

Horizon

Integrator SuperOffice Add-in Guide



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Introduction

SuperOffice CRM 6.1 - 7 Add-in Guide

This document will guide you through configuration and basic use of Horizon Integrator's SuperOffice 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-ins. See the full user guide for these topics.

SuperOffice 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.

Information You'll Need;

- ☐ Windows account username and password
- ☐ SuperOffice data source name*, prefix*, username and password (if password protected)
- ☐ Integrator main program file directory

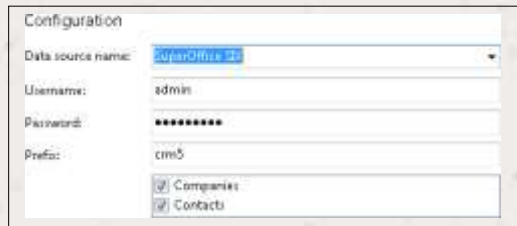
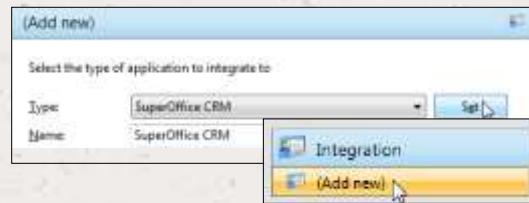


Instructions on where to find this information are given below if required



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



On the 'Configuration' group, in the 'Data source name' drop down box, pick your data source name. You can find out what your data source is called by opening the file called 'SuperOffice.ini' in your SuperOffice program folder and looking for the line that starts with 'Datapath=ODBC:'; whatever follows the ':' is the name of your data source. Foreexample,

if the line in the 'SuperOffice.ini' file reads 'Datapath=ODBC:SuperOffice SIX', the data source name is 'SuperOffice SIX'.

Enter your SuperOffice database login information into the 'Username' and 'Password' textboxes; note that using SuperOffice user account login details will not work.

Enter your SuperOffice global prefix into the 'Prefix' textbox. Again, this information can be found in the 'SuperOffice.ini' file in your SuperOffice program folder. Find the line that starts with 'GlobalPrefix='; whatever follows the '=' is the prefix you need to enter. For example, if the line in the ini file reads 'GlobalPrefix=crm5', the prefix is 'crm5'. 'Companies' and 'Contacts' are the categories of record in SuperOffice that can be looked up in searches and popped; select either or both by ticking the corresponding boxes to include them.

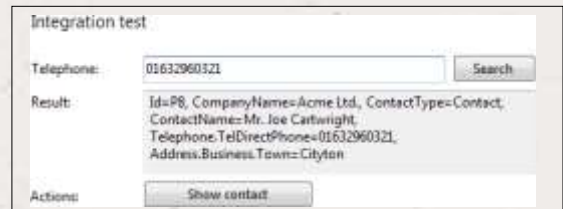
Click the 'Save' button to store the information you've entered and apply the configuration.



Integration Test

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



The screenshot shows a web interface titled "Integration test". It contains a "Telephone:" label followed by a text input field containing "01632960321" and a "Search" button. Below this is a "Result:" label followed by a text area displaying the following information: "Id=PB, CompanyName=Acme Ltd., ContactType=Contact, ContactName=Mr. Joe Cartwright, Telephone.TelDirectPhone=01632960321, Address.Business.Town=Cityton". At the bottom, there is an "Actions:" label followed by a "Show contact" button.

Dialling configuration

To dial out from within SuperOffice, dialling needs to be configured correctly but this is really simple to do.

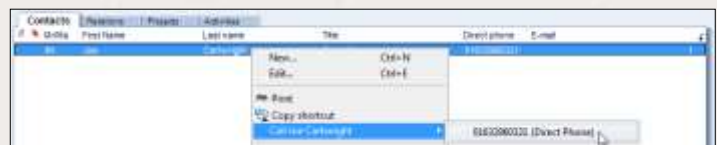
Open and login to SuperOffice, click on the 'Edit' menu option and then click on the 'Phone preferences...' option to open the 'Dialling Setup' screen.



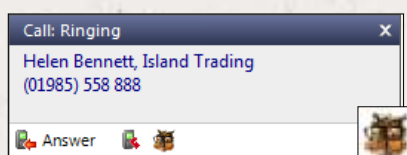
In the 'Dial by using' section, click the 'Program started from command line' option.

In the 'Application' section, the 'File' textbox needs to contain the location of Integrator's 'PhoneHelper.exe' application. If you don't know where it has been installed, ask your system administrator - they should know. You can either manually type the filepath into the textbox or you can use the magnifying glass button to the right of the textbox to navigate to and select 'PhoneHelper.exe'. Once you have the filepath in the 'File' textbox, click the 'Save' button.

Now, to dial a contact you just right-click on the contact in SuperOffice, select the 'Call' option on the pop up menu and then click on the number you want to dial.

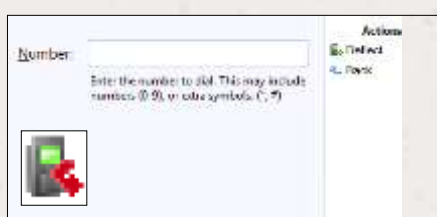


Functionality



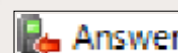
When a call comes in, Integrator's 'Preview Window' will pop up and display the phone number that is calling. If the caller is recognised as one of your contacts from SuperOffice, their details will also be displayed and you can 'pop' their contact record by clicking the 'SuperOffice CRM' button in the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

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

