February 13, 2018

Mitel Act! Integration User and Install Guide

Description: This Application Note describes about Mitel Act screen pop integration application

Table of Contents

Introduction

Mitel's ACT! screen pop integration application (Mitel ACT! Up) provides a screen pop and dialing integration to Sage ACT!, a customer/contact management program. The Mitel integration works with the client version of ACT!, not the web based version.

(ACT! is a trademark of the Sage North America company. They are not affiliated with Mitel.)

List of Features

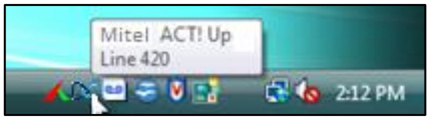
The ACT! integration provides the following features. Behavior, configuration, and other details are given in the remainder of this document.

- Appears as a tray icon and can be configured to run whenever you are logged into Windows.
- Also comes with an ACT! compatible dial control which allows single click to dial any number within ACT! company or contact records.
- Pops up a fading screen display showing ACT! contact information when one or more ACT! contacts match a calling or called number. ACT! itself does not have to be running to show the fading pop up display.
- Pop up screen has links to other ACT! data as well as call control and history creation. The contact and company links will display the matching record within ACT!, if currently running.
- Can create an ACT! History record within the application.
- Can double-click on History, Activity, and Opportunity items to locate that item in ACT!.
- User may select type of call (inbound and/or outbound) and when to trigger the pop up (on ringing or on answer).
- Can be configured to display a matching contact directly in ACT!, skipping the fading pop up (ACT! must be running).
- Can be enabled/disabled by software setting.
- Can re-trigger the last pop up by double clicking the tray icon.
- Can be configured to create ACT! history records on ACT! dialed calls and/or on incoming missed calls.

Mitel ACT! Up Client Application

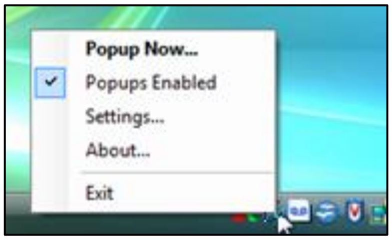
Appearance and Settings

When running, the application appears as a small Mitel icon in the Windows taskbar tray while monitoring your Mitel phone line. Mouse over to show status.



Mitel ACT! Up Tray Icon

Right click on the tray icon to see and choose from the context menu.



Mitel ACT! Up Context Menu

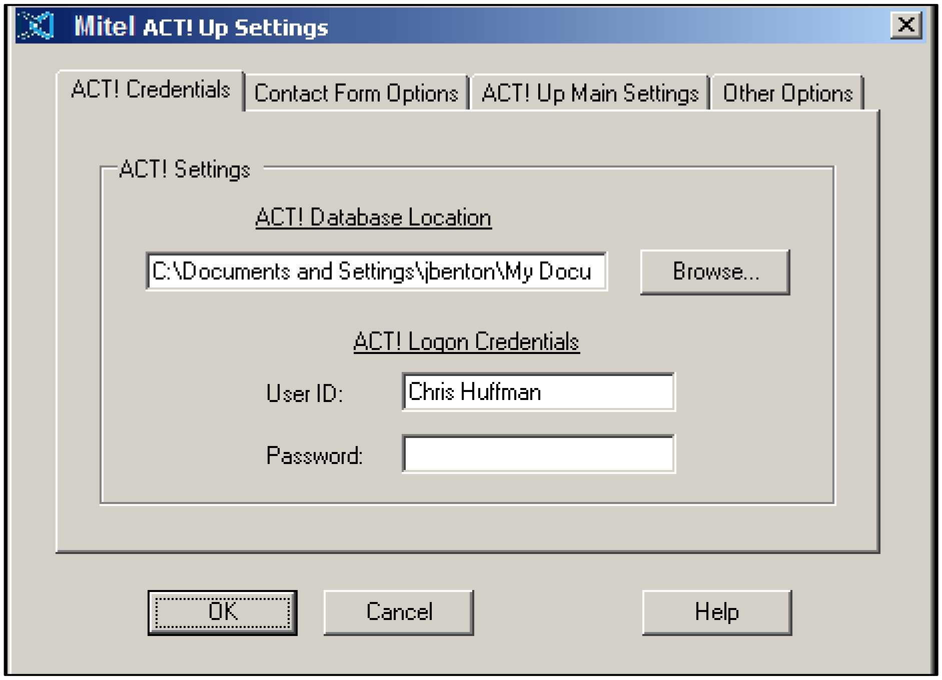
Selecting "Popup Now..." or double clicking the tray icon causes an immediate display of the last currently active call received. This is useful in case a previously ignored or dismissed popup display is now desired.

The "Popups Enabled" selection allows the application to be enabled/disabled as desired without stopping/starting the program. A check mark will be shown if it is currently enabled. The icon will be grey if popups are currently disabled, colored if enabled.

"About..." shows the current version of the application.

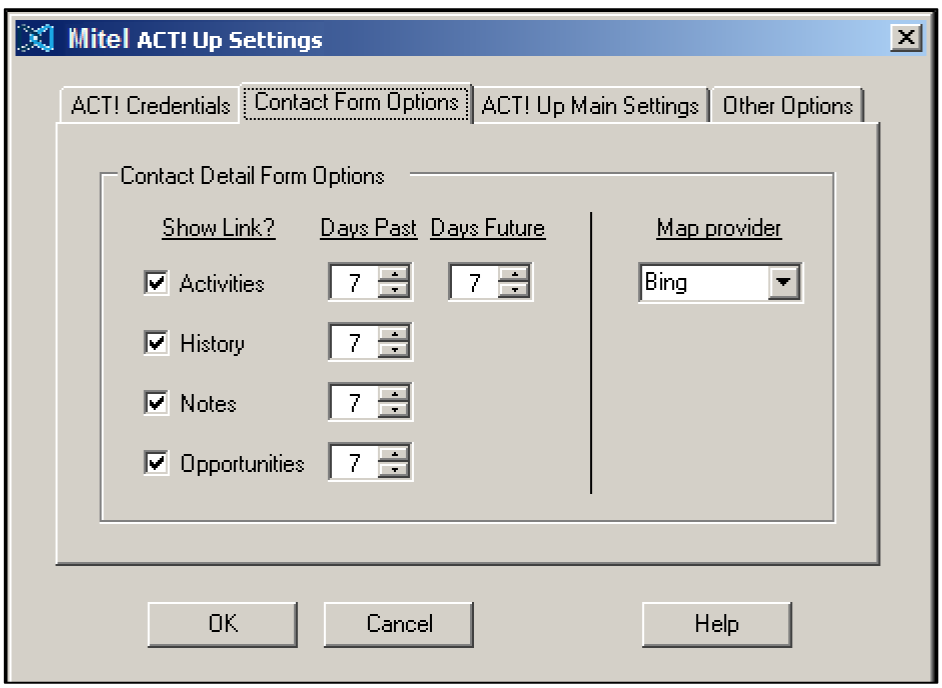
"Exit" terminates the application.

"Settings..." will display the Settings dialog which allows you to configure application behavior as follows.



Mitel ACT! Up Settings – ACT! Credentials Tab

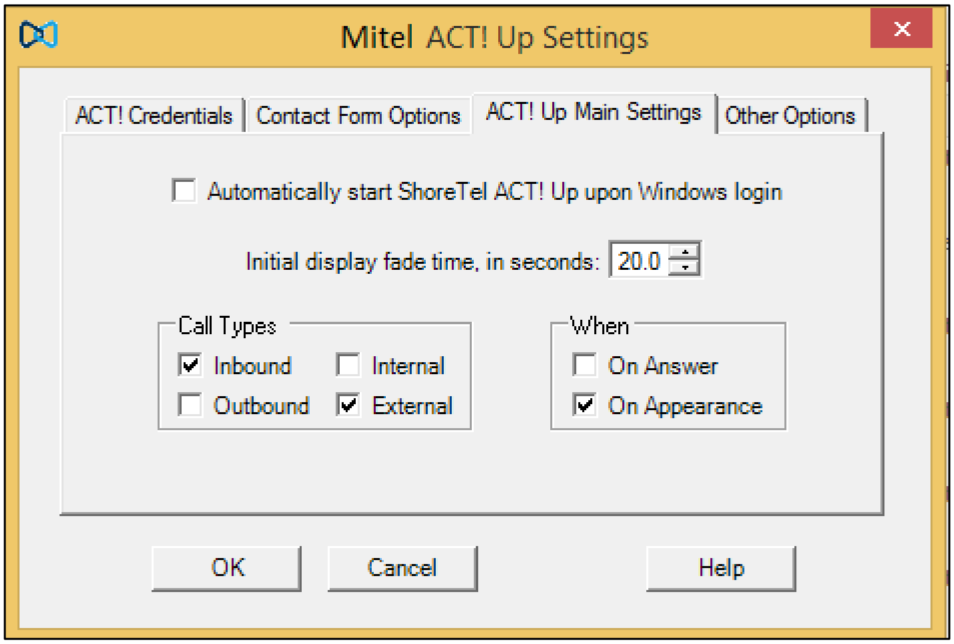
The ACT! Credentials tab contains the ACT! settings. This section is for the ACT! database location (usually points to an ACT! .PAD file) and user credentials. Your ACT! system administrator may need to tell you these values.



Mitel ACT! Up Settings – Contact Detail Form Options Tab

In the Contact Detail Form Options section you can set whether to show, as links in the contact detail form (example shown later), the Activities, History, Notes, and Opportunities as stored for that contact in ACT!. You may also indicate how many days past (and for Activities, future) to consider when displaying the links. Items outside the day range will not be considered. The default is 7 days.

For mapping contact addresses, one can set the map provider to one of the well-known internet mapping websites.



Mitel ACT! Up Settings – ACT! Up Main Settings Tab

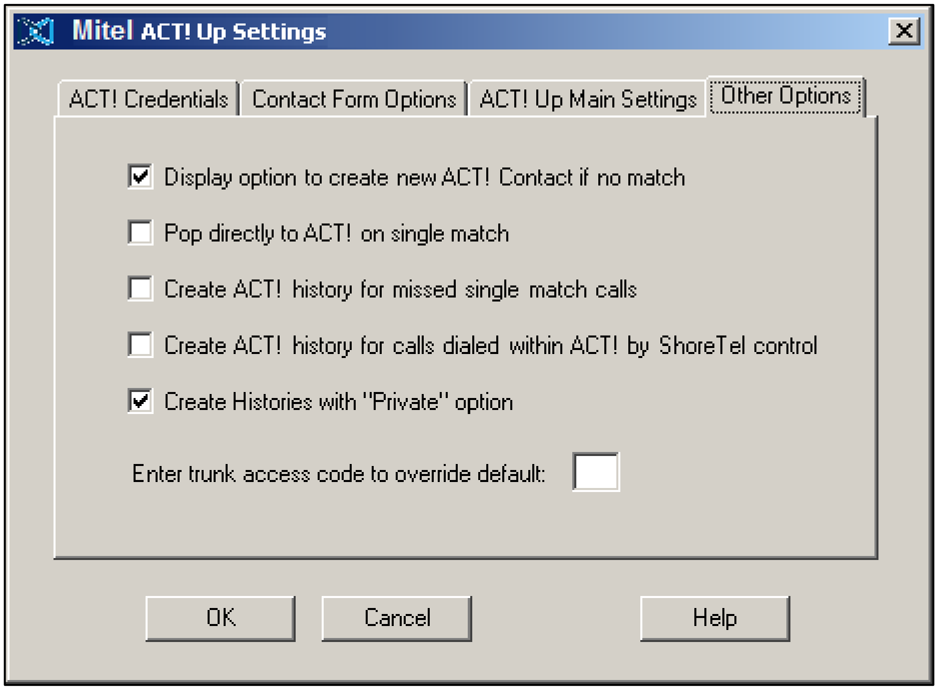
This settings tab controls much of the behavior of the application depending on user desire.

The application defaults to starting automatically each time you log into Windows. The "Automatically start Mitel ACT! Up upon Windows login" box in the Settings dialog controls this behavior. However, to start the application first time following installation, go to the Windows Start menu under Mitel (under All Programs) to find the shortcut to Mitel ACT! Integration.

Initial pop up screens (as a result of a phone call) will begin to fade away and disappear if no action is taken to interact with the screen. The "fade time" parameter controls this duration.

The tray application can monitor and process one or more of the following call types: Inbound, Outbound, Internal, and External. Check the boxes in the "Call Types" section of the Settings dialog. The default is to handle inbound, external phone calls.

In the "When" section of the Settings dialog, indicate whether you want the popup display to occur when the call is answered or when the call first appears (e.g. begins to ring on an incoming call). These are mutually exclusive settings. The default is "On Appearance".



Mitel ACT! Up Settings – Other Options Tab

This settings tab controls miscellaneous user options.

"Display option to create new ACT! Contact if no match", if checked, causes the application to pop up a display when a call appears with no matching number within ACT!. A link will allow you to immediately create a new ACT! contact. The calling number and name, if available, will be filled into the ACT! contact record.

"Pop directly to ACT! on single match", if checked, will suppress the Mitel ACT! Up fading display and immediately try to display the matching record within ACT! itself. It will only do this if there is a single matching contact record.

"Create ACT! history for missed single match calls", if checked, will automatically create a call type history item within the matching ACT! contact record on unanswered calls. It will only do this if there is a single matching contact record.

"Create ACT! history for calls dialed within ACT! by Mitel control", if checked, will automatically create a call type history item within the matching ACT! contact record when the call is dialed by pushing the Mitel dial control button within ACT! itself.

"Create Histories with 'Private' option", if checked, will set the 'Private' flag on History items the program creates.

"Enter trunk access code to override default", if a value is saved here, this will be the trunk access code (the number used to dial an “outside line”) for calls made by the Mitel dial control button within ACT!. If blank (the default), the “usual” code for that locale is used (e.g. 9 for North America, 0 for Europe).

Popup Functionality

First a note concerning text and background colors. All pop up contact information windows are color coded based the contact status as configured within ACT! (e.g. Prospect, Customer, Employee, Family, Friend, etc.).

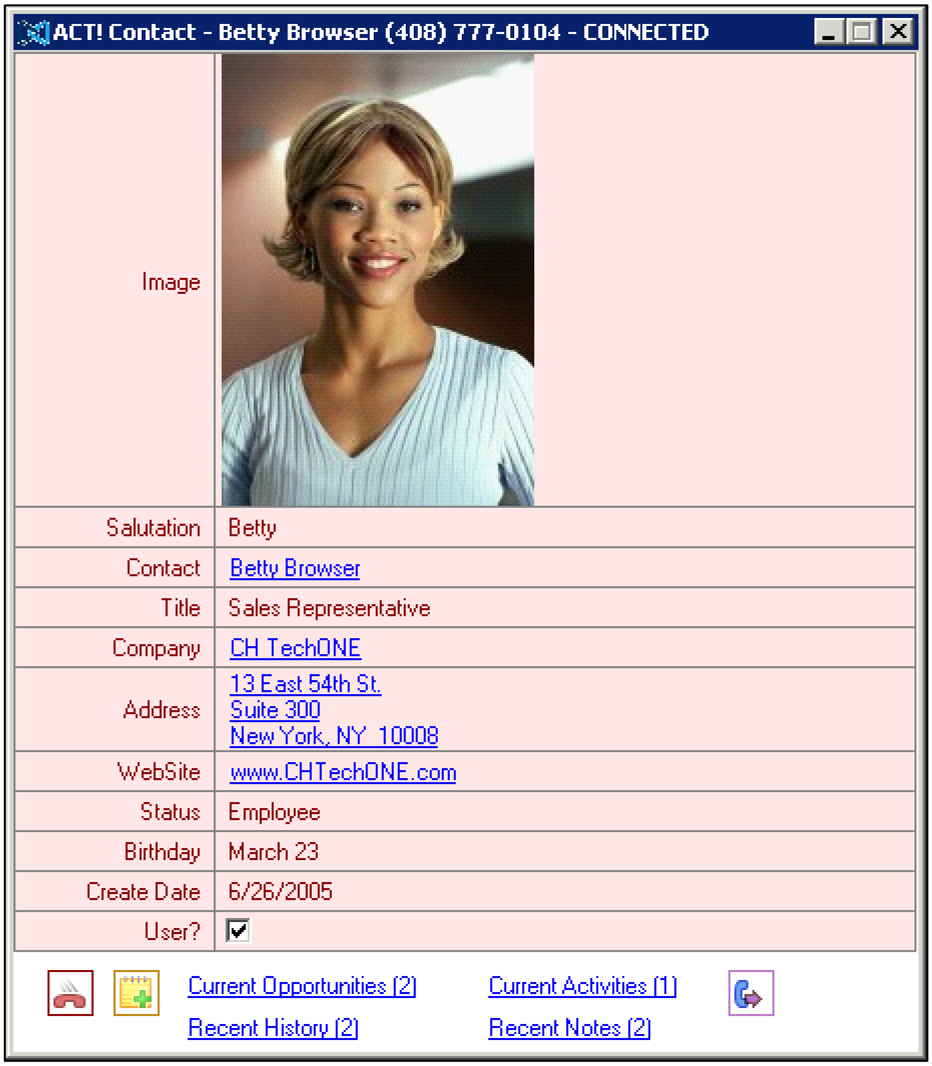
Example windows in this document all use Employee contacts from the ACT! sample database (so default to dark red text on a rose background). Customer contacts are dark green on light green. Prospect contacts are dark blue on light blue. Family and Friend contacts are brown on goldenrod. All other types are black on white. To change the default colors, please reference the Mitel ACT! Integration Advanced Configuration Guide.

The main function of the Mitel ACT! integration is to match the calling (on incoming) or called (on outgoing) party phone number to an ACT! contact record with the same phone number (defaults to matching home, business, or mobile) and display the matching contact information. If the phone number matches multiple records a window will popup similar to below, showing an overview of the matching contact records.

Pop up for call which matches multiple client records

In the above case, we see the incoming calling party number matched 2 different contact records. Clicking on the "Contact" link (the first column) will display that particular contact detail popup window. The contact detail popup window is the same window that would have appeared first if there had been only a single matching record (example follows).

Any initial pop up window, multiple match or single match, will begin to fade away (see "Settings" for configuration of duration). To stop the fading temporarily, position your mouse over that window. To stop the fading permanently, click anywhere on that window. While in "fade mode" (i.e. before clicking on the window to stop the fading), you may position the pop up anywhere on your Windows desktop and the application will, on subsequent calls, pop up in that location.



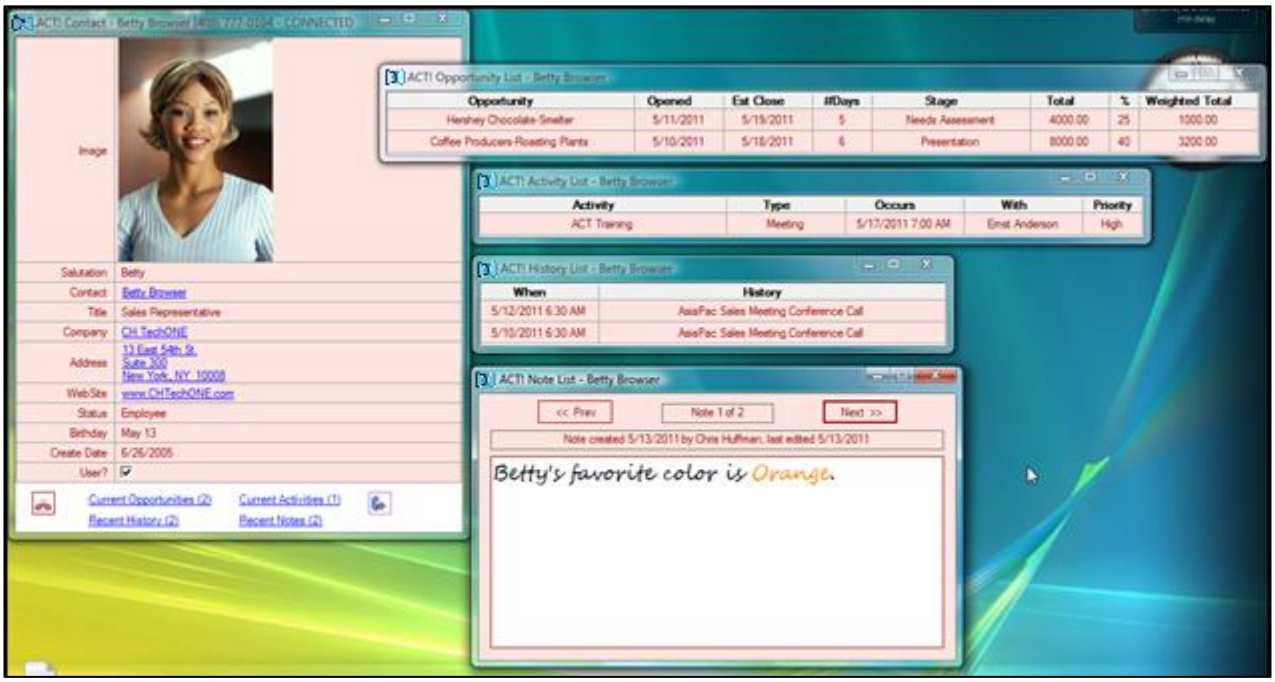
Pop up for call which matches a single client record

Shown above is an example of a contact detail popup, generated when a calling/called number matches a single ACT! contact record (or when a “Contact” link is clicked on a multiple record screen). The various data points shown from the ACT! contact record in both the multiple match or detail popup are configurable (see the Mitel ACT! Integration Advanced Configuration Guide). Those shown in this document are the defaults.

Only those data items that do exist within that contact record are shown. For example, in the ACT! sample database, contact photo images have been stored. This may or may not be how your ACT! database has been set up. Even if configured to show images, they would not be shown if one did not exist for that contact within ACT!.

Several items are clickable links (underlined in dark blue), as follows:

- The "Contact" link, when clicked, will trigger ACT! itself to display that customer record in its window. You must be currently running the ACT! application for this to work.
- The "Company" link, when clicked, will trigger ACT! itself to display that company record in its window. You must be currently running the ACT! application for this to work.
- The "Address" link, when clicked, will trigger a new browser window to display a map of the address. Popular web based map providers can be configured (see "Settings", above).
- The “WebSite” link, when clicked, will trigger a new browser window to display that URL.
- If so configured (see "Settings", above) and the contact has relevant (as configured) Activities, History, Notes, or Opportunities, you will see links at the bottom of the detail screen. If a link is clicked, another screen will pop up showing an overview of the items.

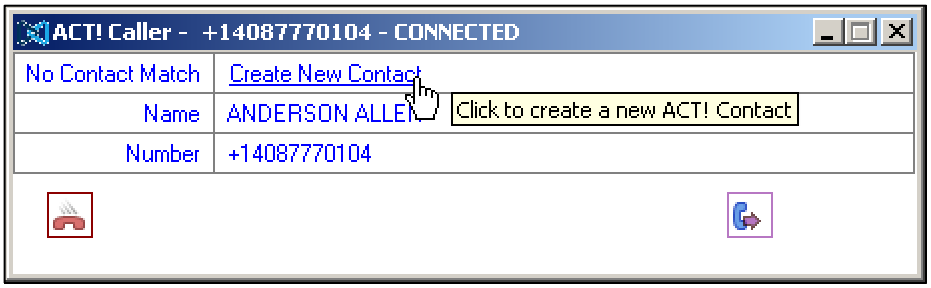


Above is an example after clicking each of the Activities, History, Notes, and Opportunities links.

Note in the Activities, History, and Opportunities detail pages, you may double-click your mouse on any individual item (row) to locate and display that item within ACT! itself.

New Contact Creation

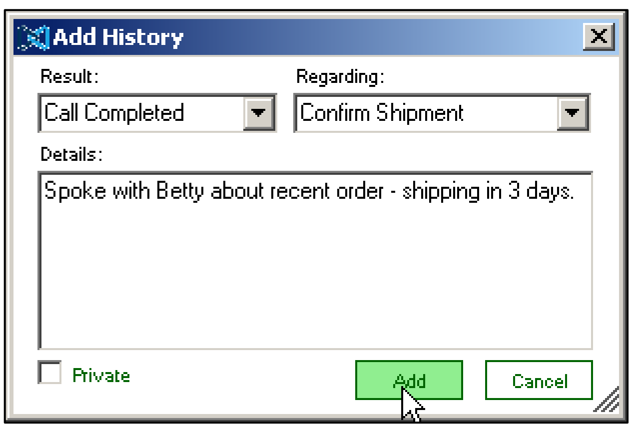
If the incoming calling party number does not match any existing ACT! contact record, and the "Display option to create new ACT! Contact if no match" option has been configured, a screen will be displayed allowing the user to (optionally) edit the name and number (as received) and click on a link to create the new contact record within ACT!. A name must be indicated so if a calling party name is not received on an incoming call (or on any outgoing call), the user must edit the "Name" field before creating the contact.



Example – No Contact Found, Option to Create

History Creation

While the phone call is still connected a history control button will be visible. The button will indicate to create a History item or to update one that has already been created. A small dialog window, shown below, will appear allowing you to fill in the History item with details.



Example – Adding a History item

When created, the History item will be added to the associated contact's record within ACT!. At the end of the call, the application will update the record with the duration of the call.

Call Control

While the phone call is still connected 2 phone control buttons will be visible. The left button will indicate ("Answer") if call is still ringing in or ("Hang up") if call is connected (answered). Clicking a button will perform the indicated function.

The right button is the "Transfer w/Data" function which allows you to transfer this call, along with a note to the target party (see example below). The call control buttons disappear if the call is disconnected (the displayed screens will not disappear until cleared by the user with the “X” button at the upper right).

Example – Transferring a call

The above shows an example after clicking the "Transfer w/Data" phone control button. A small window pops up allowing the entry of a target extension and a short note regarding the call. Clicking the "Xfer" button will send the call to that target extension where the customer detail record will be displayed with an extra field as shown below. The target party must also be running this application for this to work.

Example – A transferred call

The above display is the result of the transfer and would pop up on the target extension's computer (if also running this application and having an existing ACT! contact record for the caller). Note the first row would show any transfer data received.

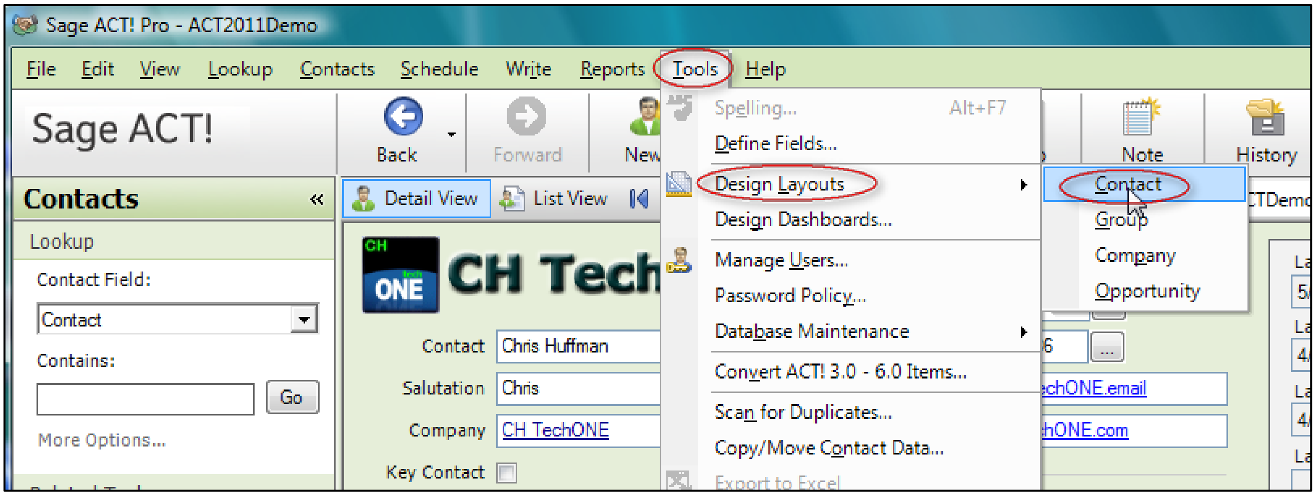
Mitel ACT! Dial Control

The Mitel ACT! integration also includes a custom control which will be added to Sage ACT! for adding a "dial" button to the contact and company layout designers. The dial control is a Mitel logo button that will dial the associated phone number upon clicking.

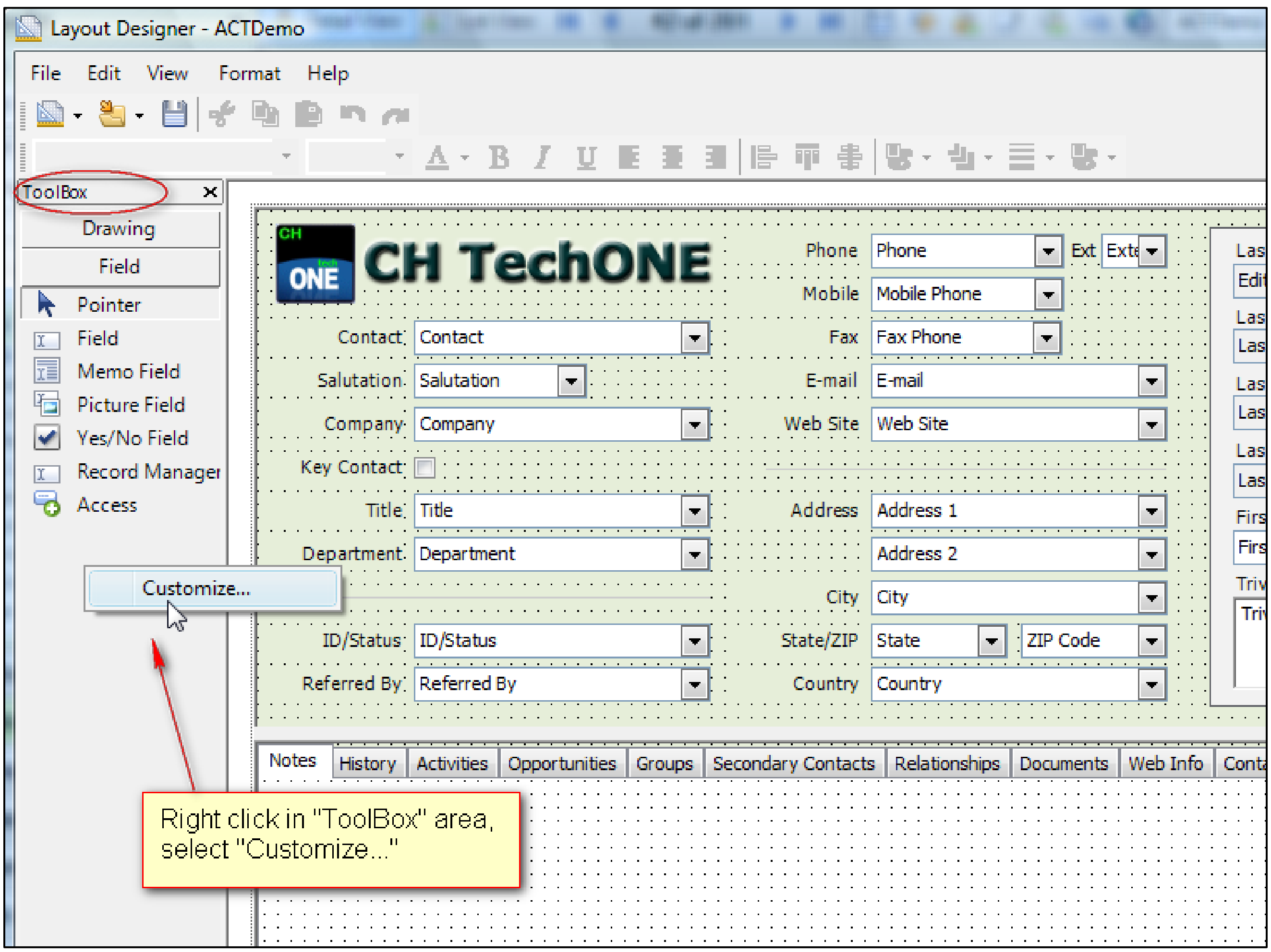
The custom control must be added by the ACT! user using the following sequence within the Sage ACT! program itself. Each user that desires this capability must initially go through this process.

The following screen shots from Sage ACT! Pro 2011 show the addition of the custom STDial control to the contact layout. The same process can be applied to the company layout designer.

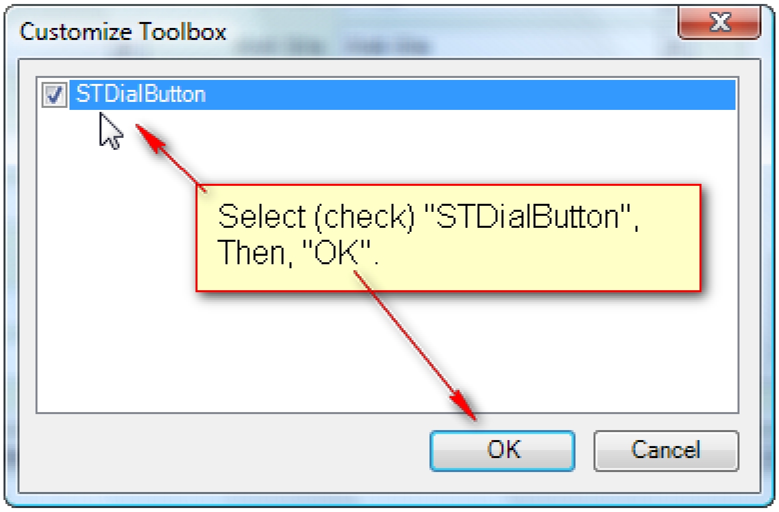
Choose Tools→Design Layouts→Contact



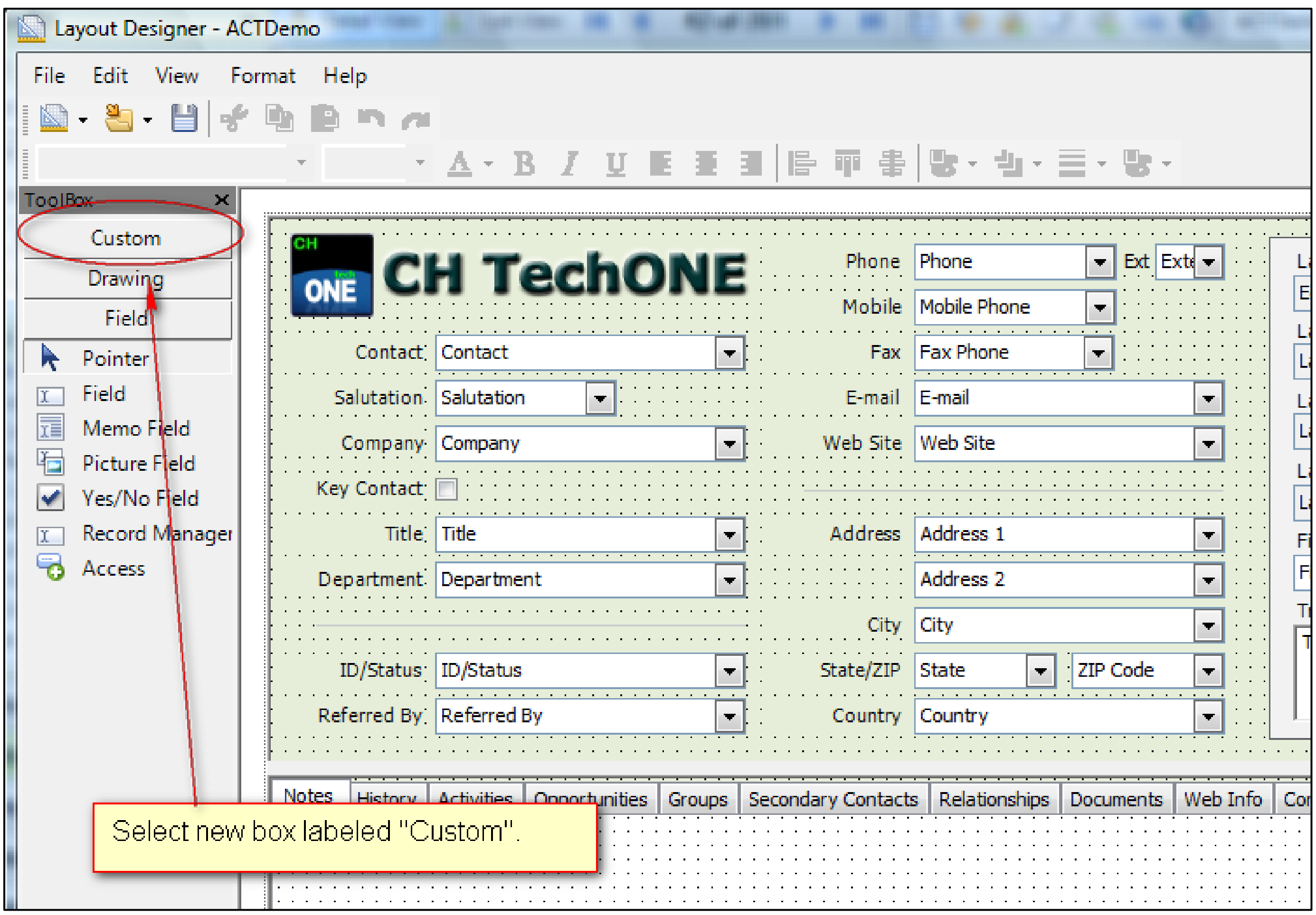
Once in the layout designer, right click in the “Toolbox” area and choose “Customize…”.



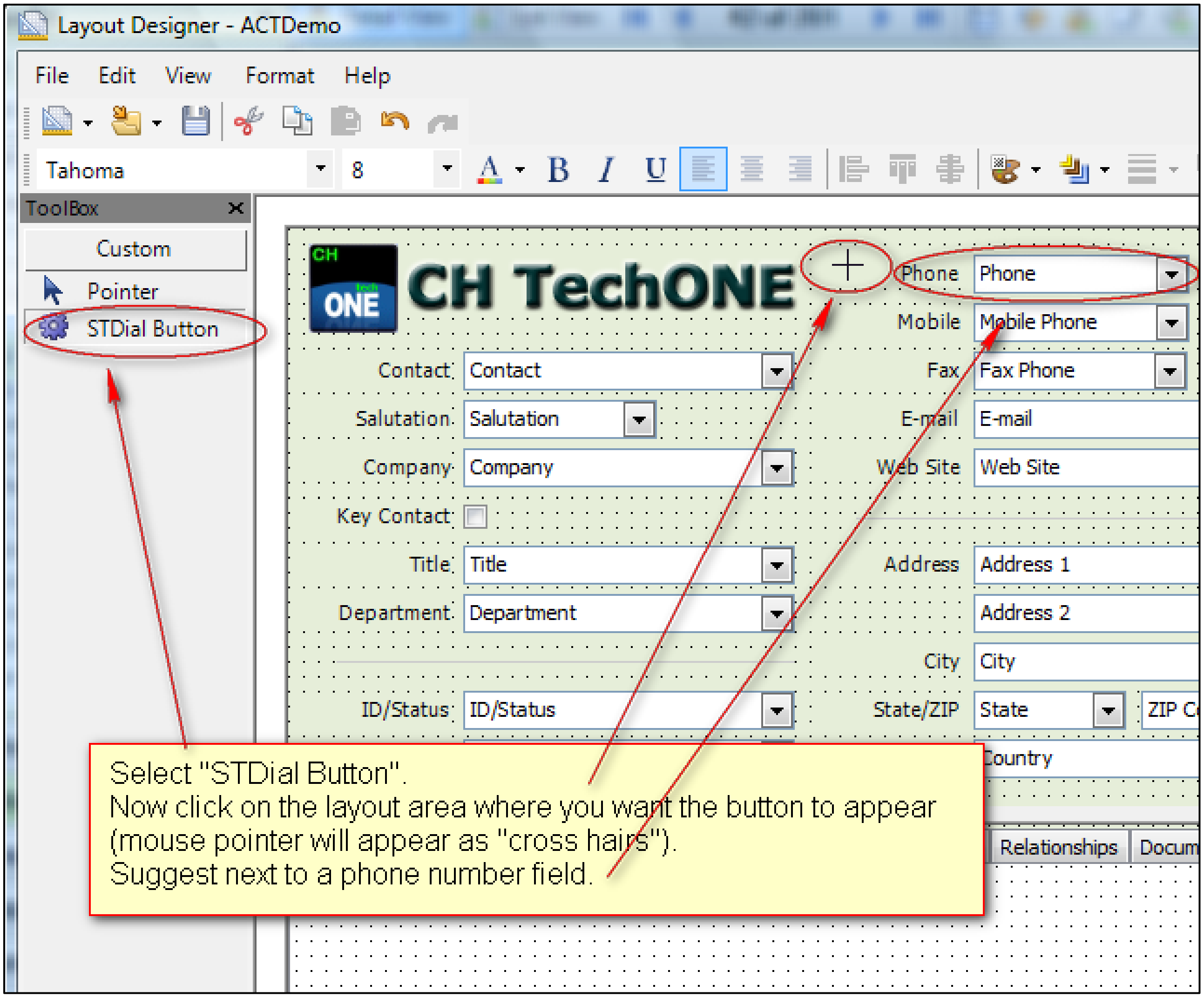
In the screen that pops up, select our custom control called STDialButton, then “OK”.



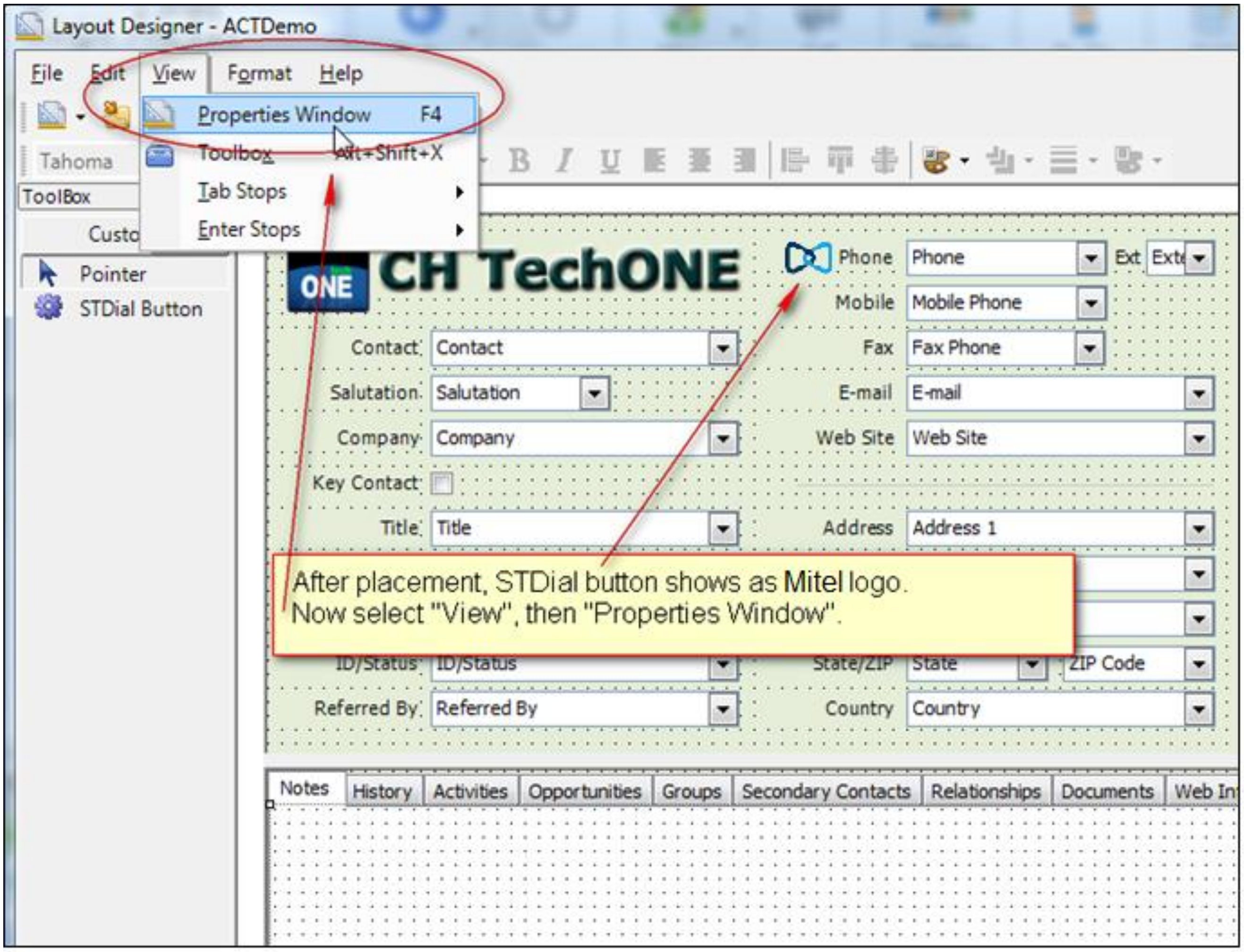
Now, select the newly added “Custom” box in the “Toolbox” area.



Click on the STDial Button graphic in the "Toolbox" area, and then select a target place on the layout designer where you want the dial button to appear. It would usually be placed near a phone field.



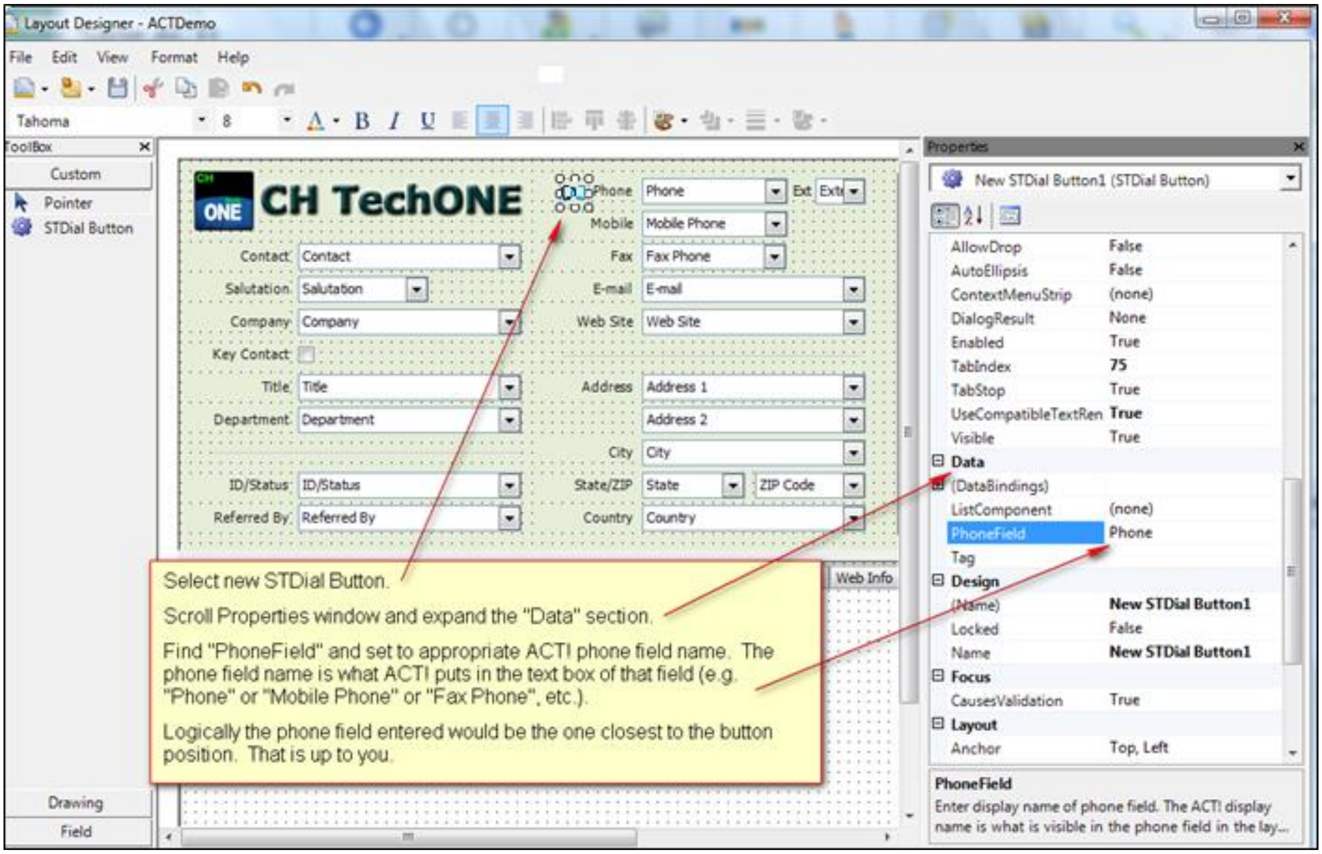
After clicking on the layout, the new button will show as the Mitel logo. Select View→Properties Window.



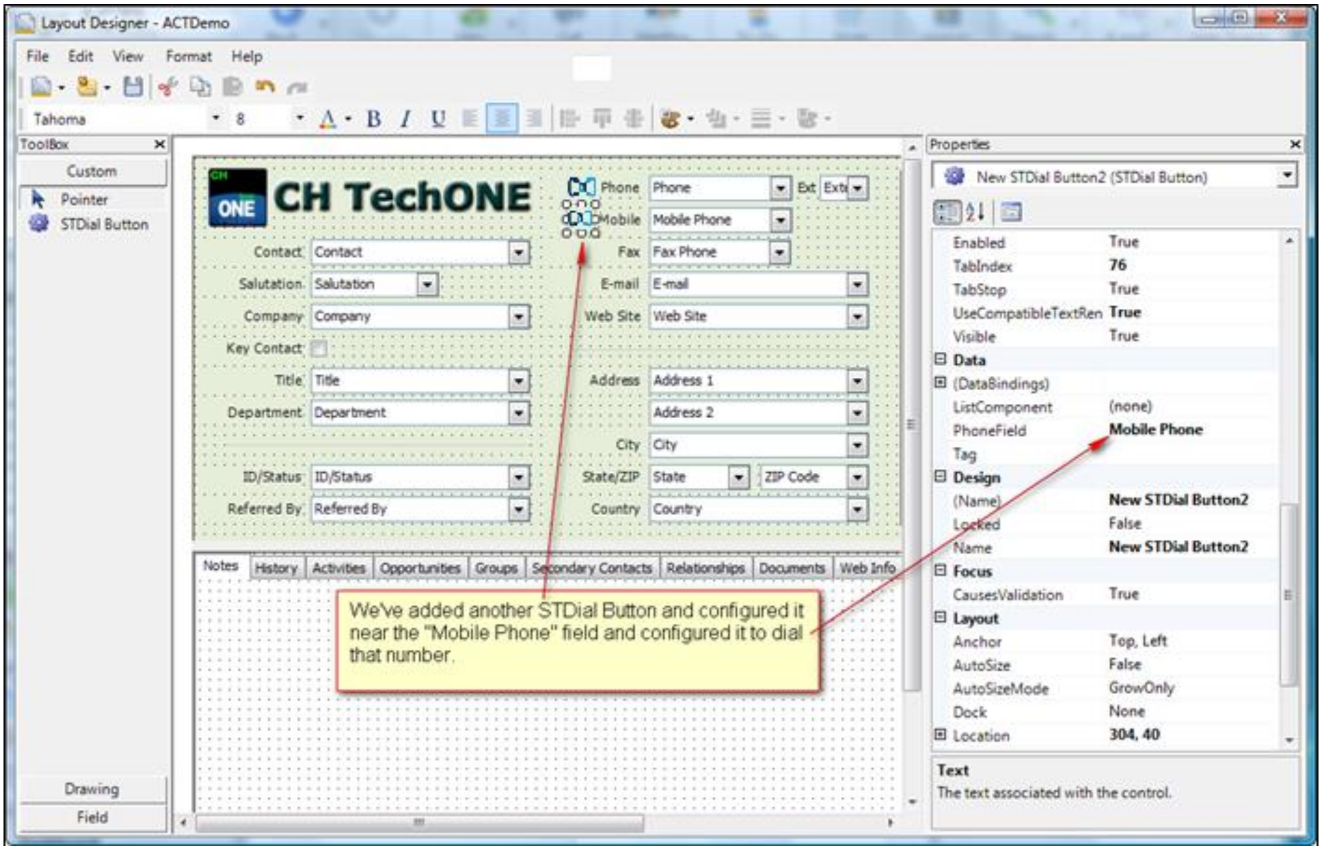
Select the newly added STDial Button. Scroll down the "Properties" area at the right side of the screen and expand the "Data" section. In the data item labeled "PhoneField" set the value to the appropriate ACT! phone field name.

The names used by ACT! are displayed in the layout designer inside the field itself. As you can see there are 3 phone fields on this layout, "Phone", "Mobile Phone", and "Fax Phone". Choose one of those (the default is "Phone" which, in ACT!, represents the main business phone number of the contact).

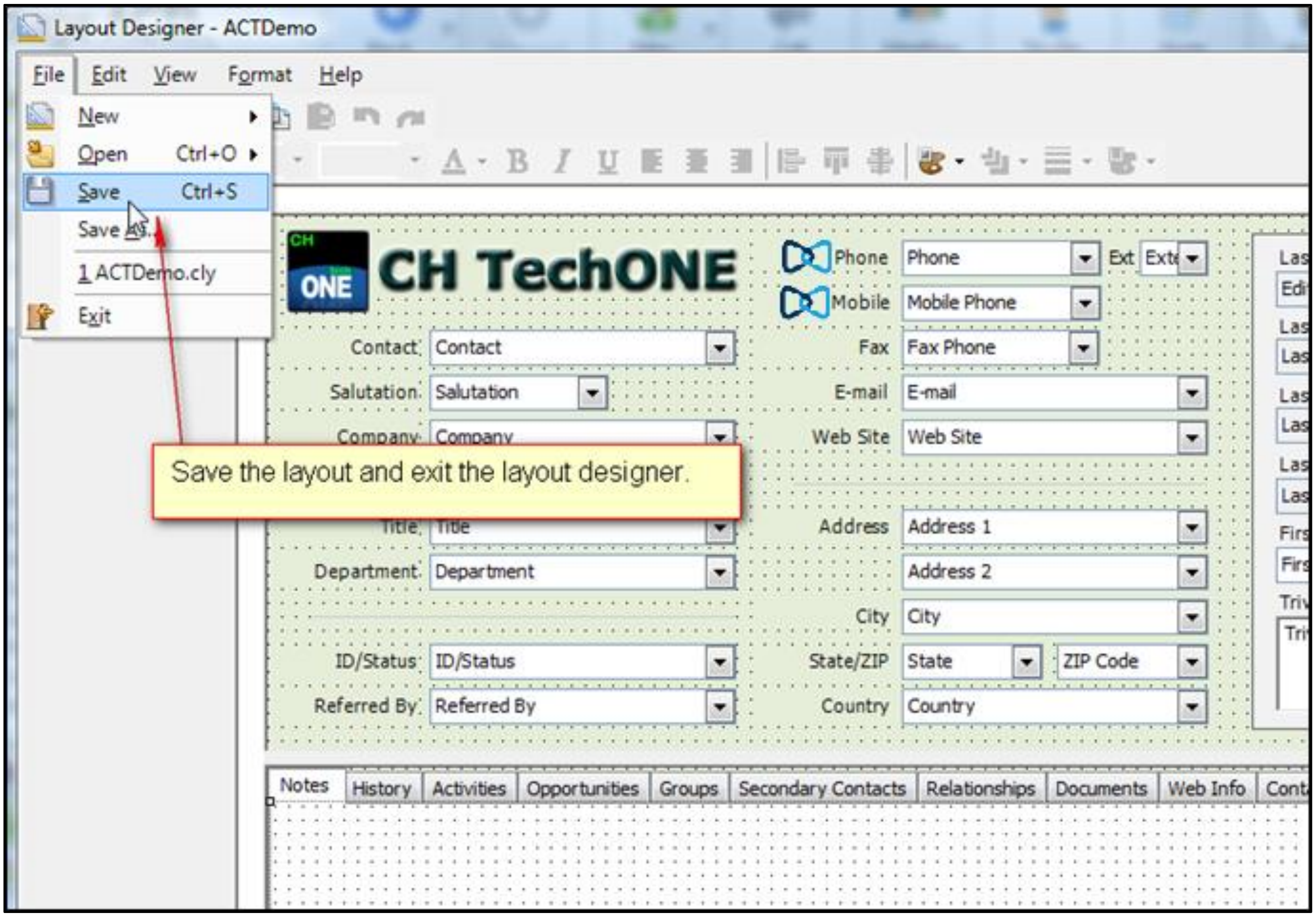
Of course you'd probably want to position the STDial Button close to the configured field on the layout. So in this case the button is positioned just to the left of the "Phone" field.



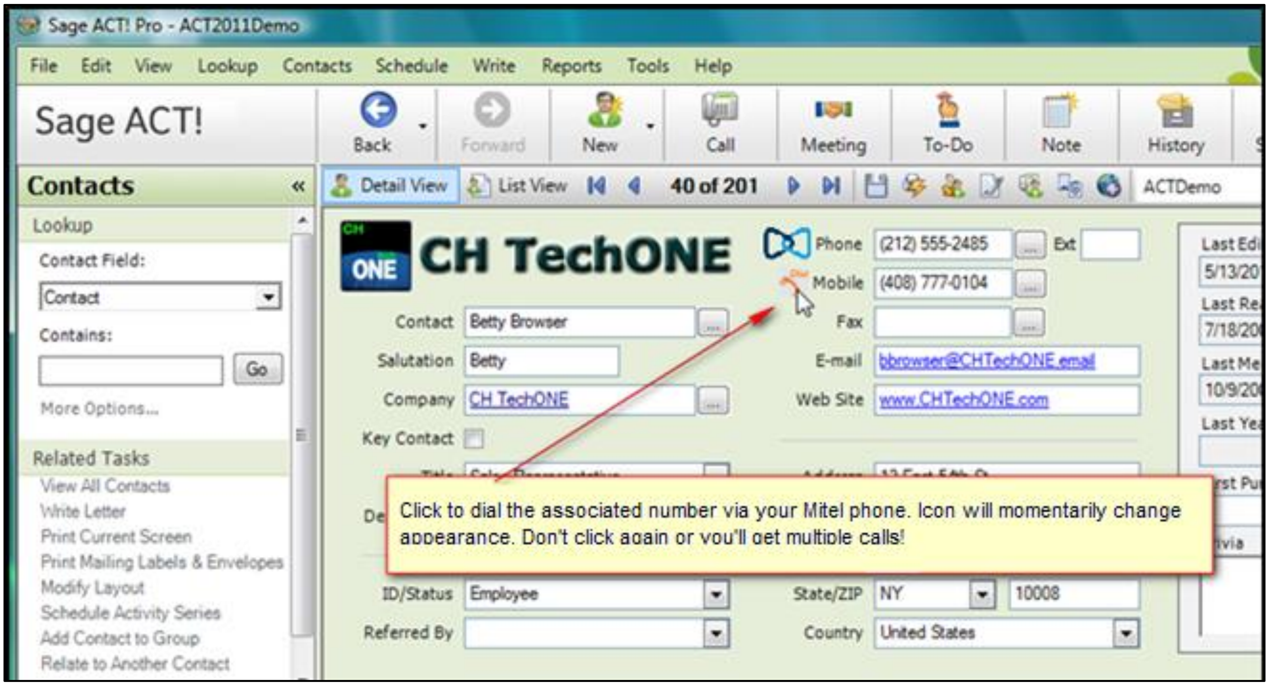
You can add multiple STDial buttons and associate them with different phone fields for quick dialing of different numbers. Here we've positioned another STDial Button next to the "Mobile Phone" field and configured appropriately.



Now we're done with the layout designer. Save and exit.



The new STDial controls are present in every contact page and will dial the associated number when clicked. We see below just after clicking on the STDial Button for this contact's Mobile number.



Mitel ACT! Up Client Installation

The Mitel ACT! Integration application comes as a Windows installer setup package (.exe and .msi).

For Mitel MiVoice systems, the Application Licensing Server and appropriate licenses must be installed in order to utilize Mitel ACT! Integration. See your Mitel partner for details and a trial license.

After initial installation, a reboot is **not** required. To start the application right after installation, go to the Windows Start menu under Mitel (under All Programs) to find the shortcut to Mitel ACT! Integration. Subsequently, the application will start up automatically with Windows logon (if so configured in the Settings).

The first time you run the application, you will be prompted to check and adjust your settings (as shown earlier in this document. In addition, other configuration files will be copied to the Sage ACT! folders this first time. You should be sure ACT! is **not** currently running until after you have configured the Mitel ACT! Up settings. After the first time, the order of launch (ACT! versus ACT! Up) does not matter.

Compatibility

The Mitel ACT! application should be loaded on the desktop computer of each client user.

Mitel Connect client must be installed and have been successfully used at least once before Mitel ACT! Integration will be able to authenticate this user in the Mitel Connect system.

Sage ACT! (version 2010 or higher) must also be installed on the client computer. It does not have to be running for popup displays from Mitel ACT! Up. However, when clicking on the contact name or company name in the contact detail display, Sage ACT! must be running so it can display the contact or company within its application.

This application requires Microsoft's .NET framework 2.0.50727 (or higher). The installer will indicate and install this Microsoft update if it not already installed. Alternatively, you may use Microsoft's Windows update to install this prerequisite or it is available directly:
http://www.microsoft.com/downloads/details.aspx?familyid=0856eacb-4362-4b0d-8edd-aab15c5e04f5&displaylang=en.

Mitel ACT Integration Installation Instructions

Install on a client computer by launching STActSetup.exe. The user installing must have the rights, under Windows, to install new software.

The only installation screen with options is the "Select Installation Folder" screen. An installation folder other than the default can be specified. Additionally, the "Everyone" versus "Just Me" setting controls whether Windows will allow all other users who may log into the machine the ability to run this application. If you are an administrator installing this application for other users, be sure to change the setting to "Everyone"

All other screens should be advanced by choosing "Next >".

Logging

The application can log errors and potentially debug tracing to a log file.

The application logging is controlled using the file log4net.config which is placed in the installation folder (default is C:\Program Files\Mitel\ACT! Integration) on the client machine.

The logging level for each component can be altered by editing log4net.config. There are 2 pertinent levels, INFO and DEBUG. To change, edit the line in log4net.config containing:

```
<level value="INFO" />
```

The value (within quotes) may be INFO or DEBUG. Editing and saving log4net.config causes the logging level to change immediately. It is suggested the level be kept to INFO unless a specific issue is being investigated in which you may be instructed to change the level to DEBUG.

The resulting log files will be in the folder referenced by %AppData%\Mitel\STActUp (you can type that reference into Windows Explorer to locate) and will be of the form STActUp.<day of week>.log.