

# Horizon Integrator CRM

EMIS Add-in Guide



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## Introduction

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

EMIS Web and the database used to store your 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 will need

- ◆ EMIS Web address
- ◆ Username
- ◆ Password



## 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 'EMIS Web' from the 'Type' dropdown box and then click the 'Set' button.

A screenshot of a configuration dialog box titled "Configuration". It contains several fields: "Application type" is a dropdown menu with "Web" selected; "Address" is a text input field; "UCI:" is a text input field; "Volume group:" is a text input field; "Database name / organization:" is a text input field; there is a checked checkbox labeled "Auto logon (client must be running)"; "User name:" is a text input field; and "Password:" is a text input field.

On the 'Configuration' group, select Web from the 'Application type'.

The 'Address' is the IP address or name of the computer that EMIS Web uses.

The 'Database name / Organization' is normally a five-digit number but must be verified with your EMIS Web maintainer.

If you are likely to always have EMIS Web running, you can tick the 'Auto logon' option and the integration will use the open instance of EMIS Web when a call comes in. If you don't tend to keep it running all day, you'll need to leave the 'Auto logon' option unticked and enter your 'User name' and 'Password' so that our software can access your EMIS Web data when a call comes in.

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 EMIS Web 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 a web interface titled "Integration test". It contains a "Telephone:" label followed by a text input field containing the number "02030500225" and a "Search" button. Below this is a "Result:" label followed by a text area containing the following text: "Id=OCT000152, ContactType=Contact, CompanyName=Acme, Inc., ContactName=Joe Cartwright, Telephone.Main=02030500225, Address.Business, Pictures=OCT000152". At the bottom is an "Actions:" label followed by a "Show contact" button.

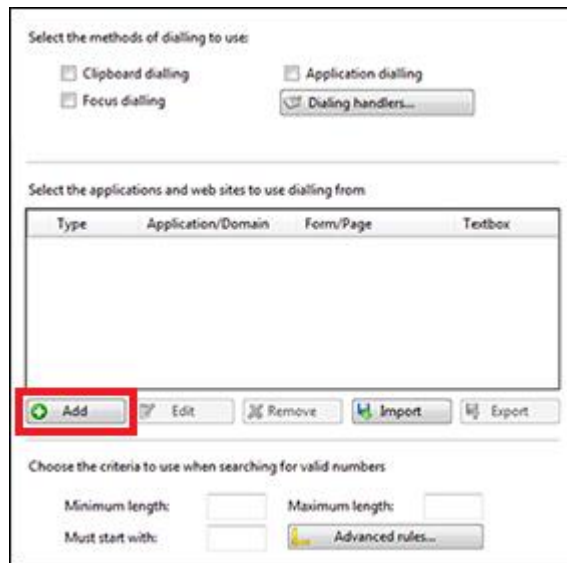
Telephone:	02030500225	Search
Result:	Id=OCT000152, ContactType=Contact, CompanyName=Acme, Inc., ContactName=Joe Cartwright, Telephone.Main=02030500225, Address.Business, Pictures=OCT000152	
Actions:	Show contact	

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.

# Dialling Configuration

To dial out from within EMIS Web, 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 EMIS Web, for example on the new contact page, we need to carry out some further configuration. 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.

This is a screenshot of a software wizard window titled "Dialling: Internet application". The window contains the following text: "You can configure dialling from a web browser for two types of presentation: Read only telephone numbers such as might appear in a list or directory and text boxes such as might appear in a CRM package. Select the type that you would like to configure. Please note, using these methods, only Internet Explorer is supported at present:". Below this text are two radio button options: "Read only telephone numbers (hyperlinks)" and "Text boxes". The "Text boxes" option is selected. At the bottom right of the window are two buttons: "Back" and "Next".

Open your EMIS Web 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.

This is a screenshot of a software wizard window titled "Dialling: Internet application: Text box". The window contains the following text: "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'". Below this text is a text input field labeled "Number to search for:". At the bottom right of the window are two buttons: "Back" and "Detect".

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.