Using ACT! Phone Link with Strata DK

ACT! is a very powerful contact management PC application which can add important functionality to your telephone system. It works well with a Strata DK system, as a TAPI compatible application, to provide database lookup and Screen Pop features.

When using ACT!, it is important to understand its capabilities and limitations so it can be used properly. The purpose of this bulletin is to assist you in understanding how to install, set options, and use ACT! as a TAPI application with the Strata DK system.

Linking ACT! Phone Link to the Toshiba TAPI Service Provider

The popular ACT! for Microsoft® Windows® (V2.04 or greater) contact management software package, with help from the ACT! Phone Link utility, can tightly integrate with the Toshiba TAPI Service Provider. For outgoing calls, ACT! Phone Link receives the dial string sent by ACT! and relays the number to the Toshiba TAPI Service Provider. For incoming calls, TAPI messages are sent directly from the Toshiba TAPI Service Provider to ACT! Phone Link which causes ACT! to lookup the phone number in the database and display any matching entries, commonly referred to as a "Screen Pop."
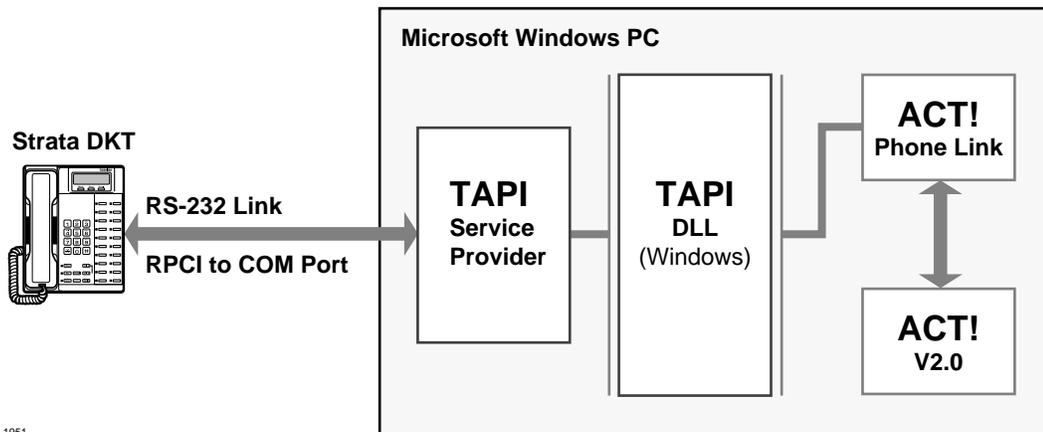
ACT! Phone Link has several characteristics that should be understood before using. First, ACT! Phone Link can handle only a single call at a time. When connected to the Strata DK, calls arriving on other line appearances while on a call will be ignored by ACT! Your phone will continue to ring and the call can be answered from your phone, but ACT! will not automatically change screens to match the next call.

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ACT! Phone Link requires a manual intervention to open the group to all records in the file for the next call to make a selection. This is done by going to the Group listing and selecting "ALL." ACT! can only have one database file open at a time; therefore, all records to be used must be kept in the same database file using its single format. ACT! does allow sub-grouping of records within the file.

ACT! Phone Link expects the Toshiba Service Provider to be device zero (0). This requires the installer to remove all existing drivers in the Telephony Control Panel, install the Toshiba Service Provider, and re-install the other drivers.

Note   This may require adjusting the settings for the appropriate device on the other applications.

ACT! Phone Link uses the first Caller ID it receives to attempt the "Screen Pop." For example, when a transferred call remains on the same key as the transferring call, ACT! Phone Link will not update the Caller ID field to the outside number and search for the matching record associated with the outside caller. This is typical of Strata DK280 Release 3 systems using Directory Numbers [DNs] for all call appearances and calls answered by an Auto-Attendant. To get around this situation, use the LCD Names feature to name the phones that will be transferring the calls. When a name is used for the LCD Display in place of the station number (and the Name is not entered with the [DN]), then the Service Provider provides ACT! with the Caller Name in place of the Caller Number. The first Caller ID seen by ACT! will be that of the outside line; thus ACT! Phone Link will search using this number.

The dial codes for accessing outside PBX lines must be included in the Location section of the Telephony Control Panel. In this section, you should define the home area code and a trunk access code for local and long distance calls. ACT! uses these settings to adjust the dialed number to be sent to the Service Provider for dialing.

Installing ACT!

Step 1: Install the Toshiba TAPI Service Provider.

Use the installation instructions for the service provider found in Chapter 13 – Computer Telephony Integration of the *Strata DK Installation and Maintenance Manual.*

Step 2: Install ACT! (V2.04 or greater)

Use the installation instructions provided by the *ACT! User Guide* to install the software. For the Trial Size copy of ACT! available with the TAPI demo kit, use the procedures in Application Bulletin AB50-0002 for ACT! Trial Size.

Step 3: Install ACT! Phone Link

See ACT! Phone Link "Read Me" files for proper setup information.

Step 4: ACT! Phone Link Tutorial (Optional)

When ACT! Phone Link is installed, a new program group labeled ACT! Phone Link is added to the Windows Program Manager. Within the ACT! group, there are two files called ACT! Phone Link Tutorial Part 1 and 2. The tutorials provide an excellent overview of the new TAPI features supported by Symantec's ACT! when used with the Toshiba RPCI-DI.

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Step 5: Enter ACT! Settings

1. Double click on the ACT! Phone Link icon to start the program.

2. From the Phone pull-down menu, select (check) the "Popup Incoming Calls" option.

   Phone Link displays the Station number in brackets, but with name and data from the current ACT! Contact record.

3. From the Phone pull-down menu, select (check) the "Setup" option.
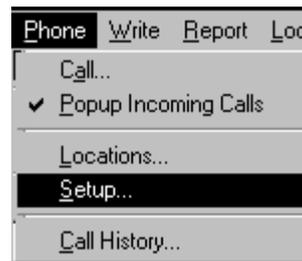
4. Make sure the button for your Intercom or [PDN] appearance is selected from the pull-down window; click the OK button.

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Setting up ACT! Phone Link

Phone Numbers in the Database

The Strata system delivers Caller ID/ANI information via TAPI to the ACT! Software. ACT! uses this Caller ID to lookup the record in the open database and compares the received number with the numbers recorded in the "Phone" field of each record. The Caller ID's received will need to match records in the database in order to find a match.

1. Select or create records in your ACT! database. Phone numbers entered into the phone field must have the following format: 214-555-9665. You must put hyphens between the area/exchange codes and between the exchange code and the last four (4) digits.

Note Access codes for trunk access are specified in the Location Settings within the Telephony Control Panel.

2. Each time you perform a call to the station causing a screen pop in ACT! Database, ACT! selects a group of records that match the search criteria. Thus, the system reduces the number of records in the search to only those that meet the criteria, typically only one. A manual intervention will be required to open the search to all records.

3. Go to the Group function located on the left side of the screen and select ALL. This will open the next search to all records.
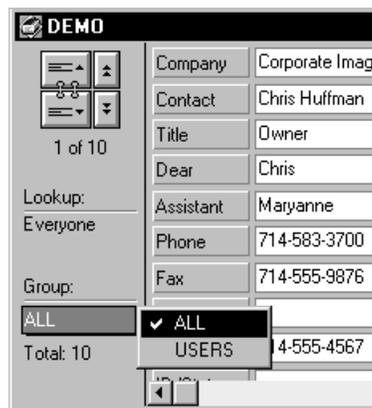
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Phone Link Settings

Phone Link has two setup parameters necessary for operation. First, an option must be set to request the screen to pop-up based upon the received Caller Number. Second, the specific line button must be set for making outgoing calls. The button should be the Intercom or [PDN] function to enable the features to operate properly.

1. Select the handset icon in the middle of the tool bar or select the Call option from the Phone pull-down menu from the Main Menu.

2. If the Phone Link dialog box appears, then you have successfully verified the Phone Link.

3. If you see the My Record dialog box, TAPI did not load and ACT! will attempt to use the COM port modem to dial. Be sure you:

    ♦ Start ACT! using ACT! Phone Link rather than ACT! 2.0 for Windows.

    ♦ Installed the Toshiba Service Provider as device zero (0). See note.

    ♦ The RPCI-DI and cable connection to the computer are working.
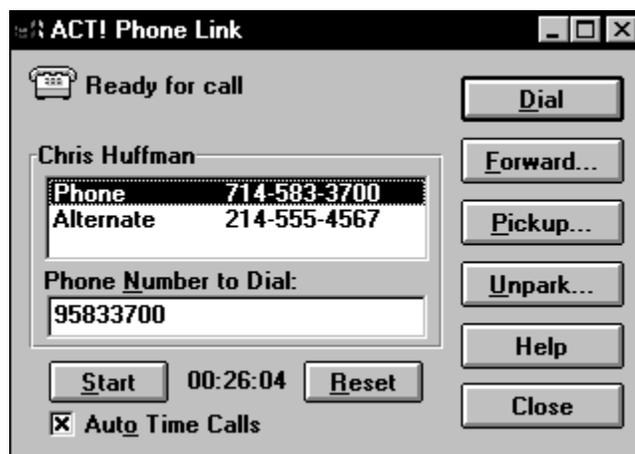
Note ACT! Phone Link requires that Toshiba Service Provider be the first driver installed (Driver 0). You may need to remove all other drivers listed in Settings, Control Panel, Telephony. In Windows 95 this includes double-clicking on Unimodem and removing any modems installed. These drivers may be added back into the list, if needed, once you get your application working.

4. If the Phone Link dialog box did not work, but appears with the Dial, Forward, Pickup, and Unpark buttons grayed out, then the connection between the PC and RPCI-DI is no longer working.

    Verify the RPCI-DI and cable connection to the computer.

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DKT Display Mode Settings

To identify the calling party, TAPI looks for the Station Identification in the LCD display data. When the DKTs are in the name mode, TAPI sends the Caller ID Name to the application in place of the Caller ID Number. ACT! ignores the name information and displays the current record information in its database. The Toshiba Service Provider uses the information on the top line of the LCD display for Caller ID information.

To have ACT! find the record of the calling DKT, clear the Name display on all phones involved in the Screen Pops. To reset the display mode:

♦ For Strata DK8/16/96, press the Intercom button, dial 620, and press the Spkr button on each phone.

♦ For Strata DK16e/280/424, press the [PDN] button, dial #620, and press the Spkr button on each phone.

Note Make sure the correct switch type has been selected in the installation process of the DKT Service Provider. This information is used to determine the format of the received data for presenting it to the TAPI application.

Operating ACT! Phone Link

The following example shows the main screen. When calls ring-in or a call is being placed, a dialog box for Phone Link appears.
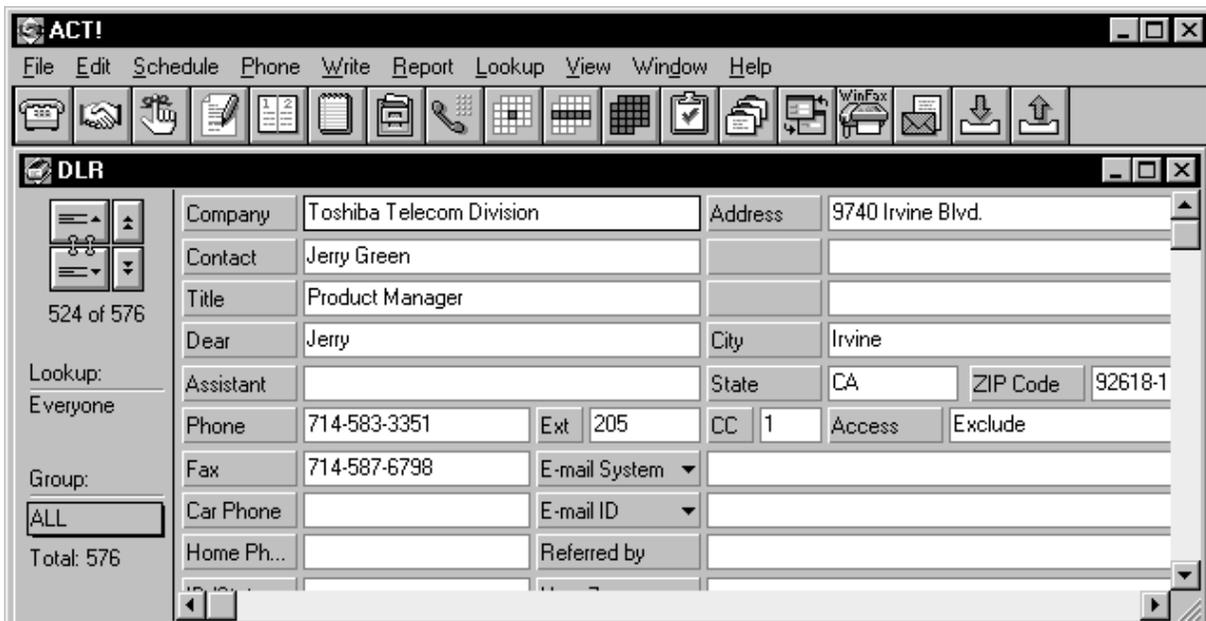
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1. As the call rings-in, the Toshiba TAPI Service Provider sends the TAPI event which causes ACT! to do a Screen Pop. If the database has three records matching the Caller ID phone number, ACT! displays the first matching record and selects all three possible records. Thus, multiple contacts from the same location are selected.
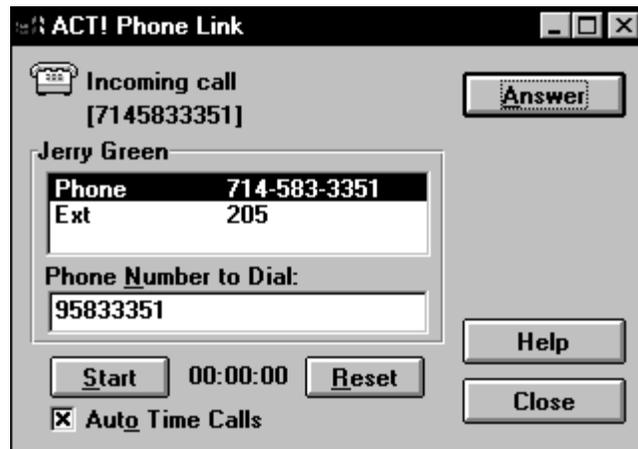
2. Once the call is answered, a series of options for the call are available, including Hold, Transfer, and Conference.The following screens show the steps that occur if you want to transfer a call, for example to extension 200. Select the Transfer option.

3. Click on OK to continue the transfer. If you click on Cancel, the screen in Step 2 is displayed again and you can choose another option.

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4. You can announce the
    call or just select
    Complete to finish the
    transfer.