

Phone Manager Application Support - Swiftpage Act!

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DOCUMENT RELEASE 5.0

APPLICATION SUPPORT



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Swiftpage Act!

Overview

This describes the features that are available when integrating with Swift Page Act!.

Supported Versions

The following Act! versions are supported.

Version	Supported
v15 (2013)	✓
v16 (2014)	✓
v17 (2015)	✓
v18 (2016)	✓

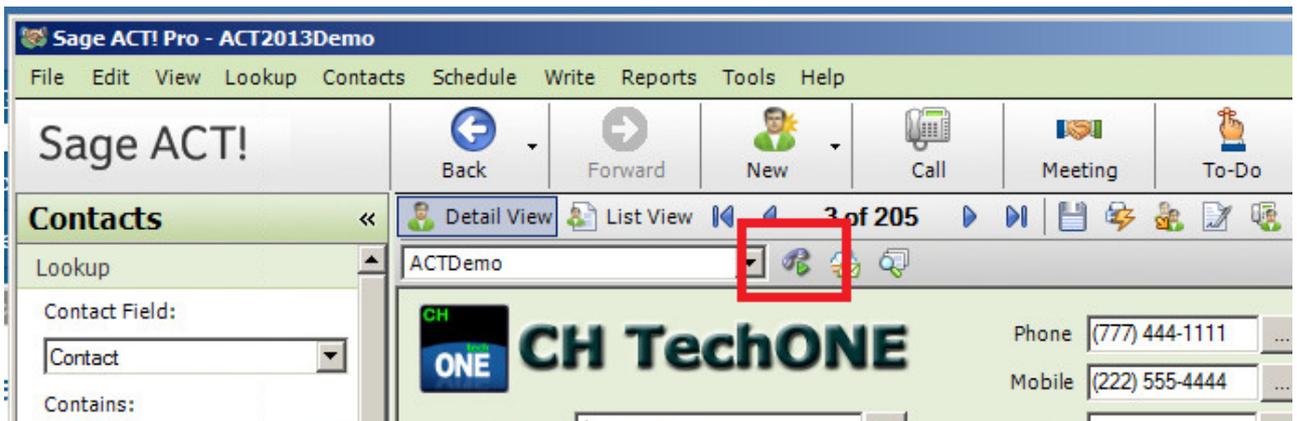
Features

Integration with Act! supports the features listed below:

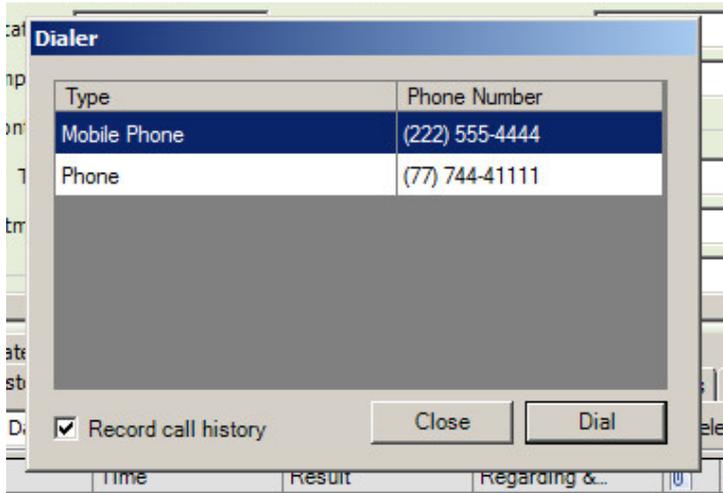
- [Click to dial](#)
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- [Automatic call history entry](#)
- [Calendar & DND synchronization](#)

Click to dial

When a Contact record is displayed a new telephone icon is shown on the toolbar.



When the telephone icon is clicked a new window is displayed that shows all of the telephone numbers that are available for this contact.



Selecting any of the rows and clicking *Dial* or double clicking the row will cause the selected number to be called.

This requires Phone Manager to be running in the same Windows session as Act!.

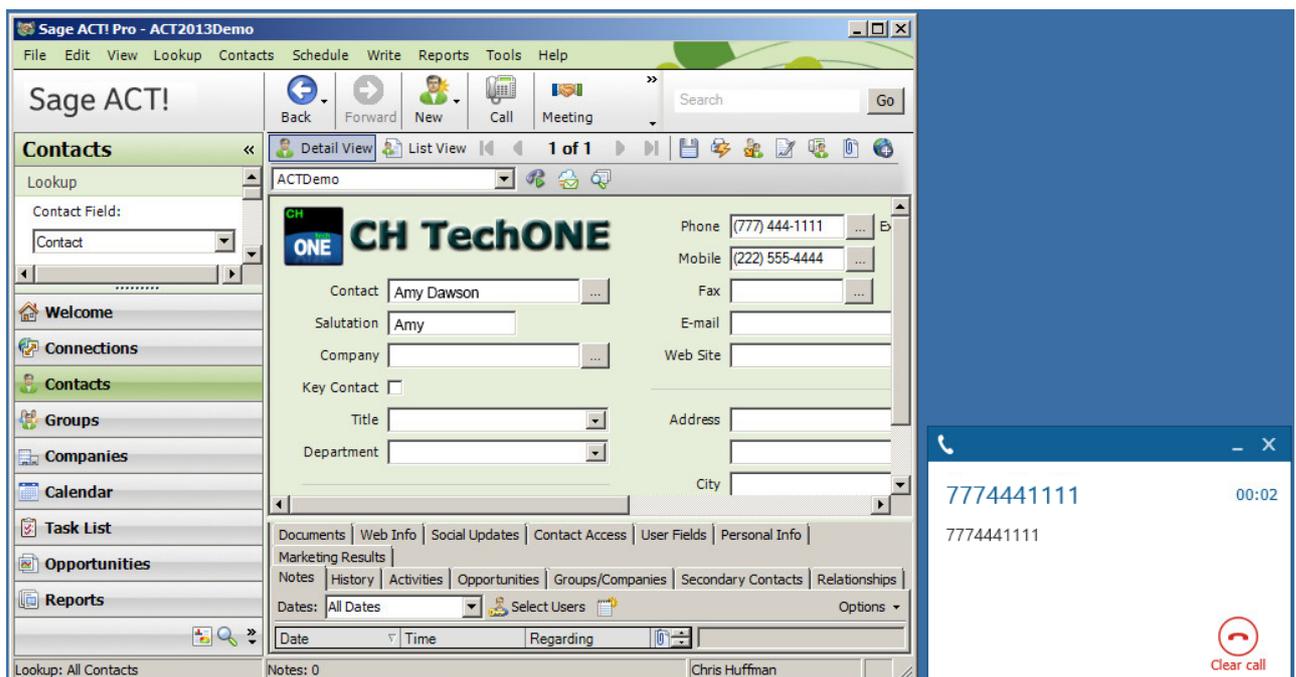
When an outbound call is made using this method a call history record can be created and opened once the Dial command has been selected. To enable this select the *Record call history* option on the form.

If the screen popping feature is also been used then this should only be configured for Inbound Calls, so as not to screen pop on outbound.

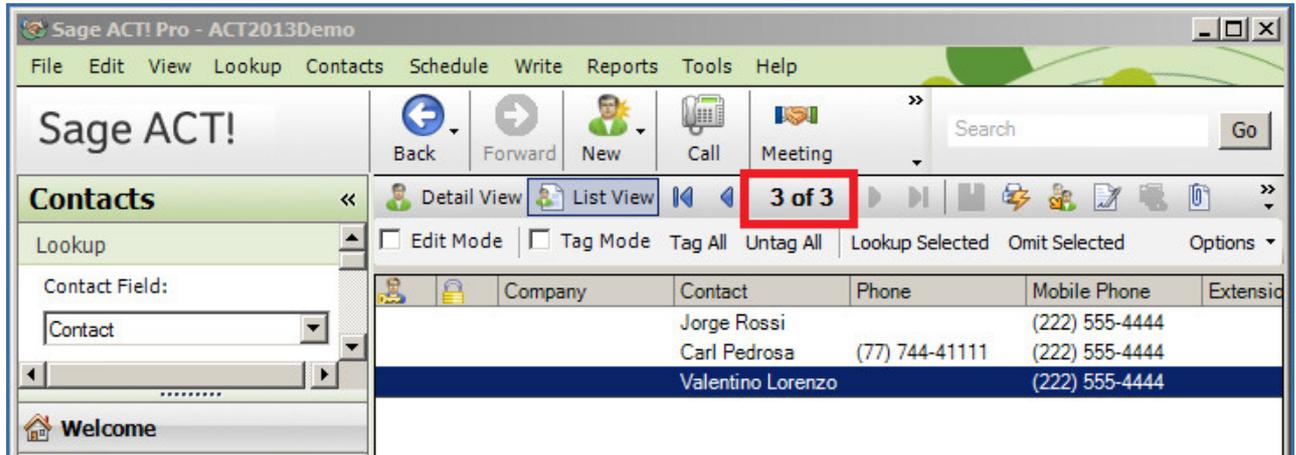
This direct dial out replaces the built in TAPI based "Dialer" feature within Act! and should not be used at the same time. To disable the built in "Dialer" feature, from the menu bar select Tools -> Preferences -> Communication -> Dialer Preferences and un check the Use dialer option.

Screen pop for contacts

The Act! contacts can be screen popped directly within Act! when an incoming call is received using the caller id or from an outgoing call using the dialed number. The telephone number is then used to find any matching contacts that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search on the contacts to find any records that have matching telephone numbers. A match was found and the contact record was automatically displayed.



If multiple matches are found then the current Act! view be filtered down for the relevant matches. For example a call is made to 22255444 and this has found three contacts that have this telephone number.



If no matches are found then there is a setting on the Options tab to enable a new *Contact* record to be created. The Phone field is set to the number received and this *Contact* is then displayed.



Contact fields

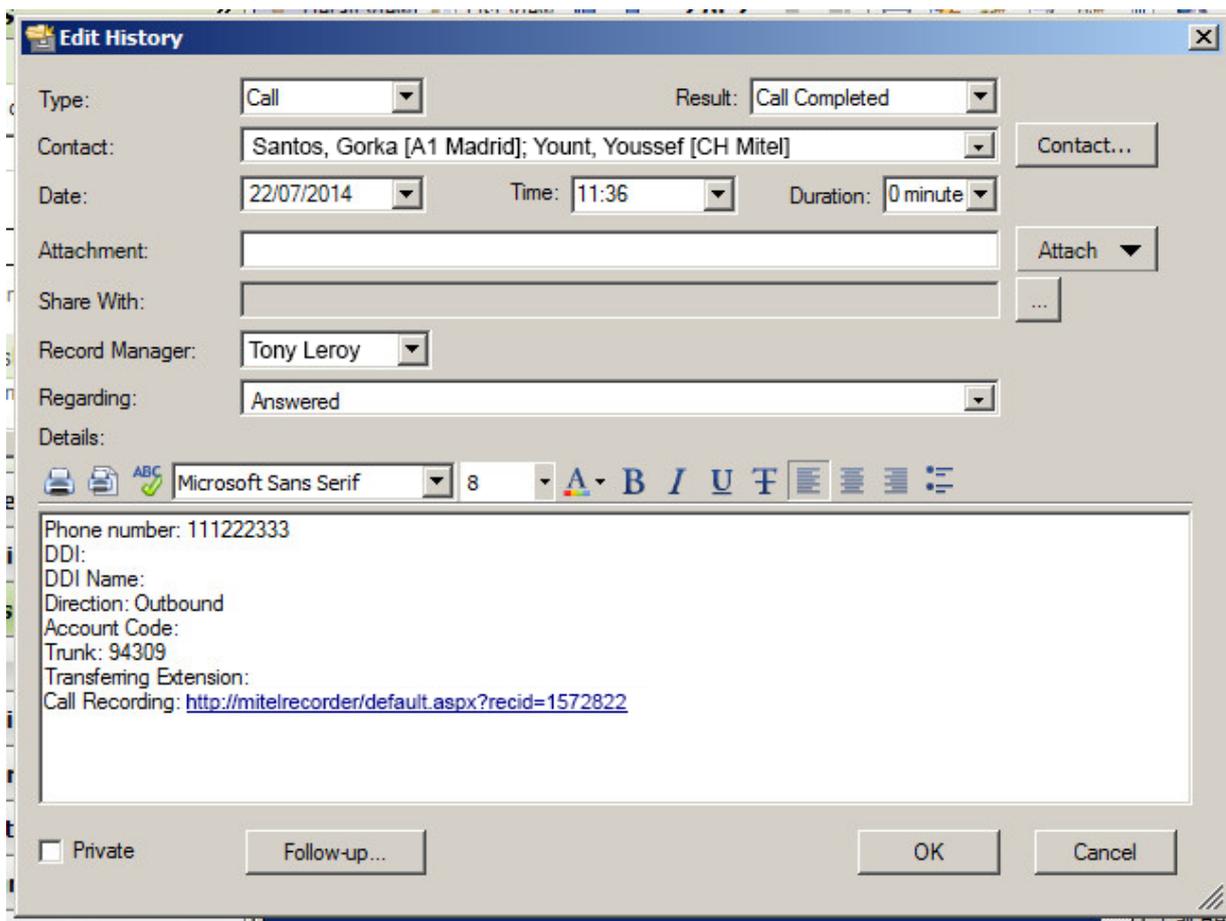
The range of telephone numbers that are to be searched for can be configured. By default the common telephone number fields are pre selected.

Act! Description	Act! Field Name	Enabled?
Business Phone	BUSINESS_PHONE	✓
Mobile Phone	MOBILE_PHONE	✓
Alternate Phone	ALTERNATE_PHONE	✓
Fax Phone	FAX_PHONE	✓
Home Phone	HOME_PHONE	✓
Pager Phone	PAGER_PHONE	✓

Automatic call history entry

Phone Manager can work with the History within Act! and can have *Call* entries automatically created for calls made or received by the User when a match has been found to an entry in their Act! contacts. The contact to associate with this is found using the caller id received or dialed number.

The body of the call entry is populated with the information shown.



Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialed number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared.
Call Recording	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser) The call event trigger must have been set to at least Call Answered as the call recorder only create the recording id when the call has been answered.

Calendar & DND synchronization

The calendar within Act! can be synchronized with the DND status of the extension of the User. For example when there is an appointment in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the *Regarding* field of the appointment. When the appointment ends, the extension will be automatically removed from DND.

For example the *Scheduled Activity* entry below will place the Users extension into DND between 09:00 and 13.30 with the DND text set to "Sales Meeting".

Schedule Activity [X] Options ▾

General | Details | Recurrence

Activity Type: Meeting Start Date: 22/07/2014 Start Time: 09:00 Duration: 4 hours 30 min
End Date: 22/07/2014 End Time: 13:30 Use Banner

Schedule With: Tony, Marcel [CH TechONE]; Scott, Marco [CH TechONE] Contacts ▾

Send invitation e-mail

Associate With: CH TechONE [CMP] ...

Regarding: Sales Meeting

Location: [Empty]

Priority: Low Colour: [Black] Ring Alarm: No alarm Schedule For...

Private OK Cancel

There are options to be able to select the type of *Activities* that trigger the DND change and these are configured on the *Activities* tab.

act!

Version | Fields | Activities | Options

Status

Select the Act activity types to include

- Call
- Meeting
- To-do
- Personal Activity
- Vacation

The *Options* tab has settings to control if private activities, recurring activities and all day events will be acted upon.

act!™

Version | Fields | Activities | Options

View

Show Private Activities Include Recurrences

Show All Day Events (with Banner)

Display

Create new Contact on no match

Configuration

The integration needs to be configured for the correct version of Act! that is running. From the *Version* tab select the relevant entry from the drop down list.

act!™

Version | Fields | Activities | Options

Properties

Select Version Act! 2013 (v15.1.108.0)

Initialise Act

Once this has been selected the plugin needs to be initialized with the Act! application. This is performed by clicking on the *Initialize Act* button.

 Act! will need to be closed before this can be done.

The plugin uses the Act! plugin framework and when you click *Initialize Act* the required files are copied into the Act! plugin folder. If this is not successful then the current user may not have the permissions to be able to copy files to this location. By default this is:

C:\Program Files\ACT\Act for Windows\Plugins