

# 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.

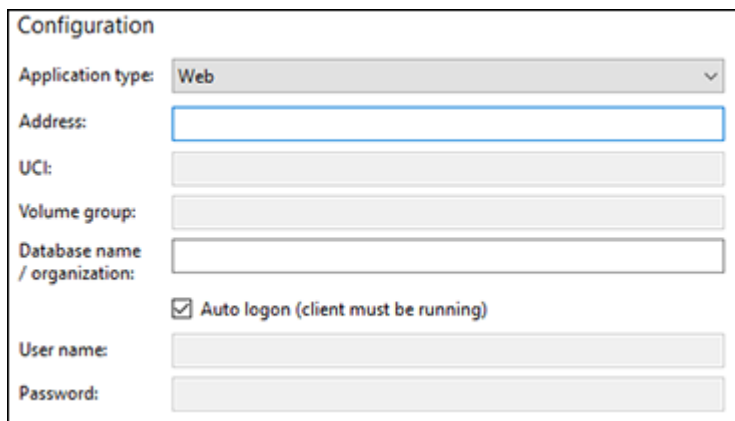
Horizon Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the 'Technical Installation Guide' or consult your system administrator

## 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.



The screenshot shows a 'Configuration' dialog box with the following fields and options:

- Application type:** A dropdown menu with 'Web' selected.
- Address:** A text input field.
- UCI:** A text input field.
- Volume group:** A text input field.
- Database name / organization:** A text input field.
- Auto logon (client must be running)**
- User name:** A text input field.
- Password:** 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.

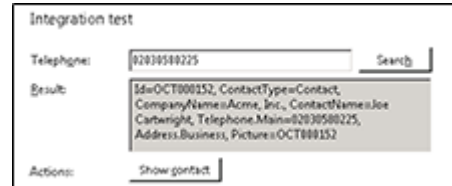
The 'Database name / Organization' is normally a five-digit number but must be verified with your EMIS Web maintainer.

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 "0203050225" and a "Search" button. Below this is a "Result:" label followed by a grey box containing the text: "Id=OCT000152, ContactType=Contact, CompanyName=Acme, Inc., ContactName=Joe Cartwright, Telephone.Main=0203050225, Address.Business, Pictures=OCT000152". At the bottom is an "Actions:" label followed by a "Show contact" button.

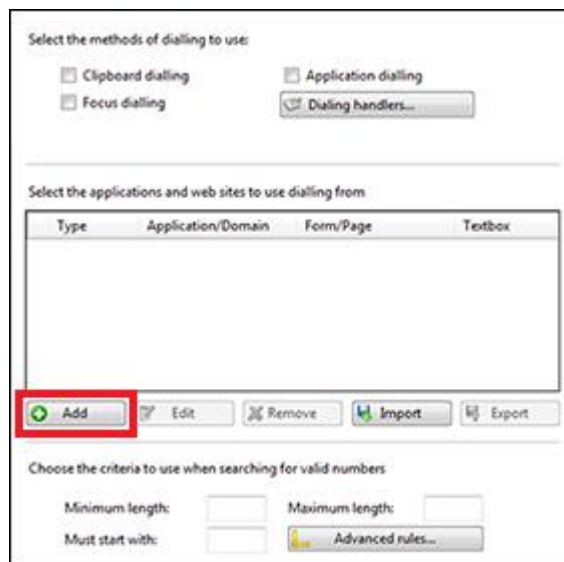
Integration test	
Telephone:	<input type="text" value="0203050225"/> <input type="button" value="Search"/>
Result:	<div style="background-color: #cccccc; padding: 5px;">Id=OCT000152, ContactType=Contact, CompanyName=Acme, Inc., ContactName=Joe Cartwright, Telephone.Main=0203050225, Address.Business, Pictures=OCT000152</div>
Actions:	<input type="button" value="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.



The screenshot shows the 'Dialling Configuration' window. At the top, it says 'Select the methods of dialling to use:' with checkboxes for 'Clipboard dialling', 'Application dialling', and 'Focus dialling'. There is a 'Dialling handlers...' button. Below this is a section 'Select the applications and web sites to use dialling from' with a table. The table has columns: 'Type', 'Application/Domain', 'Form/Page', and 'Textbox'. Below the table are buttons: 'Add' (highlighted with a red box), 'Edit', 'Remove', 'Import', and 'Export'. At the bottom, it says 'Choose the criteria to use when searching for valid numbers' with input boxes for 'Minimum length', 'Maximum length', and 'Must start with', plus an 'Advanced rules...' button.

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.



The screenshot shows the 'Set up application dialling' wizard. It asks 'Select the type of application that you want to dial from:' with radio button options: 'I have written the application myself or someone can customize it as required', 'The application runs inside a web browser' (selected), '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', and 'None of the above choices work'. There are 'Back' and 'Next' buttons at the bottom.

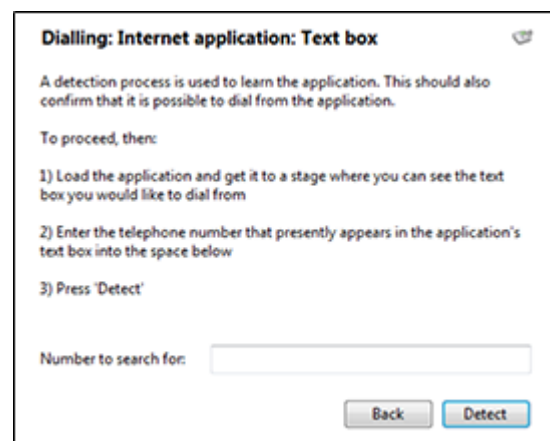


We've already covered converting identified numbers into hyperlinks so select the 'Text boxes' option on the second screen of the wizard and click the 'Next' button.

A screenshot of a web wizard window titled "Dialling: Internet application". The text explains that users 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." It asks the user to select the type to configure, noting that only Internet Explorer is supported. There are two radio button options: "Read only telephone numbers (hyperlinks)" and "Text boxes", with the latter selected. At the bottom right, there are "Back" and "Next" buttons.

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.

A screenshot of a web wizard window titled "Dialling: Internet application: Text box". It explains that a detection process is used to learn the application and confirm it is possible to dial from the application. It lists three steps: "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", and "3) Press 'Detect'". Below the instructions is a text input field labeled "Number to search for:". At the bottom right, there are "Back" and "Detect" buttons.

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.