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1 Using this tutorial

This tutorial is an easy way to learn how to use CTI Data Connector salesforce.com Edition. It is designed for all office workers who want to benefit from Computer Telephony integration.

While completing these lessons, you will learn how to make an outgoing call, use the phone book or make the necessary configuration settings for your PBX system.

Part I explains the basics for using CTI Data Connector salesforce.com Edition features, including how to make calls, receive calls or how to make personal configuration settings. Part II provides hands-on experience for using additional features like expert settings or database configuration.

The Online Tutorial will be updated also after its release. In case you do not have Internet access, you can select the Offline version (3) in the Configuration Wizard.



in the upper right corner to browse through the online

Print this tutorial

help.

The Online Tutorial is also available as a PDF document.

You can print this tutorial - click on the link to download PDF file

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CTI Data Connector salesforce.com Edition Version: 2.3.1

This document was updated: 08.10.2007



2 Software Update

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You will find up-to-date information around CTI Data Connector salesforce.com Edition at www.cti-data-connector.com , or just choose Menu **?**, **Software Service.**

Check regularly for release updates of CTI Data Connector salesforce.com Edition.

You will find your current version number in the menu **?**, **About CTI Data Connector salesforce.com Edition**. The latest main release number is **2.3.1.3**

A complete modification history of the latest updates can be found here

Display Modification History



3 Part I - learning the basics

3.1 About Part I

CTI Data Connector salesforce.com Edition is an application which responds to **incoming** and **outgoing** calls in background mode. The only precondition for your PC / telephone system is a TAPI interface 118. CTI Data Connector salesforce.com Edition supports both a First Party solution (a phone is connected via serial interface or USB to the PC) and a Third Party solution (CTI Server).

CTI Data Connector salesforce.com Edition can be configured individually for every PC and is available with different options. Therefore you may not be able to use specific functions although they are described here.

Before you start using CTI Data Connector salesforce.com Edition you have to set the configurations for the telephone system and the database(s). Normally, this is done during the installation. It is essential to make some basic configuration settings which are described in the chapter Minimum Configuration 17.



4 Introduction

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4.1 Start the Application

CTI Data Connector salesforce.com Edition is either started automatically with the operating system or you start it within the program manager group **CTI Data Connector - salesforce.com Edition**. After starting the program you will find an Icon in the taskbar (notification area, down to the right near the date and time display).



CTI Data Connector salesforce.com Edition is ready and will respond to incoming and outgoing calls. The icon in the taskbar will respond to clicks made with the **left** and **right mouse button**. For details see chapter taskbar - Control Basic Functions

Vou have to type in you salesforce login name and salesforce data before you can use CTI Data Connector salesforce.com Edition. If you get an error you probably have to install the salesforce Desktop Integration, *Office Edition* - see details chapter Install Office Edition.

4.2 Welcome Screen

By default, the Welcome Screen is opened after each program start. This screen provides you with:

- Links to most popular FAQ to get started
- Link to Online Knowledge Base
- Link to updates

The screen can be deactivated by checking *Do not display this Quick Introduction help anymore when starting* and activated again in the Configuration Wizard, Display Quick Introduction Help $\boxed{63}$.

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4.3 Minimum Configuration Settings

During installation, the Configuration Wizard ⁵³ was already started. You can define a lot of individual configuration settings there. The following settings **have to be defined** to guarantee a basic functionality.

• TAPI device driver 55 - it is delivered by the telephone manufacturer. See also: System requirements - TAPI driver 118

18

- Prefix for external calls and the minimum length of a phone number indicating an external call
- Button Dialing Rules 70 configures country settings and area code. See also special configuration for US / Canada 71
- Button Folder 77 Select Microsoft Outlook™ contact folder for caller identification

Just by setting this minimum configuration you will be able to make outgoing calls and to identify incoming calls. The Configuration Wizard can be started any time by **right** click on the icon 19^{-1} , option Configuration Wizard 53^{-1} .

🖎 CTI Configuration Wi	zard 🔀
	o obtain a basic functionality for incoming calls. After the an be done with the Configuration Wizard. Choose the t the configuration settings.
	Telephony service provider/TAPI device driver: SIPPS Line Dial tone digits for external calls: 0 Minimum length of phone number indicating an external call:
Dialing Rules	Choose Microsoft Outlook Contact folders Folders
Help Cancel	< Back Next > Finish

See also

Where do I find the TAPI driver?

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4.4 Taskbar - Control Basic Functions

After the program start, the taskbar (notification area, down to the right near the date and time) will display the icon

 \bigcirc

CTI Data Connector salesforce.com Edition is ready and will respond to incoming and outgoing calls.

You can control basic functions via the icon \mathbf{Z} :

- with a **single** click on the **right mouse button** you select options such as redialing or service programs
- with a **single** click on the **left mouse button** you operate phone functions (pick up call, hold, transfer 4), hang up)
- with a **double** click on the left or right mouse button you start the CTI Data Connector salesforce.com Edition control centre

During the signaling of a call by the Desktop Notification 35 the control via the taskbar icon will not be available.

If a call is missed 46 the icon turns to red - 22

Hovering above icon with the mouse pointer

If you hover above the icon with the mouse pointer, the message CTI Data Connector salesforce.com Edition - 0 call(s) will appear. The amount of incoming and outgoing calls during the last restart will be displayed.

The options in detail:

- Blue Icon Left Mouse Click
- Blue Icon Right Mouse Click 20
- Red Icon Left Mouse Click 20
- Red Icon Right Mouse Click 21

4.4.1 Blue Icon - Left Mouse Click

Single left mouse click on the icon

This function will be only available during an active call and is designed for phoning

with a headset. The individual options will be displayed depending on the status of the call.

- When ringing: Answer, reject or transfer 49 call
- When the call is active: Hold, transfer 49 or disconnect call. If the call is on hold, you will have these options: Answer or Disconnect

Double left mouse click on the icon

The control centre will be displayed where you can carry out further actions such as searching for an address.

4.4.2 Blue Icon - Right Mouse Click

Single right mouse click on the icon

Here you can choose from different options. Depending on the configuration it is possible that not all options will be available:

- Open CTI Data Connector salesforce.com Edition Starts the control centre
- Redialing redials the phone number used last
- Dial from Clipboard 32 searches in the clipboard (CTRL+C) for a phone number and dials
- Quick Dialing 33 opens the dialog for quick dialing
- Call History 34 (incoming calls) opens the dialog for missed calls
- Search address and dial goes straight ahead to the phone book 27 for searching an address
- Format phone numbers starts the service program b for formatting the phone numbers
- Configuration Wizard starts the Configuration Wizard
- Error protocol displays the error log
- Show License Information 3 displays the license information
- Help opens this tutorial the type of the help system (Online / Offline 63) can be set in the configuration wizard
- Quit Terminates CTI Data Connector salesforce.com Edition

4.4.3 Red Icon - Left Mouse Click

A double mouse click on the red icon opens the Call History 34 for missed calls 46.

4.4.4 Red Icon - Right Mouse Click

The same options like the blue icon 20° offers are available.

4.5 First Steps

After starting 16 CTI Data Connector salesforce.com Edition you can access all functions via the icon in the taskbar 19.

To practice, try to make an outgoing call using the Hotkey 2° , which should work with all applications.

4.6 Navigation within the Control Centre

Nearly all functions can be accessed via the file menu, the toolbar $\boxed{21}$ or by clicking on the right mouse button above the lcon in the taskbar.

	Ø	
File Menu	File Edit View Extras ?	
Status lin	ne Call information 0 call(s) waiting	
	Address:	Telephone note:
<u>Toolbar</u>	A	
	Contact person:	Processed by:
		Processed for: Activity:
		Contact person:
		Priority: Schedyle of activity:
		02:03:2004 💌 08:00
	Answer Reject	Sav
	Help	Dial

Overview over the File Menu

File

- Close: Closes the program window, but does not terminate the application
- •
- Quit: Terminates CTI Data Connector salesforce.com Edition

Edit

- Cut: Deletes the selected text and copies it to the clipboard
- Copy: Copies the selected text to the clipboard
- Paste: Pastes the contents of the clipboard into the selected field
- Delete: Deletes the selected text
- Quick dialing: Displays a submenu of the quick dialing list 33 (only available within quick dialing)
- List: Displays a submenu of the redialing list 32 or caller list 4 (only available within these lists)
- Search: Displays the phone book 27 for searching for an address

View

- Call information: displays call information 37
- Phone and Quick dialing: Displays the phone and the quick dialing list 33 for outgoing calls
- **Phone book:** Displays the phone book ²⁷ for searching for an address
- **Redialing list** (outgoing calls): Displays the redialing list 32
- Call History (outgoing calls): Displays the call history 34

Extras

- Licence Viewer: Displays the purchased licenses and allows to type in Activation Keys for adding new licenses
- Format phone numbers: Activates the function for formatting the phone numbers
- Configuration Wizard: Starts the Configuration Wizard
- Error protocol: Displays a log of the last system messages
- Always on top: Defines whether the control centre of CTI Data Connector salesforce.com Edition will always in the foreground when a call is coming in (the window will cover any other applications and you cannot switch to them) or whether the control centre will pop up and you can switch to other applications
- **Compact salesforce database**: Compact the salesforce database for caller identification. This is normally done automatically



- Contents: Displays this tutorial
- CTI Data Connector salesforce.com Edition on the Web: Displays the internet page of CTI Data Connector salesforce.com Edition
- Software Service: Checks for new Updates
- %OEMNAME%> on the Web: Displays the website of Mirage Computer Systems GmbH
- About CTI Data Connector salesforce.com Edition: Displays version information about the installed application

4.7 Simulator

?

If you have no TAPI-enabled phone available and you want to test CTI Data Connector salesforce.com Edition, you can use the simulator which works like a regular telephone.

Activating the Simulator

Start the Configuration Wizard 53 and choose the page where you can select your telephony service provider 54. Choose **<Telephone Simulator>**. When you start CTI Data Connector salesforce.com Edition, the simulator will be started automatically.

Working with the Simulator

The telephone simulator acts like a normal telephone with which you can make outgoing calls and accept incoming calls.

Phone simulator	X
0044734273834	Type in phone number
Dial Pick up Hang up	Button for Dial, Pick up, Hang up
	You can use the keyboard to make a call

Simulating an incoming call

- Type in a phone number (without country code and special characters) in the display. You can alternatively use the keyboard to type in the number.
- Press the button Dial
- CTI Data Connector salesforce.com Edition performs the caller identification and signals the incoming call
- Accept the incoming call by pressing the button Pick up
- You can disconnect the call by pressing the button Hang up

Simulating an outgoing call

- Search in the phone book 27 of CTI Data Connector salesforce.com Edition for an address or a contact person and dial by double-clicking on the phone number. You can dial alternatively by highlighting a phone number 29 and pressing the configured Hotkey 56.
- CTI Data Connector salesforce.com Edition displays the dialled address
- Establish the call by pressing the button Pick up
- You can disconnect the call by pressing the button Hang up



5 Make Phone Calls

5.1 Outgoing Calls

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CTI Data Connector salesforce.com Edition provides multiple options to make an outgoing call dependent on the application your are using. The option Dial with an Hotkey should work in any application.

All available options are:

- Dial using the Phone book 27
- Dial using a Hotkey 29
- Dial within the Browser 30
- Dial with a Hyperlink 31
- Dial using the Clipboard 32
- Redialing list 32 (outgoing calls)
- Redial 33 using the last called phone number
- Quick dialing 33
- Dial using a Phone Pad 33
- Dial using Call History List 34 (incoming calls)
- Dial using the telephone set 35 the dialled address will be displayed 35

5.1.1 Format of a Telephone Number

CTI Data Connector does not care whether phone numbers are stored unstructured or include special characters. It is only important that the numbers comply with the international phone number format. Telephone numbers can be stored as follows:

- 02089481345
- +44(0)2089481345
- 0044(0)2089481345
- 004402089481345 this is not a valid phone number but would be formatted correctly
- 636.477.8702
- +1636.477.8702

After the country code the number 0 should be surrounded by brackets or be omitted. If the number 0 is not surrounded by brackets, then CTI Data Connector salesforce.com Edition uses the dialing settings stored in windows to either truncate the 0 or leave the 0 (e.g. for Italy).

Example

- 004402089481345 would result in 00442089481345
- 003902089481345 would result in 003902089481345

5.1.2 Necessary configuration settings for outgoing calls

Below find a list of configuration settings which have an impact on outgoing calls. If outgoing calls are not working, check these settings and also check Troubleshooting - Outgoing calls [137].

Configuration Settings

- Select correct TAPI driver
- PBX Configuration
- Dialing Rules 70 for US / Canada check additional settings 71
- TAPI Configuration Prefix Outgoing Calls
- TAPI Configuration Provider Postfix
- TAPI Configuration Ignore Fake Number
- Dial via Hotkey 29 configure 56 Hotkey and activate this option 54
- Dial within Browser 30 activate this option 54
- Dial with a Hyperlink 31 activate this option 54

If internal numbers are not dialled correct, check:

- TAPI Configuration Prefix internal number
- Minimum length 60 of phone number indicating an external call

5.1.3 Dial with the Phone Book

Here you can search in all databases configured for your system $\boxed{75}$ as well as in Microsoft OutlookTM for a company name or a contact person.

To open the phone book either:

- Right click on the phone icon, select search address and dial or
- Right click on the phone icon, select **Open CTI Data Connector salesforce.com**

Edition and then the symbol



Searching

Type the search criterion in the field *Company/Name* or *Contact Person* and press the key ENTER or press the button Start.

Example: **M** searches for all company names beginning with the letter M

The field Contact Person only supports search by last name

Search Option

- Beginning of the field means that the searched address must start with the search criterion. All letters after the search criterion are ignored (the same as searching with *search criterion*)
- Part of the field means that the search criterion must be a part of a company name/ name. This is corresponding to a search with *search criterion*. Searching for Taylor with this option is the same as searching for *Taylor* and will result in finding all companies comprising the word Taylor within the company name.

Displaying the search result

All addresses matching the search criterion will be displayed in the window on the right. The list is sorted by the database(s) where the addresses are stored. Click on the icon ∇ to display **all contact persons**.

Dialing

To start dialing just click on the contact person. With a **double click** or **right mouse button click** all phone numbers of this contact person will be displayed. Click on a phone number to dial.

The phone number of the main office (phone number retrieved from main account) is always displayed in addition followed by the designation (*main*). Note: Not available when the address is retrieved from Microsoft OutlookTM.

The menu item *Enter number* allows to type in an individual phone number.

5.1.4 Dial with a Hotkey

In nearly any application a phone number can be **highlighted** and dialed using the Hotkey defined in the configuration settings 56. The default value is the key F10.

Highlight the phone number within the Web Browser by pressing down the left mouse key and dragging the mouse cursor to the right. When reaching the end of the phone number, release the left mouse button and press F10.

In the example below a phone number has been highlighted. It can be dialed using the defined Hotkey.

1 • 1 • 1 • 🔏 • 1 • 1 • 1 • 2 • 1 • 3 • 1 • 4 • 1 • 5 • 1 • 6 • 1 • 7

United Whiskey Destilleries Ltd Freemont Tower 3 Perkins Bridge Windsor SL44QQ United Kingdom

Phone: ++44734273833

See also

Troubleshooting - Hotkey is not working 140

Configuration - Hotkey to dial with a highlighted phone number 56 Configuration - Activate dialing via Hotkey 54

5.1.5 Dial within the Browser

Within an Browser any phone number can be **highlighted** and dialled with 2 different options.

Highlight the phone number within the Web Browser by pressing down the left mouse key and dragging the mouse cursor to the right. When reaching the end of the phone number, release the left mouse button. You can dial:

- Using the **right mouse button**. The option **Dial with CTI Data Connector salesforce. com Edition** will be displayed
- Using a Hotkey 29

In the example below a phone number has been highlighted within a browser application. It can be dialled using the Hotkey or right mouse click, **Dial with CTI Data Connector salesforce.com Edition**. You have to activate *Dialing within Browser* and *Dialing via Hotkey* within the configuration settings [54].

n - Microsoft Internet Explorer	
🗟 • 🕹 🖂 🛄 🚺 🚺	8
Cases Documents Reports Dashb	oards Solutions
ew Document New Task Recycle Bin	
Edit Delete Sharing	Printable View Phone: ++44734273833
eries Ltd. [<u>View Hierarchy]</u>	Fax:

1 Dialing with right mouse button is available only in the Internet Explorer

See also

Enable dialing within Browser 58

5.1.6 Dial with a Hyperlink

You can dial with a Hyperlink in Browser applications. To use this functionality, the application has to be modified. Dialing via Hyperlink allows to dial just with a click.

To dial via an hyperlink in a Browser based application, just insert the following command in your application:

phonenumber

where phonenumber has to be replaced by the real phone number like

+4970054885342

It is displayed on the screen as follows: +4970054885342

To enable dialing via hyperlink open the Configuration Wizard and check Activate dialing via Hyperlink 54.

This function is available in all Browsers (e.g. Internet Explorer or Firefox).

See also

Enable Dial with a Hyperlink Troubleshooting - Dial with a Hyperlink is not working Configuration - Application used for dialing with Hyperlink 56

5.1.7 Dial with the Clipboard

CTI Data Connector salesforce.com Edition is able to analyze the clipboard contents and to extract a phone number.

If you copy a phone number using *CTRL+C / Edit Copy* into the clipboard, you can dial the number by clicking on the icon in the taskbar with the right mouse button and selecting the option dial from clipboard. CTI Data Connector salesforce.com Edition will analyze the clipboard contents and dial the first phone number found.

See also

Troubleshooting - Hotkey is not working 140 Configuration - Hotkey to dial phone number from the clipboard 56

5.1.8 Dial using Redialing list (outgoing calls)

You can redial the phone **number used last** via the taskbar $|_{19}$, right mouse button, option: *Redialing*. All other phone numbers from outgoing calls are displayed in the redialing list and can be used there for redialing.

All **outgoing calls** - firstly grouped by **Missed / Reached**, then sorted by date - are displayed here.

A selected entry in the list is picked for dialing by a double click or by clicking on the button *Dial*. Press the key *Delete* to delete an entry. Use the *Edit Menu* -> Transfer entry to Quick dialing list (or use right mouse click *transfer entry* to Quick dialing list) to copy the entry to your personal Quick dialing list.

The number of entries can be set in the configuration 66. Once the configured number is reached, the oldest entry will be deleted.

🗭 File E	dit	View	Extras	?						_ □	X
		g List (waiting	outgoin	g calls)							
•			Phone n	umber		Date/Time		Duration	Name		
	Þ	Misse	day								
4	Þ	。 Read	0044734 hed	1273834		02.12.2006	5 19:56:07	00:00:00	United	Whisky [Des
↑ ₿											
8											
	1										•
		Help		Weiterleitur	ng			Dial		Close	

5.1.9 Redial - using last called phone number

This option is only accessible with a right mouse click on the icon, option **Redialing**. It dials the phone number last used.

5.1.10 Quick Dialing and Phone Keypad

You can type in a phone number in the field *Telephone Number* and dial. Vanity numbers via the keypad are supported (Vanity = dialing with letters - e.g. Hotline = 4685463)

Additionally, you can store any numbers for quick (speed) dialing specifying a name and phone number. By clicking on an entry or pressing the button *DIAL* the number will be dialled. You can add, rename, edit, delete an entry with the menu **Edit -> Quick dialing** or with a **right mouse button** click.

Phone numbers for the Quick Dialing list can be copied from:

• Redialing list 32 (outgoing calls)

34

• Call History list 34 (incoming calls)

	_	X
File Edit View Extras ?		
Phone and Quick Dialing 0 call(s) waiting		
Telephone Number:	Quick Dialing:	
→	Name	Phone number
	 Marketing 	112
🍕 🗡 🔶		
1 ABC DEF		
* 1 2 3		
💕 GHI JKL MNO		
4 5 6		
PQRS TUV WXYZ		
7 8 9		
* 0 #		
• 0 #		
Help Weiterleitung		Dial Close

5.1.11 Dial using Call History list (incoming calls)

All **incoming calls** - firstly grouped by **Missed /Answered** calls, then sorted by date - are displayed here.

A selected entry in the list is picked for dialing by a double click or by clicking on the button **Dial**. Press the key *Delete* to delete an entry. Use the **Edit Menu -> Transfer entry to Quick dialing list** (or use right mouse click *transfer entry* to Quick dialing list) to copy the entry to your personal Quick dialing list.

The number of entries can be set in the configuration $\boxed{68}$. Once the configured number is reached, the oldest entry will be deleted.

🕜 File I	Edit	View	Extras	?	_					×
Call	Histo		coming							
	(s)	walung								
9			Phone n	umber	Date/Time		Duration	Name		
.	P	Misse								
3		Answ		054885342	02.12.2006 19:59:5	i0	00:00:00	Mirage	Computer	r S
≪ \$	ľ	Answ	erea							
*	Ŀ									
	Ŀ									
_	Ŀ									
	Ŀ									
	Ŀ									
	1									•
										_
		Help		Weiterleitung			Dial		Close	

5.1.12 Dial with the Telephone Set

You can dial with your telephone set just as you have done previously. CTI Data Connector salesforce.com Edition will recognize this dial automatically displaying the address with the contact person you are calling either within the Desktop Notification 3^{-1} window or the caller information 3^{-1} box.

5.1.13 Signal Call with Desktop Notification

Depending on the configuration , an incoming or outgoing call will be **faded in down** to the right in a transparent window (*Desktop Notification*) or the salesforce Lead, Account or Contact folder will be opened.

If you have chosen to use *Desktop Notification*, a **transparent window** with the address information will be displayed - always and independently from the application you are currently using.

bar	Incoming call: 0044734273833 United Whiskey Destilleries Ltd., Windsor, United Kingdom Mr. Hanks, Tom	2
Addres 5 nform 1tion		

The phone number and the information whether it is an incoming or outgoing call will be displayed in the title bar.

The address information includes

- company name, city, country
- name of the contact person

If it is not possible to identify a contact person; the company name will be displayed.

If you **click on the Desktop Notification with the cursor**, the **salesforce Lead**, **Account or Contact folder will be opened** in a new Browser window. If the contact can be identified, the contact data will be displayed. In case the phone number is stored within multiple contacts, the account data will be displayed.

In case the address is an address stored in Microsoft Outlook, the contact folder in Outlook will be opened.

As long as the mouse pointer is atop of the window, the Desktop Notification will not be closed. It will fade out automatically after the time interval $\boxed{79}$ specified in the configuration settings has been lapsed.

By clicking on the symbol for the call will be answered. This is necessary when using a headset or a hands-free set.

<u>Note</u>

When you use Windows 98, the Desktop Notification screen cannot be displayed transparently due to limitations of Windows 98.

See also

Configuration Call Notification
5.1.14 Signal Call with Call Details

This screen will be displayed (depending on the configuration be settings) automatically when a call is made. Otherwise it can be opened either by:

- Right mouse click on the phone icon Open CTI Data Connector salesforce.com Edition during an active call
- Left mouse double click on the phone icon if there is no active call



The **status bar** provides additional call information. Possible messages include: *Incoming* or *outgoing call, call active* and *call completed* followed by the phone number. In addition, the duration of the actual call will be displayed in the format of *hours:minutes: seconds*. If another call is coming in while you are phoning, this call will be signalled with the message: *1 call(s) waiting*

information oming call: 0044734273833 - Duration:	00:00:00, 0 call(s) waiting	I	b
Address: (D000104)	Telephone <u>n</u> ote:		
United Whisky Destilleries Ltd. Freemont Tower 3 Perkens Bridge			~
GB-Windsor SL4 4QQ	2		1
Contact person:	Processed by:		~
Mrs. Delou Sandra	Processed for:		~
Mr. Bob Sprith	<u>A</u> ctivity:		~
	<u>⊂</u> ontact person:	Mrs. Delou Sandra	~
	Priority:	Sched <u>u</u> le of activity:	
	~	02.03.2004 💌 08:	00 +
Answer Reject		·	ave

The label of the buttons can change depending on the call status. During an incoming call you can answer the call by pressing the button *Answer* (or by picking up the receiver). Press the button *Reject* to reject a call. An active call can be set on hold by pressing the button *Hold* (only visible when the call is active). You can go back to the call by pressing the button *Answer*. With the button *Complete* (only visible when the call is active) you disconnect the active call or you can be transferred by pressing the button

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Transfer Call 49.

The following information will be displayed:

- Address: Customer number, address information 1 and 2, street, country code, zip code and city
- Contact person: A selection of the contact persons associated with the address or only one contact person, if the phone number could be linked directly to that contact person. If supported by the database, the form of address and title will be displayed, otherwise only the first and last name.

Minimizing the screen

If you want to switch to another program without ending the call documentation, just minimize the window.

Minimize window	Close window

If you select the symbol for *Close window* or click on the button *Close*, the call documentation will be terminated. The call itself will not be terminated by closing the window.

See also

Configuration Call Notification 79

5.1.15 Telephone Note and Activities

This option is only available during an active call and if configured. This feature needs another application to store the phone note.

Depending on the selected database a phone note and activity can be stored. If the address is stored in Microsoft OutlookTM, the phone note will be stored in the **Journal** and the follow-up will be stored under **Tasks**.

You can type in the following information as phone note and follow-up:

- Telephone note: A free text which is stored for the phone call in your database
- Created by: Author of the telephone note
- Assigned to: Who is responsible for the note/follow-up?
- Activity: A selection of actions in a self-learning list-box. The last 10 entered actions will be displayed
- **Contact person:** The contact person of the call ³⁷ is set as the default value but can be changed. The name is stored with the activity
- Priority: The priority for the follow-up
- Due date / time: Date and Time for the follow-up

<u>Save</u>

The button **Save** will save the phone note and activities. The data is also saved when the screen is closed.

If the database has more than one client (address is related to several clients), the client can be selected before storing the phone note.

0		🛛
File Edit View Extras ?		
Call information Incoming call active: 0044734273834 - Durat	ion: 00:02:19, 1 call(s) v	vaiting
Address: (D000104)	Telephone <u>n</u> ote:	
 United Whisky Destilleries Ltd. Freemont Tower 3 Perkens Bridge GB-Windsor SL4 4QQ 	talked about quota	ation.
Contact person:	Processed <u>by</u> :	Mr. Bob Hope
Mrs. Delou Sandra	Processed <u>f</u> or:	Mrs. Colllins 🗸 🗸
	<u>A</u> ctivity:	Make appointment 🛛 🗸
	<u>C</u> ontact person:	Mrs. Delou Sandra 🛛 🗸
	Priority:	Sched <u>u</u> le of activity:
	Midium 🔽	02.03.2004 💌 08:00 🛨
Hold Complete		Save
Help		Dial Close

5.2 Incoming Calls

CTI Data Connector salesforce.com Edition offers a sophisticated caller identification. To use this feature, you need to configure either an Microsoft Outlook / Exchange $\overline{\tau r}$ contact folder or an Enterprise database $\overline{\tau r}$.

5.2.1 How does the caller identification work?

The precondition for the caller identification is the **transmission of the phone number**. Suppressed phone numbers are treated as anonymous calls.

The identification of the phone number is a complex procedure but ensures a high recognition rate.

Formatting the phone number

Normally, phone numbers are stored unstructured (e.g. +1, 001, +1(0)444 and any special characters). The format of the phone number must comply with the international standard format 26° for telephone numbers.

CTI Data Connector salesforce.com Edition will convert all phone numbers into an international standard format - see Formatting of Phone Numbers.

Analyse and format phone numbers of incoming calls

The phone number of an incoming call will be extended with the country code, while special prefixes and characters from the phone system will be removed - see configuration settings PBX Configuration and Configuration Caller Identification 73.

If the phone call is a local call and the area code has not been transmitted, an area code will be automatically added - see Dialing Rules. 70

For internal calls, the main number can be added - see Prefix for internal numbers 61.

Identifying an address

Search step 1

The phone number, modified as described above, will be used for searching to obtain a 100% hit in the local copy of the salesforce database . If there is an exact match for a contact person, lead or account, the search will be terminated and the address with the caller data will be displayed within the Desktop Notification 35.

If there is no exact match, the search will be extended to Microsoft OutlookTM $\lceil \tau \rceil$ or the phone book of the PBX $\lceil \tau \rceil$ (if configured).

Search step 2

The phone number will be truncated beginning at the rightmost digit (see configuration details 74). If there is an exact match for an Account, the search will be terminated and the **Account with all contacts** will be displayed.

If there is no exact match, the search will be extended to Microsoft OutlookTM bor the phone book of the PBX 74 (if configured).

Search step 3

If several addresses are found in the second search step, a selection windows will be displayed where you can select the correct address (only if the option Suppress multiple hits due to identical phone numbers 74 is **not** configured).



Press the button *Ok*, to select a company address or contact person or press the button *Cancel* to proceed without selecting an address for this call.

If the Desktop Notification 35 for incoming calls is activated, there will be a message displayed in the notification window stating that the caller could not been identified. By clicking on the notification window, the above described selection screen will appear.

Search step 4

If no matching address can be found, the message < **no address identified >** will be displayed.

5.2.2 Necessary configuration settings for caller identification

Below is a list of configuration settings which have an impact on the caller identification. If the caller identification is not working, check these settings and also check Troubleshooting - Incoming calls 140.

Address information used for caller identification

- Configured Microsoft Outlook 77 contact folders
- Configured Database
- Addresses stored in the PBX system 74

Configuration Settings

- Select correct TAPI driver 55
- Configuration Caller Identification 73
- TAPI Configuration truncate incoming phone number at
- TAPI Configuration Prefix incoming call
- TAPI Configuration Don't signal updated phone number during a call 62

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If internal numbers are not identified correct, check:

- TAPI Configuration Prefix internal number
- Minimum length and of phone number indicating an external call

5.2.3 Signal Call with Desktop Notification

Depending on the configuration $\overline{r_9}$, an incoming or outgoing call will be **faded in down** to the right in a transparent window (*Desktop Notification*) or the salesforce Lead, Account or Contact folder will be opened.

If you have chosen to use *Desktop Notification*, a **transparent window** with the address information will be displayed - always and independently from the application you are currently using.



The phone number and the information whether it is an incoming or outgoing call will be displayed in the title bar.

The address information includes

- company name, city, country
- name of the contact person

If it is not possible to identify a contact person; the company name will be displayed.

If you click on the Desktop Notification with the cursor, the salesforce Lead, Account or Contact folder will be opened in a new Browser window. If the contact can be identified, the contact data will be displayed. In case the phone number is stored within multiple contacts, the account data will be displayed.

In case the address is an address stored in Microsoft Outlook, the contact folder in Outlook will be opened.

As long as the mouse pointer is atop of the window, the Desktop Notification will not be closed. It will fade out automatically after the time interval 79 specified in the configuration settings has been lapsed.

By clicking on the symbol **form** the call will be answered. This is necessary when using a headset or a hands-free set.

<u>Note</u>

When you use Windows 98, the Desktop Notification screen cannot be displayed transparently due to limitations of Windows 98.

See also

Configuration Call Notification 79

5.2.4 Signal Call with Call Details

This screen will be displayed (depending on the configuration 79 settings) automatically when a call is made. Otherwise it can be opened either by:

- Right mouse click on the phone icon Open CTI Data Connector salesforce.com Edition during an active call
- · Left mouse double click on the phone icon if there is no active call



The **status bar** provides additional call information. Possible messages include: *Incoming* or *outgoing call, call active* and *call completed* followed by the phone number. In addition, the duration of the actual call will be displayed in the format of *hours:minutes: seconds.* If another call is coming in while you are phoning, this call will be signalled with the message: *1 call(s) waiting*

oming call: 0044734273833 - Duratior	n: 00:00:00, 0 call(s) waiting	3	ba
Address: (D000104)	Telephone <u>n</u> ote:		
United Whisky Destilleries Ltd. Freemont Tower 3 Perkens Bridge	~		~
GB-Windsor SL4 4QQ	2		1
<u>C</u> ontact person:	Processed <u>b</u> y:		~
Mrs. Delou Sandra	Processed for:		~
Mr. Bob Sprith	<u>Activity</u> :		~
	<u>C</u> ontact person:	Mrs. Delou Sandra	~
	Priority:	Sched <u>u</u> le of activity:	
	~	02.03.2004 💌 08:0	10 +

The label of the buttons can change depending on the call status. During an incoming call you can answer the call by pressing the button **Answer** (or by picking up the receiver). Press the button **Reject** to reject a call. An active call can be set on hold by pressing the button **Hold** (only visible when the call is active). You can go back to the call by pressing the button **Answer**. With the button **Complete** (only visible when the call is active) you disconnect the active call or you can be transferred by pressing the button **Transfer Call**

The following information will be displayed:

- Address: Customer number, address information 1 and 2, street, country code, zip code and city
- Contact person: A selection of the contact persons associated with the address or only one contact person, if the phone number could be linked directly to that contact person. If supported by the database, the form of address and title will be displayed, otherwise only the first and last name.

Minimizing the screen

If you want to switch to another program without ending the call documentation, just minimize the window.

Minimize window	- • ×	Close window

If you select the symbol for *Close window* or click on the button *Close*, the call documentation will be terminated. The call itself will not be terminated by closing the window.

See also

Configuration Call Notification 79

5.2.5 Telephone Note and Activities

This option is only available during an active call and if configured. This feature needs another application to store the phone note.

Depending on the selected database a phone note and activity can be stored. If the address is stored in Microsoft OutlookTM, the phone note will be stored in the **Journal** and the follow-up will be stored under **Tasks**.

You can type in the following information as phone note and follow-up:

- Telephone note: A free text which is stored for the phone call in your database
- Created by: Author of the telephone note
- Assigned to: Who is responsible for the note/follow-up?
- Activity: A selection of actions in a self-learning list-box. The last 10 entered actions will be displayed
- **Contact person:** The contact person of the call ³⁷ is set as the default value but can be changed. The name is stored with the activity
- Priority: The priority for the follow-up
- Due date / time: Date and Time for the follow-up

<u>Save</u>

The button **Save** will save the phone note and activities. The data is also saved when the screen is closed.

If the database has more than one client (address is related to several clients), the client can be selected before storing the phone note.

ning call active, 0011731273031 - Da	ration: 00:02:19, 1 call(s) w	aiting
Add <u>r</u> ess: (D000104)	Telephone <u>n</u> ote:	
United Whisky Destilleries Ltd. Freemont Tower 3 Perkens Bridge GB-Windsor SL4 4QQ	talked about quota	tion.
Contact person:	Processed <u>by</u> :	Mr. Bob Hope
Mrs. Delou Sandra	Processed <u>f</u> or:	Mrs. Colllins
	<u>A</u> ctivity:	Make appointment
	<u>⊂</u> ontact person:	Mrs. Delou Sandra
	Priority:	Schedule of activity:
	Midium	02.03.2004 🔻 08:00

5.2.6 Missed Calls (red icon)

If a call is missed, the phone icon turns red 2. You can now:

- Left mouse double click on the icon to directly open the dialog for missed calls 34
- Right mouse click on the icon, select Call History (incoming calls) opens the dialog for missed calls

After opening the Call History 34, the icon color turns back to blue 2.

() Anonymous calls are not signalled as missed calls.

5.3 Call Lists

Mirage Computer Systems GmbH provides call lists for each PC. Calls can be saved only if the PC is turned on.

- Call History 34 (incoming calls)
- Redialing List 32 (outgoing calls)

5.3.1 Call History (incoming calls)

All **incoming calls** - firstly grouped by **Missed /Answered** calls, then sorted by date - are displayed here.

A selected entry in the list is picked for dialing by a double click or by clicking on the button **Dial**. Press the key *Delete* to delete an entry. Use the **Edit Menu -> Transfer entry to Quick dialing list** (or use right mouse click *transfer entry* to Quick dialing list) to copy the entry to your personal Quick dialing list.

The number of entries can be set in the configuration $\boxed{68}$. Once the configured number is reached, the oldest entry will be deleted.

						_ 🗆 🔀
dit	View	Extras ?				
		coming calls)				
		Phone number		Date/Time	Duration	Name
Þ						
				02.12.2006 19:59:50	00:00:00	Mirage Computer S
 	Answ	ered				
						Þ
	Help	Weiterleitung	1		Dial	Close
	listc I(s) 1	listory (ine l(s) waiting	Phone number Missed today 004970054885342 Answered	Iistory (incoming calls) I(s) waiting Phone number Missed ↓ today • 004970054885342 ▼ Answered	Iistory (incoming calls) I(s) waiting Phone number Date/Time Missed ↓ today • 004970054885342 02.12.2006 19:59:50 ▼ Answered	Itistory (incoming calls) (s) waiting Phone number Date/Time Duration Missed ↓ today • 004970054885342 02.12.2006 19:59:50 00:00:00 ▼ Answered

5.3.2 Redialing List (outgoing calls)

You can redial the phone **number used last** via the taskbar , right mouse button, option: *Redialing*. All other phone numbers from outgoing calls are displayed in the redialing list and can be used there for redialing.

All **outgoing calls** - firstly grouped by **Missed / Reached**, then sorted by date - are displayed here.

A selected entry in the list is picked for dialing by a double click or by clicking on the button *Dial*. Press the key *Delete* to delete an entry. Use the *Edit Menu* -> Transfer entry to Quick dialing list (or use right mouse click *transfer entry* to Quick dialing list) to copy the entry to your personal Quick dialing list.

The number of entries can be set in the configuration $\boxed{66}$. Once the configured number is reached, the oldest entry will be deleted.

8					-	-	-	-		. 🗆 🔀
File	Edi	it	View	Extras	?					
			List (aiting	outgoin	g calls)					
٩	-					1				
4	-			Phone n	number	Date/Time		Duration	Name	
.		Þ	Misse							_
1. Sec. 1				<i>lay</i> 004472	4273834	02.12.2006	10,55,07	00:00:00	United W	bieley Dee
		~	Reac		72/3037	02.12.2000	19:30:07	00:00:00	United W	HISKY DES
<u> </u>		•	Reaci	icu -						
↑ ₿										
<u> </u>										
1										
		•								•
		_	Help		Weiterleitung			Dial		llose

5.4 Transfer a Call

Call Transfer allows to transfer a call from your phone to any other phone. This feature is only available during an **active** call.

A call transfer is a mechanism that enables a user to relocate an **active** call to another telephone by using the *call transfer* button and dialing the required location. The transferred call is either **announced** or unannounced (*blind transfer*).

If the transferred call is **announced**, the desired party/extension is notified of the impending transfer. This is done by putting the caller on hold and dialing the desired party/extension; they are then notified and, if they choose to accept the call, it is transferred over to them.

On the other hand, an unannounced (**blind**) transfer is self-explanatory: it is transferred without notifying the desired party/extension of the impending call. It is simply transferred to their line typing in the phone number and terminating the call.

Both options (announced and blind) are supported by CTI Data Connector salesforce. com Edition **but not by all TAPI drivers**. If a TAPI driver does not support the transfer feature, this option will not be available in CTI Data Connector salesforce.com Edition.

10 The way how this feature works in detail depends on the PBX and TAPI driver.

5.4.1 Announced Transfer

If the transferred call is **announced**, the desired party/extension is notified of the impending transfer. This is done by putting the caller on hold and dialing the desired party/extension; they are then notified and, if they choose to accept the call, it is transferred over to them.

During an active call you can either

- Left click on the phone icon an select *Transfer Call* or
- Use the *Transfer Call* button within the Control Centre

A new screen appears. Type in the number to which the call should be transferred and press the button *Transfer Call*.

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🙆 Transfer Call	\mathbf{X}				
Transfer call to this number:					
02089481345					
Transfer Call	Complete transfer				
Blind Transfer					

You then have 2 options:

- Press Back to Active Call to talk again with the caller or
- Press Complete Transfer to transfer the call to the desired party

See also

Blind Transfer 50

5.4.2 Blind Transfer

A **blind transfer** is a call without notifying the desired party/extension of the impending call. It is simply transferred to their line typing in the phone number and terminating the call.

During an active call you can either

- Left click on the phone icon an select *Transfer Call* or
- Use the *Transfer Call* button within the Control Centre 21

A new screen appears. Type in the number to which the call should be transferred and press *Blind Transfer*. The call is transferred to the desired party.

Transfer Call	\mathbf{X}				
Transfer call to this number:					
02089481345					
Transfer Call	Complete transfer				
Blind Transfer					

See also

Announced Transfer



6 Configuration Wizard

6.1 Introduction

The Configuration Wizard of CTI Data Connector salesforce.com Edition offers several steps for making configuration settings. You can navigate through the pages with the buttons **Next** and **Back**. To apply the new settings, the program for formatting phone numbers states will be automatically started on the local PC.

The Configuration Wizard can have **different options and steps depending on the installation**. The maximum is 6 steps and an introduction page. Note that this description may differ from your installation. It is mandatory to configure the minimum configuration 17.

How to start the Configuration Wizard?

Start the Configuration Wizard by clicking on the icon in the taskbar f_{19} with the right mouse button and select the option **Configuration Wizard** or select the menu Extras - **Configuration Wizard** in the control centre f_{21} .

Overview of all configuration steps

- Introduction Select the language 54 for CTI Data Connector salesforce.com Edition
- Configuration of the TAPI device driver 55, Hotkeys 56, Expert Settings 58 and Browser Dialing 58
- Configuration of the PBX [69] and Caller Identification [73]
- Configuration of databases 75
- Configuration of Microsoft Outlook[™]
- Configuration Call Notification 79

6.2 Select Language

54

You can select the language for the application. If you want to skip this screen in the future, deselect *Always show this page.*

🛛 Configuration Wizard	$\overline{\mathbf{X}}$
Introduction Welcome to the Configuration W settings. You will get an extensiv button 'Help'.	izard. This wizard supports you with personal configuration e description in every configuration step by pressing the
	Language: English
Help Cancel	< Back Next > Finish

6.3 TAPI device driver , Hotkey, Expert Settings, Browser Dialling

Here you can configure the TAPI driver 55 and the dialing options which should be activated.

- Activate dialing within a Browser
- Activate dialing via Hyperlink 58
- Activate dialing via Hotkey 56

If available, the dialog for Expert Settings can be started.



6.3.1 TAPI Driver

Select the TAPI device driver for incoming and outgoing calls from the list box. See details for TAPI - Where do I find the TAPI driver?

With the button a window can be opened where all functions supported by the TAPI driver will be shown.

With the driver <*Telephone Simulator*> CTI Data Connector salesforce.com Edition can be tested with a phone simulator 2^{3} if no TAPI enabled phone is available.



See also

Where do I find this screen? 54 System Requirements 118 TAPI driver Where do I find the TAPI driver? 119

6.3.2 Configure Hotkeys

Hotkeys are used to dial with a shortcut from any application. You first have to select Activate dialing via Hotkey 54 before it can be used. Press the button *Hotkey* for configuration.

Hotkey to dial highlighted phone number

This Hotkey allows to dial by highlighting a phone number and press the Hotkey. For details see Dial with a Hotkey 29. The default value is **F10**.

Hotkey Here you can de phone number.	fine a system-wide Hotkey. If pressed,will dial the selected	You can choose any key combination (e.g. CTRL + ALT + F10) for outgoing calls. You should select a combination that is not used by other programs.
	Hotkey to dial highlighted phone number Modifiers CTRL MENU SHIFT Hotkey to dial phone number from dipboard	
	Modifiers CTRL MENU SHIFT	
Help	Hotkey - waiting time to read clipboard(ms):	

Hotkey to dial phone number from the clipboard

This Hotkey allows to dial a phone number which is stored in the clipboard. For details see Dial with the Clipboard 32° . The default value is CTRL + MENU + SHIFT + W to make sure that other programs are not affected. If you use this functionality change the default to a value which:

- is not used by other programs
- which can be accessed easily e.g. CTRL+C = Copy value to clipboard CTRL + D = dial (note: CTRL D could be used by other applications for the delete function)

Hotkey - waiting time to read clipboard

If the Hotkey $|_{29}$ for dialing is not working, then either the Hotkey is already in use (change Hotkey) or other applications like the Office clipboard manager are blocking the clipboard. The Hotkey copies the phone number into the clipboard and therefore needs access to the clipboard. Increase the waiting time before information of the clipboard will be read. The time is specified in a thousandth part of a second. Default time is 10 = 1 hundredth part of a second. The maximum value is 98.

See also

Where do I find this screen? Troubleshooting - Hotkey is not working Dial with the Clipboard Dial with a Hotkey

6.3.3 Configure dial options for Browser

There are 2 Browser options which can be enabled.

Activate dialing within Browser

This option allows to dial via right mouse click within the Browser. For details see Dial within the Browser 30° .

🚺 Dial with right mouse button is available only in the Internet Explorer

Activate dialing via Hyperlink

This option allows to dial via Hyperlink. For details see Dial with a Hyperlink 31.

Dialing via Hotkey 56 is also working within a Browser.

See also

Where do I find this screen? Troubleshooting - Dial with a Hyperlink is not working Configuration - Application used for dialing with Hyperlink

6.4 Expert Settings

CTI Data Connector salesforce.com Edition allows to configure a lot of additional settings which have an impact on:

- Handling of a call
- Provide a workaround for TAPI driver issues
- Handling of the development interface to other applications
- and other specific settings

Only experienced users should change these settings

Depending on the system configuration, this option can be disabled. Otherwise press the button *Expert Settings* in Step 1 of the Configuration Wizard.

🖎 Configuration Wizard	
Step 1 of 5 Select the telephony service pro Simulator > to activate a phone s	ovider/TAPI device driver will be used. Use <telephone simulator for testing.</telephone
	<u>T</u> elephony service provider/TAPI device driver: SIPPS Line ✓ Activate dialing within Browser ✓ Activate dialing via Hyperlink ✓ Activate dialing via Hotkey
	Expert Settings Hotkey
Help Cancel	< Back Next > Finish

CTI Data Connector salesforce.com Edition

6.4.1 TAPI Configuration

60

The following settings have an impact on the TAPI interface or call handling.

陷 Expert Settings		×
You can configure additional s Only make changes if you are	ettings here. aware of the impacts of the modification.	
	TAPI Configuration Help and Welcome Development API Miscellaneous Settings External call - Prefix Incoming Image: Cut prefixes Outgoing Orefixes Place prefixes Prefix for internal numbers: Provider Postfix: Image: Cut prefixes Provider Postfix: Image: Cut prefixes Image: Cut prefixes Ignore Fake Number: Image: Cut prefixes Image: Cut prefixes Ignore Fake Number: Image: Cut prefixes Image: Cut prefixes Ignore Fake Number: Image: Cut prefixes Image: Cut prefixes Ignore Fake Number: Image: Cut prefixes Image: Cut prefixes Ignore Fake Number: Image: Cut prefixes Image: Cut prefixes Image: Activate call logging Image: Superior Supe	
Help	Cancel Ok	

External call - Prefix

If the TAPI driver adds a prefix for an external call, this prefix can be removed. Otherwise prefixes can be added before the number is dialed.

Example

The phone number 0734273830 is signalled as 00734273830. In this case the prefix 0 has to be removed to allow a correct caller identification.

If the TAPI driver signals the incoming phone number **without a leading 0**, then configure: Place prefix, Incoming.

Example

The phone number 0734273830 is signalled as 734273830. In this case the prefix 0 has to be added for incoming calls to allow a correct caller identification.

O By default, the prefix to get an outside line is added as *Outgoing, cut prefix* to automatically remove the prefix after dialing.

Prefix for internal numbers

This function allows to place a prefix **in front of** an internal number. It is not used for dialling - only for **incoming and outgoing caller identification**.

Example

For all employees the complete phone number is stored in the database, e.g. 07342/7383-12. For an incoming call, only the extension number is signalled, e.g. 12. In order to find the name of the calling person, the prefix 7383 has to be added. Additionally, CTI Data Connector salesforce.com Edition adds the area code, configured in the country settings 54.

Configure **7383** for the prefix which will firstly create the number 738312 and then will add the area code. This results in the new number 07342738312 which will allow to identify the caller.

Provider Postfix

This function allows to add a postfix at the end of a phone number for outgoing calls.

Example

IP providers often require a # at the end of the phone number to dial the number instantly.

Configure # for the postfix which would dial 07342738312#

Truncate incoming phone number at:

This option is needed with IP phones and a TAPI driver which passes the phone number with IP information.

Example

The phone number is passed as 0734273830@myprovider.com. This option allows to truncate all characters after the specified character - e.g. @.

Ignore Fake Number

Some TAPI drivers firstly send a special number for **outgoing calls** and then the correct phone numbers. To allow for the special number being treated as a fake number being ignored, configure the fake number.

Example

The TAPI driver firstly sends 879 and then the correct phone number.

Configure 879 as the fake number.

Don't signal updated phone number during a call

If a phone number changes during a call (e.g. because the call was redirected from the main switchboard), the new phone number will be updated by default in the Desktop Notification 35. The update can be suppressed by checking this option.

Controlling CTI Application

If a application uses the windows dialer, CTI Data Connector salesforce.com Edition can be configured to handle all requests that go to the windows dialer. This allows to use the call logic for outgoing calls of CTI Data Connector salesforce.com Edition .

Activate call logging

This configuration is intended for service purposes. It logs the events of the TAPI device driver. See Troubleshooting - sending a log file how to send a log file 143 to support.

See also

Where do I find this screen? 58

6.4.2 Help and Welcome

The following settings allow for configuring help options.

🖎 Expert Settings 📀 🔁	×
You can configure additional settings here. Only make changes if you are aware of the impacts of the modification.	
TAPI Configuration Help and Welcome Development API Miscellaneous Settings Help Type: Online-Help Image: Display Quick Introduction Help	
Help Cancel Ok	

Help Type

2 different types of help is offered

- Online Help this is the most up-to-date help (updated even after program release). It is recommended using this help
- Offline Help this help program is stored on the local hard disk drive and can be used, if no Internet connection is available

The offline help works with Windows XP SP2 / Vista only with a single user installation

Display Quick Introduction Help

Check this option to have the Welcome Screen displayed during each program start.

See also

Where do I find this screen? 58

6.4.3 Development API

These settings have an impact on the development API using the calls.xml and jobs.xml file to handle phone events.

陷 Expert Settings		X
You can configure additional se Only make changes if you are	ettings here. aware of the impacts of the modification.	
	TAPI Configuration Help and Welcome Development API M Always write XML file (calls.xml) XML Character Set: Image: Create jobs.xml only once per call Image: Create calls.xml only once per call Create calls.xml only once per call Image: Create calls.xml only once per call Image: Create calls.xml only once per call TAPI .DLL in use is for Terminal Server Image: Signal change in phone number Image: Create call transfer(s):	iscellaneous Settings
Help	Car	ncel Ok

Always write XML file (calls.xml)

The default option specifies that a call is passed to an external program only after clicking on the Desktop Notification window. This option allows to always pass the caller data via the calls.xml file independently from clicking on the Desktop Notification.

XML Character Set

The character set for the calls.xml and jobs.xml file can be changed. This is necessary in order to pass caller data stored with different character set. Default is UTF-8.

Example

The address data is stored in the database with Greek characters. In order to pass the address data it is necessary to change the default character set.

🚺 The character set of the Desktop Notification 🗊 cannot be changed.

Create jobs.xml only once per call

If checked, the jobs.xml will be created only once per call. Otherwise the file will be created each time the *Save* button is pressed.

Create calls.xml only once per call

If checked, the calls.xml will be created only once per call. Otherwise the file will be created for each TAPI event like ring, hold, terminate, provided that the user clicks **once** on the Desktop Notification 35. See also: Always write XML file (calls.xml) 64.

TAPI .DLL in use is for Terminal Server

Special TAPI.DLL - requires Software Development Kit for Terminal Server.

Signal change in phone number

Using this option will signal in the calls.xml file, if the phone number has changed **during a call**. This event can happen when a call is redirected. See also: Don't signal updated phone number during a call $\boxed{62}$

Timeout during initializing a call transfer

This switch is used for the option Transfer a Call 49. It is the waiting time in seconds until the PBX responds to the event. The default value is 5 seconds, maximum is 60 seconds.

See also

Where do I find this screen? 58

6.4.4 Miscellaneous Settings

陷 Expert Settings		×
You can configure additional se Only make changes if you are	ettings here. aware of the impacts of the modification.	
	TAPI Configuration Help and Welcome Development API Miscellaneous Settings Network Setup: Local Version: 200610161433 Network Version: 0 Terminate database connection after each call Number of entries in Call History and Redialing List: 500 Application to dial with Hyperlink: dial.exe	
Help	Cancel Ok	

Terminate database connection after each call

If an Access database is used in an network environment and not all PCs shut down CTI Data Connector salesforce.com Edition during night, this database can never be backed up because it is always in use. Use this option to allow for back-up or compression of an database.

Depending on the usage of the database this option may significantly slow down the performance.

Never use this option on the server and never in combination with an SQL database.

Number of entries in Call History and Redialing list

Define the number of entries in the redialing list 32° and call history list 34° .

66

Application to dial with Hyperlink

Defines the executable which is used by Windows **callto:** command - see Dial with a Hyperlink 3^{1} .

This command may be used by other applications like Skype. If CTI Data Connector salesforce.com Edition should use this functionality, disable in Skype: callto: links in other applications. The default value for CTI Data Connector salesforce.com Edition is **dial. exe.**

See also

Where do I find this screen? 58

CTI Data Connector salesforce.com Edition

6.5 Configuration of the PBX and Caller Identification

This screen allows to specify PBX specific settings and how to handle caller identification.

🖄 Configuration Wizard		\mathbf{X}
Step 2 of 5 Specify the specific settings of t	he PBX and the configuration for caller identification.	
	PBX Configuration Configuration Caller Identification Dial tone digits for external calls: 9 Minimum length of phone number indicating an external call: 3 Dialing Rules Dialing Rules	
Help Cancel	< Back Next > Finish	

See also

PBX Configuration 69 Dialing Rules 70 Dialing Rules for US / Canada 71 Configuration Caller Identification 73

68

6.5.1 PBX Configuration

Basic Configuration settings for handling outgoing calls and PBX specific functions.

Configuration Wizard		×
Step 2 of 5 Specify the specific settings of t	he PBX and the configuration for caller identification.	
	PBX Configuration Configuration Caller Identification Dial tone digits for external calls: 9 Minimum length of phone number indicating an external call: 3 Dialing Rules 1	
Help Cancel	< Back Next > Finish	

Dial tone digits for external calls

Specify the digit which is necessary to get an outside line for external calls, e.g. 0 or 9. This prefix is added automatically for external calls. Also see dialing Rules $\boxed{70}$ for extended configuration.

Minimum length of phone number indication an external call

For distinguishing between internal and external calls type in the maximum length of the internal phone number + 1 (Example: The internal phone numbers are 0 to 99; an external number would be defined by using 3 digits).

See also

Dialing Rules 70 Dialing Rules for US / Canada 71

6.5.1.1 Dialing Rules

With the button *dialing Rules* the country settings and area code settings can be modified. It is important to configure the correct **area code and country** code.

> Phone and Modem Options	8 23
Dialing Rules Modems Advanced	
The list below displays the low location from which you are d	cations you have specified. Select the saling,
Locations:	
Location	Area Code
My Location	425
New	Edt Delete
OK	Cancel Apply

Outside US / Canada it is sufficient to add the country/ region and the area code **without the leading 0**. Never add a dialing rule because rules like prefixes are covered within CTI Data Connector salesforce.com Edition settings.

Example

Area Code: 425- never use **0**425 for area code as 0 is part of the dialing rule which is automatically retrieved from the country settings.

For **US / Canada** see special considerations for dialing rules 71.

Outside US / Canada: Press the button *Edit:* Select your **Country/Region** and Area Code without the leading 0 or 1. The fields Outside Line for local calls, long-distance calls, carrier code for long-distance calls and international calls **must be empty**.

New L Netion	8 ×
General Area Code Rules Calling Card	
Location name:	
Specify the location from which you will be dialing.	
Country/region:	Area code:
United States 👻	425
Dialing rules	
When dialing from this location, use the following rules:	
To access an outside line for local calls, dial:	
To access an outside line for long-distance calls, dial:	
Use this carrier code to make long-distance calls:	
Use this carrier code to make international calls:	
To disable call waiting, dial:	Y
Dial using: Tone Pulse	
L	
OK Cancel	Apply

See also

Where do I find this screen?

6.5.1.2 Dialing Rules for US / Canada

As there are different dialing rules for local and long distance calls in the USA, these rules have to be defined within CTI Data Connector salesforce.com Edition AND the Windows dialing rules.

Example Your local area code is 214. To dial an outside line you firstly have to dial 9. In some places, some prefixes within an area code are considered local calls, and other prefixes within the same area code are considered long distance. Let us assume 469 and 972 should be treated as a local call.

CTI Data Connector salesforce.com Edition has to dial:

- 9.214.415.9160
- 9.469.415.9160
- 9.972.415.9160

and for long distance calls

• 91 407-398-6913

Configuration within CTI Data Connector salesforce.com Edition

Set Dial tone digits for external calls 69 to 9

Configuration within Windows

Press the button *dialing Rules*, or within Windows select Open Phone and Modem Options by clicking the **Start** button, clicking **Control Panel** and then clicking **Phone and Modem Options**.

TAB - General

Configure: Area code: 214; outside line for local calls: 9; outside line for long distance calls: 9

New Location	8 X
General Area Code Rules Calling Card	
Location name:	
Specify the location from which you will be dialing.	
Country/region: A	rea code:
United States 👻	214
Dialing rules When dialing from this location, use the following rules:	
To access an outside line for local calls, dial:	9
To access an outside line for long-distance calls, dial:	9
Use this carrier code to make long-distance calls:	
Use this carrier code to make international calls:	
To disable call waiting, dial:	Ψ.
Dial using: Tone Pulse	
OK Cancel	Apply

TAB - Area Code rules

In some places, some prefixes within an area code are considered local calls, and other prefixes within the same area code are considered long distance. Use this tab to specify those relationships and the rules for dialing those numbers.

In the New Area Code Rule dialog box, specify how certain phone numbers in the same
or other area codes need to be dialed. Include all the prefixes to be used for this area code.

- Leave the field Dial empty
- Check: Include the area code.

CTI Data Connector salesforce.com Edition supports the dialing rules only, if Country/ Region is set to United States or Canada.

See also

Where do I find this screen?

6.5.2 Configuration Caller Identification

陷 Configuration Wizard		×
Step 2 of 5 Specify the specific settings of the PBX and the configuration for caller identification.		
	PBX Configuration Configuration Caller Identification Caller identification - truncate number of digits: 3 □ don't show internal calls 1 □ Use Called ID for caller identification ✓ ✓ Suppress multiple hits due to identical phone numbers □ Display Caller ID Name identified by PBX String if Caller ID is suppressed:	
Help Cancel	< Back Next > Finish	

Caller identification - truncate number of digits

CTI Data Connector salesforce.com Edition can truncate a phone number until a phone number with a direct match is found.

Example

Incoming number: 0044734273**833**. This number is not associated with a contact person, but the number of the main office with 0044734273-0 is stored. After 3 digits having been truncated, the number of the main office will be found. If this logic is not needed, type in 0. The default value is 3.

US or Canada

This option must be 0 because extensions can not be dialled directly.

Don't show internal calls

If selected, the caller information 35 for **internal calls will not be displayed**. For distinguishing between internal and external calls, the value in the field Minimum length of phone number indicating an external call 69 will be used.

Use Called ID for caller identification

By default, the phone number of the person who is calling (CallerID) is used for caller identification. If the number that was called (Called ID) is to be used, select this option.

Example

You provide a phone service for 10 companies and you offer a line for each company. Whenever a phone comes in, the number that was called (line for company 1 to 10) including the company name is to be displayed.

Suppress multiple hits due to identical phone numbers

If records are stored multiple times (the same phone number is stored multiple times), CTI Data Connector salesforce.com Edition will always display multiple addresses and cannot open a caller record or Outlook contact. If the option *Suppress multiple hits due to identical phone numbers* is selected, always only one suitable record will be displayed.

Display Caller ID identified by PBX

If your PBX has an own phone directory, CTI Data Connector salesforce.com Edition can display the name of the caller in the Desktop Notification 35 passed by the PBX, if no address is found in a database 75 or Outlook 77.

The option: *String if caller ID is suppressed* should be the character string which is sent by the PBX for suppressed caller IDs, e.g. ***. Instead of displaying *** the Desktop Notification is not displayed.

See also

Where do I find this screen?

6.6 Configuration of Databases

Here you can configure the databases in which CTI Data Connector salesforce.com Edition will search for address information and phone numbers. The profiles should be modified only by the manufacturer. There is a Software Development Kit available for generating own profiles.

Configuration Wizard	X
Step 3 of 5 Configure the SQL statements for database	s.
Profiles (2 Salesford	
Help Cancel	< Back Next > Finish

CTI Data Connector salesforce.com Edition can search in multiple databases. A profile for each database is necessary.

Configuration of the database access

By pressing the button *EDIT*, a configuration screen will be opened.

🖄 C	onfiguration Wizard	X
	Profile - Datasource esforce	
	D <u>a</u> ta service provider: Microsoft Jet	~
	User:	Password:
	Connection parameters:	
	Name	Value
	Data Source	C:\Programme\CTI D
	Jet OLEDB:System Dat	
	Jet OLEDB:Database P	92968D9E989A9C8B96
	Test	Edit
		Ok Cancel

Depending on the data service provider (Microsoft Jet = Access, MS-SQL, Oracle, ODBC) you have to choose the connection parameters.

Microsoft Jet - Access

Data Source: Path with the name of the access database JET OLEDB System Database: Path with the name of the system database (if needed) JET OLEDB Database Password: Password for the system database

ODBC DSN

DSN: ODBC name as stated in the system-DSN

Microsoft SQL Server

Data Source: Server name Initial Catalog: Name of the database

<u>Oracle</u>

Data Source: Path and name of the TNSnames.ora

If the field user and password is empty, an integrated login will be done!

6.7 Configure Microsoft Outlook / Exchange

Here you can configure CTI Data Connector salesforce.com Edition for using Microsoft Outlook[™] for caller identification. This works both with a local Outlook database and with Exchange databases. The configuration refers the Outlook **contact folder**. As Outlook can use only one (Exchange) profile at a time, you can additionally specify the Exchange profile name and the password. Otherwise the profile used last will be applied.

You have to select *Show Outlook contacts* to display the caller's address after clicking on the Desktop Notification 35 window.

Press the button *Folders* to select one or more contact folders.

() If there are remote Exchange folders, it may take up to a few minutes until the screen to select the folders will appear.

陷 Configuration Wizard	
Step 4 of 5 Configuration of contact folder	s for Microsoft Outlook /Exchange using the button 'Folders'.
	Exchange Profile: Profile Password: Contact folders are selected for call identification. Choose Microsoft Outlook Contact folders Folders
Help Cance	I < Back Next > Finish

Select folders

You can select one ore multiple folders to use for caller identification.

🖄 Configuration Wizard 🛛 🔀
Choice Outlook contact folders
Image: Contact te text Image: Contact text Image: Contact text Image: Contact text

6.8 Configuration Call Notification

The call notification options of CTI Data Connector salesforce.com Edition can be configured for incoming and outgoing calls.

陷 Configuration Wizard	
Step 5 of 6 Select the type of notification for	an incoming call.
	Signaling call with call details
	Incoming calls
(i) (ii) (iii) (ii	when ringing when answering the phone
	Outgoing calls
	when ringing when answering the phone
∕∕	Signaling call with Desktop Notification
	✓ Outgoing calls
	Display seconds : 10
	Level of transparency Desktop Notification:
	Preview
Help Cancel	< Back Next > Finish

Signaling call with call details

You can select whether the call detail information 37 of CTI Data Connector salesforce. com Edition will be displayed / not displayed for incoming or outgoing calls. It can be displayed when the phone rings or when the phone is answered (picking up the receiver).

 $\mathbf{1}$ It is recommended to disable this feature if the caller data is displayed in salesforce.

Signaling call with Desktop Notification

Incoming or outgoing calls can be signalled first within a transparent Desktop Notification screen 35. This is called *Desktop Notification*. The time how long this screen is displayed can be defined in seconds. The transparency can be set up with a throttle button. Click *Preview* to get an idea how the window will look like.

If you have enabled Desktop Notification , the Desktop Notification will be **displayed first**. Only if you click on the notification window, the caller data in salesforce will pop up.

If you disable Desktop Notification, the caller data will be instantly displayed in salesforce.

See also

Signal call with Desktop Notification 35 Signal call with call details 37

6.9 Configuration for Special System Environments

Here you can define special system environments for CTI Data Connector salesforce. com Edition. This is necessary when another application cannot directly communicate with CTI Data Connector salesforce.com Edition, because it is running on a Terminal server or in another window (e.g. an application for IBM iSeries).

陷 Configuration Wizard	×
Step 6 of 6 Configuration settings, how to e	xchange data with external applications.
	Configuration for Remote Applications Dial via file C: \Dokumente und Einstellungen \Dieter \Anwendt Directory for incoming calls Standard user directory C: \Dokumente und Einstellungen \Dieter \Anwendt
Help Cancel	< Back Next > Finish

Configuration for Remote Applications

If Dial via File is selected, CTI Data Connector salesforce.com Edition will dial automatically when the file **dial.xml** is available on the selected directory. Within the file, the phone number to be dialled has to be available. The file must have the following format:

<CDC>

<DialPhoneNumber>PHONENUMBER</DialPhoneNumber></CDC>

Directory for incoming calls

CTI Data Connector salesforce.com Edition can provide the call information in the file cdcsfecalls.XML for other applications. Normally, this file is created in the user specific directory, but another directory (even on a server) can be defined.



7 Service Programmes

7.1 Show License Information

To display the license information, either

• right click on the icon in the taskbar 19 - select Show License Information

or

• select within the Control Centre 21, Menu Extras, Show License Information

This will open the Licence Viewer where you can view the licenses you have acquired, the number of users/computers who can use the licence and whether a licence has a time limitation or not.

Number of licenses

The folder **CTI License** displays the maximum number of licenses and the number of licenses which are available. If you click on the + sign, all computers using a license will be displayed. See *Deactivate a License* how to deactivate one single computer.

- Number of Computers / PCs which have a license
- Demoversion 123 if omitted it is a full version or time-limited full version
- Valid until (time limitation) if omitted it is a non time-limited version
- Web Activation 110 either done or required

Update Subscription

The update subscription entitles you to install the latest updates as long as it has not expired. See chapter software update 12 about how to download updates.

- Available / Not available
- Time limitation the date when the update subscription expires

Release Number

• Internal release information

Ticence View	er	
Manufacturer: Company: Licence File:	Evaluation Version	Installation Code: Code 1: 6F7820C8 Code 2: 72BCAD9C Code 3: B880A2BD Code 4: B80A2BD Code 5: B4E58409 Code 6: E0BD219E
CTT License (Activatio PC-1 PC-2 PC-3 CTT Client Int Number of Di XIIL Interface Webdial (ava Update Subs Release (200 Licence File - Licence File V	PC) (Number of licences per Computer: 11 (thereof 8 are available), Web Action Keys terface (available) atabase Profiles (4) e (available) ilable) cription (available, Expired at: 28.09.2006) 14300) ID : 200559010 (ersion : 2400 Date : 26.08.2006 18:06:27	
Deactivate	Activation Key Info	Options <u>C</u> lose

7.2 Apply Activation Key

An Activation Key is used to modify the license information (e.g. increase number of licenses). All Activation Keys are unique and have the same format like:

fZDdq-aDC95-e54DA-atR82-DL82k-NfC4v

There are 6 blocks each with 5 characters. The blocks are separated by a hyphen for better readability.

If you got an Activation Key via E-Mail or Fax, you can enter the key within the screen Show License Information 3.

- Start screen Show License Information
- Select button Activation Key
- Paste the key from the clipboard with CTRL+V

Ut is possible to validate the Activation Key online. In this case an Internet connection is necessary.

					Service	Programmes	85
🍸 Licence Viewe	er					L	
Manufacturer: Company: Licence File:	Evaluation \ C:\Program					Installation Code: Code 1: 6F7B20C8 Code 2: 72BCAD9C Code 3: BB80A2BD Code 4: BB80A2BD Code 4: BB80A2BD Code 5: B4E5B409 Code 6: E0BD219E	< IIII >
CTI Client Int Number of Da XML Interface Webdial (avai	erface (availabi atabase Profiles e (available) lable) rription (availal 4300) ID : 20055901 ersion : 2400 ate : 26.08.20	e)	і Кеу	i4DA-atR82-DL82k-NfC4v			
Deactivate	Activ	ation Key		Info	Options		Close

7.3 Formatting of Phone Numbers

As the phone numbers stored in different formats in the enterprise databases cannot be used for the caller identification 30, they have to be converted cyclically into an international format.

This program normally runs on the server 1 or 2 times a day and formats all phone numbers of all enterprise databases 75 (profile databases). See Server Setup. 86

The local database 33 (Quick dialing list and contact data from Microsoft Outlook 777) and also the main database in a single user environment has to be formatted on the local PC. This is automatically done once a day after CTI Data Connector salesforce.com Edition has been started, if the option *Refresh daily* is selected. During the formatting of the phone numbers you can make calls, but the caller identification will not be active.

Start the program for formatting the phone numbers by clicking on the icon in the taskbar with the right mouse button and select the option *Format phone numbers* or by selecting the menu Extras - *Format phone numbers* in the control centre [21].

Depending on the installation some options might be disabled.

CTI formatting telephone numbers	\mathbf{X}
Current Local: not detectable - Global: 16.10.2006 12:33:05	
Options ✓ Local database ✓ Profile database(s) ✓ Refresh daily	
Help Start Close	

If you do not want to run the program every day, deselect *Refresh daily* and run the program from time to time by pressing the button *Start*.

• A single user installation does not support formatting phone numbers on the server, and all databases will have to be formatted locally.

7.4 Format Phone Numbers on the Server

A Server Setup is necessary to format $\boxed{B5}$ the phone numbers of enterprise databases $\boxed{75}$. When using Microsoft OutlookTM the formatting is done on the local PC.

CTI Data Connector salesforce.com Edition has to be installed on the server with the program **SetupServer.exe**. Start the program setupserver.exe on the **O** server (never on the workstation). This installs all necessary components and creates a program group *CTI Data Connector - salesforce.com Edition* with the entry **CTI Data Connector salesforce.com Edition** with the entry **CTI Data Connector salesforce.com Edition** start this program to format the phone numbers manually in order to check if it is working.

You can start a cyclical formatting of phone numbers on the server. We recommend doing this during the night. Ideally you use the Task manager of the server operating system (Control Panel, Scheduled Tasks). To start the task use the following command:

cdcsfeSTARTER.EXE -R

Alternatively you can use the timer function of CTI Data Connector salesforce.com Edition. The applications will reside in the memory of the server, while the memory is freed, if the windows task manager is used.

Possible Parameters

-R: The program starts, formats the phone numbers and terminates
-Thh:mm: Starts as a "Server". The phone numbers are formatted at the specified time (e.g.: -T08:00 = 8 o'clock)
-Mn: Starts as a "Server". The phone numbers are formatted after the specified time interval (e.g.: M180 = 180 minutes)

See also

Network Installation - general information Formatting of Phone Numbers

7.5 Error Protocol

In case of failing to access a database an error protocol will be written. You can display it by clicking on the icon in the taskbar 19 with the right mouse button and selecting the option **Error protocol** or selecting the menu **Extras - error protocol** in the control centre 21.

The error protocol will be deleted with every start of CTI Data Connector salesforce.com Edition.

There is a log file for error tracking with the TAPI device driver - see configuration settings $\boxed{62}$.

7.6 Phone Simulator

If you have no TAPI-enabled phone available and you want to test CTI Data Connector salesforce.com Edition, you can use the simulator which works like a regular telephone.

Activating the Simulator

Start the Configuration Wizard 53 and choose the page where you can select your telephony service provider 54. Choose **<Telephone Simulator>**. When you start CTI Data Connector salesforce.com Edition, the simulator will be started automatically.

Working with the Simulator

The telephone simulator acts like a normal telephone with which you can make outgoing calls and accept incoming calls.

Phone simulator		
0044734273834	Л	ype in phone number
Dial Pick up Hang up		Button for Dial, Pick up, Hang up
	k	You can use the eyboard to make call

Simulating an incoming call

- Type in a phone number (without country code and special characters) in the display. You can alternatively use the keyboard to type in the number.
- Press the button Dial
- CTI Data Connector salesforce.com Edition performs the caller identification and signals the incoming call
- Accept the incoming call by pressing the button Pick up
- You can disconnect the call by pressing the button Hang up

Simulating an outgoing call

- Search in the phone book 27 of CTI Data Connector salesforce.com Edition for an address or a contact person and dial by double-clicking on the phone number. You can dial alternatively by highlighting a phone number 29 and pressing the configured Hotkey 56.
- CTI Data Connector salesforce.com Edition displays the dialled address
- Establish the call by pressing the button Pick up
- You can disconnect the call by pressing the button Hang up



CTI Data Connector salesforce.com Edition

8 Installation

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CTI Data Connector salesforce.com Edition supports single user and network installation. The network installation offers a centralized handling of the configuration settings, updates and license information.

A network installation is recommended with more then 3 PCs.

- Single User Installation
- Network Installation
- Activate Product
- Installation FAQ 118

8.1 Single User Installation

The installation consists of 5 steps:

- Install the salesforce Desktop Integration, Office Edition Plug-in
- Install the application on the local PC 100
- Minimum Configuration Settings
- Activate Product 110
- Create custom formula fields to activate Dial vial Hyperlink

Deach PC needs a Serial Number [112] to activate the software

8.1.1 Install the salesforce Desktop Integration - Office Edition

CTI Data Connector salesforce.com Edition needs the installation of the **Office Edition** plug-in of salesforce.com. If you have not installed it yet, choose within salesforce.com: Setup, Desktop Integration, **Office Edition**, Install Office Edition.

8.1.2 Install the application on the local PC

You can select during the installation whether you want to install a Single User or Multi User system. Select Single User System.

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Necessary Rights

During installation DLLs are registered. The user who installs the application needs a right to register DLLs.

The user who runs the application needs the following rights on the installation folder:

- Files cdcsfe.xml and cdcsfe.lic: read and write access
- All other files: read access

See also

Single User Installation - general information

8.1.3 Minimum Configuration Settings

During installation, the Configuration Wizard was already started. You can define a lot of individual configuration settings there. The following settings **have to be defined** to guarantee a basic functionality.

CTI Data Connector salesforce.com Edition

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- TAPI device driver 55 it is delivered by the telephone manufacturer. See also: System requirements TAPI driver 118
- Prefix for external calls and the minimum length of a phone number indicating an external call
- Button Dialing Rules 2 configures country settings and area code. See also special configuration for US / Canada 2
- Button Folder Select Microsoft Outlook™ contact folder for caller identification

Just by setting this minimum configuration you will be able to make outgoing calls and to identify incoming calls. The Configuration Wizard can be started any time by **right** click on the icon 10^{-1} , option Configuration Wizard 53^{-1} .

🖄 CTI Configuration Wizard 🛛 🔀		
Here you can configure CTI to obtain a basic functionality for incoming calls. After the installation, individual settings can be done with the Configuration Wizard. Choose the button Help to learn more about the configuration settings.		
	Image: Telephony service provider/TAPI device driver: SIPPS Line Image: Dial tone digits for external calls: Image: Dial tone digits for external call: Image: Dial tone digits for external calls: Image: Dial tone digits for external calls Image: Dial	
Dialing Rules	Choose Microsoft Outlook Contact folders Folders	
Help Cance	<pre></pre>	

See also

Where do I find the TAPI driver?

8.1.4 Create custom formula fields to activate Dial via Hyperlink

It is possible to instantly use the option Dial with a Hotkey 23 to dial. An optimum integration can be achieved by using a link to dial within the Lead, Contact or Account page.

<u>Advantage</u>

- It is just one click instead highlight a phone number and press a key
- You can dial from any list view or report

Disadvantage

• You need to implement a field in salesforce.com for each phone number

To implement the function you have to create a new custom formula text field. This is explained for contacts.

- 1. Within Salesforce, select Setup, Customize, Contacts, Fields
- 2. Create a new custom formula field of the type Text
- 3. Name it "Call Main Phone"
- 4. Use this syntax HYPERLINK("callto://"&{!Phone},"Click to dial")
- 5. Change the layout for the contact page so that the new "Call Main Phone" field is directly under the "phone" field.

You can add the mobile phone number with another formula field. HYPERLINK("callto://"&{!MobilePhone},"Click to dial")

Your screen should look like this

Email:	marketing@mirage-systems.de
Phone:	213.232.0874
Extension:	
Call Main Phone:	Click to dial
Mobile:	+49160865432
Call Mobile:	Click to dial
Skype:	Miragecomputer

Add the fields for the Account and Lead screen.

Account: HYPERLINK("callto://"&{!Phone},"Click to dial") Lead: HYPERLINK("callto://"&{!Phone},"Click to dial")

Create smart views and reports

The new fields can be added in any Views or Reports. This allows dialing directly from the view: 'all open leads' or any report.

Enable dialing via Web Link

See details - Dial with a Hyperlink 31

8.2 Network Installation

Perform the following steps for network installation.

- Install the salesforce Desktop Integration, Office Edition Plug-in so on the server
- Install all files on the server 94
- Server Setup ¹/₈₆ and configuration for formatting the phone numbers on the server
- Workstation Setup
- Distribute Client Setup 38 to all PCs
- Activate Product 110
- Create custom formula fields to activate Dial vial Hyperlink

O The network installation can be started from any workstation. Only the Server Setup has to be started directly on the server.

Only one Serial Number is needed. The Serial Number includes the number of PCs which can be installed.

If you have more then 40.000 Leads, Contacts or Accounts stored in salesforce please contact support@mirage-systems.de how to use a SQL database for data replication.

8.2.1 Install the salesforce Desktop Integration - Office Edition

CTI Data Connector salesforce.com Edition needs the installation of the **Office Edition** plug-in of salesforce.com. If you have not installed it yet, choose within salesforce.com: Setup, Desktop Integration, **Office Edition**, Install Office Edition.

8.2.2 Install all files on the server

You can select during the installation whether you want to install a Single User or Multi User system. Select **Multi User System** to for a network installation.

The setup just copies the files to the server. This allows having all files installed on one folder. Each workstation uses these files.

The installation can be started from any workstation.

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You have to give **full read and write access for all users** to the installation folder.

Edit the file *cdcsfeconf.dat* and check if the path of the database is configured with the name of the share or UNC pathname.

sforce.Data Source=\\CTIapplication\ctisforce.mdb

If there is a direct path like C:\Programme\CTI Data Connector - salesforce.com Edition \ctisforce.mdb modify it to the UNC pathname.

See also

Network Installation - general information

8.2.3 Server Setup

A Server Setup is necessary to format [35] the phone numbers of enterprise databases [75]. When using Microsoft OutlookTM the formatting is done on the local PC.

CTI Data Connector salesforce.com Edition has to be installed on the server with the

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program **SetupServer.exe**. Start the program setupserver.exe on the **①** server (never on the workstation). This installs all necessary components and creates a program group *CTI Data Connector - salesforce.com Edition* with the entry **CTI Data Connector** salesforce.com Edition Format Phone Numbers. Start this program to format the phone numbers manually in order to check if it is working.

You can start a cyclical formatting of phone numbers on the server. We recommend doing this during the night. Ideally you use the Task manager of the server operating system (Control Panel, Scheduled Tasks). To start the task use the following command:

cdcsfeSTARTER.EXE -R

Alternatively you can use the timer function of CTI Data Connector salesforce.com Edition. The applications will reside in the memory of the server, while the memory is freed, if the windows task manager is used.

Possible Parameters

-R: The program starts, formats the phone numbers and terminates
-Thh:mm: Starts as a "Server". The phone numbers are formatted at the specified time (e.g.: -T08:00 = 8 o'clock)
-Mn: Starts as a "Server". The phone numbers are formatted after the specified time interval (e.g.: M180 = 180 minutes)

See also

Network Installation - general information Formatting of Phone Numbers

8.2.4 Workstation Setup

To install a workstation (client PC) perform the following steps:

- Open the installation folder on the server default folder is ...programs\CTI Data Connector salesforce.com Edition
- Start Setup.exe
- Make the Minimum Configuration Settings use the **button Help** to get detail information about the configuration options

All settings which have been defined by the administrator are automatically applied. For details see: Distribute Client Setup 98.

Necessary Rights

During installation DLLs are registered. The user who installs the application needs a right to register DLLs.

The user who runs the application needs the following rights on the installation folder on the server:

- Files cdcsfe.xml and cdcsfe.lic: read and write access
- All other files: read access

🔨 Each PC (not user) needs a CTI license 🖽.

See also

Network Installation - general information 94

8.2.5 Create custom formula fields to activate Dial via Hyperlink

It is possible to instantly use the option Dial with a Hotkey 29 to dial. An optimum integration can be achieved by using a link to dial within the Lead, Contact or Account page.

Advantage

- It is just one click instead highlight a phone number and press a key
- You can dial from any list view or report

Disadvantage

• You need to implement a field in salesforce.com for each phone number

To implement the function you have to create a new custom formula text field. This is explained for contacts.

- 1. Within Salesforce, select Setup, Customize, Contacts, Fields
- 2. Create a new custom formula field of the type Text
- 3. Name it "Call Main Phone"
- 4. Use this syntax HYPERLINK("callto://"&{!Phone},"Click to dial")
- 5. Change the layout for the contact page so that the new "Call Main Phone" field is directly under the "phone" field.

You can add the mobile phone number with another formula field. HYPERLINK("callto://"&{!MobilePhone},"Click to dial")

Your screen should look like this

Email:	marketing@mirage-systems.de
Phone:	213.232.0874
Extension:	
Call Main Phone:	Click to dial
Mobile:	+49160865432
Call Mobile:	Click to dial
Skype:	Miragecomputer

Add the fields for the Account and Lead screen.

Account: HYPERLINK("callto://"&{!Phone},"Click to dial") Lead: HYPERLINK("callto://"&{!Phone},"Click to dial")

Create smart views and reports

The new fields can be added in any Views or Reports. This allows dialing directly from the view: 'all open leads' or any report.

Enable dialing via Web Link

See details - Dial with a Hyperlink

8.2.6 Distribute Client Setup

It is possible to export the configuration settings of one PC and distribute it to all PCs. We recommend the following procedure:

- Install one Client
- Go through all configuration settings using the Configuration Wizard
- Test outgoing and incoming calls
- If everything is working fine, export the settings of this PC

Export the configuration settings

- Open the installation folder on the server default folder is ...programs\CTI Data Connector salesforce.com Edition
- Quit CTI Data Connector salesforce.com Edition
- Start the program ExportSettings.exe. This will create a file cdcsfeconf.bak with all the settings of this PC. You can now delete settings if you do not want to export all settings

- Copy now cdcsfeconf.bak to cdcsfeconf.dat
- When a Client starts CTI Data Connector salesforce.com Edition, it will automatically apply the settings reading the file cdcsfeconf.dat

(1) All personal settings of all workstations will be overwritten.

How is this feature working?

The file *cdcsfeconf.dat* is a text file and consists of 2 sections:

- [ClientConfigExt] which has a copy of all settings of the PC
- [ClientConfig] which has a version number

During each program start, the file *cdcsfeconf.dat* is read. It is checked whether the version number stored in the registry of the PC is smaller than the version number stored in the section **[ClientConfig].** If yes, the settings of the *cdcsfeconf.dat* will be applied and the version number will be updated in the local registry. This ensures that the Client PC can configure personal settings afterwards.

[ClientConfigExt]

DailyRefresh=0 Language=2000 [ClientConfig] Version=200610251440

You find a detail description of each criteria in the following chapter cdcsfe sconfig.dat - node [ClientConfigExt] and cdcsfeconfig.dat - node [ClientConfig]

See also

Network Installation - general information 94

8.2.6.1 cdcsfeconfig.dat - node [ClientConfigExt]

Enter topic text here.

8.2.6.1.1 CallerIDOwnerTel

Enter topic text here.

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8.2.6.1.2 CallToEXE

100

Defines the executable which is used by Windows **callto:** command - see configuration Application to dial with Hyperlink [67] and Dial with a Hyperlink [31].

Value range Any executable name

Default value: Dial.exe

8.2.6.1.3 ClipboardWaitTime

Time how long the Hotkey 29 function waits until the clipboard is accessed. The time is given in a thousandth part of a second - see configuration Hotkey Settings 57

Value range 1-98

Default value: 10 (hundredth part of a second)

8.2.6.1.4 DailyRefresh

Only active in **single user** installation environment. Defines, if the formatting of the phone numbers [35] is done daily or not.

Value range 0 = false 1 = true

Default value: 0

8.2.6.1.5 DialDirectory

8.2.6.1.6 DialViaFile

Enables to option to dial via an XML file. See configuration, Configuration for special system requirements $\boxed{100}$.

Value range 0 = false 1 = true

Default value: 0

8.2.6.1.7 DisplayCallerIDPBX

Option to use the name stored in a PBX directory or local phone for caller identification if supported by the TAPI driver - see configuration Display CallerID identified by PBX 74.

 $\frac{\text{Value range}}{0 = \text{No}}$ 1 = Yes

Default value: 0

See also

EmptyCallerIDPBX 101

8.2.6.1.8 DontRemoveCallWhenNumChanged

If a phone number changes during a call (e.g. because the call was redirected from the main switchboard) then the new phone number is updated by default in the Desktop Notification 35. The update can be suppressed by checking this option - see configuration Don't signal updated phone number during a call 52

<u>Value range</u> 0 = No 1 = Yes

Default value: 0

8.2.6.1.9 DontShowInternal

Configuration setting to signal internal calls or not. See configuration, Configuration caller identification 73.

<u>Value range</u> 0 = No - displays internal calls 1 = Yes - does not display internal calls

Default value: 0

8.2.6.1.10 EmptyCallerIDPBX

String character string, which is sent by the PBX for suppressed caller IDs, e.g. ***. Instead of displaying *** the Desktop Notification is not displayed - see configuration String if Caller ID is suppressed 74.

Value range Any character

Default value: Empty

See also

DisplayCallerIDPBX 101

8.2.6.1.11 ExchangePWD

Encrypted password if an Exchange profile is configured - see configuration, Configure Microsoft Outlook / Exchange.

8.2.6.1.12 ExchangeUID

UID for Profile, if an Exchange profile is configured - see configuration, Configure Microsoft Outlook / Exchange. 77

8.2.6.1.13 ExternalDigit

Dial tone digits for an external call - see configuration, PBX Configuration 6.

Default value: Empty

8.2.6.1.14 ExternalMinLen

Minimum length of phone number indication an external call - see configuration, PBX Configuration 69.

Default value: Empty

8.2.6.1.15 FadeInbound

Enable / Disable Desktop Notification $\overline{r_9}$ window for **incoming calls**. See configuration, Configuration Call Notification $\overline{r_9}$.

Value range 0 = false 1 = true

Default value: 1

8.2.6.1.16 FadeIntens

Regulates the transparency of the Desktop Notification 79° . See configuration, Configuration Call Notification 79° .

Value range

0-255

Default value: 180

8.2.6.1.17 FadeOutbound

Enable / Disable Desktop Notification $\overline{r_9}$ window for **outgoing calls**. See configuration, Configuration Call Notification $\overline{r_9}$.

Value range 0 = false 1 = true

Default value: 1

8.2.6.1.18 FadeTime

Duration in seconds for Desktop Notification 79. See configuration, Configuration Call Notification 79.

Value range 0 -99

Default value: 10

8.2.6.1.19 FindLikeChecks

Caller identification - truncate number of digits. See configuration, Configuration caller identification 74

Value range 0 - 4

Default value: 3

8.2.6.1.20 FormatNumbers

8.2.6.1.21 HelpType

Define the type of help (online or offline) - see Help and Welcome

Value range 0 = Online 1 = Offline

Default value: 0

8.2.6.1.22 HotKey

104

Hotkey in coded Format. See configuration, Configure Hotkey

<u>Value range</u> see configuration screen

Default value: 121 (F10)

8.2.6.1.23 HotKeyEnabled

Enable / Disable the use of an Hotkey. See configuration, Activate Dialing via Hotkey 54.

 $\frac{\text{Value range}}{0 = \text{false}}$ 1 = true

Default value: 1

8.2.6.1.24 HotKeyModifier

8.2.6.1.25 Iconwithoutclient

This feature can only be use with the Development SDK.

8.2.6.1.26 IncomingCutPostfix

This option is needed with IP phones and a TAPI driver, which passes the phone number with IP information. See configuration - Truncate incoming phone number at $\boxed{161}$

Value range Any character

Default value: Empty

8.2.6.1.27 InternalNumberPrefix

Prefix for internal number - see TAPI configuration

Default value: Empty

8.2.6.1.28 IPProviderPostfix

Postfix which is added at the end of a phone number for outgoing calls - see TAPI configuration $\begin{bmatrix} 61 \\ 61 \end{bmatrix}$

Default value: Empty

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8.2.6.1.29 Language

A lot of configuration settings can be made language specific. A language identifier (number) is used to specify a language.

<u>Value range</u> 1000 = German 2000 = English 4000 = Italian

Default value: 2000

The language can be configured by each user in the Configuration Wizard, introduction screen $\lceil_{53}\rceil$.

8.2.6.1.30 LastsForceSession

8.2.6.1.31 LastsForceUrl

8.2.6.1.32 LastUser

This feature can only be use with the Development SDK.

8.2.6.1.33 ListEntries

Number of entries in Call History and Redialing list. See configuration, Miscellaneous Settings $\boxed{166}$.

Value range 0 - 1000

Default value: 500

8.2.6.1.34 LogTapi

Enable / Disable call logging . See configuration, TAPI configuration

Value range 0 = false 1 = true

Default value: 1

8.2.6.1.35 NoPermanentConnect

Disable permanent connection to an Access database - see configuration Miscellaneous Settings $\boxed{166}$

 $\frac{\text{Value range}}{0 = \text{No}}$ 1 = Yes

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Default value: 0

W Never use this option on the server

8.2.6.1.36 OpenOutlookContact

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Enable / Disable to open an Outlook contact if the caller data is stored in MS-Outlook . See configuration, Configure Microsoft Outlook / Exchange. 77

Value range 0 = false1 = true

Default value: 1

8.2.6.1.37 PresetIn

Enter topic text here.

8.2.6.1.38 PresetMode

Enter topic text here.

8.2.6.1.39 PresetOut

Enter topic text here.

8.2.6.1.40 RaiseNumberChangedEvents

Using this option would signal in the calls.xml file, if the phone number has changed during a call - see configuration - development API_{65} .

<u>Value range</u> 0 = No 1 = Yes

Default value: 1

8.2.6.1.41 RegisterRequest

Handle calls from Windows dialer - see Controlling CTI Application

Value range 0 = No 1 = Yes

Default value: 1

8.2.6.1.42 SaveCallOnlyOnce

If yes, the calls.xml is created only once per call. Otherwise the file is created for each TAPI event like ring, hold, terminate - see configuration development API 65.

Value range 0 = No 1 = Yes

Default value: 1

8.2.6.1.43 SaveJobOnlyOnce

If checked, the jobs.xml is created only once per call. Otherwise the file is created each time the *Save* button is pressed - see configuration development API

Value range 0 = No 1 = Yes

Default value: 1

8.2.6.1.44 SetupTransferTimeout

This switch is used by the ActiveX integration option in the case a call is transferred. It is a wait time in seconds until the PBX responds to the event. The default value is 5 seconds, maximum is 60 seconds - see configuration Timeout during initializing a call transfer $\begin{bmatrix} 65 \\ 65 \end{bmatrix}$

Value range 1-60 (seconds)

Default value: 5

8.2.6.1.45 sforce.Data Source

Enter topic text here.

8.2.6.1.46 sforce.Jet OLEDB:Database Password

Enter topic text here.

8.2.6.1.47 sforce.Jet OLEDB:System Database

Enter topic text here.

8.2.6.1.48 sforce.Provider

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Enter topic text here.

8.2.6.1.49 SFORCE.PWD

Enter topic text here.

8.2.6.1.50 SFORCE.UID

Enter topic text here.

8.2.6.1.51 sforcePassword

Enter topic text here.

8.2.6.1.52 sforceUser

Enter topic text here.

8.2.6.1.53 ShowConfirm

Enter topic text here.

8.2.6.1.54 ShowInbound

Enter topic text here.

8.2.6.1.55 ShowInboundMode

Enter topic text here.

8.2.6.1.56 ShowIntro

Enter topic text here.

8.2.6.1.57 ShowOutbound

Enter topic text here.

8.2.6.1.58 ShowOutboundMode

Enter topic text here.

8.2.6.1.59 ShowQuickStart

Display Welcome Screen - see Help and Welcome

Value range 0 = No 1 = Yes

Default value: 1
8.2.6.1.60 Simulate

Enter topic text here.

8.2.6.1.61 SuppMultiHits

Enter topic text here.

8.2.6.1.62 SwitchExtension

Enter topic text here.

8.2.6.1.63 TAPIDriverFakeNumber

A fake number which is ignored for outgoing calls - see TAPI configuration

Default value: Empty

8.2.6.1.64 TapiLine

Enter topic text here.

8.2.6.1.65 TapiLineName

Enter topic text here.

8.2.6.1.66 TSTapi

Defines, if a TAPI.DLL for Terminal server is used - see configuration - development API ${\tiny\fbox{65}}$

 $\frac{\text{Value range}}{0 = \text{No}}$ 1 = Yes

Default value: 0

8.2.6.1.67 UseCallTo

Enter topic text here.

8.2.6.1.68 WebDial

Enter topic text here.

8.2.6.1.69 WindowsDialer

Enter topic text here.

8.2.6.1.70 WizWasStarted

Enter topic text here.

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8.2.6.1.71 WriteXMLAlways

Used when communication to an external program using calls.xml. Always write this file even if the user does not click on the Desktop Notification 35 window - see development API 64

Value range 0 = No 1 = Yes

Default value: 0

8.2.6.1.72 XMLDirectory

Enter topic text here.

8.2.6.1.73 XMLEncoding

Enter topic text here.

8.2.6.2 cdcsfeconfig.dat - node [ClientConfig]

8.2.6.2.1 Version

Enter topic text here.

8.2.6.2.2 MaxVersion

Enter topic text here.

8.3 Activate Product

During the trial period, the activation screen appears with each start of the program. You need a Serial Number for activating the product - see Buy Serial Number [112].

You do not have to reinstall the version and you can directly activate it if:

- You have installed the trial version as a single user version and you bought a single user version
- You have installed the trial version as a network version and you bought a network version

and

• The version you have installed has the same version number like the version you bought - see How can I check my version number?

What happens during activation?

The activation process will connect the licence to the PC or Server. Use the Serial Number only on the PC / Server you want to use CTI Data Connector salesforce. com Edition. The Serial Number cannot be used twice. After the activation is done,

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CTI Data Connector salesforce.com Edition will run only on this PC / Server. Your hardware data, Serial Number, name, e-mail address and some program-specific data is transferred to our activation center. No other data stored on your PC will be transmitted.

The activation process can be done from any PC, even if you have a network version (starting the activation process on the server is not possible)

Select Activation Method

On the first screen, either choose:

- I have a Serial Number and I want to activate CTI Data Connector salesforce.com Edition. This will trigger the Online Activation 112. This is the recommended activation method and should be used if an Internet connection is available
- You can also request an unlock key by E-Mail. This will trigger the E-Mail Activation [114]

(note: the screen you see could be slightly different)

Activation of CTI	
WN 79 17	Welcome to CTI
Vitro is realing?	☞ I have a Serial Number and I want to activate CTI
	Enter your Serial Number to activate CTI
Serial Number If you don't have a valid Serial Number you can buy the software.	You don't have a Serial Number? Buy a Serial Number online
Buy it You can activate the software within the evaluation period. If you don't want to activate, you can use the evaluation version in a time limited mode.	C I want to evaluate CTI (there are 10 day(s) left to evaluate) You can evaluate CTI for another 10 day(s). After that you have to activate CTI to further use the software.
Show Licence Jofermation	You can also request an unlock key by E-Mail You can also request an unlock key by Fax You can also request an unlock key by Phone Next
Show Licence Information	

See also

Buy Serial Number 112 Online Activation 112 E-Mail Activation 112 Reinstall Software 117 Your CTI Data Connector salesforce.com Edition License 123

8.3.1 Buy Serial Number

The Serial Number is your proof of purchase. It is unique and will look like this:

dO8uc-G1iC9-jOGeA-BqgEX-U71ID-0V1VX

There are 6 blocks each with 5 characters. The blocks are separated by a hyphen for better readability.

For a network version, the Serial Number also includes the number of network licenses.

Buy Serial Number

If you do not have a valid serial number, click on the Link Buy a Serial Number online

Activate CTI Data Connector salesforce.com Edition

Activate the product Online 112 or by E-Mail 114.

8.3.2 Online Activation

The Online Activation needs the Serial Number 112, company name and your e-mail address. Press the button **Next.** Then the licence will be verified online and activated. If the Activation is successful, the screen Activation finished 116 is displayed.

No additional step will be required. CTI Data Connector salesforce.com Edition can now be used on this PC / Server.

Dackup your Serial Number. You will need it for a reinstallation.

113



8.3.3 E-Mail Activation

The E-Mail Activation needs the Serial Number (112), company name and your e-mail address.



E-Mail Activation

Request Unlock Key

After filling out the screen, select: **Request Unlock Key by E-Mail - send E-Mail**. This will open your default E-Mail client. An e-mail with the hardware IDs and licence information will be created. Press **send** to send the e-mail to our activation center. You will get an **Unlock Key** back within 2-3 business days.

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🖻 Activation-Request for CTI Nachricht (HTML)
<u>Datei Bearbeiten Ansicht Einfügen Format Extras Aktionen 2</u>
Senden und Hinzufügen 🗳 Salesforce-Adressbuch
A <u>n</u> reqister@em-data.dk
<u><u>C</u>c</u>
Bcc
Betreff: Activation-Request for CTI
Activation-Request for CTI (11.12.2006 18:45:57) Please do not change the following information Name/Company: Tom Hanks Serial Number: 31DEM-5CP93-9E4II-3tE8X-fQD5k-6314s E-Mail-Address: tom.hanks@smartinc.com Instcodes: 01: 6F7B20C8 02: 72BCAD9C 03: BB80A2BD 04: BB80A2BD 05: 6D827478 06: ABB8A581 07: 2D818C98 08: 440E6C86 09: BAA3248A
Project:demo-easygo - QHD001 User Info: (here you can write comments to the Activation Center)

E-Mail Activation - send E-Mail

Enter Unlock Key

After requesting the Unlock Key by fax, the screen shown below will appear during each start of the program. Type in the Unlock Key you got back by e-mail or fax. Press the button *Next*. If the Activation is successful, the screen *Activation finished* is displayed.



Enter Unlock Key

Dackup your Serial Number. You will need it for a reinstallation 117.

8.3.4 Activation finished

Either after the Online Activation 112 screen or after entering the Unlock Key 115, the final screen appears to signal that the activation was successful. Press the button *Next* to complete the activation process to get the screen *Activation finished*.

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8.3.5 Reinstall Software

You can reinstall the application **on the same PC / Server** as often as you like. First uninstall CTI Data Connector salesforce.com Edition, delete the complete **installation folder**, then reinstall the application - see How do I activate CTI Data Connector salesforce.com Edition?

See also

Installation 🔊

8.4 Installation FAQ

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This chapter introduces Frequently Asked Questions around the installation process.

- System Requirements TAPI driver
- Where do I find the TAPI driver?
- How do I activate CTI Data Connector salesforce.com Edition?

8.4.1 System Requirements - TAPI driver

To communicate with a phone system, either a CTI server (Third Party Solution) or the connection of the phone set to the PC (First Party Solution) is supported. For both systems a **TAPI driver 2.x** is mandatory. See details for TAPI - Where do I find the TAPI driver?

If you are using a modem, we strongly recommend switching to a phone set connected to the PC (via USB/serial), because the TAPI drivers of modems often do offer only basic functions or do not function at all.

Analogue phones without a PBX can use an adapter www.way2call.com . ISDN phones without a PBX are available with an inbuilt TAPI driver.

VOIP systems like Cisco Call Manager, Avaya, Swyx or Innovaphone normally have a TAPI driver included.

SIP phones which offer TAPI support are Lancom (http://www.lancom-systems.com VOIP Client), Sipps (Ahead) www.sipps.de and Xten (Counterpath) www.xten.de .

Please check firstly with your phone vendor about which solution meets your requirements and how you can install and configure the TAPI driver. You can contact Support@mirage-systems.de if you do have the TAPI driver installed and CTI Data Connector salesforce.com Edition has problems with making an outgoing call or receiving incoming calls.

Windows NT to Windows XP SP2 is supported. Every Windows System (especially NT) needs the latest service pack. CTI Data Connector salesforce.com Edition can be installed on a server, but this is not mandatory.

See also

Configure 55 the TAPI driver within CTI Data Connector salesforce.com Edition Where do I find the TAPI driver?

8.4.2 Where do I find the TAPI driver?

Telephony Application Programming Interface (TAPI) is a development interface for CIT applications. Applications using TAPI need a **TAPI driver**. This TAPI driver has to be delivered by the **phone manufacturer**. As this driver is always device-dependent, it is not possible to use a generic driver which is supplied with the operating system. The driver often has the name of the manufacturer or the phone system, sometimes in combination with the extension number.

To check whether a TAPI driver is installed, do the following (Instructions for Windows XP).

- Start, Control Panel
- Phone and Modem options
- TAB advanced



There are a lot of drivers which come with Windows like *NDIS Proxy TAPI Service Provider*. Search for a driver with the name of the **PBX, PBX vendor or your direct line**. If this driver is missing, you probably do not have the correct TAPI driver for your PBX.

See also

System Requirements 118- TAPI driver Configure 55 the TAPI driver within CTI Data Connector salesforce.com Edition

8.4.3 How do I activate CTI Data Connector salesforce.com Edition?

During the trial period, the activation screen appears with each start of the program. You need a Serial Number for activating the product - see Buy Serial Number [112].

You do not have to reinstall the version and you can directly activate it if:

- You have installed the trial version as a single user version and you bought a single user version
- You have installed the trial version as a network version and you bought a network version

and

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• The version you have installed has the same version number like the version you bought - see How can I check my version number?

What happens during activation?

The activation process will connect the licence to the PC or Server. **Use the Serial Number only on the PC / Server you want to use CTI Data Connector salesforce. com Edition. The Serial Number cannot be used twice.** After the activation is done, CTI Data Connector salesforce.com Edition will run only on this PC / Server. Your hardware data, Serial Number, name, e-mail address and some program-specific data is transferred to our activation center. No other data stored on your PC will be transmitted.

The activation process can be done from any PC, even if you have a network version (starting the activation process on the server is not possible)

Select Activation Method

On the first screen, either choose:

- I have a Serial Number and I want to activate CTI Data Connector salesforce.com Edition. This will trigger the Online Activation 112. This is the recommended activation method and should be used if an Internet connection is available
- You can also request an unlock key by E-Mail. This will trigger the E-Mail Activation

(note: the screen you see could be slightly different)

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See also

Buy Serial Number 112 Online Activation 112 E-Mail Activation 112 Reinstall Software 117 Your CTI Data Connector salesforce.com Edition License 123



9 Part II - Enhanced Features

These lessons explain Mirage Computer Systems GmbH features. It is mainly for administrators. After completing them, you will have experience with these tasks:

- License Information chapter Your Mirage Computer Systems GmbH License
- How TOs and FAQ 132
- Advanced Network Configuration
- •

9.1 Your CTI Data Connector salesforce.com Edition License

CTI Data Connector salesforce.com Edition comes with an own licence file - **cdcsfe.lic**. The licence is a licence **PER PC / COMPUTER**. Copy Protection is turned on after activation. We recommend backing up the licence file and all Activation Keys at you got.

- You have to activate the product before you can use it without the restrictions of the demo version 123 see How do I activate CTI Data Connector salesforce.com Edition
- Find out more about your licence in the chapter Show License Information
- See License Agreement 128 for details of usage.

See also

Demoversion 123 Browse your License Information 83 Apply Activation Key 84 Deactivate a License 126 License Agreement 128

9.1.1 Demoversion

The Demoversion has the following restrictions:

• Limited by days - normally 15 days

All other parts of the application are fully functional

9.1.2 Show License Information

To display the license information, either

CTI Data Connector salesforce.com Edition

• right click on the icon in the taskbar

or

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• select within the Control Centre 21, Menu Extras, Show License Information

This will open the Licence Viewer where you can view the licenses you have acquired, the number of users/computers who can use the licence and whether a licence has a time limitation or not.

Number of licenses

The folder **CTI License** displays the maximum number of licenses and the number of licenses which are available. If you click on the + sign, all computers using a license will be displayed. See *Deactivate a License* how to deactivate one single computer.

- Number of Computers / PCs which have a license
- Demoversion 123 if omitted it is a full version or time-limited full version
- Valid until (time_limitation) if omitted it is a non time-limited version
- Web Activation 110 either done or required

Update Subscription

The update subscription entitles you to install the latest updates as long as it has not expired. See chapter software update 12 about how to download updates.

- Available / Not available
- Time limitation the date when the update subscription expires

Release Number

• Internal release information

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🝸 Licence Viewe	r				🛛 🔀
Manufacturer: Company: Licence File:	Evaluation Version C:\Programme\cti\cti.lic			nstallation Code: Code 1: 6F7820C8 Code 2: 72BCAD9C Code 3: BB80A2BD Code 4: BB80A2BD Code 4: BB80A2BD Code 5: B4E5B409 Code 6: E0B0219E	
Activation PC-1 PC-2 PC-3 CTI Client Inter Number of Dat Webdial (avail. Update Subscr Release (2004 Licence File - I Licence File Ve	rface (available) abase Profiles (4) (available) able) iption (available, Expired at: 28.09.200 300) D : 200559010 rsion : 2400 te : 26.08.2006 18:06:27	Veb Activation (do	ne))		
Deactivate	Activation Key	 Info	Options		Close

9.1.3 Apply Activation Key

An Activation Key is used to modify the license information (e.g. increase number of licenses). All Activation Keys are unique and have the same format like:

fZDdq-aDC95-e54DA-atR82-DL82k-NfC4v

There are 6 blocks each with 5 characters. The blocks are separated by a hyphen for better readability.

If you got an Activation Key via E-Mail or Fax, you can enter the key within the screen Show License Information 3.

- Start screen Show License Information
- Select button Activation Key
- Paste the key from the clipboard with CTRL+V

Ut is possible to validate the Activation Key online. In this case an Internet connection is necessary.

		Installation Code:
Manufacturer:		Code 1: 6F7B20C8 Code 2: 72BCAD9C
Company:	Evaluation Version	Code 3: BB80A2BD Code 4: BB80A2BD Code 5: B4E5B409
Licence File:	C: \Programme \cti \cti .lic	Code 5: 64256409 Code 6: E08D219E
Release (200	ilable) cription (availal 4300) ID : 20055901 crision : 2400 ate : 26.08.20	

9.1.4 Deactivate a License

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If a PC does not further need the license of CTI Data Connector salesforce.com Edition, its license can be deactivated. The license can then be used by another PC.

• Start screen Show License Information

CTI Data Connector salesforce com Edition

- Click on the + sign before *CTI License*, then select the PC the license of which should be deactivated
- Press the button *Deactivate*. The name of the PC will be displayed in brackets e.g. (PC-2)

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🗡 Licence Viewer			_ 🗆 🔀
Manufacturer: Company: Licence File:	Evaluation Version C:\Programme\cti\cti.lic	Installation Code: Code 1: 6F7820C8 Code 2: 728CAD9C Code 3: 8B80A28D Code 4: 8B80A28D Code 5: 84658409 Code 5: 608D219E	
CTI Client Inte CTI Client Inte CTI Client Inte Webdial (availa Update Subscr Release (2004 Licence File - II Licence File Vei Licence File Vei	rface (available) abase Profiles (4) (available) able) iption (available, Expired at: 28.09.2006) 300) 2 : 200559010 rsion : 2400 te : 26.08.2006 18:06:27		
Deactivate	Activation Key Info Options		Close

Reactivate a license

The license can be activated again by selecting the deactivated PC and then pressing the button *Activate*.

🍸 Licence Viewer		🛛 🔀
Manufacturer: Company: Licence File:	Evaluation Version C:\Programme\cti\cti.lic	Installation Code: Code 1: 6F7B20C8 ▲ Code 2: 72BCAD9C ■ Code 3: BB80A2BD ■ Code 4: BB80A2BD ■ Code 5: B4E5B409 ■ Code 6: E0BD219E ▼
Activation Activation PC-1 PC-3 CTI Client Inter Number of Data XML Interface Update Subscri Release (2004; Ucence File - II Ucence File Ver	face (available) abase Profiles (4) (available) ble) ption (available, Expired at: 28.09.2006) 100) : 200559010 sion : 2400 re : 26.08.2006 18:59:17	
Activate	Activation Key Info Options	Close

9.1.5 License Agreement

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Date: 01.08.2003 LA-DE-01082003

9.2 How TOs and FAQ

This chapter introduces Frequently Asked Questions as well as tips and tricks.

9.2.1 How can I print this Tutorial

Print this tutorial

The Online Tutorial is also available as a PDF document.

You can print this tutorial - click on the link to download PDF file

9.2.2 How do I activate CTI Data Connector salesforce.com Edition?

During the trial period, the activation screen appears with each start of the program. You need a Serial Number for activating the product - see Buy Serial Number [112].

You do not have to reinstall the version and you can directly activate it if:

- You have installed the trial version as a single user version and you bought a single user version
- You have installed the trial version as a network version and you bought a network version

and

• The version you have installed has the same version number like the version you bought - see How can I check my version number?

What happens during activation?

The activation process will connect the licence to the PC or Server. Use the Serial Number only on the PC / Server you want to use CTI Data Connector salesforce. com Edition. The Serial Number cannot be used twice. After the activation is done,

CTI Data Connector salesforce.com Edition will run only on this PC / Server. Your hardware data, Serial Number, name, e-mail address and some program-specific data is transferred to our activation center. No other data stored on your PC will be transmitted.

The activation process can be done from any PC, even if you have a network version (starting the activation process on the server is not possible)

Select Activation Method

On the first screen, either choose:

- I have a Serial Number and I want to activate CTI Data Connector salesforce.com Edition. This will trigger the Online Activation 112. This is the recommended activation method and should be used if an Internet connection is available
- You can also request an unlock key by E-Mail. This will trigger the E-Mail Activation 114

(note: the screen you see could be slightly different)

Activation of CTI	
WN 73 177	Welcome to CTI
Vite is too ling? You know the answer instantiat	◦ I have a Serial Number and I want to activate CTI
	Enter your Serial Number to activate CTI
Serial Number If you don't have a valid Serial Number you can buy the software.	You don't have a Serial Number? Buy a Serial Number online
Buy it You can activate the software within the evaluation period. If you don't want to activate, you can use the evaluation version in a time limited mode.	C I want to evaluate CTI (there are 10 day(s) left to evaluate) You can evaluate CTI for another 10 day(s). After that you have to activate CTI to further use the software.
Show Licence Information	You can also request an unlock key by E-Mail You can also request an unlock key by Fax You can also request an unlock key by Phone Next

See also

Buy Serial Number 112 Online Activation 112 E-Mail Activation 112 Reinstall Software 117 Your CTI Data Connector salesforce.com Edition License 123

9.2.3 System Requirements - TAPI driver

To communicate with a phone system, either a CTI server (Third Party Solution) or the connection of the phone set to the PC (First Party Solution) is supported. For both systems a **TAPI driver 2.x** is mandatory. See details for TAPI - Where do I find the TAPI driver?

If you are using a modem, we strongly recommend switching to a phone set connected to the PC (via USB/serial), because the TAPI drivers of modems often do offer only basic functions or do not function at all.

Analogue phones without a PBX can use an adapter www.way2call.com . ISDN phones without a PBX are available with an inbuilt TAPI driver.

VOIP systems like Cisco Call Manager, Avaya, Swyx or Innovaphone normally have a TAPI driver included.

SIP phones which offer TAPI support are Lancom (http://www.lancom-systems.com VOIP Client), Sipps (Ahead) www.sipps.de and Xten (Counterpath) www.xten.de .

Please check firstly with your phone vendor about which solution meets your requirements and how you can install and configure the TAPI driver. You can contact Support@mirage-systems.de if you do have the TAPI driver installed and CTI Data Connector salesforce.com Edition has problems with making an outgoing call or receiving incoming calls.

Windows NT to Windows XP SP2 is supported. Every Windows System (especially NT) needs the latest service pack. CTI Data Connector salesforce.com Edition can be installed on a server, but this is not mandatory.

See also

Configure 55 the TAPI driver within CTI Data Connector salesforce.com Edition Where do I find the TAPI driver? 119

9.2.4 Where do I find the TAPI driver?

Telephony Application Programming Interface (TAPI) is a development interface for CIT applications. Applications using TAPI need a **TAPI driver**. This TAPI driver has to be delivered by the **phone manufacturer**. As this driver is always device-dependent, it is not possible to use a generic driver which is supplied with the operating system. The driver often has the name of the manufacturer or the phone system, sometimes in combination with the extension number.

To check whether a TAPI driver is installed, do the following (Instructions for Windows XP).

- Start, Control Panel
- Phone and Modem options
- TAB advanced



There are a lot of drivers which come with Windows like *NDIS Proxy TAPI Service Provider*. Search for a driver with the name of the **PBX, PBX vendor or your direct line**. If this driver is missing, you probably do not have the correct TAPI driver for your PBX.

See also

System Requirements 118- TAPI driver Configure 55 the TAPI driver within CTI Data Connector salesforce.com Edition

9.2.5 Minimum Configuration Settings

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During installation, the Configuration Wizard ⁵³ was already started. You can define a lot of individual configuration settings there. The following settings **have to be defined** to guarantee a basic functionality.

- TAPI device driver 55 it is delivered by the telephone manufacturer. See also: System requirements TAPI driver 118
- Prefix for external calls and the minimum length of a phone number indicating an external call
- Button Dialing Rules 70 configures country settings and area code. See also special configuration for US / Canada 71
- Button Folder ¹/¹ Select Microsoft Outlook[™] contact folder for caller identification

Just by setting this minimum configuration you will be able to make outgoing calls and to identify incoming calls. The Configuration Wizard can be started any time by **right** click on the icon 19^{-1} , option Configuration Wizard 53^{-1} .

🖄 CTI Configuration Wizard 🛛 🔀				
Here you can configure CTI to obtain a basic functionality for incoming calls. After the installation, individual settings can be done with the Configuration Wizard. Choose the button Help to learn more about the configuration settings.				
	<u>T</u> elephony service provider/TAPI device driver: SIPPS Line Dial tone digits for external calls: 0 Minimum length of phone number indicating an external call:			
Dialing Rules	Choose Microsoft Outlook Contact folders Folders			
Help Cancel	< Back Next > Finish			

See also

Where do I find the TAPI driver? [119] System requirements - TAPI driver [118]

9.2.6 Troubleshooting - Outgoing calls

If outgoing calls do not always or never work, then first perform the following checks:

- Necessary configuration settings for outgoing calls 27
- Outgoing call never possible 138
- Outgoing call dials wrong number / prefix 138
- Outgoing call Dial with Hyperlink not working
- Outgoing call Postfix like # necessary 139
- Outgoing call problem with Internal Number 140
- Outgoing call Hotkey is not working 140

If the problem cannot be located, CTI Data Connector salesforce.com Edition can log all events coming from the TAPI driver. Often wrong implementations of the TAPI driver or functions not implemented like call transferring are causing problems. Our support team can analyze the log file.

To send us a log file - see How do I send a log file?

9.2.6.1 Necessary configuration settings for outgoing calls

Below find a list of configuration settings which have an impact on outgoing calls. If outgoing calls are not working, check these settings and also check Troubleshooting - Outgoing calls [137].

Configuration Settings

- Select correct TAPI driver 55
- PBX Configuration
- Dialing Rules 70 for US / Canada check additional settings 71
- TAPI Configuration Prefix Outgoing Calls
- TAPI Configuration Provider Postfix
- TAPI Configuration Ignore Fake Number
- Dial via Hotkey 29 configure 56 Hotkey and activate this option 54
- Dial within Browser 30 activate this option 54
- Dial with a Hyperlink 31 activate this option 54

If internal numbers are not dialled correct, check:

• TAPI Configuration - Prefix internal number

• Minimum length and of phone number indicating an external call

9.2.6.2 Outgoing Call - never possible

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If you are not able to make an outgoing call, perform the following checks:

- Start the Configuration Wizard 53
- Browse to the page where you can select the TAPI driver 55 and select the correct TAPI driver. See also Where do I find the TAPI driver?
- Press button *Finish*
- Select Quick dialing 33
- Type in a phone number an select Dial

If the number is dialed but with a **wrong prefix** (a wrong number is placed in front or numbers are missing), check solution Outgoing Call - wrong Prefix 138.

If dialing works with Quick dialing but you can not dial with a Hotkey 3° , change the Hotkey 5° within the Configuration Wizard.

If dialing still does not work, send us a log file 143.

9.2.6.3 Outgoing Call - wrong Prefix

If outgoing calls are working, but the **prefix is wrong** (a wrong number is placed in front or numbers are missing) **or the number has a wrong format**, perform the following checks:

- Start the Configuration Wizard 53
- Browse to the page PBX Configuration
- Select button dialing Rules 70.
- Select your location and press Edit
- The Country/Region setting is important. Select your **country** and enter the Area code **without** any prefix like 0 or 1
- DO NOT use dialing rules they are only supported for US / Canada see dialing Rules for US / Canada 71
- Check the Dial tone digits for external calls . This is the number to get an outside line, normally 0 or 9.
- Enter the Minimum length of phone number indicating an external call 6. If the maximum INTERNAL phone number has a length of 3 digits, you have to enter 4 here
- Activate the Desktop Notification 79 for **outgoing** calls to get each call signaled
- Press button *Finish*
- Select Quick dialing 33
- Type in a phone number an select Dial

If the number is dialed correctly but **no caller data is displayed**, try to cut a prefix for an outside line, e.g. 9 or 0. This can be configured within Expert Settings, TAPI configuration $\boxed{60}$. Do also check the option Ignore Fake Numbers $\boxed{61}$.

If the number is still wrong, try other settings.

If dialing still does not work, send us a log file $|_{143}$.

New Lycation	8 X
General Area Code Rules Calling Card	
Location name:	
Specify the location from which you will be dialing.	
Country/region:	Area code:
United States 👻	425
Dialing rules	
When dialing from this location, use the following rules:	
To access an outside line for local calls, dial:	
To access an outside line for long-distance calls, dial:	
Use this carrier code to make long-distance calls:	
Use this carrier code to make international calls:	
To disable call waiting, dial:	
Dial using: Tone Pulse	
OK Cancel	Apply

9.2.6.4 Outgoing Call - Dial with Hyperlink not working

Dialing with an hyperlink is supported in all Browsers. You have to activate this function within the Configuration Wizard - see Configure dial options for Browsers 58. Make sure that you have disabled the feature in Skype. See also: *Expert Settings, Miscellaneous Settings*, Application to dial with Hyperlink 67.

To dial via an hyperlink in a Browser based application, just insert the following command in your application:

Click to Dial

where phonenumber has to be replaced with the real phone number like

Click to Dial

9.2.6.5 Outgoing Call - Postfix like # necessary

If a character like # has to be added **after** each phone number (postfix), configure this option in Expert Settings, TAPI Driver.

9.2.6.6 Outgoing Call - problem with Internal Number

140

Check the following configuration settings:

- Minimum length of phone number indication an external call 6 this is the main configuration setting to determine if a call is internal or external
- Activate the Desktop Notification window 79 for **outgoing** calls to get each call signaled
- The configuration option: Don't show internal calls ⁷³ must be **unchecked** to trace the call in the Desktop Notification window
- If the internal number is e.g. signaled with 12 but the number stored in the database is 07342/7383-12, see in Prefix for Internal Numbers and area code

9.2.6.7 Outgoing Call - Hotkey is not working

If you try to dial with a Hotkey 2, and nothing happens, perform the following checks:

Firstly check if you can dial with the Quick dialing 33 option. If this is also not possible (the phone does not dial anything), check Outgoing Call - never possible 138.

If the phone dials, the Hotkey settings have to be modified:

- Try a Hotkey which is not used like CTRL+SHIFT+F10 change the Hotkey here
- Especially in case the Hotkey is sometimes working and sometimes not, increase the Clipboard waiting time in increments of 10 change the waiting time here

9.2.7 Troubleshooting - Incoming calls

If incoming calls do not always or never work, firstly perform the following checks:

- Necessary configuration settings for caller identification 41
- Incoming call never signalled 141
- Incoming call wrong prefix 142
- Incoming call Caller Identification not working [142]
- Incoming call use address data stored in PBX 142
- Incoming call problem with Internal Number 143

If the problem cannot be located, CTI Data Connector salesforce.com Edition can log all events coming from the TAPI driver. Often wrong implementations of the TAPI driver or functions not implemented like call transferring are causing problems. Our support team can analyze the log file.

To send us a log file - see How do I send a log file?

9.2.7.1 Necessary configuration settings for caller identification

Below is a list of configuration settings which have an impact on the caller identification. If the caller identification is not working, check these settings and also check Troubleshooting - Incoming calls [140].

Address information used for caller identification

- Configured Microsoft Outlook 77 contact folders
- Configured Database
- Addresses stored in the PBX system 74

Configuration Settings

- Select correct TAPI driver 55
- Configuration Caller Identification 73
- TAPI Configuration truncate incoming phone number at
- TAPI Configuration Prefix incoming call
- TAPI Configuration Don't signal updated phone number during a call 62

If internal numbers are not identified correct, check:

- TAPI Configuration Prefix internal number
- Minimum length ¹ of phone number indicating an external call

9.2.7.2 Incoming Call - never signalled

If an incoming call is **never** signalled, perform the following checks:

- Start the Configuration Wizard 53
- Browse to the page where you can select the TAPI driver 55 and select the correct TAPI driver. See also Where do I find the TAPI driver?
- Activate the Desktop Notification window 79 for incoming calls to get each call signaled
- Press button Finish
- Call with your mobile phone and make sure that you **do not suppress the phone number** from your mobile

If the number is signalled but with a **wrong prefix**, check the solution Incoming Call - wrong $Prefix_{142}$

If incoming calls still do not work, send us a log file $|_{143}$.

See also

Incoming call - wrong address information is displayed

9.2.7.3 Incoming Call - wrong Prefix

142

If the number of an incoming call is signaled but with a wrong prefix (e.g. **00** 70054885342), try to cut a prefix e.g. 9 or 0. If the leading 0 is missing (e.g. 70054885342), add 0 for incoming calls.

This can be configured within Expert Settings, TAPI configuration .

9.2.7.4 Incoming Call - Caller Identification not working

If the number of an incoming call is signaled, but the caller can not be identified, firstly perform the following checks:

- If you get the wrong caller signalled, change the value for Caller Identification truncate number of digits 73 to a value between 1 to 3
- Make sure that the number is stored in your database or MS-Outlook
- If you are using MS-Outlook / Exchange, make sure you have the right Outlook folder selected 77
- If you are using a single user installation, firstly perform Format Phone Numbers
- If you have your address information stored in the PBX, check Incoming Call use address data from PBX 142
- If you are using a network installation, either test with a number stored in MS-Outlook or have the administrator perform the synchronization of the the phone numbers on the server B
- If the number is signaled with a wrong prefix (e.g. **00**70054885342), check Incoming Call wrong Prefix 142
- If the number is signaled with additional characters (e.g. 070054885342@xy.com), truncate the incoming phone number at the @ sign - check Expert Settings, TAPI Configuration 60
- If only internal calls are not identified, check Incoming Call problem with Internal Number 143

9.2.7.5 Incoming Call - use address data stored in PBX

If the address data is stored in the PBX or phone, this data can be used additionally for caller identification. Enable Display Caller ID Name identified by PBX.

9.2.7.6 Incoming Call - wrong address information is displayed

If you often get into the situation that multiple addresses are displayed in combination with the text *Caller could not be identified exactly*, this is due to the feature of truncating phone numbers. Reduce the number of digits which are truncated - see settings *Caller Identification truncate number of digits* 74

- In Europe use either 3 or 2
- In USA / Canada always use 0

9.2.7.7 Incoming Call - problem with Internal Number

Check the following configuration settings:

- Minimum length of phone number indication an external call 6 this is the main configuration setting to determine if a call is internal or external
- Activate the Desktop Notification window 79 for **incoming** calls to get each call signaled
- The configuration option: Don't show internal calls 73 must be unchecked
- If the internal number is e.g. signaled with 12 but the number stored in the database is 07342/7383-12, see in Prefix for Internal Numbers and area code

9.2.8 How do I send a log file?

If a problem can not be located, CTI Data Connector salesforce.com Edition can log all events coming from the TAPI driver. Often wrong implementations of the TAPI driver or functions not implemented like call transferring are causing problems. Our support team can analyze the log file.

To send us a log file, perform the following steps:

- Start the Configuration Wizard (CTI Data Connector salesforce.com Edition icon, right mouse click, Configuration Wizard)
- Browse to step 1 (depending on the program version this can be another page) and select the Button Expert Settings 58
- Check Activate call logging
- Press button OK, then button Finish
- CTI Data Connector salesforce.com Edition starts. Now perform the operation **that is not working correctly**, e.g. make an incoming call with your mobile phone
- Everything is now logged into a file
- Start the Configuration Wizard (CTI Data Connector salesforce.com Edition icon, right mouse click, Configuration Wizard)
- Browse to step 1 (depending on the program version this can be another page) and select the Button Expert Settings 58
- Press the button **Send Log File**. Your e-mail client opens. Add a detailed description of the problem and the exact phone numbers which do not work. Send the e-mail.
- Uncheck Activate call logging
- Press button OK, then button Finish

9.2.9 Special requirements for Access database in a network environment

If an Access Database is used in a network environment, it could never be backed up as long as CTI Data Connector salesforce.com Edition is running.

Enable the configuration option: Terminate database connection after each call $|_{66}$ on each client PC and **disable this option on the server** which performs the phone number formatting $|_{86}$.

9.2.10 How to use the Called ID (my number) for caller identification?

By default, the phone number of the person who is calling (CallerID) is used for caller identification. If the number which was called (Called ID) should be used, select the option Use Called ID for caller identification $\frac{1}{73}$.

9.2.11 How can I suppress the notification of internal calls?

By default, internal calls are signalled. Check the configuration option: Don't show internal calls 73

9.2.12 How can I dial with an Hotkey?

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In nearly any application a phone number can be **highlighted** and dialed using the Hotkey defined in the configuration settings 56. The default value is the key F10.

Highlight the phone number within the Web Browser by pressing down the left mouse key and dragging the mouse cursor to the right. When reaching the end of the phone number, release the left mouse button and press F10.

In the example below a phone number has been highlighted. It can be dialed using the defined Hotkey.



United Whiskey Destilleries Ltd Freemont Tower 3 Perkins Bridge Windsor SL44QQ United Kingdom

Phone: ++44734273833

See also

Troubleshooting - Hotkey is not working Configuration - Hotkey to dial with a highlighted phone number Configuration - Activate dialing via Hotkey 54

9.2.13 How can I dial with an Hyperlink?

You can dial with a Hyperlink in Browser applications. To use this functionality, the application has to be modified. Dialing via Hyperlink allows to dial just with a click.

To dial via an hyperlink in a Browser based application, just insert the following command in your application:

phonenumber

where phonenumber has to be replaced by the real phone number like

+4970054885342

It is displayed on the screen as follows: +4970054885342

To enable dialing via hyperlink open the Configuration Wizard and check Activate dialing via Hyperlink 54.

This function is available in all Browsers (e.g. Internet Explorer or Firefox).

See also

Enable Dial with a Hyperlink Troubleshooting - Dial with a Hyperlink is not working Configuration - Application used for dialing with Hyperlink

9.2.14 How can I speed up dialling?

Often dialling of a phone number can be accelerated by using an additional character - especially when using an IP phone or software.

The configuration of the additional character (e.g. #) can be done in the Configuration Wizard, Expert Settings, Provider Postfix 61.

9.2.15 How can I check my version number?

Right mouse click on the icon and select Open CTI Data Connector salesforce.com Edition. Select menu **?**, **About CTI Data Connector salesforce.com Edition**. You will find the detailed version number there.

To check for the latest updates, select menu ?, Software Service.

9.2.16 How do I uninstall CTI Data Connector salesforce.com Edition

To uninstall CTI Data Connector salesforce.com Edition

- Select Start, Control Panel
- Add/Remove Programs

Search for CTI Data Connector salesforce.com Edition 2.3.1 and select Remove.

9.2.17 I found no answer for my questions

If you did not find an answer for your questions in the tutorial search in the extensive Online Knowledge Base.

Browse Online Knowledge Base

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