Horizon Integrator CRM

Bullhorn Add-in Guide

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Introduction

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

Bullhorn CRM 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.

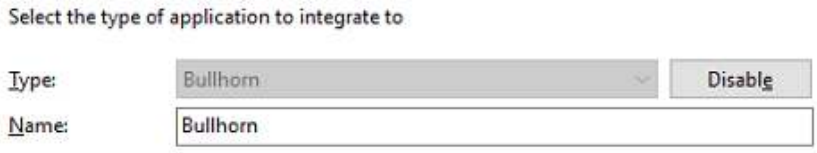
Information You'll Need

Bullhorn CRM username and password (if password protected).

Bullhorn CRM API Key.

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



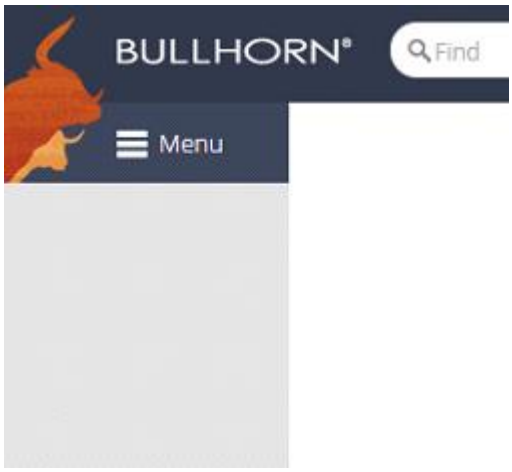
In the 'Configuration' area that appears below is where the details of the database to which the client software should connect. More detailed instructions on how to complete the fields are given later in this document.

On the Configuration group, enter your Bullhorn CRM account username, password along with the 'API Key'.

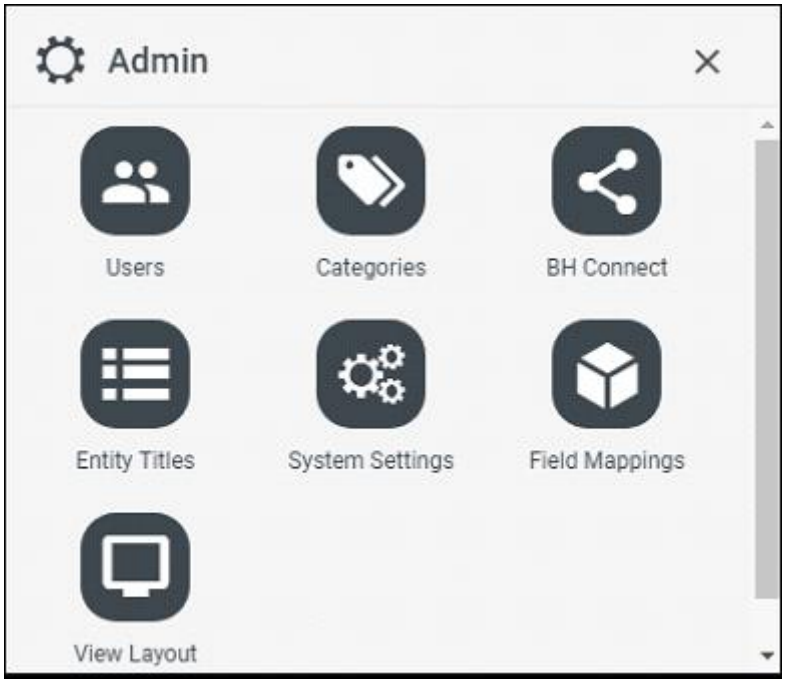
In the Entities section, 'Candidates', 'Companies' and 'Contacts' are the categories of records in Bullhorn CRM that can be looked up in searches and popped. Select one or more of the required categories by checking the corresponding boxes to include them.

The API Key can be found within the Bullhorn CRM application for users with access to Admin.

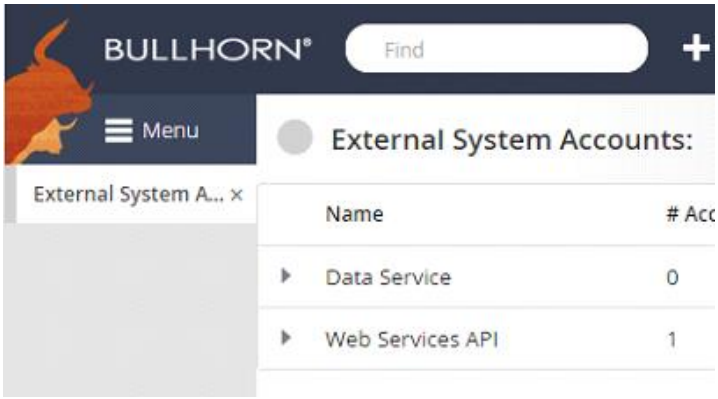
From the menu, if dashboard not shown, click on menu



From the dashboard select the menu option ‘Admin’ then ‘BH Connect’ menu option.



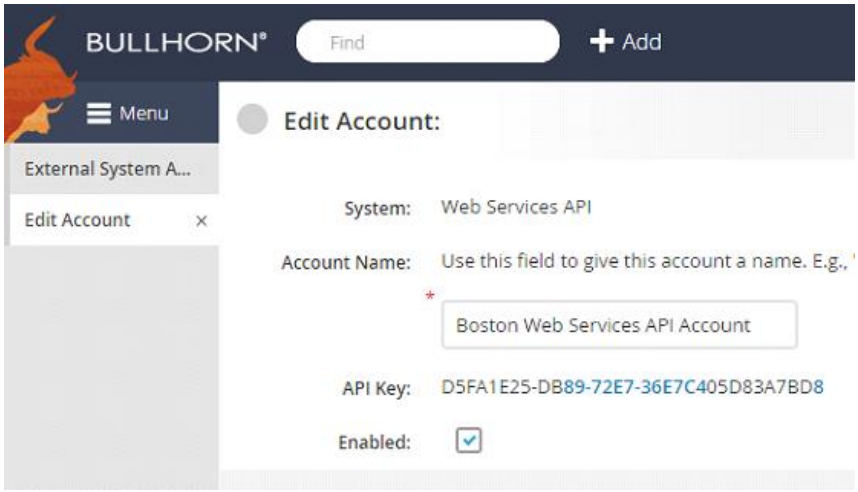
From this screen ‘External Systems Accounts’, select ‘Web Services API’.



If there is already an ‘Account’ then select this account to display the Account information from this screen. Copy the ‘API Key’ from Bullhorn CRM into ‘API Key’ on the ‘Configuration’ group.

NOTE: If there are no 'Web Services' API's available then an API will need to be created.

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 Bullhorn 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.

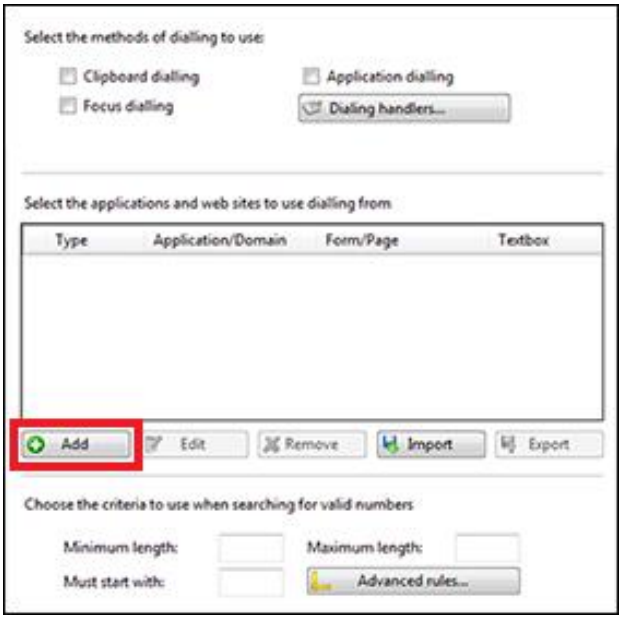
The test area results should look similar to the results showing in the image here. If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Dialing configuration

To dial out from within Bullhorn CRM, dialling 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 'Dialling' option.

Please see the following link to make sure that the web dialling 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 Bullhorn CRM, 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.

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.

Open your Bullhorn 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.

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.