Horizon

Integrator CRM Workbooks Add-in Guide

Contents

Introduction

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

Workbooks 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

Workbooks URL and the Workbooks API Key.*

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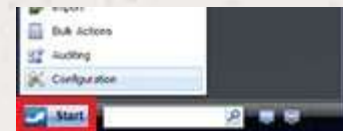
Configuration

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

On the 'Configuration' group, enter the URL for the Workbooks account.

Enter the API Key which can be found in Workbooks. First log into Workbooks and select 'Configuration' option from the 'Start' menu in the bottom left hand corner of the screen.

From the 'Configuration' window which is then displayed, click on the 'Email & Integration' option on the left hand side of the 'Configuration' window. This will then display a drop down list of options, select 'API Keys' which will open the 'API Keys' window.

Copy and paste the appropriate API Key on to Horizon Integrator 'Configuration'. The API Key selected must be enabled and have the following capabilities which can be viewed by double clicking the API Key record.

If there is not a suitable API Key available, you can create an API Key by clicking 'Add New API Key' button at the top right hand corner of the 'API Keys' window.

First, select the user name from the dropdown list. Then add a name for the API Key e.g. 'Horizon Integrator' then add the IP Address which will have access to the API (there is a hint above to the IP Address that should be used).

Then click the 'Create' button which can be found in the top right hand corner of the 'New API Key' window.

Next click the 'Add Capability' button which will open the list of Capabilities available.

From this list select all Capabilities by clicking the tick box next to 'Name' or select the required Capabilities. Save and close by clicking the 'Save and Close' button in the top left hand corner of the window.

Copy the APK Key code displayed into the UCBrand 'Configuration' 'API Key' field.

In the Entities section, 'Organisations' and 'People' are the categories of records in Workbooks that can be looked up in searches and popped. Select one or more required categories by checking the corresponding boxes to include them.

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

Known Behaviours

Screen pop behaviour within Workbooks:

A second tab will always open

Where possible this second tab is closed automatically

A message is displayed within the first tab to notify of (or to allow) the new record being displayed. Each browser implements notifications differently. Some display it outside of the browser, some display it inside the desktop. Some show it as a modal dialog, some are not. Chrome has the best implementation which is a non-modal pop-up notification outside of the browser, which disappears after a short time. Furthermore, if there are lots of notifications, Chrome only shows the last one.

The person record is then displayed in Workbooks (automatically or after interacting with the message)

Testing

To test if the configuration worked, enter a phone number from your Workbooks account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

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

To dial out from within Workbooks, dialling needs to be configured correctly for web page dialling.

Dialling will also need to be configured within Workbooks.

To configure Workbooks for dialling, first click on the 'Start' button and select 'Preferences' menu option.

On the 'Preferences' window, scroll down to the 'Telephone Integration' section and type in the method of dialling to use e.g. CallTo:and add @number@ as instructed.

Workbooks

To transfer a call to another extension, click the 'Transfer'   button, enter the extension number and click 'Transfer' again.