START communications

Horizon

Integrator SalesLogix Add-in Guide

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Introduction

SalesLogix 7.2 – 7.5 Add-in Guide

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

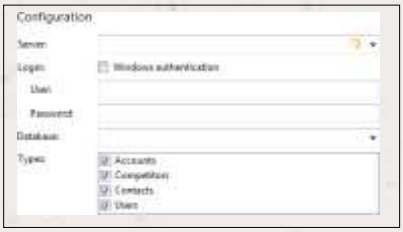
SalesLogix and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

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
- SalesLogix server, username and password

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 SalesLogix from the Type dropdown box and then click the Set button.



On the Configuration group, select the SQL server where your SalesLogix database is stored from the Server dropdown box. If there are no options in this list, wait for the animated circle to disappear and then check again; the circle indicates the list is updating; you can also type the name in manually.

If you can use your Windows login details to access SalesLogix, tick the Windows authentication tick box. Otherwise, enter your username and password into the User and Password text boxes.

Select the correct database from the Database dropdown list; the list will update once you have selected your server or you can enter the name manually.

In the Types section, select the SalesLogix 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.

Testing

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

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 SalesLogix, dialling needs to be configured correctly.

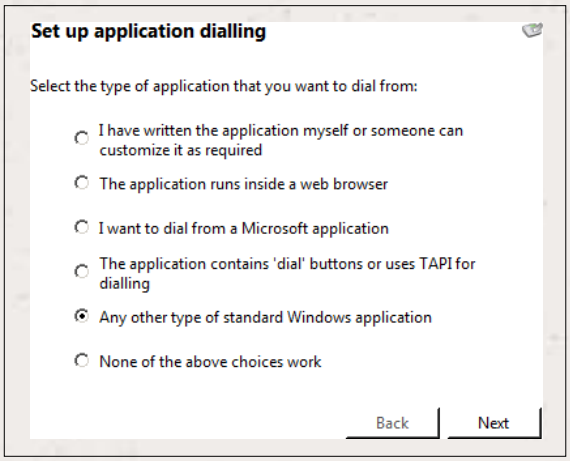
Right-click the CTI client's tray icon in the system tray menu and then left-click the Configuration option from the menu that pops up, this will open the Configuration screen. In the General group, click on the Dialling option.

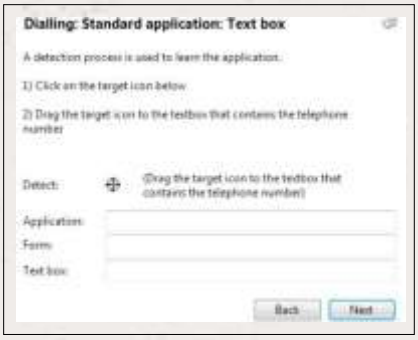
You can refine the criteria used to identify telephone numbers. Enter the appropriate number of digits into the Minimum length and Maximum length text boxes and specify a prefix that identifies telephone numbers (if there is one) by entering it in the Must start with box.

Click the Add button to start the CTI client'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.





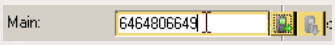
Open SalesLogix and navigate to a screen that has a unique telephone number already in it. Back in the CTI client's wizard, click and hold the target icon, drag it over the textbox containing the telephone number and then let go.

If the wizard finds a valid number, it will recognise that you are using SalesLogix 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 SalesLogix. If you click No, the wizard will just add the textbox you selected to the configuration settings. Click Next and then Close.

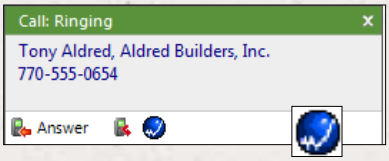
You can add as many textboxes as you like, just start the process by clicking the Add button and working your way through again. The wizard only offers to setup the default values once per session so just exit and reload the client to try again.

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

Now, a clickable icon appears at the end of any textboxes you have configured when you hover the mouse cursor over them and you just click on the icon to dial the number in the textbox.



Functionality

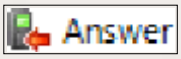


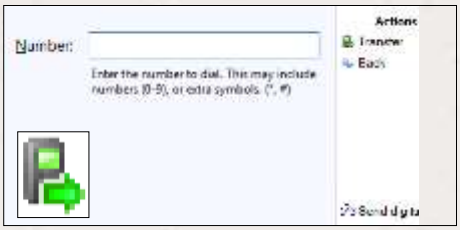
When a call comes in, the CTI client's Preview Window will pop up and display the phone number that is calling. If the caller is recognised as one of your contacts from SalesLogix, their details will also be displayed and you can 'pop' their SalesLogix contact record by clicking the SalesLogix button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

You can also pop recognised callers' SalesLogix contact records by clicking the SalesLogix 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.