

Horizon

Integrator CRM Teamleader Add-in Guide



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Introduction

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

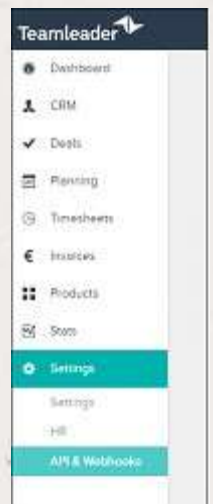
Teamleader and the database used to store your contact data should already be installed and working normal before proceeding with this integration.

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.

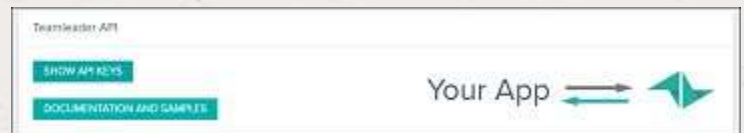
Information You'll Need

Teamleader API Group and API key.

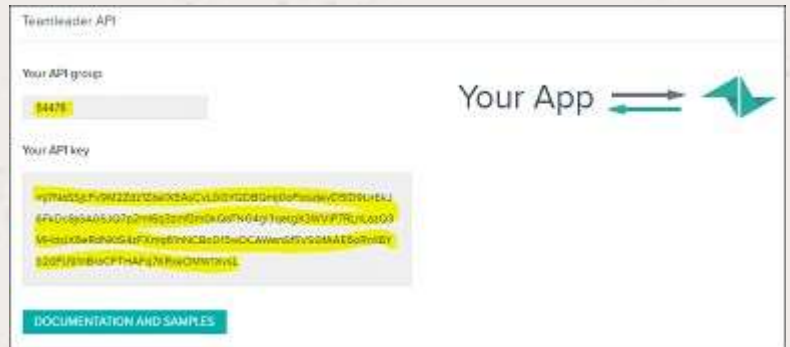
To find the Teamleader API Group and API key, in Teamleader, select the 'Settings' menu option from the left hand side menu. Then select 'API & Webhooks' option.



On the 'Teamleader API' window displayed select 'SHOW API KEYS'



The highlighted areas will need to be copied and pasted into the Configuration box during the integration set up outlined below.



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

Select the type of application to integrate to

Type: Teamleader Disable

Name: Teamleader

On the 'Configuration' enter the Teamleader API group and API key which can be found in the Account Settings menu option within Teamleader.

Copy and paste the API Group and API key from the screen displayed into the UC config fields.

Configuration

API group:

API key:

Entities: ☒ Contacts ☒ Companies

In the Entities section, 'Contacts' and 'Companies' are the categories of records in Teamleader that can be looked up in searched and popped; select one or more required categories by ticking the corresponding boxes to include them.

Save the changes to the 'Configuration' group.

IMPORTANT: Notes from the Development Team:

The API doesn't return the contact's company name, so we must do an additional request to get the company name for each contact returned by a search. This could mean we end up exceeding the API rate limit (25 requests every 5 seconds), so there's an invisible option you can enable in the Settings.xml to stop doing the extra lookup if needed.

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 Teamleader account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

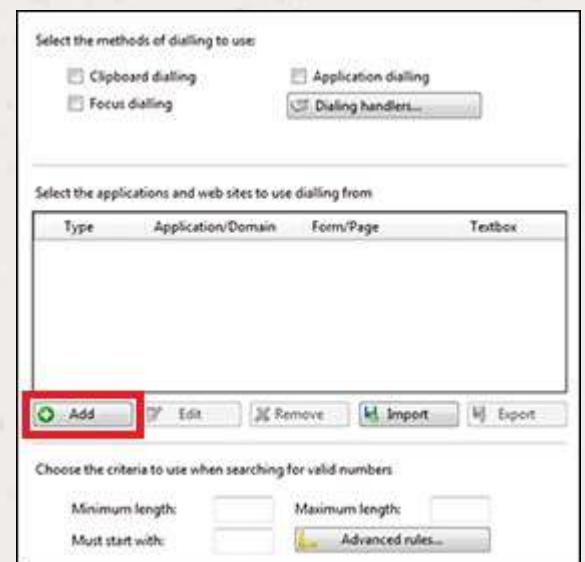
The test area results should look similar to the results of showing in the image here. If the test does not work, go to the 'Log' page of the configuration and turn on logging, then do the test again to see if there are any errors in the log.



Dialing configuration

To dial out from within Teamleader, 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.



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 Teamleader, 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 Teamleader 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.



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

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.

