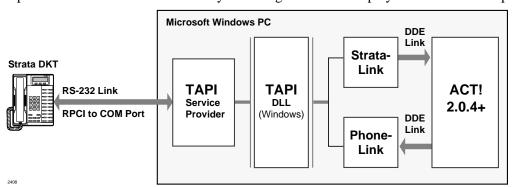AB50-0010
September 1, 1997

**4 1 7 0 1 1 5**

# Using ACT! 2.0 with StrataLink

Symantec's ACT! 2.0.4 (and higher) has a TAPI compliant interface when used with another product supplied by Symantec called PhoneLink. This combination forms a link between your phone and Symantec's popular contact manager application. This operation works with a Strata DK system, but many limitations of ACT! PhoneLink can be overcome when used with StrataLink. 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! 2.0 PhoneLink to StrataLink

ACT! PhoneLink contact management software package, in conjunction with the StrataLink utility, can tightly integrate with the Toshiba TAPI Service Provider. For outgoing calls, ACT! uses PhoneLink and 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."



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.

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 attempt in ACT! will be seen 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 call. 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 only (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.

The original ACT! PhoneLink Application Note listed the following ACT! software limitations:

♦   "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.

**Note**   ACT! PhoneLink must be started before StrataLink. PhoneLink opens in an "ownership" mode only and will not initialize the TAPI link if another TAPI application is currently open.

# Installing ACT! PhoneLink

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

Insert the first diskette of the two diskette set in Drive A:, select Run... from either File main menu of Windows 3.1x or under the Start button for Windows 95 and enter A:\Setup. The installation Wizard will direct you in installing the software. **Do not select StrataLink to be in the Startup Menu.**

## Step 2: Install ACT! and PhoneLink

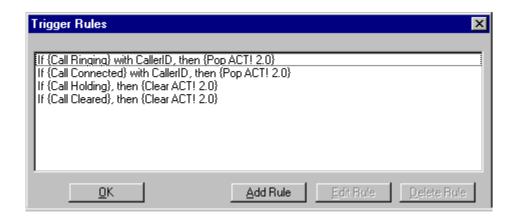Use the software installation instructions provided by Symantec, Inc.

## Step 3: ACT! Settings

Start ACT! PhoneLink using the labeled with this name. After the program has opened, select Phone from the main menu, and make certain that "Popup Incoming Calls" is turned off. ACT! will use the TAPI capabilities of PhoneLink for dialing outbound calls and will use StrataLink for inbound call control.

## Step 4: Start StrataLink

StrataLink needs to be initialized for controlling ACT! for incoming calls. This is done by creating a set of Triggering Rules for operation. 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 will create a "Pop" 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 will create 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.

This last actions are needed for ACT! since the search routine narrows the number of records being looked at to those which meet the criteria. Thus, it will generally narrow down to one record and all further selections must be within this selected group. To automatically search all records to allow a call to be placed on Hold and move to a second or third caller, we want to open the search 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! 2.0 to control the screen to match the Caller ID received. Toshiba does not expect the user to understand details of the interface between ACT! and StrataLink. These are provided to allow for ensuring information is entered correctly in a given system when problems might occur.

**Add/Edit Action**

Action Name:
Pop ACT! 2.0

Type:
DDE Execute

OK    Cancel    Apply

Show Test Params

DDE Execute:

App Name: ACTWIN2

App Topic: SYSTEM

DDE Execute String:
LOOKUP PHONE &H

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**Add/Edit Action**

Action Name:
Clear ACT!

Type:
DDE Execute

OK    Cancel    Apply

Show Test Params

DDE Execute:

App Name: ACTWIN2

App Topic: SYSTEM

DDE Execute String:
LOOKUP EVERYONE

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Toshiba has verified these operations and would be glad to assist in any changes that you may need.