

Horizon

Integrator eGroupware Add-in Guide



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Introduction

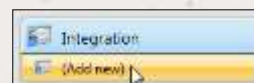
EGroupware CRM 1.0 – 1.8 Add-in Guide

This document will guide you through configuration of the EGroupware CRM Add-in. It is expected that you are already familiar with the Address Book and Preview window, and the basic concepts of integration and screen popping using the Add-in. See the full user guide for these topics.



Configuration

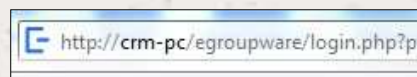
Right-click Integrator's tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up. In the 'Integration' area, click the '(Add new)' button, select 'EGroupware' from the 'Type' dropdown box and then click the 'Set' button.

A screenshot of a 'Configuration' dialog box. It has a title bar 'Configuration' and a close button. Below the title bar are four input fields: 'Data source:' with a dropdown menu showing 'Egroupware', 'ODBC user:', 'ODBC password:', and 'Webpage:'.

On the 'Configuration' group, there a number of fields listed that need to be completed. First select the 'Data source' which would be 'EGroupware'. Then in the 'ODBC user' and 'ODBC password' boxes enter the credentials used for accessing the database, these are usually specified when

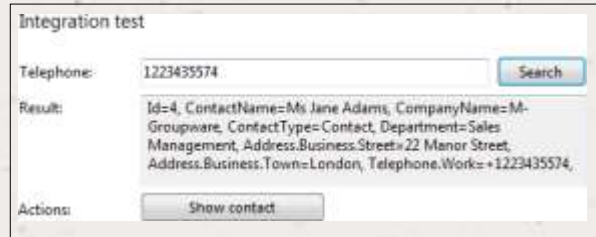
installing EGroupware (Note: these are not the credentials used for general access of EGroupware CRM).

In the 'Webpage' box please fill the URL of the CRM which you can find by opening EGroupware CRM and looking in the address bar of your internet browser. Copy part of the address shown in the bar starting from 'http' up to and including everything before '/login.php?' e.g. 'http://crm-pc/egroupware' and then paste or type it into the 'Webpage' box.



Testing

To test if the configuration worked, enter a phone number from your EGroupware 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 form titled "Integration test". It has a "Telephone:" label followed by a text input field containing "1223435574" and a "Search" button. Below this is a "Result:" label followed by a text area displaying the following information: "Id=4, ContactName=Ms Jane Adams, CompanyName=M-Groupware, ContactType=Contact, Department=Sales Management, Address.Business.Street=22 Manor Street, Address.Business.Town=London, Telephone.Work=+1223435574". At the bottom is an "Actions:" label followed by a "Show contact" button.

It is also possible to check the contact's full details by pressing 'Show contact' button, which will bring you to the webpage on the EGroupware where are displayed the detail of that contact.

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

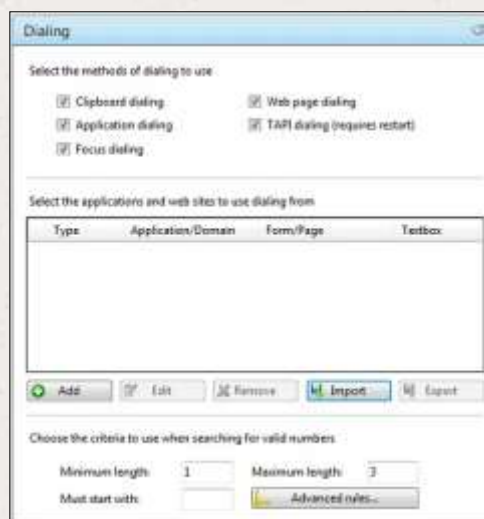
To dial out from within EGroupware CRM, dialling needs to be configured correctly.

Right-click the 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 'Dialling' option.

Make sure the 'Web page dialling' box is ticked. This converts the telephone numbers identified on web pages into hyperlinks you can click to dial the number.

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 EGroupware CRM e.g. on the new contact page, we need to carry out some further configuration so click the 'Add' button to start the Dialling 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.

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: 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:

Open your EGroupware 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'.

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.

Configure Dialling

Dialling: Internet application: Text box

Please wait while detection proceeds:

Searching for 1223430574

Completed

Result

Domain:

Page:

Text box:



Now, a clickable icon is placed at the end of any textboxes you have configured and just click on it to dial the number in the textbox. Refresh the page in EGroupware CRM to see it in action.