

Horizon

Integrator CRM Servicemax Add-in Guide



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Introduction

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

ServiceMax 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

ServiceMax database name and location

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

On the 'Configuration' group, enter your ServiceMax information.



In the 'Database' text box, you need to enter full location and name of the ServiceMax database e.g. 'C:\ServiceMax\ServiceMax.accdr'.

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 Desk.com 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 image here. 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.

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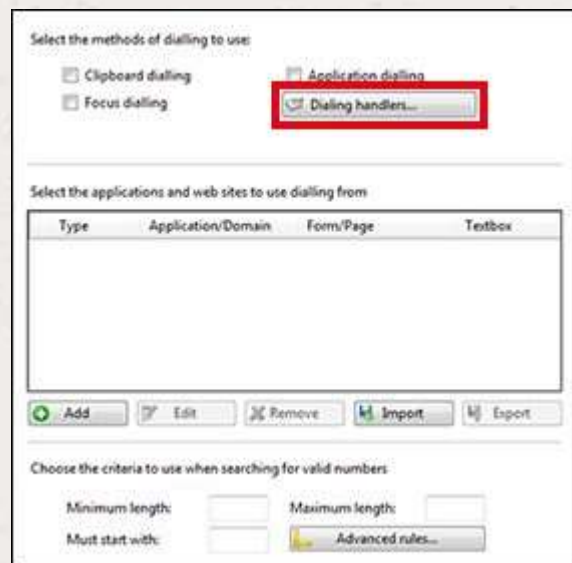


Dialling configuration

To dial out from within ServiceMax, dialling 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 'dialling' option.

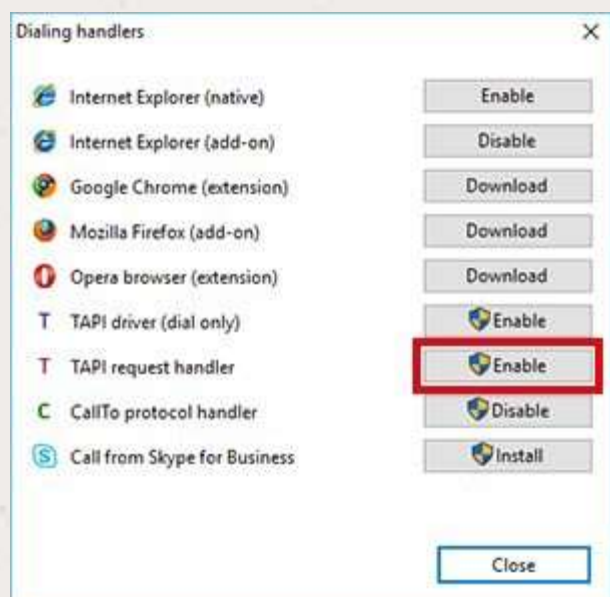
Click the 'dialling handlers' button.



The screenshot shows the 'dialling' configuration window. At the top, under 'Select the methods of dialling to use:', there are three checkboxes: 'Clipboard dialling', 'Focus dialling', and 'Application dialling'. The 'Dialling handlers...' button is highlighted with a red rectangle. Below this, under 'Select the applications and web sites to use dialling from', there is a table with columns: 'Type', 'Application/Domain', 'Form/Page', and 'Textbox'. The table is currently empty. Below the table are buttons for 'Add', 'Edit', 'Remove', 'Import', and 'Export'. At the bottom, there are fields for 'Minimum length:', 'Maximum length:', and 'Must start with:', along with an 'Advanced rules...' button.

Click the 'Enable' button for the 'TAPI request handler' option and then close the window.

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



The screenshot shows the 'Dialling handlers' window. It lists several handlers with their corresponding status buttons. The 'TAPI request handler' is highlighted with a red rectangle, and its 'Enable' button is also highlighted. The list includes: Internet Explorer (native) - Enable, Internet Explorer (add-on) - Disable, Google Chrome (extension) - Download, Mozilla Firefox (add-on) - Download, Opera browser (extension) - Download, TAPI driver (dial only) - Enable, TAPI request handler - Enable, CallTo protocol handler - Disable, and Call from Skype for Business - Install. A 'Close' button is at the bottom right.

Handler	Action
Internet Explorer (native)	Enable
Internet Explorer (add-on)	Disable
Google Chrome (extension)	Download
Mozilla Firefox (add-on)	Download
Opera browser (extension)	Download
TAPI driver (dial only)	Enable
TAPI request handler	Enable
CallTo protocol handler	Disable
Call from Skype for Business	Install