AB50-0016 June 1, 1998

Using Commence V4.0 with StrataLink

This bulletin assists you in installing, setting options, and using Commence® as a Telephone Application Programming Interface (TAPI) application with the Strata DK system. Customizing Commence is described in the manuals supplied with the software.

Commence is a contact management Microsoft® Windows® PC application that adds important functionality to your phone system. When used with StrataLink as a TAPI compatible middleware, it provides database lookups and screen-pop features.

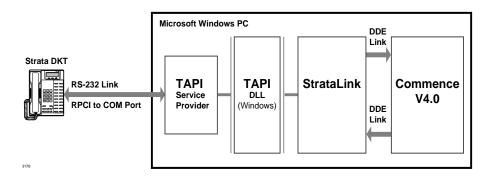
Commence should be used on a Local Area Network (LAN) to optimize communications and the processing of your daily activities; however, it can be used as a desktop application.

Linking Commence to Toshiba StrataLink

Commence, in conjunction with a StrataLink utility, can efficiently integrate with the Toshiba TAPI Service Provider. For outgoing calls, Commence sends a dial string using a Dynamic Data Exchange (DDE) communication link to the StrataLink/TAPI Service Provider. For incoming calls, TAPI messages are sent to StrataLink from the Toshiba TAPI Service Provider.

StrataLink applies conditions and filters to these events and creates an action to send a DDE communication to Commence. A Commence Agent receives the DDE communication that defines how to handle each event. Matching entries (screen pops) display or a new entry is enabled if no match is found in the database.

The flow of information is shown in the following diagram.



Commence Installation Guidelines

Setup and programming guidelines are provided in this bulletin for full desktop dialing and screen-pop integration between Toshiba StrataLink and Commence. It also provides examples of customizing a Commence Agent for your customer's needs.

Before you begin, install:

- ◆ Toshiba TAPI Service Provider by following the steps found in Chapter 13, "Computer Telephony Integration" of the *Strata DK Installation & Maintenance Manual*.
- ♦ Commence using the installation instructions provided with the software.

In the following paragraphs, you configure an outdialing option, enable a screen-pop feature, and pop-Commerce triggers.

➤ To configure the Outdialing option

- 1. Open the COMMENCE.INI file (found in the C:\Windows directory) with a text editor or word processor.
- 2. Add the following three lines in [Dialer3]:

```
[Dialer3]
Selected=StrataLink
StrataLink=[C:\Program
Files\StrataLink\stratlnk.exe][Stratlnk][SYSTEM][Dial,"&P",""]
```

Note In the preceding StrataLink line, you can put a specific button appearance number in the parameter "". For example, adding a "4" to this parameter (\....[Dial,"&P","4"]) makes a call on an outgoing line in position 4 of the connected phone. To choose a specific line button for outdialing, enter a number with "0" being the bottom button on your phone.

- 3. Save and close the COMMENCE.INI file.
- 4. Start the Commence software.
- 5. From the Customize menu, select Preferences and Dialer (StrataLink is added to the Dial Using choices).
- 6. From the Dial Using dialog box, select StrataLink. (All Commence dialing is done using DDE commands to the StrataLink.)

Note If Windows TAPI Dialing Preferences affects the dial string, you can set the program to automatically dial "9" for an outside line.

➤ To add a StrataLink screen-pop feature

1. Open StrataLink and select Setup.

2. Select Add/Change Actions. This displays:



- 3. Select Pop Commence and enter type, App Name, App Topic, and DDE Execute String.
- 4. Click OK.

Note Technical Support only supports Actions shown in this Application bulletin. Changes made as part of customizing are the responsibility of the technician making the changes.

➤ To add a StrataLink pop-Commence trigger

- 1. Open StrataLink and select Setup.
- 2. Select the Add/Change Trigger Rule. This displays:



3. Enter Triggering Event, Action, Caller ID, Phone State, and Appearance. If you want to toggle between held calls, select Call Connected from the Triggering Event pull-down menu.

Note Normally, this screen-pop needs a Caller ID number. Delaying the action is recommended if the call is connected to another party. The "pop to the next record" action occurs if the current call is terminated or placed on hold. A time delay (in tenths of a minute) can be used if needed for your application, but this delay can only be used for selected line buttons.

Creating Commence Agents

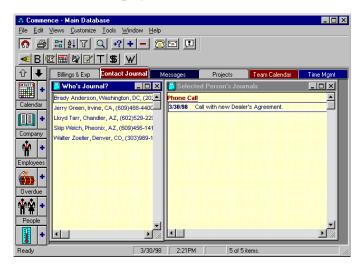
Commence has a programming interface for setting up the DDE Execute instruction. It creates an agent to receive the DDE instruction and defines the outcome. Refer to your Commence manual for details.

To assist you, we have created agents named CallRing DDE and CallRing Not in Database. The first agent selects a person when a match occurs, and the second is in the event of "no match is found."

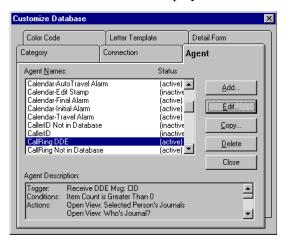
Each agent can have one Trigger Event, two Conditions and four Actions. When the conditions are met, these provide the logic that cause the desired action resulting from the Triggering Event.

➤ To create the CallRing DDE agent

1. Open Commence. This displays:



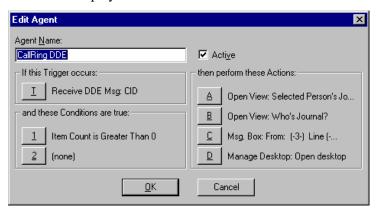
2. Select Customize, then Database. This displays:



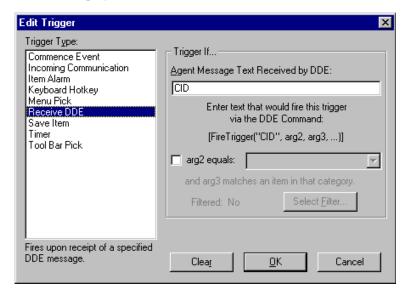
- 3. Select the Agent tab and a list of existing Agents and their statuses displays.
- 4. Click Add.
- 5. In the New Agent window, type CallRing DDE.

➤ To edit the CallRing DDE trigger

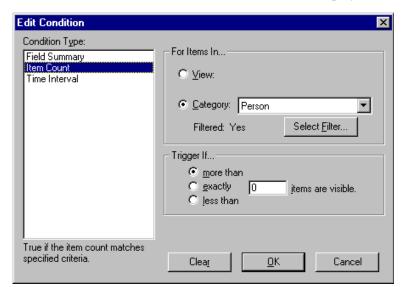
- 1. Select Customize, then Database from Commence's Main menu.
- 2. Select the Agent tab and highlight CallRing DDE.
- 3. Click Edit. This displays:



4. Click T. This displays:

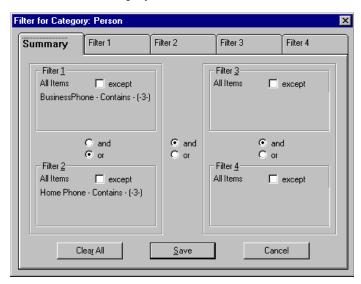


- 5. Highlight the Trigger Type (Receive DDE in this example).
- 6. Enter CID in the Agent Message field. The arg2 check box remains unmarked and the Filter for the trigger is not used (Filtered: No).
- 7. Click OK. You are returned to the Edit Agent dialog box.



8. Click Condition 1 (Item Count is Greater Than 0). This displays:

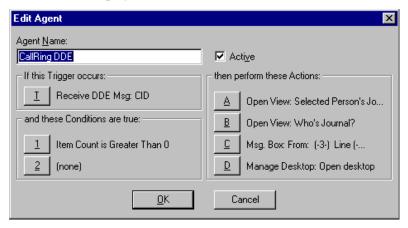
- 9. Define the following fields:
 - Condition Type : highlight Item Count.
 - Items In: select Category, then Person from the pull-down menu.
 - Trigger If: select "more than" and enter "0" items.
- 10. Click OK. You are returned to the Edit Trigger dialog box.
- 11. Click Select Filter. This displays:



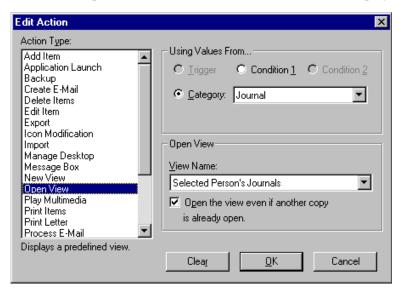
12. Select each filter tab and create Business Phone Contains (-3-) and Home Phone Contains (-3-).

Note These conditions cause a search for a business or home phone number located in one or more of the contact databases in the Person Category. The value (-3-) is the third parameter (&P) in the DDE message and comes from StrataLink or the Caller ID phone number.

13. Click Save. This displays:



14. Click Action A, Open View: Selected Person's Journals. This displays:



- 15. Define the following fields:
 - Action Type: select Open View.
 - Using Values From: click Category and select Journal from the pull-down menu.
 - Open View: select Selected Person's Journals from the pull-down menu and click Open the view even if another copy is already open.
- 16. Click OK. You are returned to the Edit Agent screen.

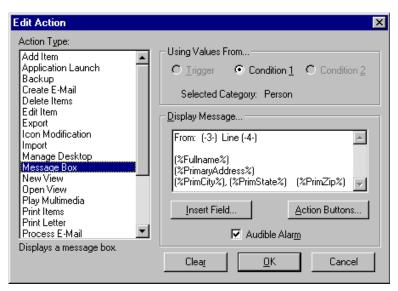
Edit Action Action Type: Using Values From... Add Item Application Launch ○ Trigger Backup Create E-Mail Category: Delete Items Edit Item Selected Category: Person Export Icon Modification Open View Import Manage Desktop Message Box View Name: New View Who's Journal? • Open View Play Multimedia Open the view even if another copy Print Items is already open. Print Letter Process E-Mail Displays a predefined view. Clear <u>0</u>K Cancel

17. Click Action B, then Open View: Who's Journal? This displays:

18. Make the appropriate selections and click OK. You are returned to the Edit Agent screen.

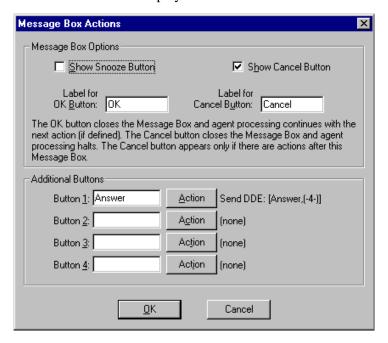
➤ To add a CallRing DDE message

1. From the Edit Agent screen, click Action C (Msg. Box: From: (-3-) Line). This screen displays.



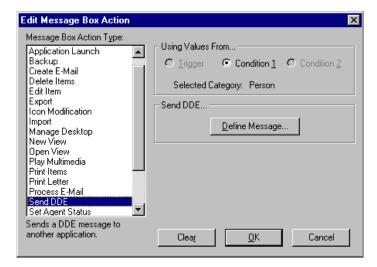
- 2. Highlight Message Box as the Action Type.
- 3. Select Condition 1.
- 4. Click Insert Field and select the fields to be included; for example, %Fullname% and %PrimaryAddress% displays the name and address of the caller.

5. Click Action Buttons. This displays:



Note You can have four defined Action buttons. In the example above, we define one of the Action buttons for answering calls.

- 6. Enter the button name in the Button 1 field. In the example above, we are labeling it "Answer."
- 7. Click the corresponding Action button. This displays:



8. Highlight Send DDE in the Message Box Action Type field and select Condition 1 under Using Values From.

Define DDE Message Program-File Name: stratlnk.exe Select... Run If Necessary Conversation Application Name: stratlnk Topic Name: SYSTEM DDE Message Message Type:

Execute Insert Field.. Item Name: Insert Field.. Message Text: [Answer,(-4-)] <u>0</u>K Cancel

9. Click Define Message. This displays:

10. Enter the File Name (path), Application Name, Topic Name, DDE Message Type (execute or poke), and the DDE Message Text that is sent to StrataLink.

➤ To create the CallRing Not in Database Agent

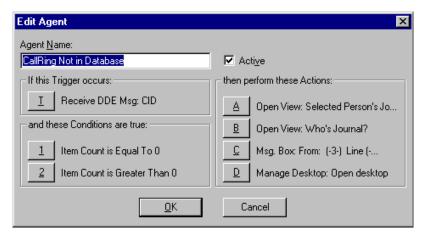
1. Open Commence. This displays:



Customize Database Color Code Letter Template Detail Form Category Connection Agent Agent Names: Status (active) ___ (inactive (active) ___ Calendar-AutoTravel Alarm Add.. Calendar-Edit Stamp Calendar-Final Alarm Calendar-Initial Alarm <u>E</u>dit. (active) (active) (inactive Calendar-Travel Alarm CallerID Not in Database Сору. CallerID
CallRing DDE
CallRing Not in Database inactive <u>D</u>elete (active) 💌 Close Agent Description: Trigger: Receive DDE Msg: CID
Conditions: Item Count is Greater Than 0
Actions: Open View: Selected Person's Journals
Open View: Who's Journal? **T**

2. Select Customize, then Database. This displays:

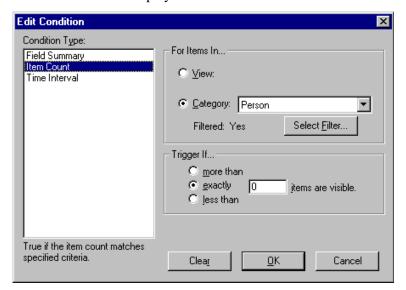
- 3. Select the Agent tab and a list of existing Agent Names displays along with their statuses.
- 4. Select CallRing DDE and click the Copy button. This displays:



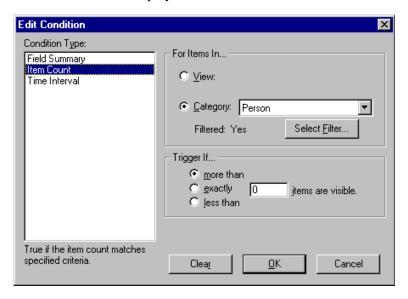
5. Type CallRing Not in Database in the Agent Name field.

Note Skip the trigger section because CallRing Not in Database has the same trigger as the CallRing DDE.

6. Click Condition 1. This displays:



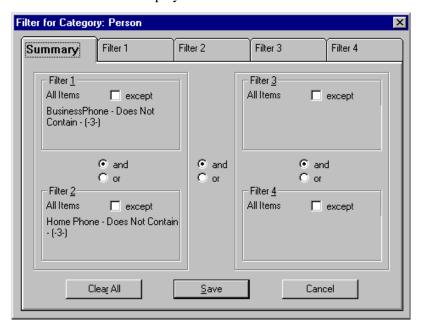
- 7. Select "exactly" in the Trigger If field and enter 0 in the "items are visible" field.
- 8. Click OK. You are returned to the Edit Agent screen.
- 9. Click Condition 2. This displays:



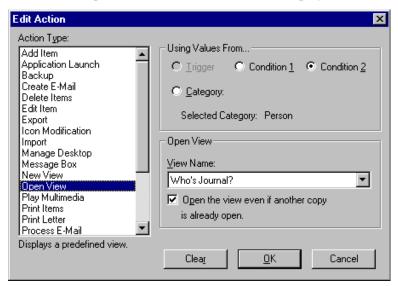
Note This condition finds all of the people in the database that do not match the list for displaying in the Who's Selected... View on the screen.

- 10. Select Category, then Person from the pull-down menu (For Items In... section).
- 11. Select "more than" (Trigger If... section) and enter 0 in the "items are visible" field.

12. Click Select Filter. This displays:

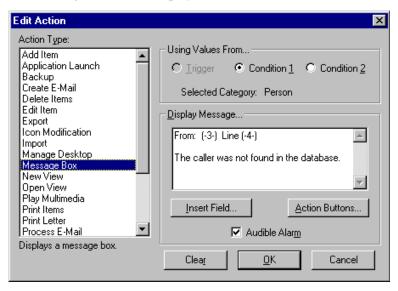


- 13. Create a new filter that looks like the previous ones, except choose Does Not Contain (-3-).
- 14. Click Save. You are returned to the Edit Agent screen.
- 15. Select Action B, Open View: Who's Journal? This displays:



- 16. Select Condition 2 in the Using Values From... field.
- 17. Click OK. You are returned to the Edit Agent screen.

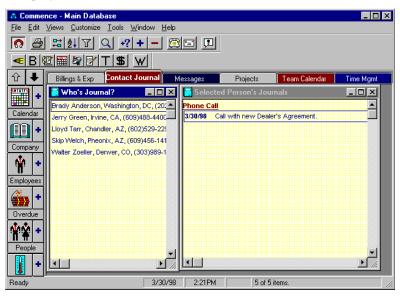
18. Click C, Message Box. This displays:



19. Change the message to "the caller was not found in the database" by clicking the Insert Field and Action buttons.

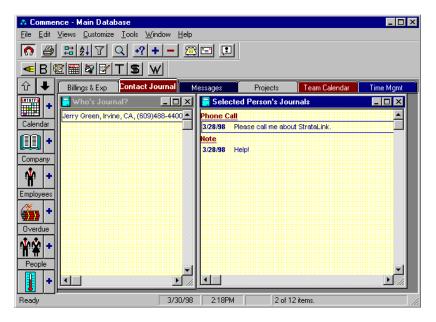
Triggers

If your trigger cannot match its phone number with one in the database, a complete list of all names is displayed (shown below).



From this list, you can select a different phone number or enter the new person's name.

If the trigger matches its phone number with one in the database, only the names that match are displayed (shown below).



A history of journal entries for that person is displayed. You can add new entries by using the toolbar.

Note The Who's Journal View defaults to Name only. It was modified by adding the Full Name, PrimCity, PrimState, and Business Phone in the Display Message fields of the Message Box Action.