ODBC Addin Guide

This document will guide you through configuration of the ODBC 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 ODBC addin configuration is split into three groups: Connection, Fields, and Show Contact.

Connection

On the Connection group, first select the ODBC data source to use from the Data source name dropdown list. You need to have created the data source from ODBC Configuration first.

The connection string will be shown, allowing you to edit it if necessary.

If the data source requires a username and password, enter them in the relevant boxes.

From the Table/query list, select which table in the data source contains the contact data you wish to use.

If you need to you can enter your own custom SQL statement in the Advanced box. You might do this for example if phone numbers are stored in a different table to the table that contains contact names, and you need to do a join.

The Left and Right boxes allow you to enter custom identifier quote characters. These are dependent on the type of ODBC driver your data source uses, and are usually square brackets or quotes.
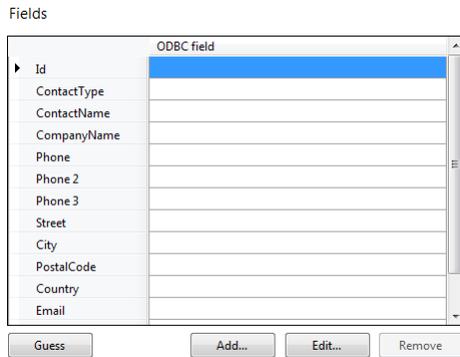
The Parameterize queries box should be left checked, only turn this off if your ODBC driver does not support parameterized queries. This is a security feature.

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

Fields

On the Fields group, you will tell the addin what the fields in your data source represent. For example, the field in your data source named ACCOUNT_NUMBER might represent the unique Id of the contact.

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 your data source corresponds to the field you selected, and click OK.

The only fields you need to map are Id, ContactName and/or CompanyName, and as many Phone fields as you have in your data source. You can also optionally map the City and Email fields so that they appear in search results.
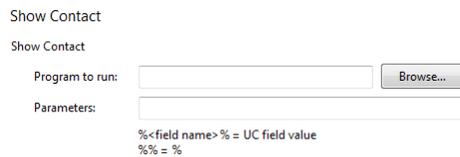
If your contacts have more than 3 phone numbers, you can add extra phone fields using the Add… button and selecting a Type of Phone number.

The Guess button will attempt to guess which fields in your data source 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.

If you want screen popping, so that you can actually go to the contact in your database program from the Preview window or the Address Book, you need to configure the Show Contact action to tell the addin what to do when you want to show the contact.

The addin will run the program or go to the URL that you specify and pass it the command-line parameters that you specify.

Use the Browse… button to select the program to run. Or to launch a web page, enter its URL.

In Parameters you can enter, for example, %Id% to pass the value of the field mapped to Id to the command-line of the program. If you entered a web page URL in Program to run, the parameters are appended to the URL.

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 ODBC 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.