

# Horizon

## Integrator CRM WinSIMS Add-in Guide



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# Contents

Contents .....	2
Introduction .....	3
Requirements .....	4
Configuration .....	4
Testing .....	5
Dialling configuration .....	5



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# Introduction

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

WinSIMS 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.



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# Information You'll Need

WinSIMS database name and filepath

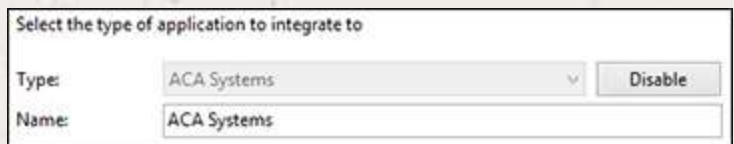
## Requirements

ACA Systems are required to assist with the ACA Systems – WinSIMS integration, please contact your WinSIMS software maintainer for details

The location of the ACA Systems – WinSIMS data folder

## 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



Select the type of application to integrate to

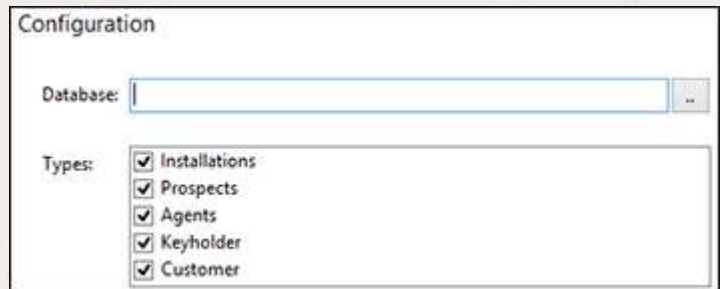
Type: ACA Systems [v] [Disable]

Name: ACA Systems

'configuration' screen. In the 'Integration' area, click the 'Add new' button, select 'ACA Systems' from the 'Type' dropdown box and then click the 'Set' button.

On the 'Configuration' group, you need to enter the details of your WinSIMS database.

In the Entities section, 'Installations', 'Prospects', 'Agents', 'Keyholder' and 'Customer' are the categories of records in WinSIMS that can be looked up in searches and popped. Select one or more required categories by checking the corresponding boxes to include them.



Configuration

Database: [Text Field] [Browse]

Types:

- ☒ Installations
- ☒ Prospects
- ☒ Agents
- ☒ Keyholder
- ☒ Customer

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

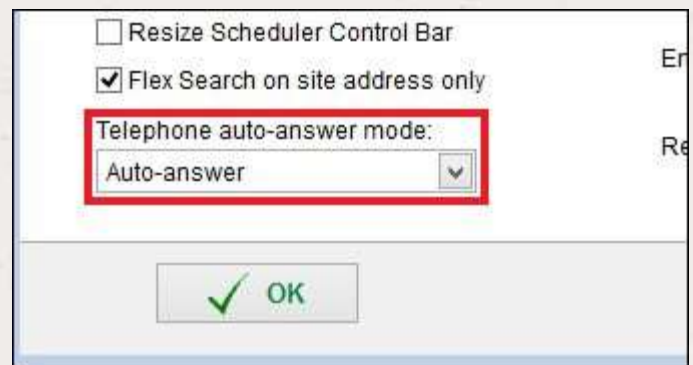
A dialog box titled 'Integration test'. It contains a 'Telephone:' label followed by a text input field and a 'Search' button. Below this is a 'Result:' label followed by a large, empty rectangular area. At the bottom, there is an 'Actions:' label followed by a 'Show contact' button.

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.

## Dialling configuration

Dialling will need to be configured to use TAPI dialling within the client along with the ACA Systems - WinSIMS application which will need to be configured by the ACA Systems – WinSIMS software maintainer as follows.

On each individual PC within ACA Systems - WinSIMS, select menu option 'File' -> 'Change User Preferences...' -> 'Other' to activate / deactivate the dialling link. The options available within ACA Systems - WinSIMS are 'Auto-answer' and 'Do not Auto-answer'.

A dialog box titled 'User Preferences' with a tab labeled 'Other'. It contains two checkboxes: 'Resize Scheduler Control Bar' (unchecked) and 'Flex Search on site address only' (checked). Below these is a section titled 'Telephone auto-answer mode:' which contains a dropdown menu currently set to 'Auto-answer'. This section is highlighted with a red border. At the bottom of the dialog is a green checkmark icon followed by an 'OK' button.

Assuming that the mode has been set to 'Auto-answer', two functions are available, answering calls and making calls