START communications

Horizon

Integrator Sage Add-in Guide

Contents

Introduction

Sage CRM 7.0 – 7.1 Add-in Guide

This document will guide you through configuration and basic use of Horizon Integrator's Sage CRM 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 guidefor these topics.

Sage CRM 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.

Please note: when you want to integrate with Sage CRM 7.2 the phone link and email link tables need to be exposed in web services, so you need to make the following change:

1. Custom_Tables.bord_WebServiceTable is set to null by default for PhoneLink and EmailLink and they need to be set to Y

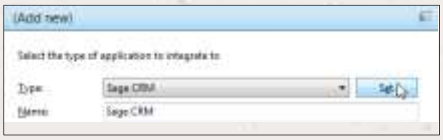
If you don't do this we are unable to integrate into the Sage CRM.

Information You'll Need;

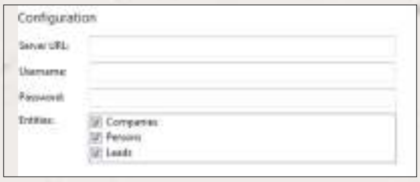
- Windows account username and password
- Sage CRM server URL*, username and password (if password protected)

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



On Integrator's 'Configuration' group, enter your Sage CRM account login information.

You can find your Server URL by logging in to Sage CRM and clicking the 'Administration' link near the top-left of the screen.

When the new page loads, you should see the 'My Account' icon directly underneath the 'Administration' link you just clicked; click 'My Account'.

Another new page is loaded and you need to click the button called 'Web Services Connection', it's on the bar near the top of the screen. The Server URL (which will start with 'https://') will be displayed on the screen, make a note of it or copy it and then enter or paste it into the 'Server URL' textbox on the 'Configuration' group.

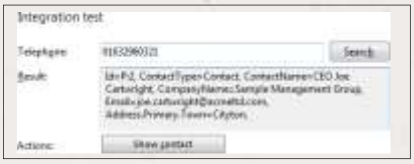
Enter your username and password into the appropriate textboxes.

In the 'Entities' section, select the Sage CRM 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.

Testing

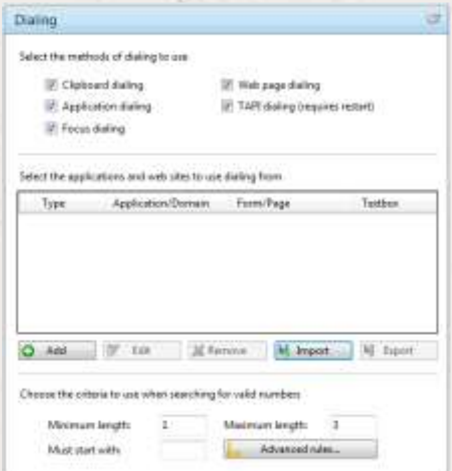
To test if the configuration worked, enter a phone number from your Sage CRM account into the ‘Telephone’ box in the ‘Integration test’ area and click the ‘Search’ button. The results will be displayed after a few seconds.



The test area results should look similar to the results showing in the figure above. 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 CRM, dialling needs to be configured correctly.

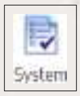


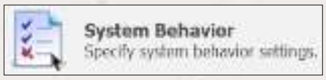
Right-click Integrator's tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'Configuration' screen. In the 'General' group, click on the 'Dialling' option.

Make sure the 'Web page dialling' box is ticked. This converts the telephone numbers identified on web pages into hyperlinks you can click to dial the number.

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.

If you would like to be able to dial directly when you are entering new information in Sage CRM e.g. on the new contact page, we need to carry out some further configuration.





In Sage CRM, by default, telephone numbers are split up into three separate textboxes called 'Country', 'Area' and 'Number' but we need the telephone numbers to be in just one textbox. You can stop Sage CRM from using the 'Country' and 'Area' textboxes by clicking the 'Administrator' link that you clicked before and then clicking the 'System' icon. Next, you need to click the 'System Behavior' icon and then the 'Change' icon which is over on the right hand side of the screen. Select 'No' in the 'Use country code' and 'Use area code' dropdown boxes and then click 'Save'.

If you already have telephone numbers stored using all three textboxes, you'll need to delete the parts of the numbers in the 'Country' and 'Area' textboxes and re-enter the full telephone numbers into the 'Number' textbox.

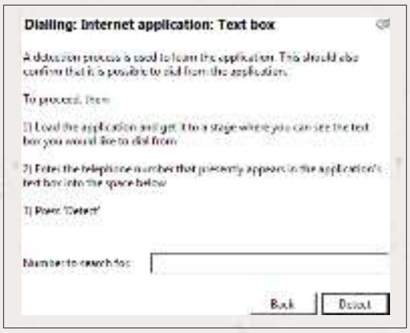
Back on Integrator's 'Dialling' option screen, click the 'Add' button to start the Dialling wizard.

The first question in the wizard asks you about the type of application you want to dial from. Select the 'The application runs inside a web browser' option.

Click the 'Next' button.

We've already covered converting identified numbers into hyperlinks so select the 'Text boxes' option on the second screen of the wizard and click the 'Next' button.

Open your Sage CRM account in Internet Explorer and find the text box you want to dial out from, it needs to have a number in it already so add a temporary one if you need to.



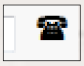
Copy or make a note of the telephone number currently displayed in the text box and leave the web page open.

Back in Integrator's wizard, paste or type the number into the 'Number to search for' box and click the 'Detect' button.

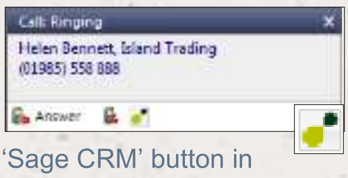
The wizard will search the current web page for the telephone number you entered and, once found, display the details. Click 'Next' and then 'Close'.

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, 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. Refresh the page in Sage CRM to see it in action.



Functionality



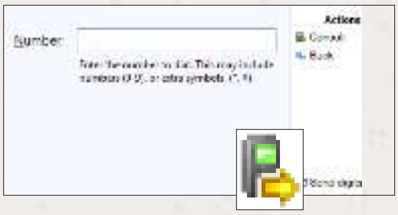
‘Sage CRM’ button in

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 Sage CRM, their details will also be displayed and you can ‘pop’ their contact record by clicking the the window.

You can also pop recognised callers’ contact records by clicking the ‘Sage CRM’ 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.