Horizon Integrator CRM

Salpo Add-in Guide

Contents

Introduction 5
Information You'll Need 6
Configuration *6*
Testing *7*
Dialing configuration *7*

Introduction

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

Salpo CRM and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

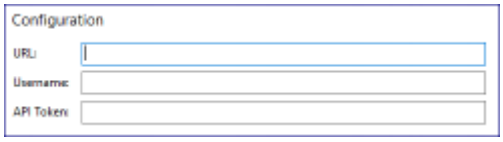
Horizon Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the 'Technical Installation Guide' or consult your system administrator.

Information You'll Need

Salpo CRM URL used to launch Salpo CRM, username and Salpo 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 'Salpo CRM' from the 'Type' dropdown box and then click the 'Set' button.



In the 'Configuration' area that appears below is where the details are entered which the client software should use to connect. More detailed instructions on how to complete the field are given later in this document.

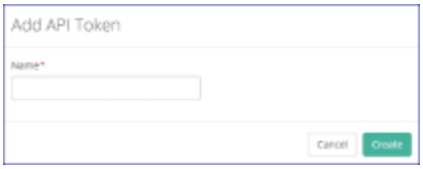
In the 'URL' text box, you need to enter the URL used to launch your Salpo CRM account.

Enter your Salpo CRM username into the 'Username' text boxes.

In the ‘API Token’ text box, enter your Salpo CRM API token which is only displayed when the Salpo API is created.

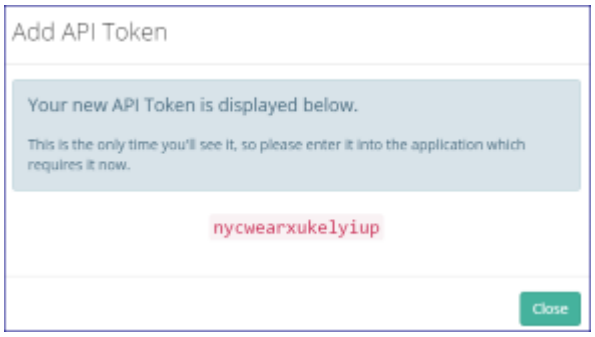
To create the Salpo API Token, in Salpo CRM select your account menu which is located in the top right hand corner and select the menu option ‘API Tokens’

On the API Tokens screen click the ‘Add API Token’ button



Enter a name for your API Token and click create.

From the ‘Add API Token’ screen copy the API Token which is to be used in the GoConnect configuration screen.

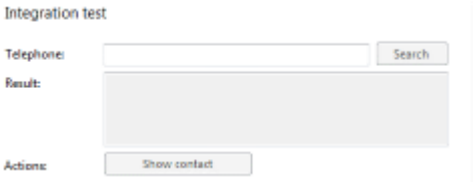


Click the 'Save' button to store the information you've entered and apply the configuration.

IMPORTANT: The method of integration we use for Salpo CRM is to periodically (daily / hourly) 'cache' the contact data which would then be available to identify the caller. This 'cached' contact data is used to identify callers therefore would not be 'live' data.

Testing

To test if the configuration worked, use the Address Book as you are unable to use the ‘Integration Test’ facility as this is a ‘cached’ integration.



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.

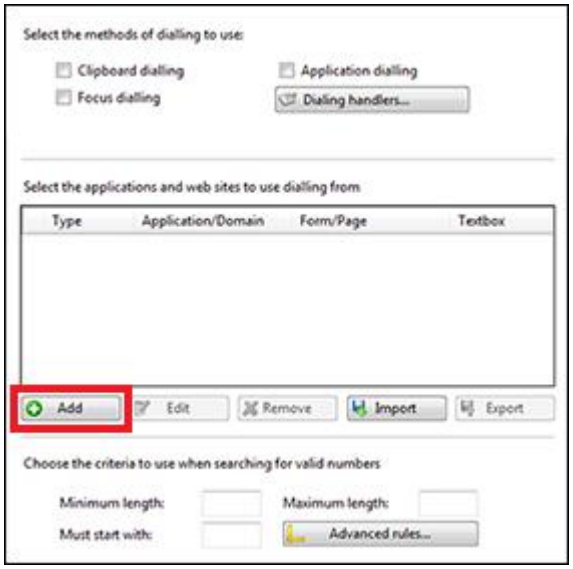
Dialing configuration

To dial out from within Salpo CRM, 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

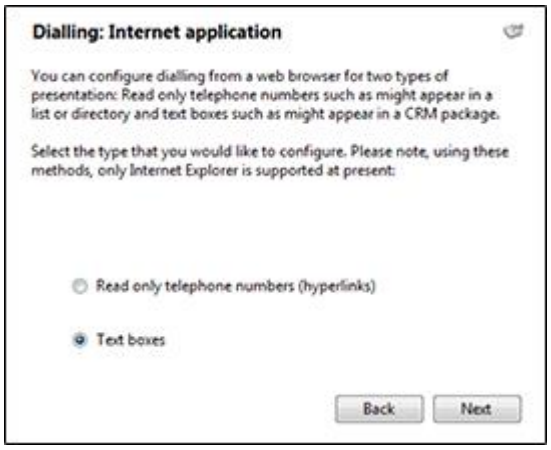


You can refine the criteria used to identify telephone numbers. Enter the appropriate number of digits into the 'Minimum length' and 'Maximum length' text boxes and specify a prefix that identifies telephone numbers (if there is one) by entering it in the 'Must start with' box.

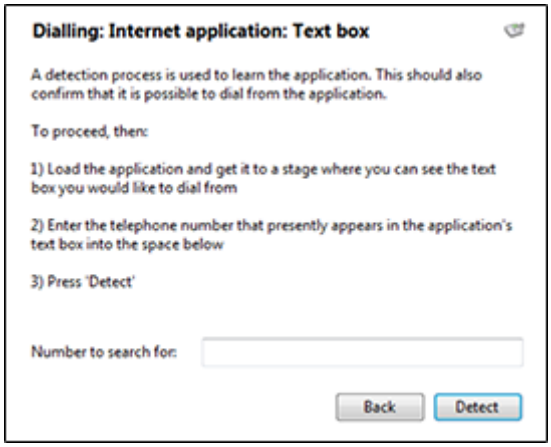
If you would like to be able to dial directly when you are entering new information in Salpo CRM, for example on the new contact page, we need to carry out some further configuration. Click the 'Add' button to start the Dialing wizard.

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 Salpo 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.

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.