

# Computer Telephony Integration Application Bulletin

AB50-0019  
December, 1999

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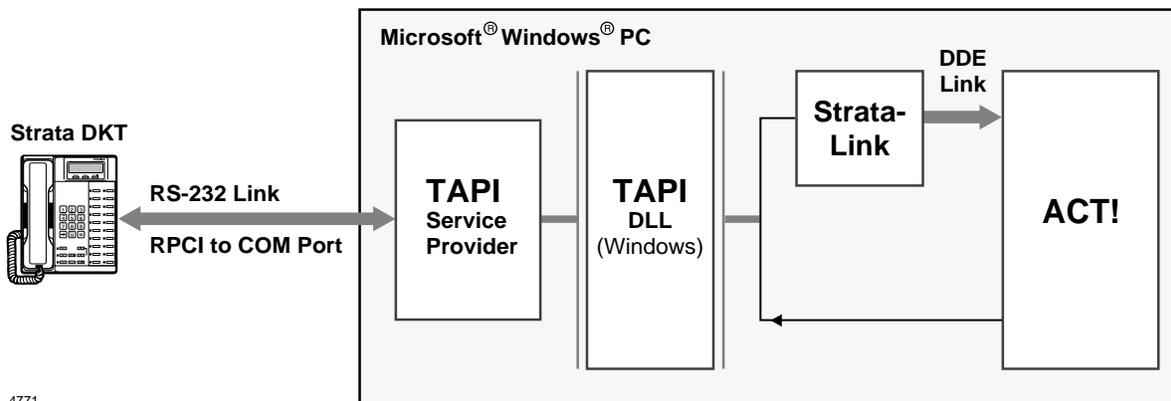
## Using ACT! with StrataLink ACT! 3.0, 4.0, or 2000

ACT!<sup>TM</sup> provides a TAPI compliant interface that can be linked with StrataLink to provide an extremely powerful application working with a Strata DK system. This combined application overcomes many limitations of ACT!. This includes handling multiple calls, having screens “pop” when calls are connected, and automatically opening the search to all records for each “screen pop” action.

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! to StrataLink

ACT! contact management software package, in conjunction with the StrataLink utility, can tightly integrate with the Toshiba TAPI Service Provider. The ACT! and StrataLink connections are shown in the figure below. For outgoing calls, ACT! uses its TAPI interface to dial the number to the 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, which causes ACT! to lookup the phone number in the database. Any matching entries are displayed in a “Screen Pop.”



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A number of considerations should always be applied whenever calls are being controlled with CTI applications such as ACT!. The method that the application handles the search routine can impact whether the screen will match the call. ACT! sequentially selects records, reducing the number from which to choose with each selection. This can be a problem if calls are transferred to the CTI enabled phone.

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When calls are transferred from one phone to another, the first call to the CTI phone is an “Intercom Consultation Call.” The Caller ID for this call is the internal station number of the transferring station. If this station were a number such as extension 214, then the first Caller ID attempted in ACT! will be for Area Code 214 and all records selected will be from this Area Code. When the call is finally transferred, then the Caller ID will be sent a second time with the number from the outside caller. If this number is not within the 214 Area Code, ACT! will not find a match.

To fix this problem, use the Strata DK System Administration capabilities to create LCD names on phones used for the call transfers. By creating an LCD name that contains a name (or a name and number if no space character appears between the name and number) causes TAPI to send a Caller ID name only and not a number. This stops StrataLink from sending the “screen pop” event on the intercom call and only sends it when the outside call is finally transferred to the station.

ACT! PhoneLink software limitations referenced in previous Application Notes still apply as follows:

- ♦ “EVERYONE” must be selected to handle multiple calls.
- ♦ Act! treats all line buttons equally.
- ♦ ACT! does not provide information on held calls; it only provides automatic screen pops for Call Ringing events.

StrataLink addresses many of these issues and provides capabilities to flexibly control these events. Toshiba has verified the following operations and would be glad to assist with any changes that you may need. For further information, refer to the *Strata DK Installation and Maintenance Manual* – Chapter 13.

## Installing the CT Link Software

### Step 1: Install the Toshiba StrataLink/TAPI Service Provider

Insert the first diskette of the two diskette set in Drive A:, select Run... from the Start button for Windows and enter A:\Setup. The installation Wizard will direct you in installing the software. Toshiba recommends that StrataLink be included in the startup process of the PC. This will have StrataLink always working on the desktop and the user only needs to start ACT! to be operational.

### Step 2: Install ACT!

Use the software installation instructions provided by Symantec, Inc.

### Step 3: Setup ACT! for Use With StrataLink

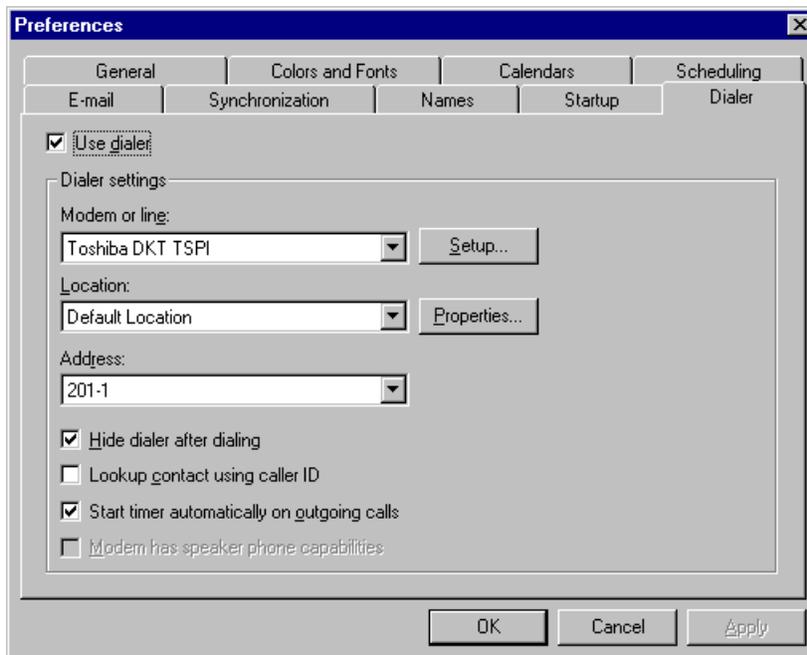
To setup ACT! for use with StrataLink select Edit from the main menu then select Preferences.

1. Select the Dialer tab (see figure on following page). Then check “Use dialer.”
2. Under Dialer settings, select Toshiba DKT TSPI as the modem.
3. Choose a Location.

Location refers to the Windows Location Parameters established in Telephony Setup. These are used to determine PBX dial codes to be inserted prior to dialing the number.

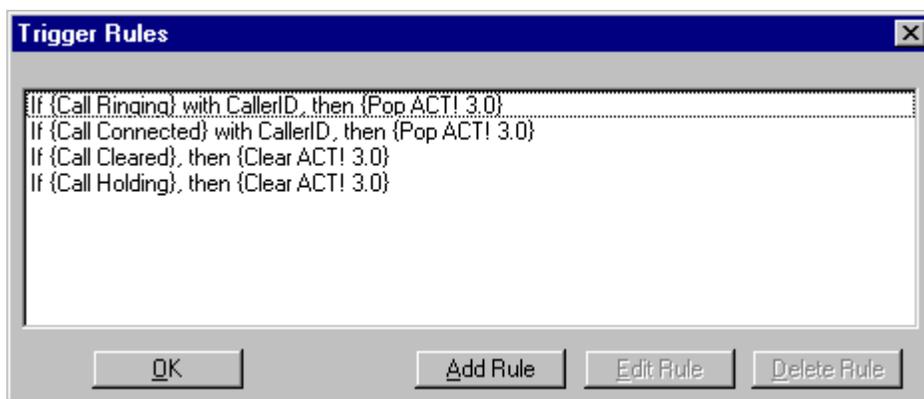
4. Make sure that Lookup Caller using Caller ID must be Off (*not* checked).

5. (optional) Other items can be selected based upon the preferences for the desktop. You can:
  - ◆ hide the dialer (set it to disappear) when the call is done or remain until manually cleared
  - ◆ set the timer to automatically start a timer for calls
  - ◆ set a preference for outbound line (button) selection.



### Step 4: Open StrataLink

StrataLink needs to be initialized for controlling ACT! for incoming calls. This is done by creating a set of Trigger Rules for operation. To edit Trigger Rules, select Setup from the Main Menu then select Triggers. The Trigger Rules window shown in the figure below appears. The following rules are a guide for creating a set of rules that will work for your application.



The above rules are written for any line button on the phone. The first rule creates a “Pop” screen whenever a new call begins ringing, and a Caller ID number has been received, and I am “Not Talking” on the phone.

The second rule creates a “Pop” whenever I connect to that call and the call has a Caller ID number associated with the call. The last two rules open the search to “EVERYONE” when a call is placed on Hold or Disconnected.

These last actions are needed for ACT! since the search routine narrows its record search to those that meet the criteria. These rules generally lead the search to one record group, and any additional selections must be within this group.

To automatically search all records to allow a call to be placed on Hold and move to a second or third caller, the search should be opened to all records in the file.

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**CAUTION!** Use caution when employing Call Hold and Call Clearing trigger rules. If multiple phones have the same line appearances, calls placed on hold and disconnected from one of the other phones will trigger the event in this CTI-enabled location. The action “Lookup Everyone” should not cause a problem.

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## ACT! Screen Pop Actions

The following Actions have been predefined to work with ACT! to control the screen to match the Caller ID received. Toshiba does not expect the user to understand the details of the interface between ACT! and StrataLink. These actions are provided to ensure that information is entered correctly in a given system when problems might occur. The Edit/Actions window shown below can be accessed by selecting Setup from the Main Menu then select Actions. To Edit an existing Action, highlight the Action and click Edit. To Add a new Action, click the Add button.

**Important!** *Deleting or adding Actions without instructions from Toshiba or knowledge of your program’s DDE commands is not recommended.*

The screenshot shows the 'Add/Edit Action' dialog box. The 'Action Name' field contains 'Pop ACT! 3.0'. The 'Type' dropdown menu is set to 'DDE Execute'. The 'DDE Execute' section contains the following fields: 'App Name' is 'ACTWIN3', 'App Topic' is 'Database', and 'DDE Execute String' is 'Lookup Phone &H'. At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Show Test Params'.

The screenshot shows the 'Add/Edit Action' dialog box. The 'Action Name' field contains 'Clear ACT! 3.0'. The 'Type' dropdown menu is set to 'DDE Execute'. The 'DDE Execute' section contains the following fields: 'App Name' is 'ACTWIN3', 'App Topic' is 'Database', and 'DDE Execute String' is 'Lookup Everyone'. At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Show Test Params'.