

Computer Telephony Integration Application Bulletin

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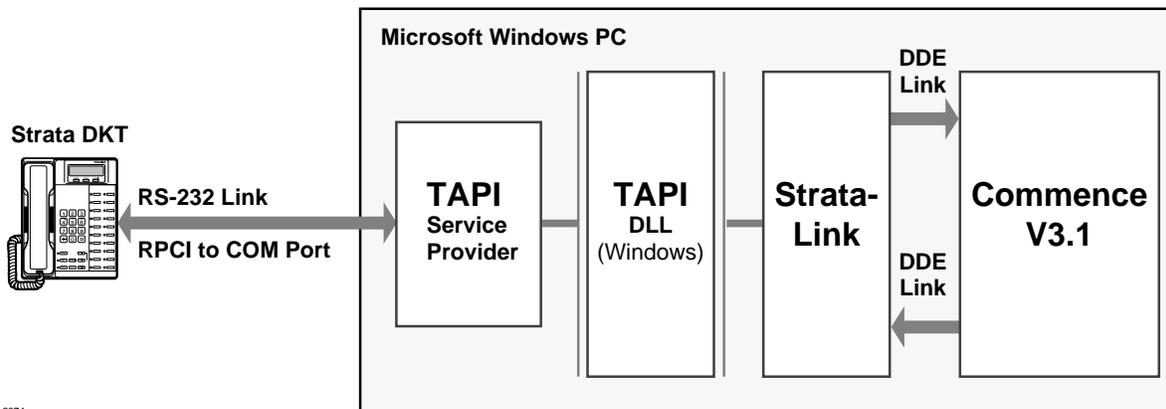
Using Commence[®] V3.1 with StrataLink

Commence V3.1 is a powerful contact management PC application that adds important functionality to your telephone system. It works well with a Strata DK system when used with StrataLink as a TAPI compatible middleware, to provide database lookup and screen-pop features.

To use Commence properly, it is important to understand its capabilities and limitations. The purpose of this bulletin is to assist you in understanding how to install, set options, and use Commence as a TAPI application with the Strata DK system.

Linking Commence V3.1 to Toshiba StrataLink

The popular Commence contact management software package, in conjunction with StrataLink utility, can efficiently integrate with the Toshiba TAPI Service Provider. For outgoing calls, Commence receives the dial string sent by Commence and relays the number to the StrataLink/TAPI Service Provider. For incoming calls, TAPI messages are sent to StrataLink from the Toshiba TAPI Service Provider. StrataLink applies the conditions and filters to this event and creates an action with Commence which causes Commence to locate the database phone number and display any matching entries, commonly referred to as a "Screen Pop".



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Commence V3.1 Installation Guidelines

This section provides the setup and programming information to provide a full desktop dialing and screen-pop integration between the Toshiba StrataLink and Commence V3.1 contact manager. The Commence product has a very powerful agent capability which allows it to be extensively customized. Use this application bulletin as an example for customizing Commence for your user's needs.

1. Install the Toshiba TAPI Service Provider (use the installation instructions for the service provider found in Chapter 13 of the Installation and Maintenance Manual.)
2. Install Commence V3.1 (use the installation instructions provided by the Commence User Guide to install the software.)
3. Customize the Commence Settings.

Link Commence to StrataLink

► To configure the Outdialing option

1. In the COMMENCE.INI file in the C:\Windows directory, add the following three lines with a text editor or word processor:

```
[Dialer3]
Selected=StrataLink
StrataLink=[C:\Program
Files\StrataLink\stratlnk.exe][Stratlnk][SYSTEM][Dial,"&P","]
```

Note In the preceding StrataLink line, you can put a specific TAPI appearance number in the 2nd parameter (in-between the last set of quotation marks), on the Dial command, but if you do so, that appearance will be used on all calls dialed from Commence. To choose a specific line button for outdialing, enter a number, with "0" being the bottom button on your phone, corresponding to the line button.

2. Execute the Commence software.
3. From the Customize menu, select Preferences, then select Dialer. You will see "StrataLink" added to the "Dial Using:" choices.
4. From the Dial Using box, select "StrataLink" and all Commence dialing will be done using DDE commands to the StrataLink.

Note The Windows TAPI "Dialing Preferences" will affect the dial string, for instance, you set the program to automatically dial 9 for an outside line.

Provide StrataLink Settings

► To enable the Screen Pop feature in the StrataLink

1. From the Add/Change Actions window, select Pop Commence.
2. Click OK to add the following action.

Important! Do not edit any information in this window.

The screenshot shows the 'Add/Edit Action' dialog box. The 'Action Name' field contains 'Pop Commence'. The 'Type' dropdown is set to 'DDE Execute'. The 'DDE Execute' section contains the following fields: 'App Name' is 'Commence', 'App Topic' is 'GetData', and 'DDE Execute String' is '[FireTrigger("CID","Person",&P",&A")]'. There are buttons for 'OK', 'Cancel', 'Apply', and 'Show Test Params'.

► To add the Pop Commence Trigger

- In the Add/Change Trigger Rule window, enter the settings shown below.

The screenshot shows the 'Add/Change Trigger Rule' dialog box. The 'Triggering Event' dropdown is 'Call Ringing'. The 'Action' dropdown is 'Pop Commence'. Under 'Caller ID', the 'any Number' radio button is selected. The 'Trigger Delay' is set to '0' tenths. Under 'Phone State', the 'If Not Talking' checkbox is checked. There is an 'Edit Actions' button. The 'Appearance' dropdown is set to '<any>'. There are buttons for 'OK', 'Cancel', and 'Apply'.

Normally, this Screen Pop application needs a Caller ID number and it is preferred to delay the action if currently talking with some one else. The Action to pop the next record will occur if the current call is terminated or placed on hold.

A time delay (in tenths of a minute) could be used if needed for your application and this action can be selected for only selected line buttons.

Interface Commence and DDE Execute

Commence has a programming interface for setting up the execution of the DDE Execute instruction. This is done by creating an “Agent” to receive the DDE instruction and define the outcome. See the Commence manual for details. Using the Commence manual, please add the following “Agent” (“Customize”, “Database”, “Agent”):

Agent Name:	CallRinging DDE
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If this trigger occurs:	DDE Execute
	Trigger Type: Receive DDE Trigger if Agent Message: CID

and These Conditions are True:	Item Count
	for items in...: Category: Person Select Filter Filter1 Business Phone Contains Field Value: (-3-) Summary or Filter2 Filter2 Home Phone Contains Field Value: (-3-) Trigger if... More than 0 items

Then Perform these Actions:	
A	Edit Item: <input checked="" type="checkbox"/> Display Items Initial Form
B	Message Box: Call from: (-3-), (%First Name%) (%Last Name%) Action Buttons: Button #1 “Answer” Send DDE FileName: Stratlnk.EXE Application Name: Stratlnk Topic Name: SYSTEM Message Type: Execute Message Text: [Answer, (-4-)]