

# Horizon

## Integrator CRM Tall Emu Add-in Guide



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# Introduction

This page will guide you through configuration and basic use of the Horizon Integrator Tall Emu 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 'User Guide' for these topics.

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

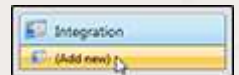
Horizon Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the 'Technical Installation Guide' or consult your system administrator.

## Information You'll Need

Tall Emu CRM SQL Server, database location, username and password

## 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 'Tall Emu CRM' from the 'Type' dropdown box and then click the 'Set' button.



On the Configuration group, enter Tall Emu CRM 'SQL Server', the 'SQL database'.

Enter the 'Username' and 'Password' in the textboxes if you do need to use specific details, otherwise leave them blank to use Window authentication.

In the 'Tables' group, select which of the Tall Emu CRM table categories you want Horizon Integrator to use for searches and popping by checking the corresponding boxes in the 'Tables' section.

Configuration

SQL server:

SQL database:

SQL username:

SQL password:

☐ Leave username and password blank to use Windows authentication.

Tables:

☐ Companies

☐ Contacts

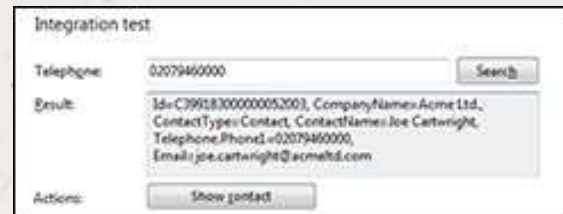
☐ Employees

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 Tall Emu 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.



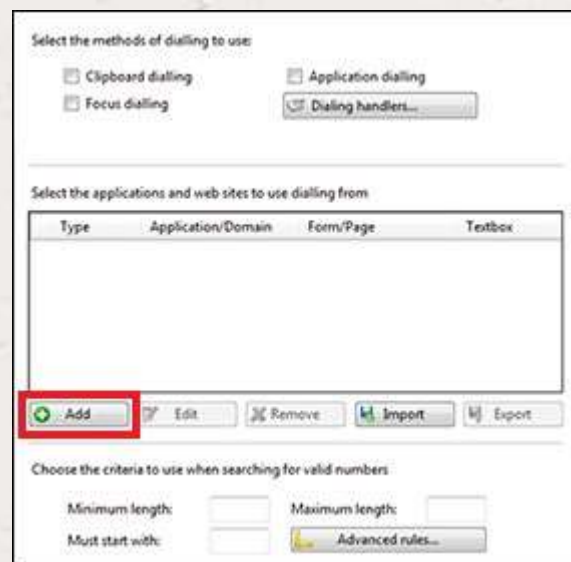
The screenshot shows a web interface titled 'Integration test'. It has a 'Telephone' input field with the value '02079460000' and a 'Search' button. Below this, the 'Result' section displays contact information: 'Id: C390183000000052003', 'Company Name: Acme Ltd.', 'Contact Type: Contact', 'Contact Name: Joe Cartwright', 'Telephone/Phone: 02079460000', and 'Email: joe.cartwright@acme.co.uk'. At the bottom, there is an 'Actions' section with a 'Show contact' button.

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.

## Dialing configuration

To dial out from within Tall Emu CRM, dialing 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 'Dialing' option.



The screenshot shows a 'Dialing configuration' window. It has two main sections. The first section, 'Select the methods of dialing to use:', contains checkboxes for 'Clipboard dialing', 'Application dialing', and 'Focus dialing', along with a 'Dialing handlers...' button. The second section, 'Select the applications and web sites to use dialing from:', contains a table with columns 'Type', 'Application/Domain', 'Form/Page', and 'Textbox'. Below the table are buttons for 'Add', 'Edit', 'Remove', 'Import', and 'Export'. The 'Add' button is highlighted with a red box. At the bottom, there is a section 'Choose the criteria to use when searching for valid numbers' with input fields for 'Minimum length', 'Maximum length', and 'Must start with', along with an 'Advanced rules...' button.

Please see the following link to make sure that the web dialing feature is enabled before progressing: <http://integrator.unlimitedhorizon.co.uk/help/help.php?item=1119&lang=uk>

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 Tall Emu CRM, for example on the new contact page, we need to carry out some further configuration. Click the 'Add' button to start the Dialing 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.



**Set up application dialling**

Select the type of application that you want to dial from:

- ☐ I have written the application myself or someone can customize it as required
- ☒ The application runs inside a web browser
- ☐ I want to dial from a Microsoft application
- ☐ The application contains 'dial' buttons or uses TAPI for dialling
- ☐ Any other type of standard Windows application
- ☐ None of the above choices work

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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.



**Dialling: Internet application**

You can configure dialling from a web browser for two types of presentation: Read only telephone numbers such as might appear in a list or directory and text boxes such as might appear in a CRM package.

Select the type that you would like to configure. Please note, using these methods, only Internet Explorer is supported at present:

- ☐ Read only telephone numbers (hyperlinks)
- ☒ Text boxes

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Open your Tall Emu 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 the 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'.



**Dialling: Internet application: Text box**

A detection process is used to learn the application. This should also confirm that it is possible to dial from the application.

To proceed, then:

- 1) Load the application and get it to a stage where you can see the text box you would like to dial from
- 2) Enter the telephone number that presently appears in the application's text box into the space below
- 3) Press 'Detect'

Number to search for:

Back Detect

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.

