

Computer Telephony Integration Application Bulletin

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Installing ACT! Trial Size Demo Software

Trial Size Demo Software ACT! is a very powerful contact management PC application and can add important functionality to your telephone system. As a TAPI-compatible application, it works well with Strata DK systems to provide database lookup and Screen Pop features.

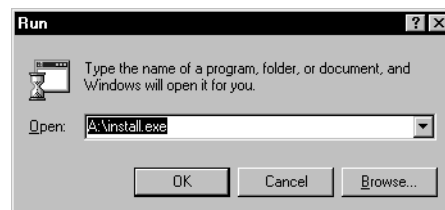
ACT! Trial Size is a small version of Symantec's ACT! Version 2.0 software. This version demonstrates the capabilities of TAPI and its inter-operation with the Toshiba Strata DK systems. The purpose of this bulletin is to assist you in installing, setting options, and using ACT! in TAPI demonstrations using a Strata DK system. This document is written for a Strata DK16 system, but the concepts can be used for any of the Strata DK products.

Installing ACT! Trial Size

ACT! Trial Size is a special package of the popular ACT! Contact Manager software limited to 25 contacts to be used for demonstration purposes when needed. The following installation procedures are presented for those who do not have the full version of the software.

Step 1: ACT! Trial Size Installation

1. From Windows, choose the Run command from the Start button on the Task Bar. (Program Manager's File Menu in Windows.)
2. Place the ACT! Disk 1 into either drive A or B. In the Run dialog box type:
A:\INSTALL and click the OK button.



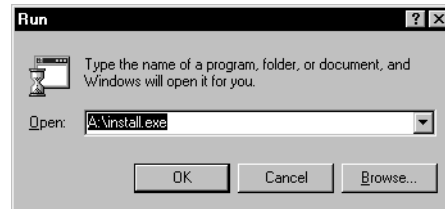
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3. Click the Easy Install button. Easy Install lets you install all ACT! Files in a new ACTWIN2 directory. Custom lets you choose the files, reports, macro, or templates to install. Toshiba recommends the Easy Install to avoid potential problems in your demo.
4. Click the OK button to install ACT! to the default directory, C:\ACTWIN2. If you want to change the drive or directory, type the new path and click the OK button.
5. When prompted, remove disk 1 and insert disk 2. Click the OK button.
6. After all ACT! files have been copied, the on-screen registration dialog box appears. Fill in the requested information, click the OK button, and follow the prompts.
7. Click the OK button to finish installation. Double-click the Read Me icon for any updated ACT! information.



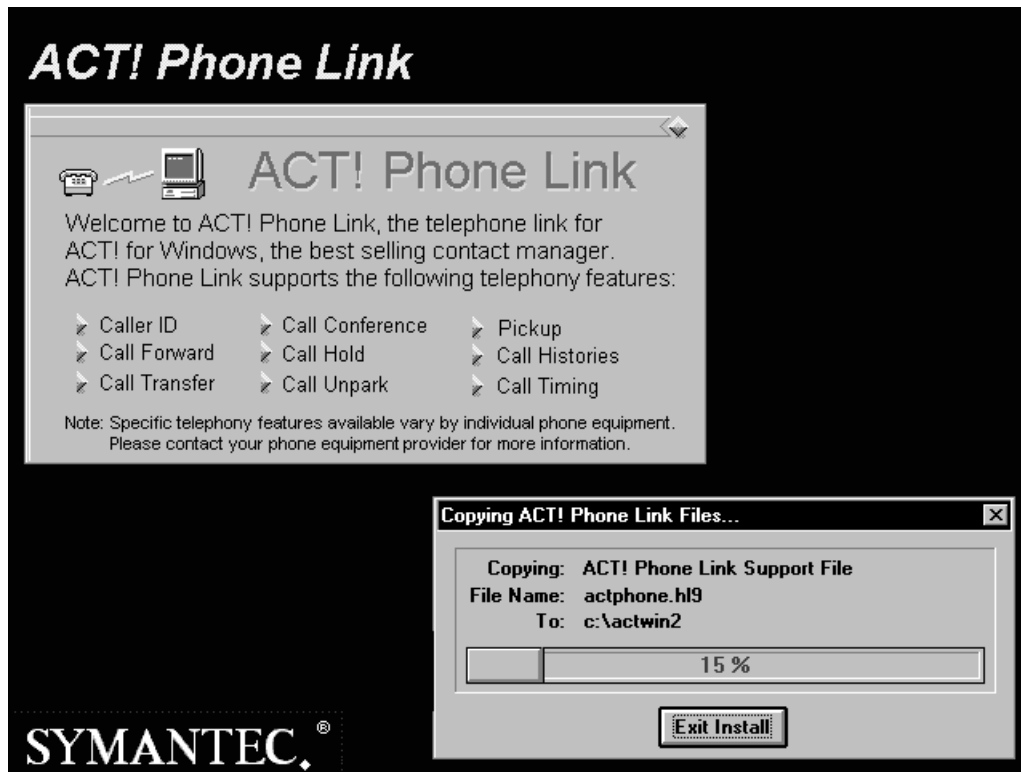
Step 2: Install ACT! Phone Link

1. Place the ACT! Phone Link disk into drive A.
2. From Windows, choose the Run command from the File Menu in the Program Manager.
3. In the Run dialog box type:
A:\INSTALL and press **Enter**.
(**B:\INSTALL** if your disk is drive B.)
4. If you agree to the License Agreement terms click the Yes button.



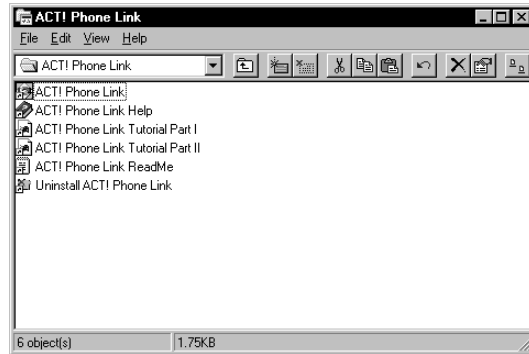
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5. Select the drive and path (default recommended) then click the OK button.



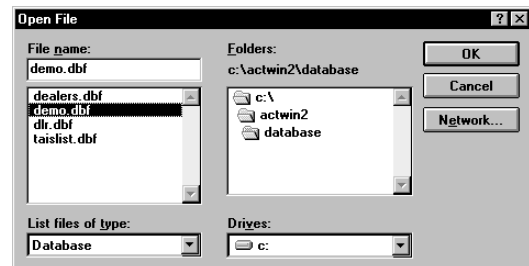
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- Once the installation is complete “Phone Link Installation Successful” appears. Click the OK button. The ACT! Phone Link appears and the installation is complete.



Step 3: Open the ACT! Trial Size Demo Database

- Double-click the ACT! icon.
- From the ACT! main screen, select File; select Open.
- Select demo.dbf and then click the OK button.
- From the ACT! File pull-down menu, select Exit to quit.



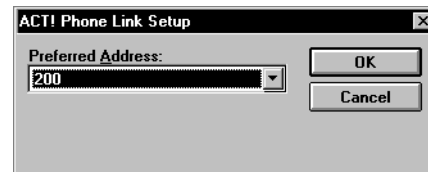
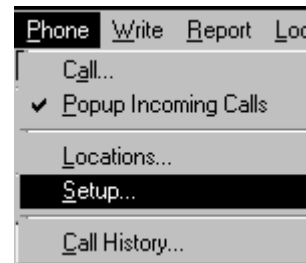
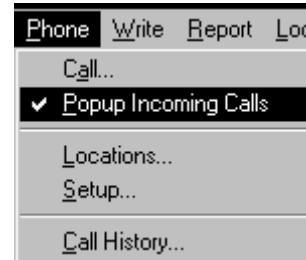
Step 4: ACT! Phone Link Tutorial (Optional)

When ACT! Phone Link is installed a new program group labeled ACT! Phone Link is added to the Windows Program Manager. Within the ACT! Phone Link group are two files called ACT! Phone Link Tutorial Part I and ACT! Phone Link Tutorial Part II. 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: Entering ACT! Settings

1. Start ACT! Phone Link.
2. From the Phone pull-down menu ensure that the "Popup Incoming Calls" is selected (checked).
3. Select Phone from the main menu and then Setup.
4. Make sure "Intercom" or the Primary DN of your station (in this case 200) appears in the pull-down window; click the OK button.

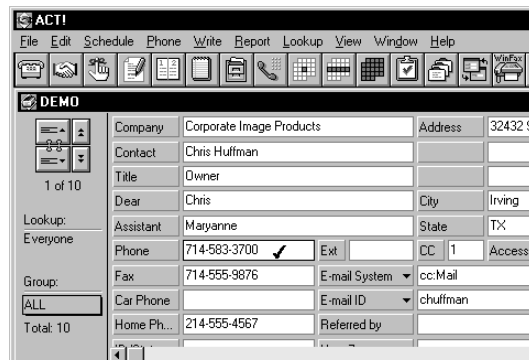


Setting up an ACT! Demo

Step 1: Check the Database Lookup

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 compare the received number with the numbers recorded in the "Phone" field of each record. The Strata DK16 Demo sends the station numbers (typically 10, 11, 12) as the Caller ID. The Caller ID's received will need to match records in the database to find a match.

1. Select records in the Demo database and change the Phone number to match the Station numbers used to originate the calls. Example: Change Chris Huffman (record 1) Phone field from 214-555-9665 to 12.



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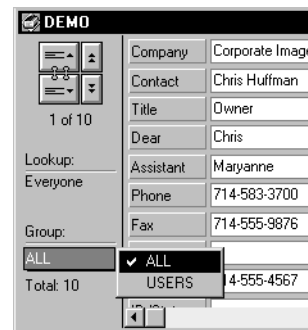
Note To make the demonstration more realistic, use a text editor such as Notebook and add the following lines to the file, **C:\WINDOWS\SYSTEM\dktsp.ini**:

```
[ DEMO ]  
ANI=1  
NUMBER=7145833700  
NAME=CHRIS HUFFMAN
```

Any intercom call to the TAPI enabled telephone will present the defined Number and Name.

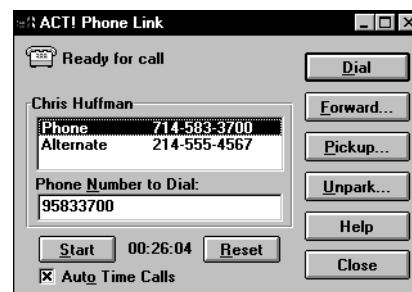
Each time you call a station causing a screen pop in the ACT! Database, ACT! selects a group of records that match the search criteria. Thus, the system reduces the number of records in the search to only those that meet the criteria, typically only one. A manual intervention will be required to open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

2. 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.



Step 2: Verify Phone Link

1. Select the handset icon in the middle of the tool bar or open Phone and select Call 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:
 - ♦ Verify that ACT! Phone Link was used to start ACT! rather than ACT! 2.0 for Windows.
 - ♦ Verify that the Toshiba Service Provider is installed per the Installation Instructions.
 - ♦ Verify the RPCI-DI and cable connection to the computer.



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

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any modems installed. If needed, these drivers may be added back into the list 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. Step 3: Check Phone System Settings and DKT Display Mode

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 will display 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.

1. 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:
 - ✦ Strata DK8/16/96 - Press the Intercom button, dial 620, and press the Spkr button on each phone.
 - ✦ Strata DK16e/280/424 - Press the [PDN] button, dial #620, and press the Spkr button on each phone.
2. 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.

Performing the TAPI Demo Using ACT! Phone Link

The Toshiba TAPI Demos take advantage of Strata DK280 Release 3 features such as Caller ID and ANI functionality, notifying you of the source of an outside call, even before you answer it. Additionally, the demos cover auto dialing and history record keeping that have helped make ACT! a successful contact manager.

The following demo instructions are written for a Strata DK16 telephone system that is configured with stations 10, 11, and 12 with an RPCI-DI connected to station 10. The contact records in this tutorial have been created to demonstrate a working TAPI enabled system.

The "dktsp.ini" file is changed to reflect the additional line shown on Page 6.

Since Caller ID searches the Phone field for a unique number, remember to verify that extensions numbers 10, 11, and 12 or the number recorded in "dktsp.ini" exist in the ACT! database and are located in the Phone field rather than the Extension field of your contact records.

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Demo 1: Placing a Call

1. Start ACT! Phone Link.
2. Select the record for Chris Huffman from your ACT! database.



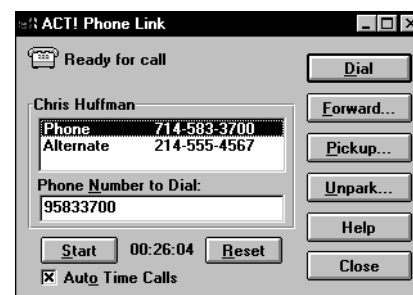
3. Use the Page Up and Page Down keys to change contacts within the database, or use the additional navigation buttons on the left side of the screen.



4. Open by clicking on the Handset icon in the middle of the toolbar or open the Phone, Call option from the main menu.
5. Choose the number to dial. You could also type in the number to dial directly into the Number to Dial field.
6. Set the Auto Time Calls option at the bottom of the dialog box to automatically start the timer when the call is connected. Without this box marked, the timer must be started manually using the Start button.

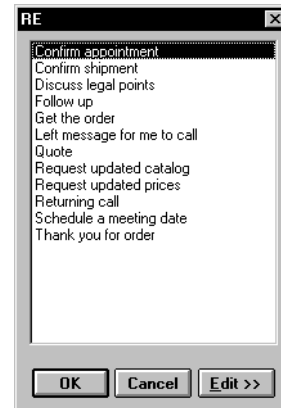
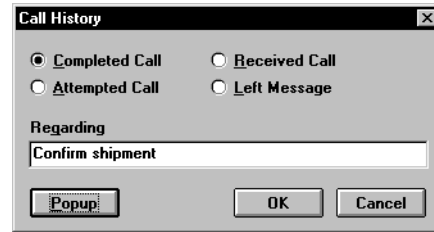


7. Autodial the number by clicking the Dial button. After a moment, the status of the line changes to Ringing and again later to Connected.
8. Explore your connected options. Answer the call ringing at station 12, the line Ringing state changes to the Connected state. You may put the conversation on hold by using the Hold button and retrieving the call using Unhold.



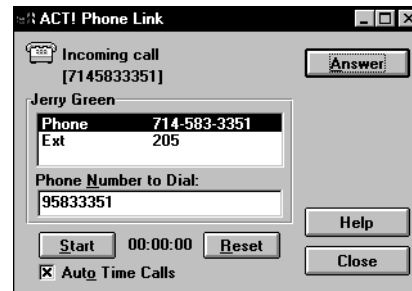
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9. Hang up and record the call history. At the called station (12) press the Spkr button to end the call. ACT! displays the Call History screen, where you can record the results of your call.
10. You may also choose Popup to select from your user-defined list of common remarks.



Demo 2: "Screen-Pop" from an Incoming Call

1. Place a call to station 10 from station 12.
2. When the Strata DK receives ANI or Caller ID, the phone number is passed to the DKT Service Provider and on to the ACT! application. ACT! searches the contact database until it finds a record that matches the incoming phone number and then displays the contact record. In this case, the record for Chris Huffman is displayed before you answer the call.



Note The number in brackets below the phone status message is the number received from TAPI as the Calling Number.