Horizon Integrator CRM

PerfectView Add-in Guide

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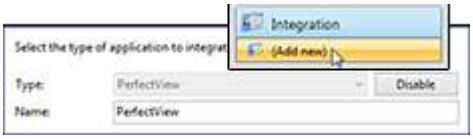
Introduction

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

PerfectView 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.

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

On the 'Configuration' group, enter the API Key, Database ID and User ID which can be found within PerfectView when logged into PerfectView.

In PerfectView select the settings icon which can be found on the right-hand side of the screen then select the 'Modules' option.

Next click the 'Key file download' button which will download the information to an .xml file (PerfectView Api Credentials) which will need to be saved temporarily to a known location. This file will contain the API Key, Database ID and User ID and the API URL which will need to be imported onto the 'Configuration' group. On the 'Configuration' group

click 'Import' and select the PerfectView API Credentials.xml file to import.

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

Testing

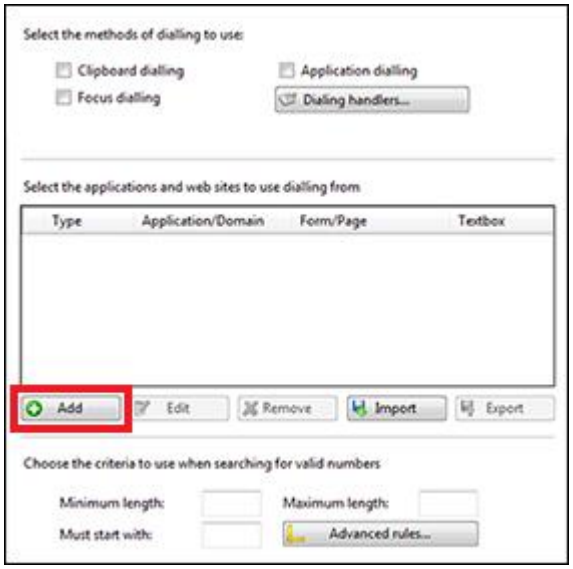
To test if the configuration worked, enter a phone number from your PerfectView account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

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.

Dialing configuration

To dial out from within PerfectView, dialing 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 'Dialing' option.



Please see the following link to make sure that the web dialing 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 PerfectView, 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 PerfectView 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.