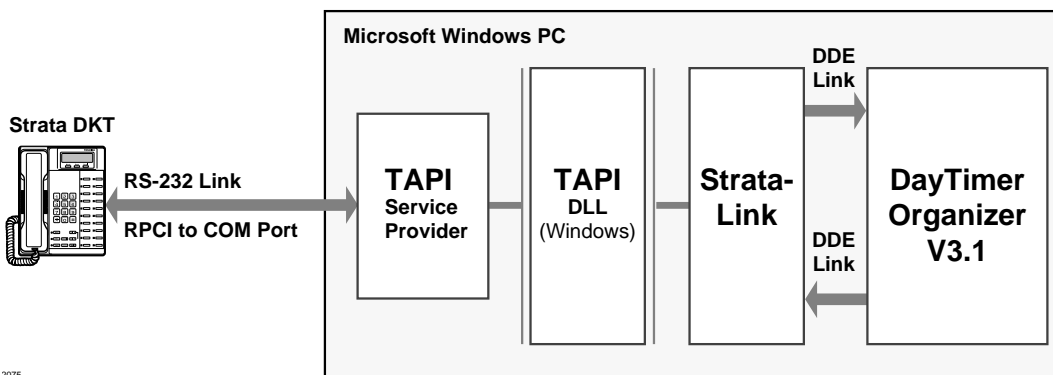# Using DayTimer Organizer™ V2.0 with StrataLink

DayTimer Organizer V2.0 for Microsoft® Windows® is a powerful contact management PC application and can add 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.

When using DayTimer, 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 DayTimer as a TAPI application with the Strata DK system.

Linking DayTimer Organizer V2.0 to the Toshiba StrataLink

The popular DayTimer Organizer V2.0 contact management software package, in conjunction with StrataLink utility, can efficiently integrate with the Toshiba TAPI Service Provider. For outgoing calls, DayTimer receives the dial string sent by DayTimer 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 by creating an action which causes DayTimer to locate the database number and display any matching entries, commonly referred to as a "Screen Pop". Also, when this ends, StrataLink will send another command to clear the selection to be ready for another call.

Diagram: Microsoft Windows PC — Strata DKT connected via RS-232 Link / RPCI to COM Port to TAPI Service Provider → TAPI DLL (Windows) → Strata-Link → (DDE Link) DayTimer Organizer V3.1

Installing DayTimer Organizer V2.0

➤ **To install DayTimer Organizer V2.0**

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 DayTimer Organizer V2.0 (use the installation instructions provided by the DayTimer User Guide to install the software).

3. Configure the DayTimer Organizer Settings.

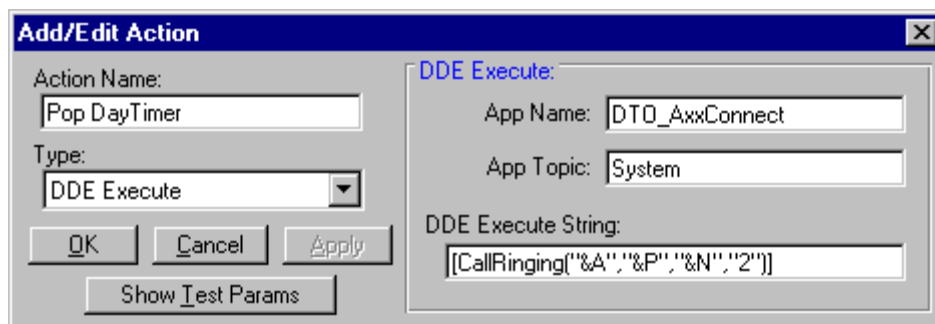➤ **To Configure DayTimer for StrataLink Dialing**

Using the menus: Set<u>u</u>p, <u>T</u>elephone, <u>O</u>ptions:

1. In Local Area Code set to your local area code (i.e. "714").

2. In Modem Settings, COM port use the dropdown box to select: "Use DDE"

3. In DDE Dialing set:

   ♦ DDE Server Name: "STRATLNK"

   ♦ Launch Command: C:\StratLink\STRATLNK.EXE

   ♦ Launch if Necessary: set to Checked

   Note   If you installed StrataLink in a different directory, then change the "launch command" programming accordingly. DayTimer Organizer limits the "Launch Command" field to 26 characters or less, thus for this "AutoLaunch" feature to work, the installation directory for StrataLink must be chosen to be less than this limit.

➤ **To enable the StrataLink screen pop**

   Important!   *In general, do not change other items in the action unless specifically instructed to do so.*

➤ **To add the following StrataLink Triggers:**

Daytimer Organizer V2.0 requires two trigger rules. The first creates a screen pop when a call rings in while the second clears the selection when the call disconnects to be ready for the next call.

1. From the StrataLink dialog box, select Setup, Triggers.

2. Select Add Rule and the Add/ Change Trigger Rule dialog box appears.

3. Enter your settings to match both of these Add/Change Trigger Rule dialog boxes.

4. Select OK.

These trigger rules should follow those shown in the preceding dialog box screens. Modifications may be applied to create a delay if needed and to make the trigger rule apply to specific line buttons.