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.

select the ty	pe of application to integrate to	
<u>I</u> ype:	Bullhom	✓ Disabl <u>e</u>
Name:	Bullhorn	

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'.

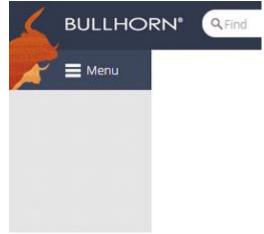
Configura	ition
Username:	
Password:	
API Key:	
Entities:	 ✓ Candidates ✓ Companies ✓ Contacts

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.

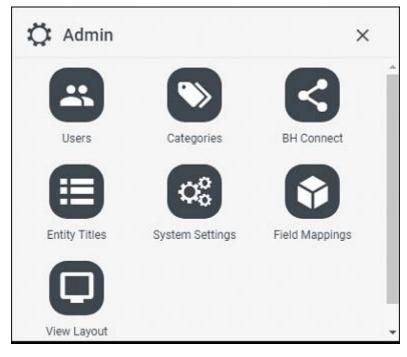
The API Key can be found within the Bullhorn CRM application for users with access to Admin.



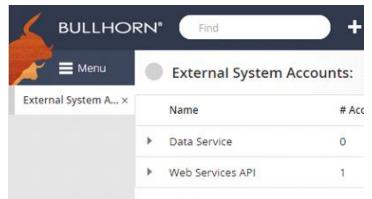
From the menu, if dashboard not shown, click on menu



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.

	HORI	N° Find	+ Add
📈 🗏 Men	u	Edit Account	t:
External System	n A		
Edit Account	×	System:	Web Services API
		Account Name:	Use this field to give this account a name. E.g., '
			Boston Web Services API Account
		API Key:	D5FA1E25-DB89-72E7-36E7C405D83A7BD8
		Enabled:	

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.

Telephone:	0334444233	Search
Result:	Id=683, ContactName=Meindert va ContactType=Contact, Address Bur 1121, Address Business Postcade=1 Address Business TownsAmsterder	sin ets. Street:::Watarkade 011 AW
A	Show contact	

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

Clipboard dialling		Application dialling Dialing handlers	
ct the applica	tions and web sites to u	se dialling from	
Туре	Application/Domain	Form/Page	Textbox
444	57 E.G 32	energy H Import	El Forma
Add	()" Edit () () # P	iemove Import	No Exper
	🗊 Edit 🔐 R a to use when searching		₩ Expor
	a to use when searching		Ne Exper



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.

Set	t up application dialling	3
Sele	ct the type of application that you want to dial from:	
	 I have written the application myself or someone can customize it as required 	
	The application runs inside a web browser	
	I want to dial from a Microsoft application	
	 The application contains 'dial' buttons or uses TAPI for dialling 	
	Any other type of standard Windows application	
	None of the above choices work	
	Back	bd.
Dia	alling: Internet application	3

You can configure dialing from a web browser for two types of presentation: Read only telephone numbers such as might appear in list or directory and text boxes such as might appear in a CRM packar	
Select the type that you would like to configure. Please note, using the methods, only Internet Explorer is supported at present.	

Read only telephone numbers (hyperlinks)

Text boxes

Dialling: Internet application: T	ext box	G
A detection process is used to learn the a confirm that it is possible to dial from the		d also
To proceed, then:		
 Load the application and get it to a sta box you would like to dial from 	ge where you can see	the text
 Enter the telephone number that prese text box into the space below 	ntly appears in the ap	plication's
3) Press 'Detect'		
		_
Number to search for:		

Back Ned



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.