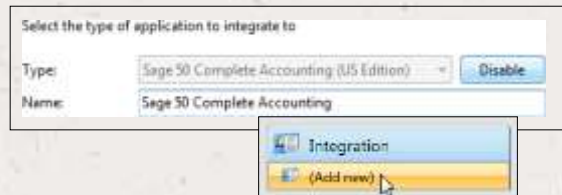
Data source: CTBSageDSN

ODBC user: Peachtree

ODBC password: *****

Entities:

- ☒ Contacts
- ☒ Customers
- ☒ Vendors
- ☒ Employees



Select the type of application to integrate to

Type: Sage 50 Complete Accounting (US Edition) [Disable]

Name: Sage 50 Complete Accounting

Integration

(Add new)

On the Configuration group, select your Sage 50 data source from the Data source dropdown box. If there are no options in this list, you need to set up a DSN (see ODBC DSN Setup).

Enter the ODBC username and password to use when accessing the Sage 50 database externally i.e. not the

information used to access the Sage 50 software itself; your system administrator should know this if you don't.

In the Entities section, select the Sage 50 account contact types you want to be used by ticking the corresponding boxes.

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

The first time you pop a Sage 50 contact you will be asked to confirm that it is okay to do so by clicking Yes in the message window that appears; tick Remember this setting to prevent the message appearing every time you pop a contact.



Peachtree Accounting

Do you want to allow Peachtree Software to run with your Peachtree Software?

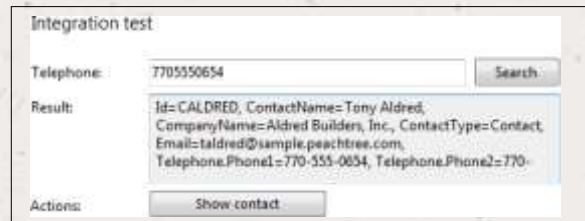
Yes No Help

☒ Remember this setting



Testing

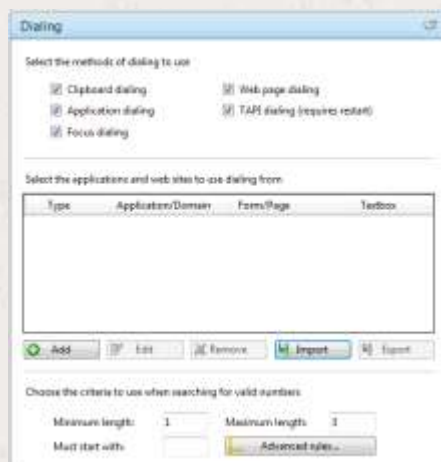
To test if the configuration worked, enter a phone number from your Sage 50 company account into the Telephone box in the Integration test area and click the Search button. The results will be displayed after a few seconds.



The screenshot shows a web interface titled "Integration test". It contains a "Telephone:" label followed by a text input field containing "7705550654" and a "Search" button. Below this is a "Result:" label followed by a text area displaying the following information: "Id=CALDRED, ContactName=Tony Aldred, CompanyName=Aldred Builders, Inc., ContactType=Contact, Email=taldred@sample.peachtree.com, Telephone.Phone1=770-555-0654, Telephone.Phone2=770-". 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.

Dialling configuration



To dial out from within Sage 50, dialing needs to be configured correctly.

Right-click the CTI client'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 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 CTI client's Dialing 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 Sage 50 and navigate to a screen that has a unique telephone number already in it. Back in the CTI client'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 recognize that you are using Sage 50 and offer to setup the default values for it so click Yes or No as appropriate. Clicking Yes adds buttons next to all of the standard telephone number textboxes in Sage 50. If you click No, the wizard will just add the textbox you selected 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. The wizard only offers to setup the default values once per session so just exit and reload the client to try again.

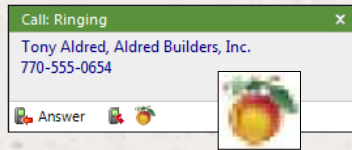
Click Save to store your settings and you're ready to go.

Now, a clickable icon is placed at the end of any textboxes you have configured and you just click on it to dial the number in the textbox.

Customer type:	LAND	
Telephone 1:	770-555-0654	
Telephone 2:	770-555-0655	



Functionality



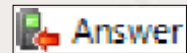
When a call comes in, the CTI client's Preview Window will pop up and display the phone number that is calling. If the caller is recognized as one of your contacts from Sage 50, their details will also be displayed and you can 'pop' their Sage 50 contact record by clicking the Sage 50 button in the window.

You can also pop recognised callers' Sage 50 contact records by clicking the 'Sage 50' 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' gain.

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.

