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Using Maximizer97 with StrataLink

Maximizer97 software is a contact management software package that can be customized for a specific application. It is typically sold through Value Added Resellers (VARs) who know how to customize for your specific application. It is a great tool when used with the Toshiba Strata DK Business Telephone System because it identifies the calling party.

Outgoing calls made from Maximizer97 use a standard Telephone Application Programming Interface (TAPI) link with the Toshiba TAPI Service Provider. Incoming calls are identified by StrataLink to receive Caller ID information and define actions for each of the buttons on the phone. The following diagram shows how the connections are made in the PC for StrataLink and the TAPI Service Provider.

Toshiba America Information Systems, Inc.
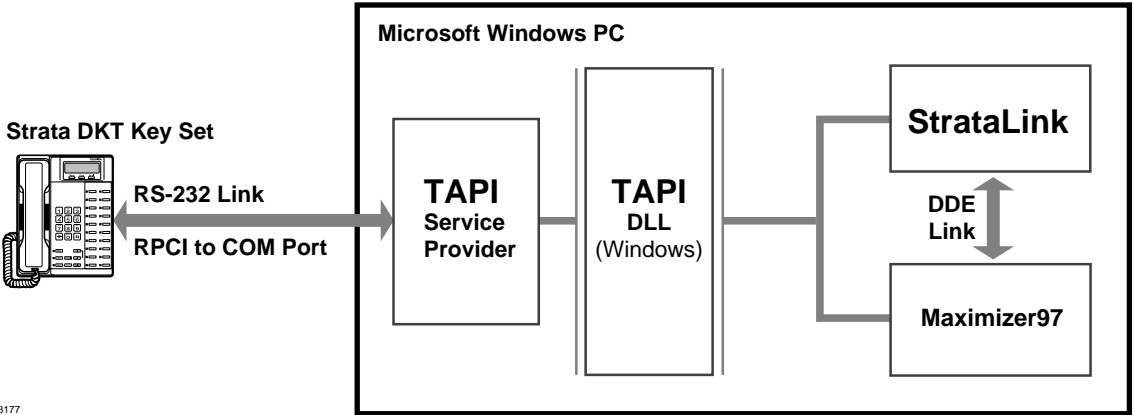
Maximizer97 Installation Guidelines

Getting Started

1. Install the Toshiba TAPI Service Provider and StrataLink by inserting Disk #1 (comes with two disks) in the floppy disk drive.

2. Choose Start and Run.

3. Enter A:\SETUP (change drive letters as appropriate).

4. Select both StrataLink and Service Provider.

Note   Windows prompts you whether or not StrataLink should be included in the Startup Menu. It is recommended that you answer Yes. This starts StrataLink when the PC is turned on, and you only need to start Maximizer97 to be operational.

5. Install Maximizer97 by following the installation instructions in the *Maximizer97 User Guide*.

Enabling the TAPI Link

1. Start Maximizer97.

2. In the File Menu, click Preferences. This displays:
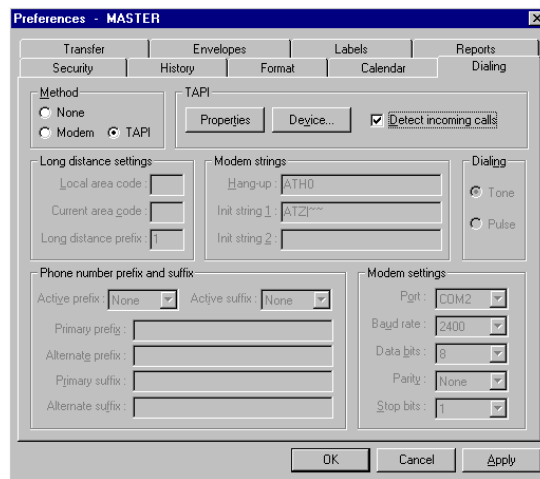
3. Select the Dialing tab.

4. Under the TAPI section, click Properties.

Note   Properties enables you to setup the dialing properties for outgoing calls. It includes the home area and access code for reaching an outside line. Typically, the phone returns internal dial tone and an access code must be dialed for an outside call. You can remove the home area code in this dialog box.

5. In the Properties dialog box, enter the home area and access code.

6. Click OK. You are returned to the Preferences dialog box.

7. Click Device. This window displays:
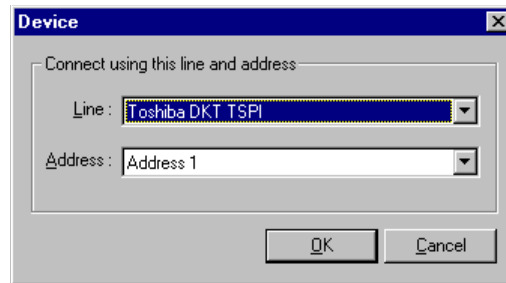
8. Select Toshiba DKT TSPI from the Line drop-down menu. This connects TAPI.

9. Select Address1 from the Address drop-down menu. Address1 is the lower left flexible button on your phone. You can also select the phone used for the outgoing call.

10. Click OK. You are returned to the Preferences dialog box.

11. Click Apply and OK.

Setting Up StrataLink

1. Start StrataLink.

2. Click Driver Setup and define the COM Port for the connection to the phone.

3. Click Configure Keys and define the keys to match the labels and functions of the phone being connected.

4. Select the Strata DK system being used.

The TAPI Service Provider is now ready for use. The LED on StrataLink changes to yellow and then green indicating a link has been made. At this point, the lower portion of the screen can be used to test the link to ensure that you can receive and place calls.

Adding Actions in StrataLink

If the Actions for Maximizer97 are not included in the Action List, you must add them.

➤ **To add an Action**

1. Select the Setup Menu and click Actions.

2. Press Add for a new Action.

3. Choose Pop Maximizer97, Open Maximizer, or Close Maximizer as the Action Name (shown below).

4. Enter information in each field (Type, App Name, and App Topic).

5. Enter the DDE Execute String.

   Pop Maximizer97 provides a number of options within the brackets of the DDE Execute String as follows:

   ♦ Field 1 defaults to Phone1, but it could be Phone2, Phone3, or Phone4 since the database accommodates up to four phone number per contact.

   ♦ Field 2 should remain &P which is the token for sending the Caller ID phone number without any formatting characters.

   ♦ Field 3 is a condition field where the entry can be 0, 1, or 2.

      0 – Adds entries that match search criteria to the currently displayed list.

      1 – Narrows the currently displayed/marked list to only those that match the search criteria.

      2 – Replaces the currently displayed list with those that match search criteria.

   ♦ Field 4 is a condition field for searching Company Records: 0 – No or 1 – Yes.

   ♦ Field 5 is a condition field for searching Individual Records: 0 – No or 1 – Yes.

   ♦ Field 6 is a condition field for searching Contact Records: 0 – No or 1 – Yes.

6. Click Apply and OK.

7. Repeat Steps 2~6 for each action.

Important! *In some applications, the Maximizer97 screen is always maximized. You can minimize it and still exchange information with StrataLink. However, the contact list must be maximized to view the selection. You can also minimize Maximizer97 as calls complete. The Open and Close Maximizer screens are shown above. Once defined, they are called by creating Trigger Rules for invoking the action.*

Using Trigger Rules

Trigger Rules define how the buttons on the phone act within your application, in this case Maximizer97. StrataLink comes without defined Trigger Rules. To customize your Trigger Rules, follow the examples. The defined rules enable the:

♦ Opening of Maximizer97 by any ringing line that has Caller ID.

♦ Popping of Maximizer97 by any connected phone line with CallerID, whether on hold or answering a non-ringing line so that the current record matches the call connected at that time.

♦ Closing of Maximizer97 10 seconds after a call is cleared.

The screen below is the customized example.
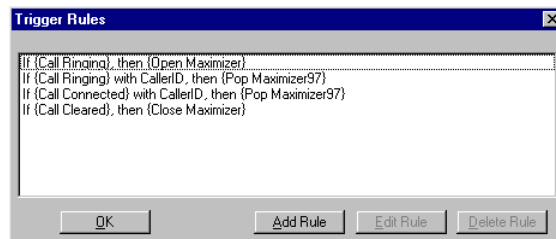
➤ **To define the Triggers**

1. Go to the Setup Menu and select Triggers.

2. Enter the required information (shown in the following two screens).