

Horizon Integrator CRM

ServiceMax Add-in Guide

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Introduction

This guide will lead you through configuration and basic use of the Horizon Integrator ServiceMax 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 'Horizon Integrator User Guide' for these topics.

ServiceMax 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

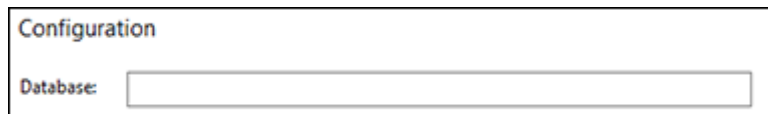
Information you'll need

ServiceMax database name and location

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

On the 'Configuration' group, enter your ServiceMax information.


A screenshot of a configuration dialog box titled "Configuration". It contains a label "Database:" followed by a text input field.

In the 'Database' text box, you need to enter full location and name of the ServiceMax database e.g. 'C:\ServiceMax\ServiceMax.accdr'.

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 Desk.com 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 screenshot of the "Integration test" window. It shows a "Telephone" input field with the number "92034548025" and a "Search" button. Below it, the "Result" field displays: "Id=OCT000152, ContactType=Contact, CompanyName=Acme, Inc., ContactName=Joe Cartwright, Telephone Main=9203050025, Address Business, Pictures OCT000152". At the bottom, there is an "Actions:" section with a "Show contact" button.

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.

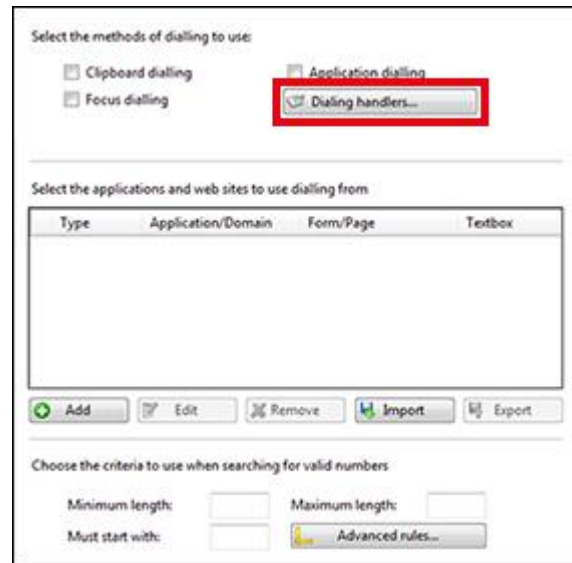
If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Dialling configuration

To dial out from within ServiceMax, dealing 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.

Click the 'Dialling handlers' button.



Click the 'Enable' button for the 'TAPI request handler' option and then close the window.

Click 'Save' to store your settings and you're ready to go.

