

Access Addin Guide

This document will guide you through configuration of the Access addin. It is expected that you are already familiar with the Address Book and Preview window, and the basic concepts of integration and screen popping using the addins. See the User Guide for these topics.

Configuration

The Access addin configuration is split into three groups: Database, Field mapping, and Show Contact.

Database

On the Database group, first use the Browse... button to select the Access database you wish to integrate with. You can select .mdb and .accdb files.

Database configuration window showing fields for File, Username, Password, Table/Query, and an Advanced text area. There are buttons for Browse..., Guess, and Sample.

If the database is password protected, enter the username and password to use to open the database.

From the Table/Query list, select which table or query contains the contact data you wish to use. You can use the Guess button to have the addin try to guess the correct table or query (based on the name of the table or query)

If you need to you can enter your own custom SQL statement in the Advanced box. Usually though, you would create a query in Access and just select the query from the dropdown list.

If you want to check that you have selected the correct table or query, you can click the Sample button to see the first few records from the table or query that you selected.

Field mapping

On the Field mapping group, you will tell the addin what the fields in your Access database represent. For example, the field in your Access database named ACCOUNT_NUMBER might represent the unique Id of the contact.

Field mapping window showing a list of contact fields on the left and a list of database fields on the right. The 'Id' field is selected in the database field list. There are buttons for Guess, Add..., Edit..., and Remove.

To map a field, double-click it in the list (or highlight the field and click the Edit... button). From the list that pops up, select which field in the database corresponds to the field you selected, and click OK.

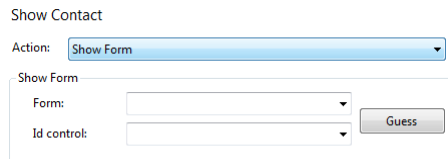
The only fields you need to map are Id, Contact Name and/or Company Name, and as many Phone fields as you have in your database. You can also optionally map the City and Email fields so that they appear in search results.

If your contacts have more than 3 phone numbers, you can add extra phone fields using the Add... button and selecting a Type of Phone number.

The Guess button will attempt to guess which fields in your database map to which fields in the addin (based on the name of the field)

Show Contact

So far, you have configured the ability to search for contacts from the Address Book and to see the name of people calling you in the Preview window.



Show Contact

Action: Show Form

Show Form

Form:

Id control:

Guess

In order for screen popping to work, so that you can actually go to the contact in your database from the Preview window or the Address Book, you need to configure an action to tell the addin what to do when you want to show the contact.

You can either show a form contained in your database, or run a VBA procedure that you have stored in a module in your database.

If you want to show a form, the form needs to contain a control that holds the unique id of the contact (the field that you have mapped to the Id field in the addin). This control needs to be visible and enabled. Select Show Form from the Action box, and enter the name of the Form and the name of the control that contains the unique id. If you press the Guess button, the addin will load the database in Access and attempt to guess the correct form and control.

If you want to run a procedure, select Run Procedure from the Action box, and enter the name of the procedure to run in the Procedure text box. You can send arguments to the procedure by filling in the Arguments text box (usually you will want to send the id, by entering %Id%).

Testing

To test if the configuration worked, you can either enter a phone number in the Telephone box of the Integration test area in the Microsoft Access addin configuration page, or use the Address Book window to search for a name or number.

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.