

# Horizon

## Integrator WebCRM Add-in Guide



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## Introduction

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

webCRM 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.

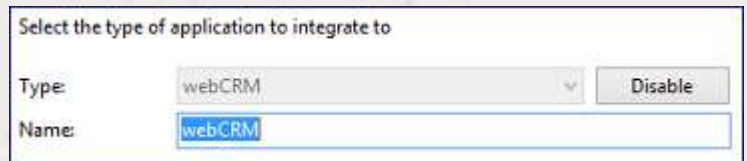
## Information You'll Need

webCRM APP URL, API dbn code, user id 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 'webCRM' from the 'Type' dropdown box and then click the 'Set' button.



Select the type of application to integrate to	
Type:	<div>webCRM ▼</div> <div>Disable</div>
Name:	<div>webCRM</div>



On the 'Configuration' enter the webCRM APP URL, API dbn and credentials which can be found within the webCRM application as follows.



The screenshot shows the 'Configuration' form with the following fields and values:

Field	Value
App url:	https://v5.b2bsys.net/Home.aspx
API url:	https://webcrmapi5.b2bsys.net/WebCrmApi.asmx
API dbn code:	
API user id:	
API password:	*****
Entities:	<input checked="" type="checkbox"/> Organisations <input checked="" type="checkbox"/> Persons

In webCRM select 'Configuration' which can be found in the top right hand corner of the screen.



On the page displayed, on the left hand side, you should see a URL displayed for the API SOAP Web Service, the URL address provided is the API url required in the config.

On the page displayed you will find the 'API dbc code', 'User ID', and 'password'. Copy these on to the 'Config' group.

'Organisation' and 'Person' are the categories of records in webCRM that can be looked up in searches and popped; select either or all by ticking the corresponding boxes to include them.

Save the changes to the 'Configuration' group

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 webCRM 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.



The screenshot shows the 'Integration test' form with the following fields and values:

Field	Value
Telephone:	
Result:	
Actions:	Show contact

