PassageWay®

Solution

FastCall™ Release 2.0
for Telephony Services
Release 2.2

The shortest distance
between your phone
and your database

AT&T

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AT&T FastCall™ Release 2.0

for PassageWay® Solution Telephony Services Release 2.2

User's Guide

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Introduction

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What is FastCall for PassageWay Solution Telephony Services?

FastCall™ for PassageWay® Solution Telephony Services is a software package that runs with Microsoft® Windows™ operating system 3.1 or later or Windows for Workgroups 3.11 or later, enabling you to control telephone calls (both incoming and outgoing) directly from your IBM®-compatible personal computer on a local area network (LAN) using NetWare® Telephony Services software.

In the PassageWay Telephony Services Solution environment, there is no physical connection between telephone and computer, as the telephone system and network server interface to provide third party call control. FastCall interfaces with the Telephony Services software to provide computer-telephone integration.

PassageWay Solution provides the interface between your telephone and your PC on the LAN running NetWare Telephony Services software. PassageWay Solution provides the pathway for information to be exchanged between your PC and your telephone.

FastCall is a Windows-based Computer Telephone Integration (CTI) middleware program that brings together telephone and computer technology. CTI is the linking of telephone voice communication systems to computers, which can increase productivity and customer satisfaction through the exchange of information between the computer and telephone. FastCall enables you to access the telephone directly from your computer keyboard. It automates the handling of both inbound and outbound calls.

FastCall for Windows provides three principle Computer-Telephone Integration capabilities:

- Screen-based telephony

  Telephone functions normally achieved by pressing buttons on the telephone are accessed through keystrokes or mouse clicks on the computer, with feedback provided on the computer screen. The following screen based telephony functions are supported in FastCall:

  — Answering an incoming call

  — Disconnecting (hanging up) a call

  — Placing a call

  — Transferring a call

  — Conferencing up to six parties on a call

  — Redirecting an incoming call to another extension or number

  — Dialing an outbound call

  Special dialing codes, such as agent log, call park, and international dialing can be customized to your phone system.

- Incoming call and screen synchronization (or screen pops)

  FastCall enables you to receive calls and information about the caller, through the computer and telephone. Information can be obtained from a database application, spreadsheet, or other application resident on or accessed from your computer. FastCall uses a learning algorithm to link Windows programs to incoming calls. For example, a bank loan officer could see the database record of a mortgage applicant "pop up" automatically when that applicant calls. Information would be available as soon as voice communication is established.

- Application-based preview dialing

  FastCall links with applications for automated outbound dialing. By recording the keystrokes used to find and retrieve a telephone number from a database record, FastCall can find the telephone number, extract it, and automatically begin dialing, whenever you press a single function key.

- Rules-based intelligent call handling

FastCall can also support multiple line appearances. FastCall can support up to 10 simultaneous calls. The number of line appearances used is determined by the configuration of the Telephone System for the extension administered to the PC.

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How FastCall Works

FastCall allows you to "telephony enable" your Windows applications. Through the use of keystroke macros, you can train FastCall to execute "triggers" when incoming telephone calls match the criteria of an incoming call rule. A trigger is information and instructions that execute actions. You define triggers by configuring application paths and recording keystroke macros. Triggers make your applications and data pop upon the screen. Triggers are enabled by call rules, which are a set of conditions that filter your calls and enable FastCall to handle your calls in the ways that you want them to be handled. You can configure FastCall so that when a call meets the criteria of a rule, a trigger is executed.

Call rules can use the following criteria to determine what action to take when calls arrive:

- Calling Number (usually ANI or CLID)

  Calling Number identifies who will be calling you. Calling numbers can be configured to be specific people you know will be calling, such friends or associates, or they can be numbers of business clients. This feature utilizes the Automatic Number Identification (ANI) or Caller ID (CLID) capabilities of the telephone system.

- Called Numbers (DNIS or VDNs)

  The called number identifies the number called by someone. You may have many numbers through which incoming calls may be received, such as 1-800-555-INFO, 1-800-555-ACCT, 1-800-555-SALE, etc., each one connecting to a different department. A Called Number can also be an extension. You can configure FastCall to identify the number for which a call is coming in, and have FastCall automatically execute a series of actions based on the number called.

For example, if someone calls 1-800-555-SALE, you know that he is calling in regard to a purchase. You would configure FastCall to pop up a database record containing pricing and product availability information. You could also configure FastCall so that when your personal extension is called, it will pop up your personal directory application, such as Lotus Organizer™.

If someone calls 1-800-555-ACCT, you know that she is calling to inquire about her account status. You may configure FastCall to automatically redirect the call to your accounting department and pop up an account record on the screen. Before the accounting agent answers the phone, information regarding the account would be available to the agent. This feature utilizes the Vector Directory Number (VDN) or Dialed Number Identification Service (DNIS) capabilities of the telephone system.

■ Caller Input

Caller input is information that the calling party enters via a touch-tone (DTMF) phone. Information may be an account number, as when you call a credit card company and are prompted to enter your account number. For caller input to be used by FastCall, your AT&T telephone system must be equipped with the Call Prompting feature. FastCall Promotional and Runtime do not support the Call prompting feature.

■ Time of Day

Time of Day determines the time that a call arrives.

Calls may be answered and a trigger may be launched, or calls could be rerouted to another extension based on any one call rule criterion, or a combination of the call rule criteria.

For outgoing calls, FastCall allows you to preview dial from any Windows application through the use of outbound macros. Depending on your version of FastCall, you can develop keystroke macros to highlight, extract, and dial numbers from any Windows application. You also have the option to speed dial using the F6 - Call key and access numbers from the FastCall Calling Number list.

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FastCall Product Offerings

The following versions of FastCall are available:

- FastCall Professional

- FastCall Runtime

- FastCall Promotional

FastCall Professional

FastCall Professional is the full-featured version of FastCall and is described throughout this manual. FastCall Professional has the following features:

- Call Control Keys with administrative and directory icons

- Up to 100 Rules and Triggers included for intelligent, rules-based call processing and handling

- DDE support

- Warn Before Dial over Dial warning configuration

- Lookup Conversion - speed improvements and centralized look-up lists

- Ability to Telephony Enable any Windows applications (that is, recording macros for any Windows applications)

- Conference Room

- Caller Input feature

FastCall Runtime

FastCall Runtime offers the knowledge worker "Off the Shelf" middleware integration and screen-based telephony provided by FastCall's Call Control Keys. FastCall Runtime has the following features:

- Call Control Keys with administrative and directory icons

- Up to 100 Rules and Triggers included for intelligent, rules-based call processing and handling

- Middleware integration only with applications in the Library.

- The Library keystroke macros may be re-recorded. (You cannot record keystroke macros for applications that are not in the Library.)

FastCall Promotional

FastCall Promotional is the basic version of FastCall and provides all screen-based telephony features of the core product, as well as middleware integration with AT&TCall as a default. FastCall Promotional has most of the FastCall Runtime features for 30 days after installation. After 30 days, most advanced call control functions (for example, Transfer and Redirect) and access to the Library are denied.

➡ NOTE:

Most call control functions and access to the macro Library are disabled 30 days after installation. To regain these capabilities, you must upgrade to FastCall Professional or FastCall Runtime.

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System Requirements

To run FastCall 2.0, you must have the following hardware and software already installed:

- An IBM-compatible PC with:

    — an 80486 or higher microprocessor.

    — at least 8 MB of RAM memory.

    — at least 28 MB of space on your hard disk if you choose to load the FastCall on-line documentation. If you do not load the on-line documentation, you need at least 8 MB of space on your hard disk:

    — a 3.5-inch, 1.44 MB diskette drive.

    — a VGA or better video controller and monitor.

    — a mouse or other Windows-compatible pointing device.

    ### ⇒ NOTE:

    System performance may be adversely affected by lower system speeds and lower memory capacities.

- Microsoft Windows 3.1 or Windows for Workgroups 3.11 running in enhanced (386) mode. Emulation environments such as Windows under OS/2® or Windows NT are not supported.

- LAN hardware and networking software.

- A NetWare Telephony Services server (release 2).

- FastCall Workstation Setup software. This software is typically installed when the Telephony Services Release 2.0 platform software is installed on your PC.

In order for FastCall and PassageWay applications to operate, your Network Administrator must perform the following NetWare Telephony Services administration:

■ Create a computer telephony integration (CTI) link which is capable of controlling your telephone. (You will enter the name of this link in the Server ID field of the Telephony Server Auto Login dialog box when you configure FastCall.)

■ Create a NetWare login on the Telephony Server that services the CTI link to which your telephone is assigned. (More than likely, you already will be a user of your organization's LAN, and will have a NetWare login on the server that has been designated to be the Telephony Server.) Note that your Telephony Server login and password are the same as your NetWare login and password.

■ Add your login to the list of Telephony Services users.

■ Add your phone to the list of devices on the Telephony Server.

■ Assign you "call control" and "device/device monitoring" permissions for your "device" (that is, telephone). These are the default permissions provided by the system.

Your Network Administrator will inform your telephone System Administrator of the Server ID for Telephony Services. If you do not already have a NetWare login and password for the server assigned to Telephony Services, this information will also be provided.

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Organization of This User's Guide

This user's guide contains eight chapters and two appendices. Also included is a glossary of terms and an index. Each section of this manual is described below.

- ■ Chapter 1 - Introduction

  Chapter 1 describes the structure and content of this user's guide. This chapter also provides an introduction to the features and operation of FastCall, and includes an overview of CTI.

- ■ Chapter 2 - Initial Configuration

  Chapter 2 provides information about configuring FastCall the first time you run it. You must configure FastCall before you can use it.

- ■ Chapter 3 - Using FastCall

  Chapter 3 provides information about the FastCall Controller main window, and how to use it for inbound and outbound call control.

- ■ Chapter 4 - Administering FastCall

  Chapter 4 provides information and instructions for configuring FastCall.

- ■ Chapter 5 - Setting Up Applications

  Chapter 5 describes the methods and procedures for setting up the Windows applications that are to work with FastCall.

- ■ Chapter 6 - Configuring Call Rules

  Chapter 6 discusses call rules and describes the procedures for configuring the rules that you want to apply in your FastCall environment. Several examples of call rules are included to demonstrate how rules are configured and applied.

- Chapter 7 - Using Log Viewer

  This chapter describes how to use Log Viewer to view and store entries of your calls.

- Chapter 8 - Using AT&TCall

  This chapter describes how to use AT&TCall.

- Appendix A - Troubleshooting

  This appendix provides information about possible error conditions and how to respond to them.

- Appendix B - Keyboard Shortcuts

  This appendix provides some common keyboard shortcuts that you can use with FastCall.

- Glossary

  The glossary provides definitions of words, terms, and phrases that are used in this user's guide and/or in the CTI and telecommunications industries.

- Index

  The index provides a quick way of locating information within this manual.

User Responsibilities

Before using any of the FastCall applications, you should be familiar with basic Windows functions and procedures. If not, consult your *Microsoft Windows User's Guide.*

You may also want the documentation for the applications that you will be configuring for use with FastCall.

Conventions Used in this Guide

The following conventions are used in this guide:

- Commands and text you should enter appear **`in this style of type.`**

- Values, instructions, and prompts that appear on the screen are `in this style of type`.

- Key names that are always located on the keyboard in the same place appear in all capital letters, as in ENTER.

- Key combinations (holding down one key while pressing another key) are connected with a "+" (for example, SHIFT + TAB).

- Only active windows are displayed.

- The terms option buttons and radio buttons refer to the same object.

Getting Help

If you have questions about or problems with FastCall for PassageWay Solution Telephony Services that this user's guide does not resolve, call the AT&T Technical Service Center at 1 800 334-1096 or your local Authorized Dealer.

Initial Configuration

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Overview

After you have installed FastCall, you must set some initial parameters before you can use FastCall. This chapter describes the procedures for initial setup.

The Configure FastCall dialog box (Figure 2-1) will automatically appear every time you run FastCall until you configure at least the Telephone Parameters, Outgoing Call Rules, and Directory Application. After these parameters have been configured, the Configure FastCall dialog box will no longer appear. You can reconfigure these parameters later. (Refer to Chapters 4, 5 and 6.)
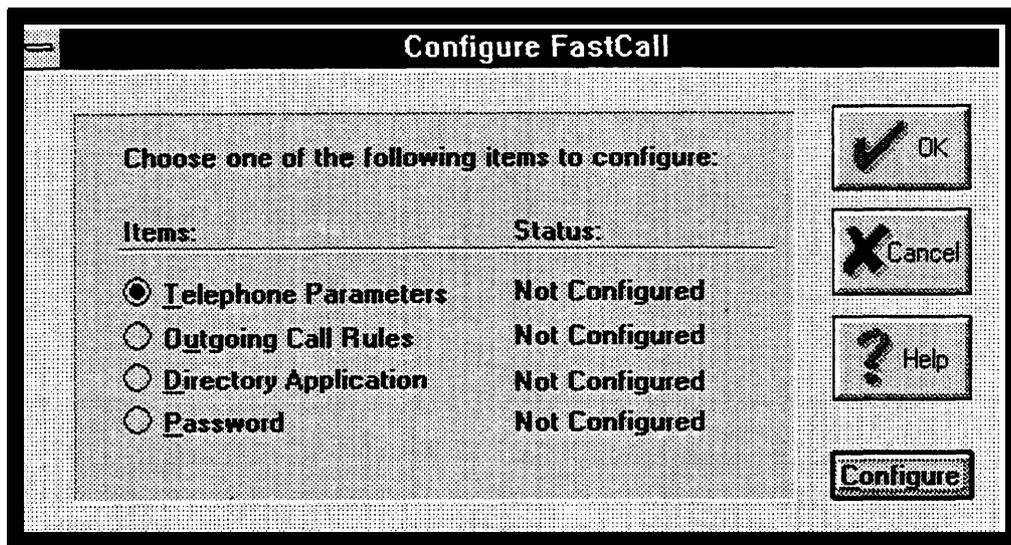
Figure 2-1. Configure FastCall Dialog Box

You can access the Configure FastCall dialog box to configure FastCall
initially in any of the following ways:

- Double-click on the FastCall Controller icon in the AT&T PassageWay
  program group.

- Double-click on the FastCall Administration icon in the AT&T
  PassageWay program group.

To configure FastCall, you must perform the following steps:

1. Configure the Telephone Parameters.

2. Configure the Outgoing Call Rules.

3. Select the Directory Application.

Before configuring FastCall, you must know the following information:

- your extension number

- the numbers of any other extensions that you can answer from your telephone

- the extension number to which incoming calls should be redirected or forwarded in the event that the original destination is busy or invalid. (This is the Master Redirect Number.) FastCall only uses the Master Redirect Number for calls that are redirected or forwarded via call rules you create.

- whether your company's telephone system uses caller input. If your company's telephone system uses caller input, you must know the device identification of the VDN which is being used for monitoring purposes.

    ➡ **NOTE:**
    Caller Input is only available in FastCall Professional.

- the name of the server where the Telephony Server software is installed

- your login ID for the Telephony Server

- your password for the Telephony Server

You can get this information from your System Administrator.

Configuring Telephone Parameters

To configure the telephone parameters, follow these steps:

1. In the Configure FastCall dialog box, select the Telephone Parameters option button.

2. Click the Configure button.

   The Telephone Parameters dialog box appears.
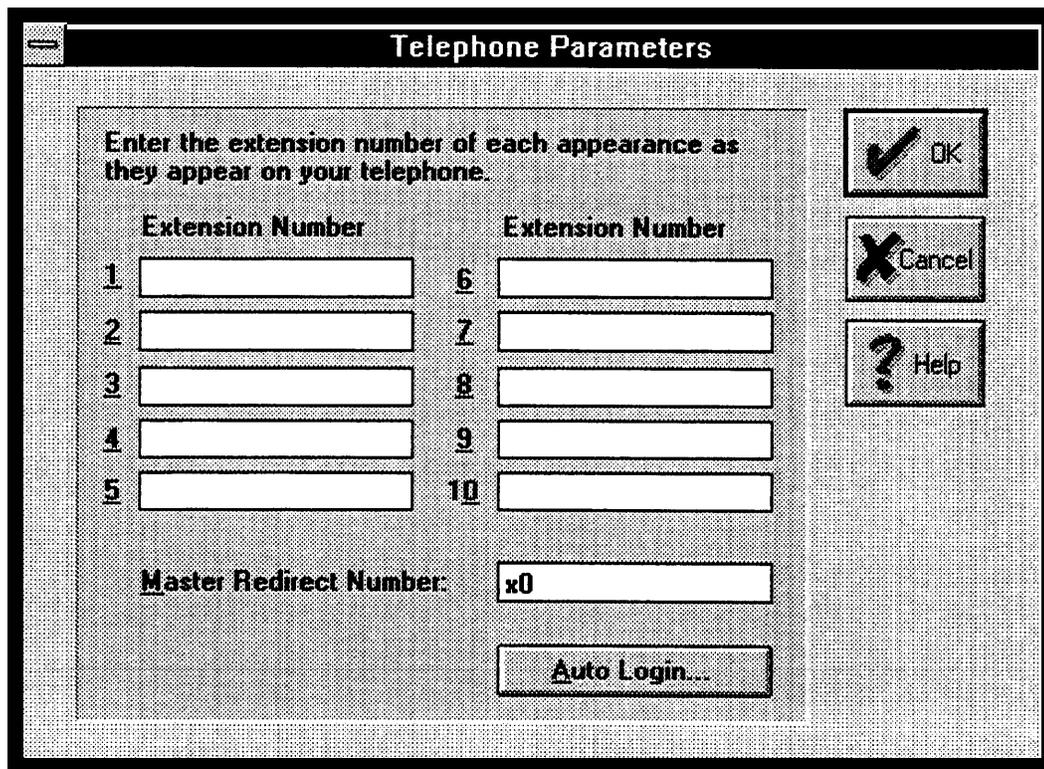
Figure 2-2. Telephone Parameters Dialog Box

≡> **NOTE:**
> With FastCall Professional, the Telephone Parameters dialog box also contains the Caller Input button.

3. Enter the extension number of each extension that appears on the first ten buttons of your telephone in the corresponding space. (Your telephone may have less than ten extensions administered.)

4. Enter the Master Redirect Number in the space provided.

5. If your company's telephone system does not use caller input, proceed to step 6.

   If your company's telephone system uses caller input, perform the following steps:

   ≡> **NOTE:**
   > Caller Input is only available in FastCall Professional.

   a. Click the Caller Input button.

      The Caller Input dialog box appears.
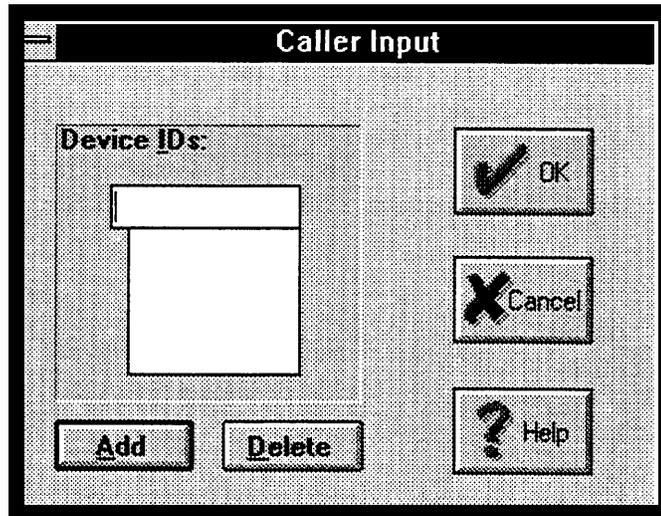
Figure 2-3. Caller Input Dialog Box

b. In the Device IDs field, enter the device identification of the VDN which is being used for monitoring purposes. (Consult your System Administrator.)

c. Click the Add button.

d. Click the OK button.

The Caller Input dialog box closes, and the Telephone Parameters dialog box reappears.

6. Click the Auto Login button.

The Telephony Server Auto Login dialog box appears.
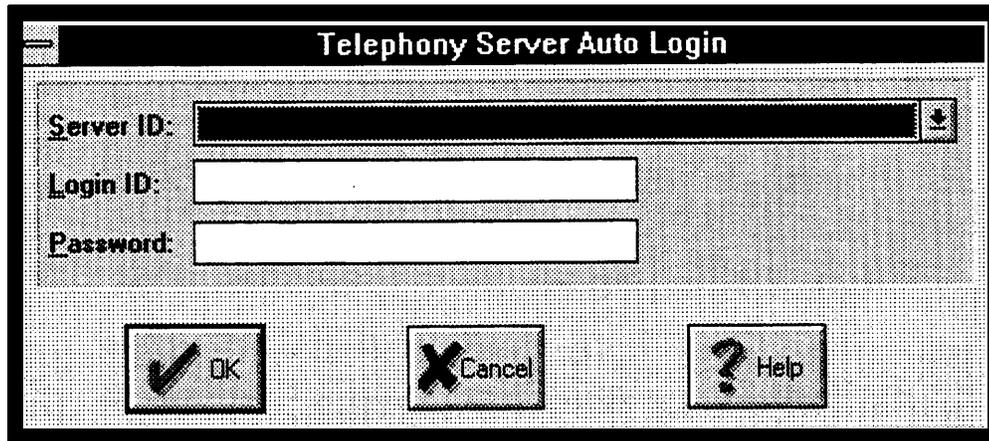
Figure 2-4. Telephony Server Auto Login Dialog Box

7. Click the drop-down button at the right of the Server ID field.

    A list of server IDs appears.

8. Click the server identification for the server where the Telephony Server software is installed.

9. In the Login ID field, enter your login ID for the Telephony Server.

10. In the Password field, enter your password.

11. Click the OK button.

    The Telephony Server Auto Login dialog box closes, and the Telephone Parameters dialog box reappears.

12. Click the OK button.

    The Telephone Parameters dialog box closes, and the Configure FastCall dialog box reappears.

Next, proceed to "Configuring Outgoing Call Rules."

Configuring Outgoing Call Rules

To configure the outgoing call rules, follow these steps:

1. In the Configure FastCall dialog box, select the Outgoing Call Rules option button.

2. Click the Configure button.

   The Outgoing Call Rules - North American Dialing dialog box appears.
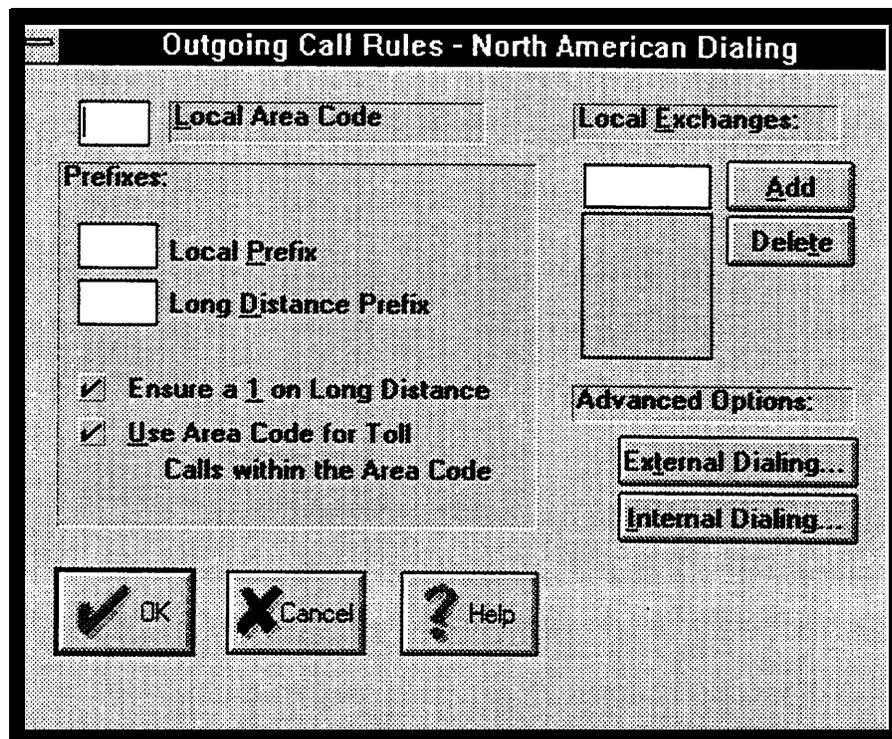
Figure 2-5. Outgoing Call Rules - North American Dialing Dialog Box

3. In the Local Area Code box, enter your local area code.

4. In the Local Prefix box, enter the prefix you must dial to obtain an outside line before dialing local calls.

5. In the Long Distance Prefix box, enter the prefix you must dial to obtain an outside line before dialing long distance calls.

6. If it is necessary to dial "1" for long distance calls, check the Ensure a 1 on Long Distance check box.

7. If it is necessary to dial your local area code for long distance calls within the area code, check the Use Area Code for Toll Calls within the Area Code check box.

8. In the Local Exchanges box, enter all exchanges where it is unnecessary to dial "1" before making a local call. Your System Administrator will provide you with a list of these exchanges or will indicate that you should use the constant ALL instead of individual exchanges. Each exchange is entered by following these steps:

   a. Enter an exchange.

   b. Select the Add button.

      The exchange is added to the list.

9. Click the External Dialing button.

   The Advanced External Dialing Options dialog box appears.
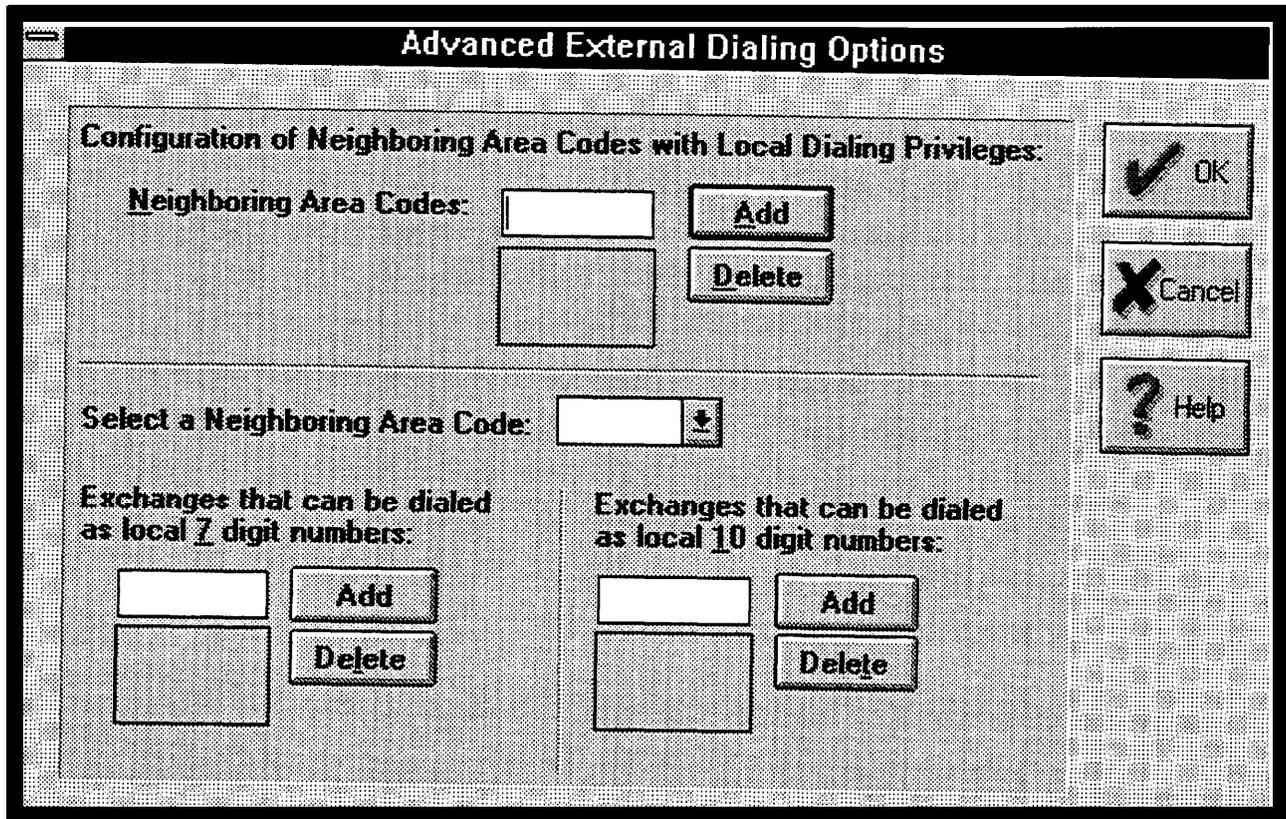
Figure 2-6. Advanced External Dialing Options Dialog Box

10. If there are any area codes where it is unnecessary to dial a "1" before the 10-digit telephone number, enter each area code in the Neighboring Area Codes box and click the Add button. You may enter a maximum of three area codes.

11. If there are any exchanges in neighboring area codes where you do not have to dial a "1" or the area code before the 7-digit telephone number, enter each exchange in the Exchanges that can be dialed as local 7-digit numbers box and click the Add button.

12. If there are any exchanges in neighboring area codes where it is unnecessary to dial a "1" before the area code and telephone number, enter each exchange in the Exchanges that can be dialed as local 10 digit numbers box and select the Add button.

13. When you are finished, select the OK button.

   The Advanced External Dialing Options dialog box closes.

14. Select the Internal Dialing button in the Outgoing Call Rules - North American Dialing dialog box.

   The Advanced Internal Dialing Options dialog box appears.
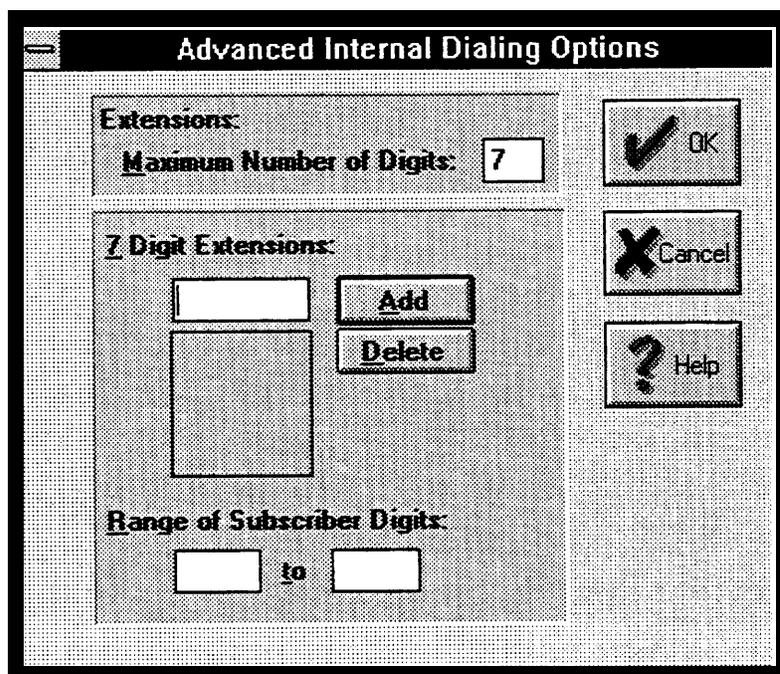
Figure 2-7. Advanced Internal Dialing Options Dialog Box

15. In the Maximum Number of Digits box, enter the maximum number of digits an internal extension in your company may have. FastCall supports extension lengths from 1 to 7 digits.

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16. If your company uses 7-digit internal extensions, perform the following steps:

    a. In the Exchanges box, enter each exchange that is used as part of 7-digit extension numbers and select the Add button.

    b. In the Range of Subscriber Digits boxes, enter the range for the last four digits of any 7-digit extensions that have been added to the Exchange list.

    If your company does not use 7-digit internal extensions, proceed to step 17.

17. When you are finished, select the OK button.

    The Advanced Internal Dialing Options dialog box closes.

18. Select the OK button.

    The Outgoing Call Rules - North American Dialing dialog box closes, and the Configure FastCall dialog box reappears.

Next, proceed to "Configuring Directory Application."

Configuring Directory Application

To configure the directory application, follow these steps:

1. In the Configure FastCall dialog box, select the Directory Application option button.

2. Click the Configure button.

   The Directory Application dialog box appears. The default directory application, AT&TCall, will be entered in the Description field and the path to AT&TCall will be entered in the Path Name field.
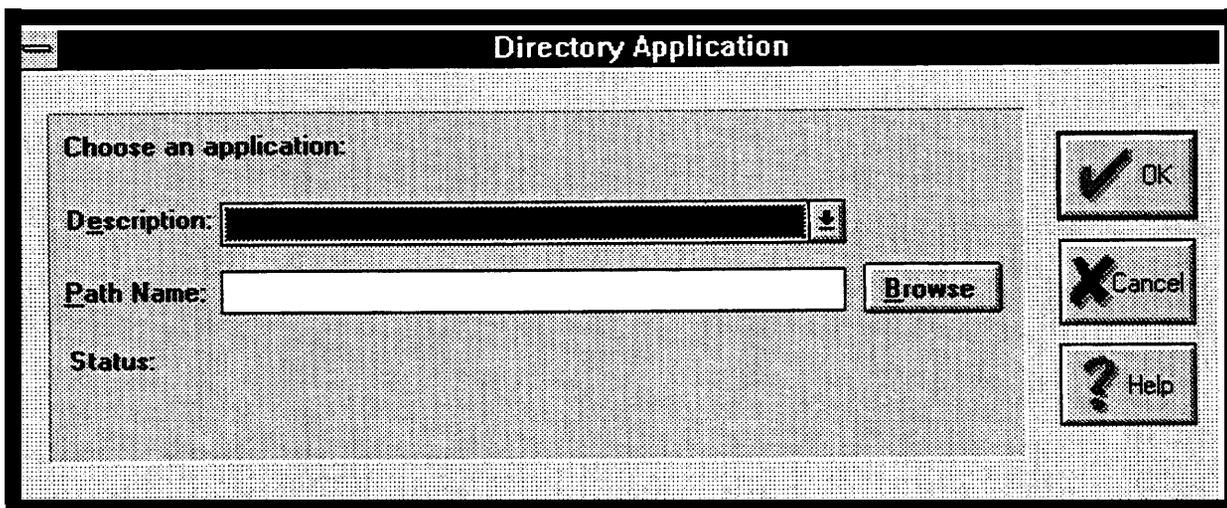
Figure 2-8. Directory Application Dialog Box

You cannot change the directory application until the application paths have been configured elsewhere in FastCall Administration. See Chapter 4 for instructions.

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3. To accept the default AT&TCall directory application, click the OK button.

   The Directory Application dialog box closes, and the Configure FastCall dialog box reappears.

4. Click the OK button in the Configure FastCall dialog box.

   The Configure FastCall dialog box closes.

5. Select Exit from the File menu to close the FastCall Administration program.

You can now use FastCall.

Other Configuration Settings

After you set the initial FastCall configuration parameters, you may wish to configure other options to customize FastCall to your way of working. Some of the options you can configure are:

- Incoming Call Rules: Tells FastCall how to route or process calls based on calling number, called number, caller input (available in FastCall Professional only), time of day, and other factors.

- Applications Paths: Tells FastCall where to find Windows applications for use as the directory application for outgoing calls or for "screen-pop" use for incoming calls.

- Applications Triggers: Tells FastCall how to use other Windows applications for directory or "screen-pop."

- Password: Prevents inadvertent alteration of your FastCall setup.

For call-handling groups such as inbound or outbound telemarketing, a FastCall configuration can be saved and then loaded so that it can be used by all members of the group with minimum effort.

> **NOTE:**
> Saving and loading configurations is not supported in FastCall Promotional.

Using Fast Call

3

Overview

This chapter provides the following information:

- how to start FastCall

- a description of the FastCall - Call Control Keys window

- a description of the call control functions within the FastCall - Call Control Keys window

- a description of the icons within the Tool bar of the FastCall - Call Control Keys window

- how to use the FastCall - Call Control Keys window for call control

- how to use the Conference Room feature

- how to exit FastCall

Starting FastCall

Before you can run FastCall, you must first access Windows and open the program group that contains FastCall. To start FastCall, double-click on the FastCall Controller icon. The FastCall - Telephony Services Login dialog box appears.

If you are running FastCall for the first time, perform the following steps:

1. Enter the name of the Telephony Server or select the name of the Telephony Server in the Server ID box.

2. Enter your login ID on the Telephony Server in the Login ID box.

3. Enter your password in the Password box, and then select the OK button.

   The FastCall - Call Control Keys icon and the FastCall - Master Control Program icon appear.

4. Double-click the FastCall - Call Control Keys icon.

   The FastCall - Call Control Keys window appears.

If you have run FastCall before, enter your password for the Telephony Server, and select the OK button. The FastCall - Call Control Keys icon and the FastCall - Master Control Program icon appear. Double-click the FastCall - Call Control Keys icon to open the FastCall - Call Control Keys window.

What is the FastCall - Call Control Keys Window?

The FastCall - Call Control Keys window provides user control of telephony functions through the use of function keys or icons on the FastCall - Call Control Keys window button bar. Call information on incoming and outgoing calls, and access to special functions through the FastCall - Call Control Keys tool bar are also provided. Figure 3-1 shows the FastCall - Call Control Keys window.
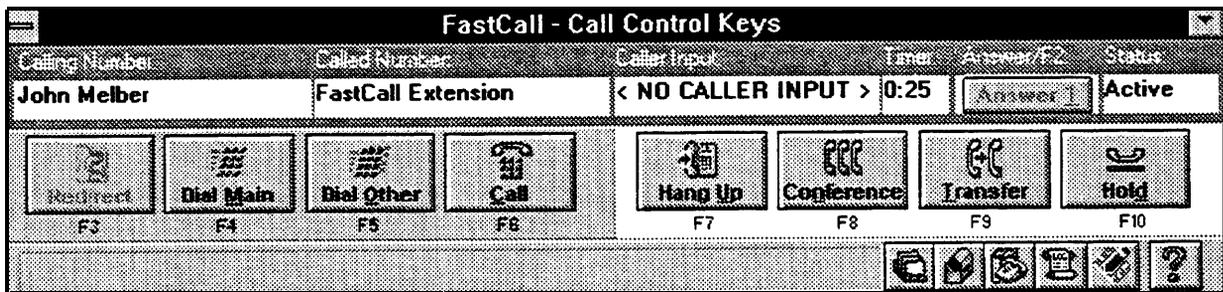
Figure 3-1. FastCall - Call Control Keys Window

The FastCall - Call Control Keys window consists of the following components:

- Call Information Panel
- Button Bar
- Display Information Panel
- Tool Bar
- System Menu Button
- Minimize Button

Figure 3-2 shows the elements of the FastCall - Call Control Keys window.
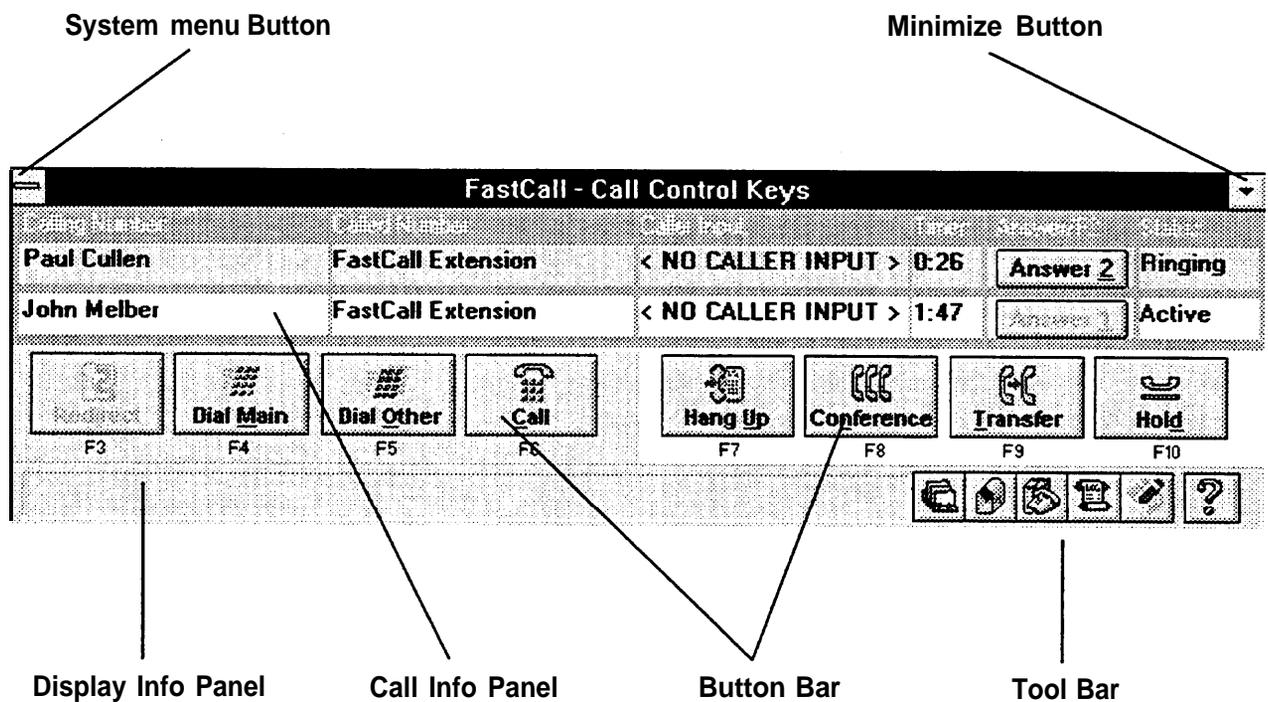
Figure 3-2. FastCall - Call Control Keys Window Elements

Call Information Panel

The Call Information Panel displays the status of all current calls. Each call appearance causes this window to grow upwards to a maximum of 10 appearances (Figure 3-3).
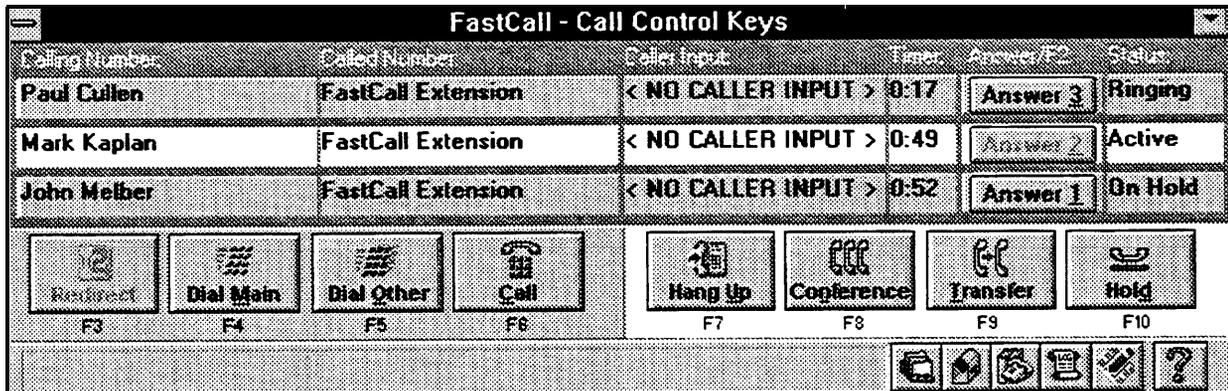
Figure 3-3. FastCall - Call Control Keys Window with Multiple Call Appearances

The following information is shown for every call appearance in the Call Information Panel:

- Calling number

  On incoming calls, this is the Caller ID label (as defined in the Calling Number List, see Chapter 4) or the calling number of the particular call. If incoming call information is not available, "No Calling Number" will be displayed in this field. Internal calls will show either the name from the Calling Number List or the actual extension number of the calling party. On outgoing calls, this shows your extension or name.

■ Called Number

On incoming calls, this is the Caller ID label (as defined in the FastCall Called Number List, see Chapter 4) or the phone number dialed by the incoming caller. If the Caller ID label is not found or the Called Number is unknown, "No Called Number" will be displayed. Internal calls will show the Caller ID label or the extension number dialed. On outgoing calls, this shows either the name or the telephone number of the person you are calling.

■ Caller Input

On incoming calls, this is the information entered via touch tone (DTMF). For Caller Input to be utilized by FastCall, your AT&T telephone system must be equipped with the Call Prompting feature. The Caller Input field is only displayed with the Professional version of FastCall. The Promotional and Runtime versions of this product do not have the Caller Input feature. The FastCall - Call Control Keys window shown in Figure 3-4 shows the FastCall Promotional version without the Caller Input field.
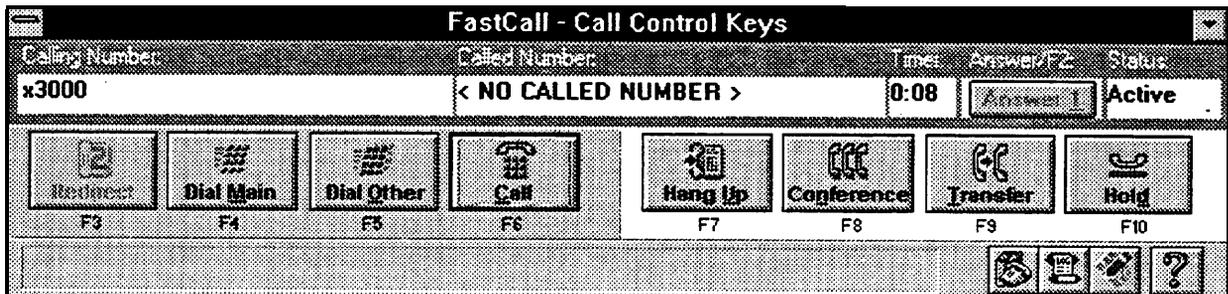
Figure 3-4. FastCall - Call Control Keys Window for FastCall Promotional

■ Timer

Timer shows the connect time of the call from the ringing state until the call is disconnected.

■ Answer/F2

Answer/F2 allows you to answer ringing appearances, or calls in the
Hold state. Calls may be answered by using the mouse to click on the
desired appearance, by pressing F2 and the call appearance number
(if there is more than one), or by pressing ALT and the call appearance
number. Once the call is answered, the Answer button for the
answered appearance is disabled. See Figure 3-5 for details.

■ Status

Status shows the state of each call appearance. The three states are
Active, On Hold, or Ringing. Only one call may be in the Active state.
The color of the Active appearance will be white, while a non-active
appearance (for example, On Hold or Ringing) will be gray. As calls
come in, the most recent call appears at the top of the Call Information
Panel, while the oldest appears at the bottom. See Figure 3-5 for
details.

Figure 3-5. FastCall Call Status

Button Bar

The Button bar consists of eight buttons as shown in Figure 3-6. The functions shown on the buttons may be invoked by pressing the function key indicated beneath each button, by clicking on the desired button with the mouse, or by entering the accelerator for the button (for example, ALT + i for Redirect).
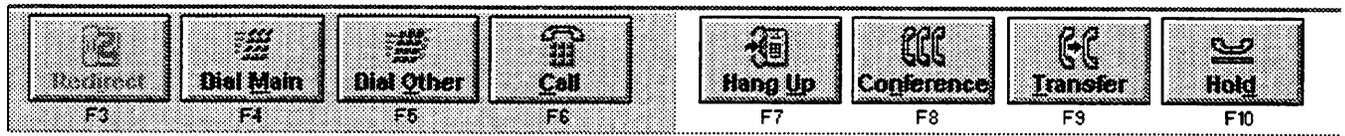
Figure 3-6. Button Bar

How to Answer Calls

There are several ways to answer incoming calls using the FastCall - Call Control Keys window:

■ Using the mouse, click on the Answer button for the desired call appearance.

■ Press the ALT key and the line number that corresponds to the desired call appearance. The line appearance is displayed in the Call Information Panel on the Answer button.

■ Press the Answer function key. If there is only one call appearance ringing or on hold, that call is answered. If there is more than one incoming call, the Answer - Select Call dialog box is displayed (Figure 3-7).
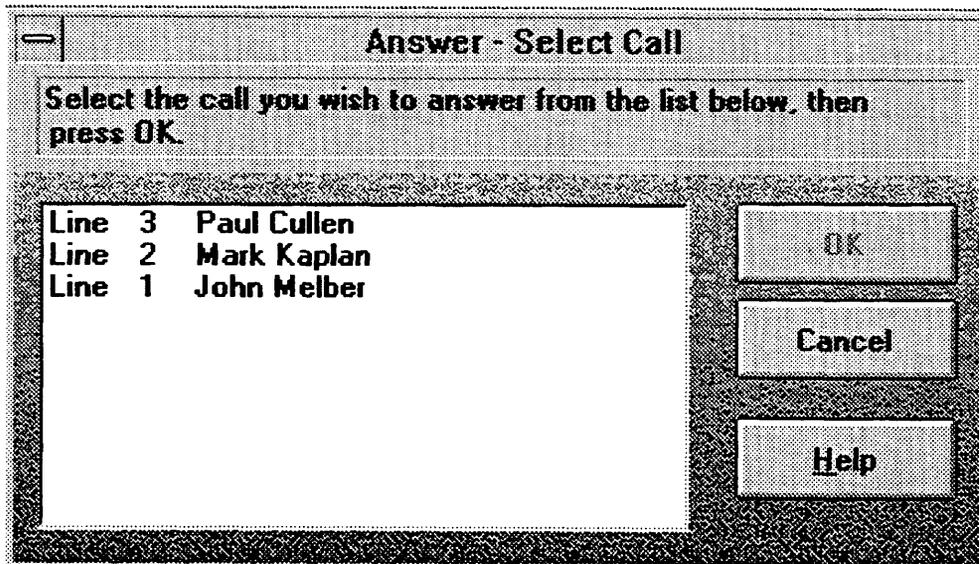
Figure 3-7. Answer - Select Call Dialog Box

Elements of the Answer - Select Call Dialog Box

■ Information Panel - Displays information pertinent to the Answer operation.

■ Selection List - List of calls to answer.

■ Cancel Button - Cancels the Answer - Select Call option.

■ Help Button - Invokes the Help option for the Answer operation.

■ System Menu Button - Opens the Windows standard menu, and allows the Move and Close options. Move permits moving the Answer - Select Call dialog box to another position on the screen, while Close cancels the Answer operation.

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The order of calls in the Answer - Select Call dialog box matches the order in the FastCall - Call Control Keys window. The call on the top of the list is the most recent call, while the call on the bottom is the oldest. You select the call to be answered by highlighting it and pressing the OK button. Selecting the Cancel button closes the Answer - Select Call dialog box and returns to the FastCall - Call Control Keys window.

If you attempt to answer a call while another call is active, the active call is put on hold automatically.

F3 - **Redirect**

Press F3 - Redirect to forward a ringing call to another party. Redirect is enabled only when there is a ringing call appearance, and only one call may be redirected at a time. When there is more than one ringing call appearance, FastCall prompts you to select which call should be redirected. Pressing the F3 - Redirect button causes the Redirect dialog box to appear as shown in Figure 3-8.
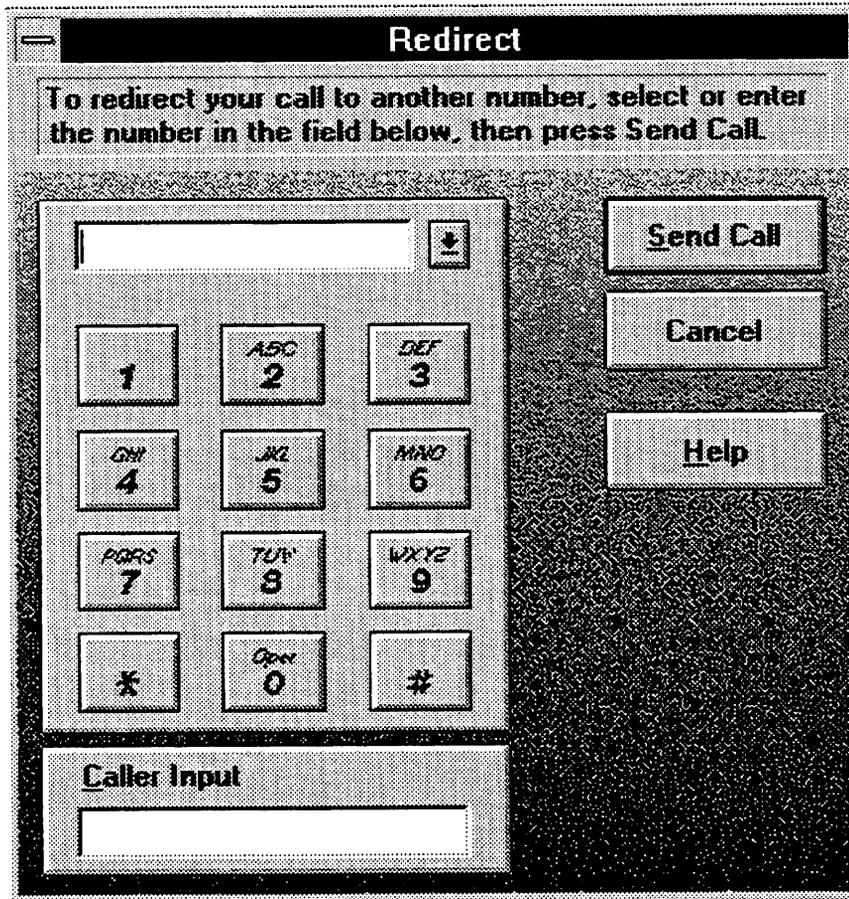
Figure 3-8. Redirect Dialog Box

Redirect Dialog Box Elements

- Information Panel - Contains directions for the Redirect operation in process.

- Dialpad - Enables you to enter numbers for the Redirect operation. You may enter numbers by using the Dialpad buttons, by using the PC keyboard, or by selecting entries from the Caller ID list. Entries in this list are from the Call Forward Destination lists as configured in FastCall Administration.

- Dialpad Text Field - Displays the number entered from the Dialpad or Caller ID list. The default entry in this list is the first number in the Caller ID list.

- Selection Button - Allows you to select different entries in the Caller ID List.

- Send Call Button - Dials the number selected in the Dialpad text field.

- Cancel Button - Cancels the Redirect operation and reconnects to the original call.

- Help Button - Displays help information for the Redirect process.

- System Menu Button - Opens the Windows standard menu, and allows the Move and Close options. Move permits moving the Redirect dialog box to another position on the screen, while Close cancels the Redirect operation, and reconnects to the original call.

- Caller Input Field - Displays the caller input associated with the incoming call. When the call is redirected to another extension monitored by FastCall, the caller input will go with the call and will be displayed in the Caller Input field of the FastCall - Call Control Keys window.

In cases where caller input is not used, and this field is blank, you may enter up to 16 characters of digits or text that will appear in the Caller Input field of the destination extension if it is monitored by FastCall.

➡ NOTE:

Caller Input is available with FastCall Professional only.

How to Redirect a Call

Press the F3 - Redirect button when there is a ringing call appearance that you want to redirect. If there is only one ringing appearance, the Redirect dialog box appears. If there is more than one ringing appearance, the Redirect - Select Call dialog box appears (Figure 3-9).
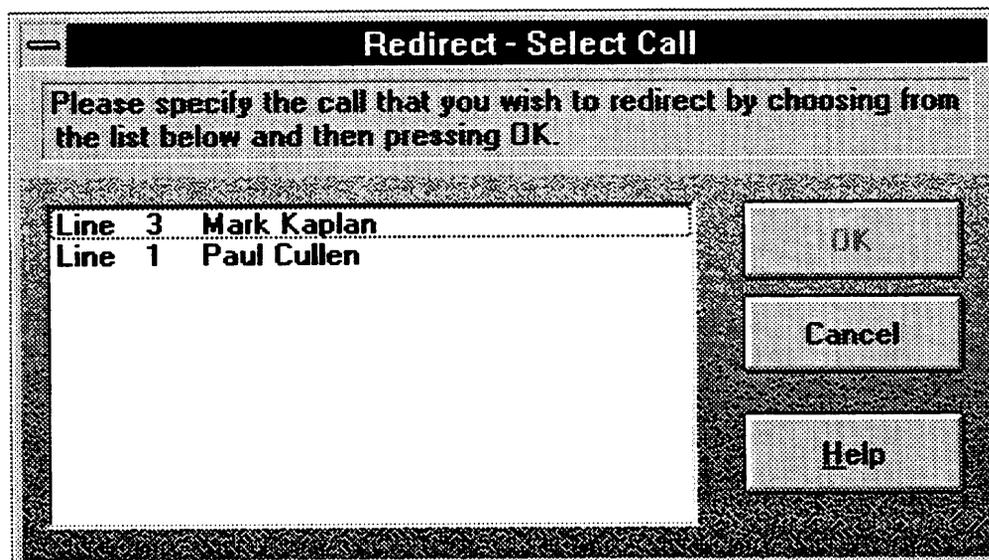
Figure 3-9. Redirect - Select Call Dialog Box

Options for this dialog box operate in the same manner as the Redirect dialog box, which appears when there is only one ringing appearance. The only difference is the Selection List when all appearances that can be redirected are shown. Select the appearance to be redirected and press the OK button. The OK button is not enabled until a selection is made. Canceling the process at this point will return to the FastCall - Call Control Keys window.

After you select the call to be redirected, the Redirect List dialog box appears. Select the number you want to redirect the call to and press the Send Call button. After you press the Send Call button, FastCall dials the selected redirect number. Refer to Figure 3-10.
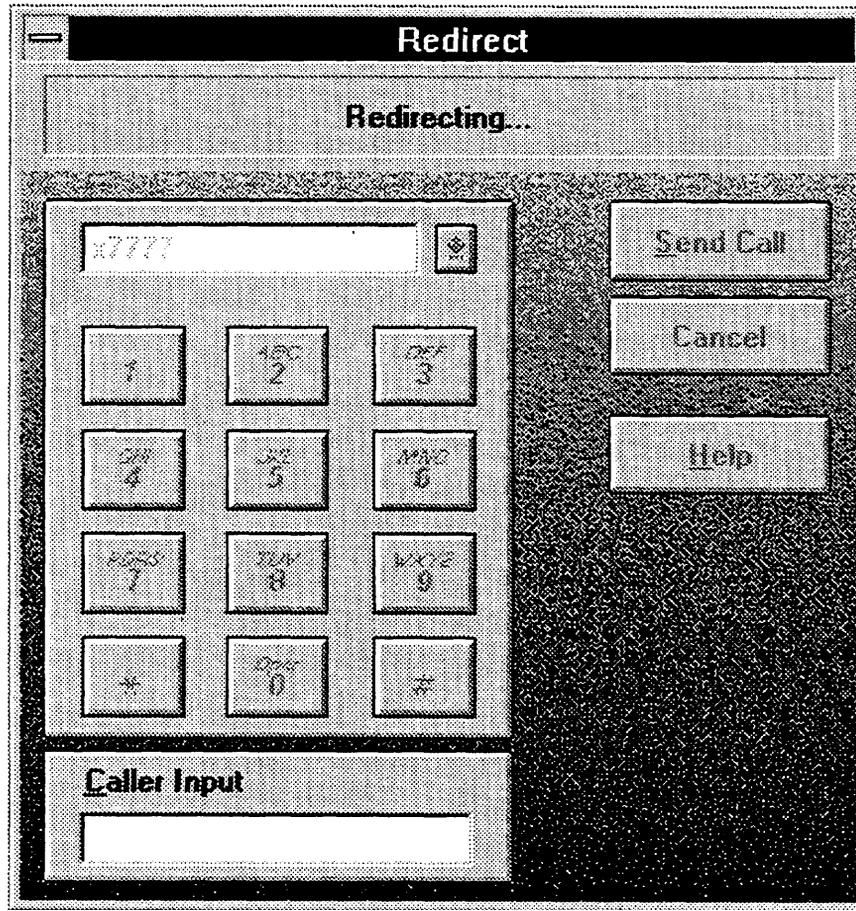
Figure 3-10. Redirecting Call

If this consultation call is successful, the Redirect dialog box closes and the original call is connected to the dialed number. Exceptions are handled as follows:

- If there are no lines available for a consultation call, the redirect operation fails, and the call being redirected is placed on hold. FastCall closes the Redirect dialog box.

- If you call an internal line that is busy, the Redirect fails, and the Redirect dialog box stays open. You may then try the Redirect operation again, or close the box by pressing the Cancel button.

- If at any point during the Redirect operation the original call is terminated, the Redirect dialog box closes, and the FastCall - Call Control Keys window appears.

F4 - **Dial Main**

Press the F4 - Dial Main button to dial the main number as defined by the outgoing call trigger for the application you selected. With FastCall Promotional, the number dialed will be from the application you associated with FastCall during installation. You activate this application by pressing the Directory Application icon on the Tool bar in the FastCall - Call Control Keys window. If your version of FastCall has the ability to record and create outgoing triggers from other windows applications, refer to Chapter 5 for details on how to set up FastCall's Outgoing Call Triggers.

If the application is not open or has not been configured for use with FastCall, the following message will be displayed in the Display Information Panel: *"Could not find application from which to dial."* If the number is not copied to the Windows clipboard, the following message will be displayed in the Display Information Panel: *"No dialable number found in the clipboard."*

➡️ **NOTE:**

You can enter touch-tone digits from your telephone dialpad during a call using FastCall. If your company has a DEFINITY® Communications System Generic 3 Version 4 (G3V4), you can also enter touch-tone digits from your PC keyboard during a call using FastCall. You cannot enter touch-tone digits from any of the FastCall dialog boxes during a call.

F5 - **Dial Other**

Press the F5 - Dial Other button to dial the alternate number as defined by the outgoing call trigger for the application you selected. With FastCall Promotional, the number dialed will be from the application associated with FastCall during installation. You activate this application by pressing the Directory Application icon on the Tool bar in the FastCall - Call Control Keys window. If your version of FastCall has the ability to program and create outgoing triggers from other windows applications, refer to Chapter 5 for details on how to set up FastCall's Outgoing Call Triggers.

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If the application is not open or has not been configured for use with FastCall, the following message will be displayed in the Display Information Panel, *"Could not find application from which to dial."* If the number is not copied to the Windows clipboard, the following message will be displayed in the Display Information Panel, *"No dialable number found in the clipboard."*

➡ **NOTE:**
> You can enter touch-tone digits from your telephone dialpad during a call using FastCall. If your company has a DEFINITY Communications System Generic 3 Version 4 (G3V4), you can also enter touch-tone digits from your PC keyboard during a call using FastCall. You cannot enter touch-tone digits from any of the FastCall dialog boxes during a call.

F6 - Call

The F6 - Call button initiates several different types of calls from the FastCall - Call Control Keys window. You can make the following types of calls with the F6 - Call button:

- **Directory:** Allows you to make calls from the dialpad or by selecting an entry from the FastCall internal name/number list. This list is built from an alphabetized combination of the FastCall Calling Number and Call Forward Destinations lists as configured in FastCall Administration. See Chapter 4 for further information.

- **Redial:** Allows you to dial from a list of the last unique 100 dialed numbers and received incoming numbers.

- **Special Codes:** Allows you to make special calls, such as international or feature access codes as configured in the FastCall Administration Special Dialing codes list.

Pressing the F6 - Call button displays the Call dialog box (Figure 3-11).
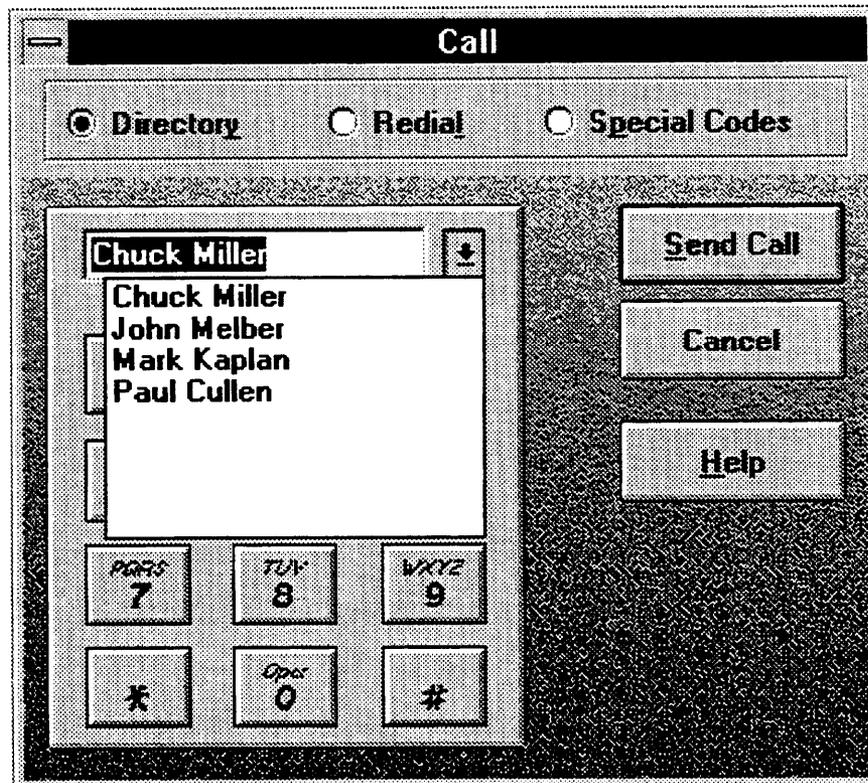
Figure 3-11. Call Dialog Box

⇛ **NOTE:**

You can enter touch-tone digits from your telephone dialpad during a call using FastCall. If your company has a DEFINITY Communications System Generic 3 Version 4 (G3V4), you can also enter touch-tone digits from your PC keyboard during a call using FastCall. You cannot enter touch-tone digits from any of the FastCall dialog boxes during a call.

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How to Use F6 - Call

Press the F6 - Call button to pop the Call dialog box (Figure 3-12). The first time the Call box is opened, the Directory button and the first entry in the Directory list are selected as defaults. You may press the Selection button to select another entry in the Directory list, type a number using your PC keyboard, or use the dialpad to enter another number.
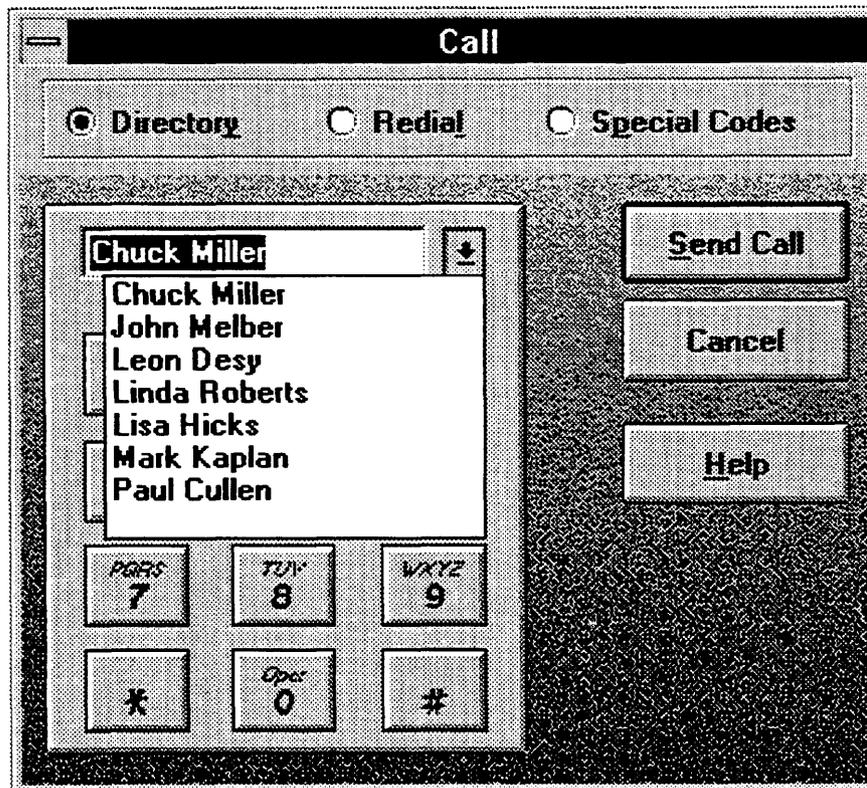
Figure 3-12. Call Directory List

If you want to use the Redial or Special Codes list, select that option from the Call dialog box by pressing the button associated with that option. The Directory list associated with the selected option will appear.

After making the list and number selections, pressing the Send Call button will cause FastCall to attempt to dial the selected number. Once the call is successful, the Call dialog box is closed, and the FastCall - Call Control Keys window returns. Exceptions are handled as follows:

■ If you have no available lines or calls to a number that is busy, the Call operation fails to complete, and the Call dialog box is closed.

■ If there is an active call and the Send Call button is pressed, the Placing Call dialog box appears (Figure 3-13). Pressing the OK button will drop the active call and dial the selected number. Pressing the Cancel button will close the Call dialog box and return to the active appearance in the FastCall - Call Control Keys window.
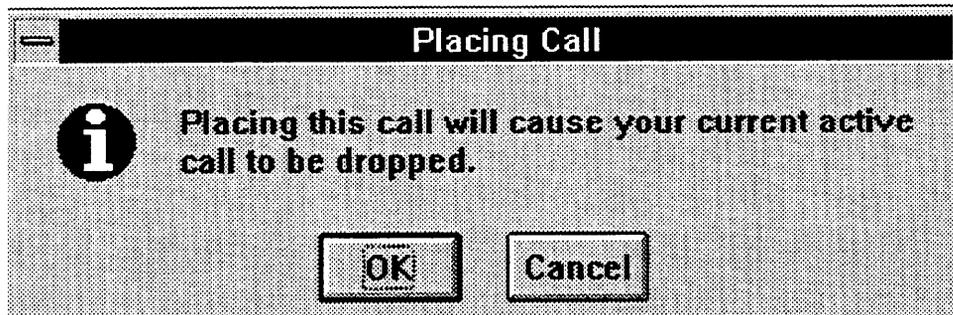
Figure 3-13. Placing Call Dialog Box

━➤ **NOTE:**
This dialog box can be disabled from the FastCall Administration program via the Preferences option. This can be especially useful in high-volume outgoing call environments such as collections or telemarketing.

F7 - **Hang Up**

Press the F7 - Hang Up button to disconnect the currently active call appearance. This button is enabled only when there are active calls. When no calls are active, the FastCall - Call Control Keys window is automatically minimized.

F8 - **Conference**

The F8 - Conference button is enabled when an active call exists and a conference is not already in session. One conference session with a maximum of six members is supported. The F8 - Conference button is pressed to invoke a three-way conference. Once the conference is established, the F8 - Conference button is disabled, and changes to the conference are made through use of the Conference Room feature. The Conference Room feature is described later in this chapter.

Pressing the F8 - Conference button with an active call appearance displays the Conference - Add dialog box (Figure 3-14).
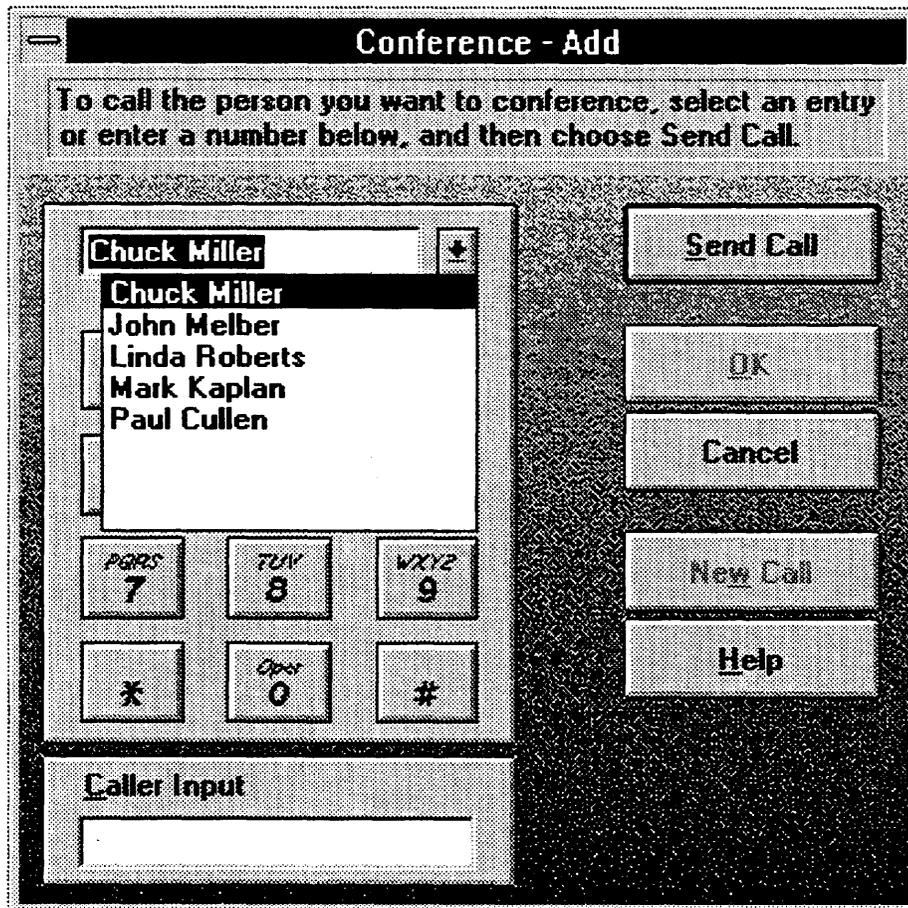
Figure 3-14. Conference - Add Dialog Box

Conference - Add Dialog Box Elements

- Information Panel - Displays information pertinent to the Conference operation.

- Dialpad - Allows for number entry for the Conference - Add function. Numbers may be entered by using the Dialpad buttons, by using the PC keyboard, or by selecting entries from the Caller ID list. Entries in this list are a combination of the FastCall Calling Number and Call Forward Destination lists as configured in FastCall Administration.

- Dialpad Text Field - Displays the number entered from the Dialpad or Selection button. The default entry in this list is the first entry in the Caller ID list.

- Selection Button - Allows you to select different entries in the Caller ID List.

- Send Call Button - Dials the number selected in the Dialpad text field.

- OK Button - Completes the Conference - Add operation.

- Cancel Button - Cancels the Conference - Add operation and reconnects to the original call.

- New Call button - Drops the consultation call and reconnects to the original call.

- Help Button - Displays help information for the Call operation.

- System Menu Button - Opens the Windows standard menu, and allows the Move and Close options. Move permits moving the Conference - Add dialog box to another position on the screen, while Close cancels the Conference operation.

■ Caller Input Field - Displays the caller input associated with the incoming call. When the call is conference to another extension monitored by FastCall, the caller input will go with the call and will be displayed in the Caller Input field of the FastCall - Call Control Keys window.

In cases where caller input is not used, and this field is blank, you may enter up to 16 characters of digits or text that will appear in the Caller Input field of the destination extension if it is monitored by FastCall.

⇛ NOTE:
Caller Input is available with FastCall Professional only.

How to Conference a Call

After pressing F8 - Conference with a call active, the Conference - Add dialog box appears (Figure 3-15).
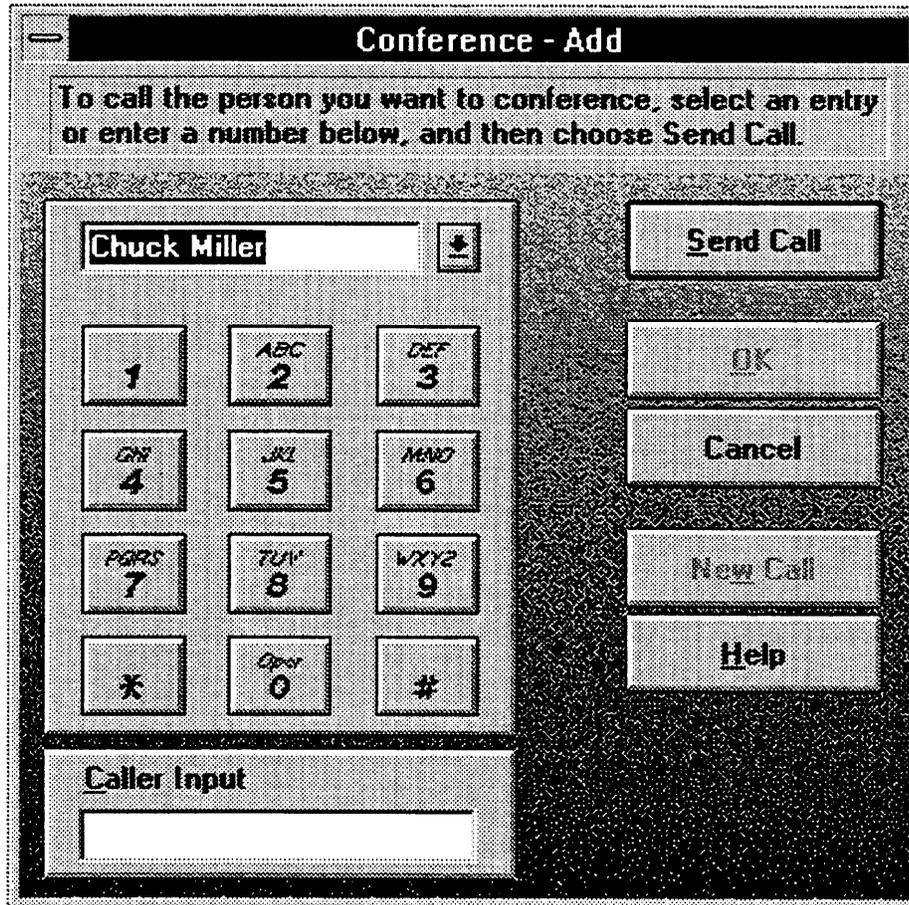
Figure 3-15. Conference - Add Dialog Box

You may select a number from the dialing list shown when the selection button is pressed, or you may enter a number from the dialpad. Once the number is selected, you may press the Send Call button. After the Send Call button is pressed, the Conference Information Panel will display, *"Call in progress xxx-xxxx"* where *"xxx-xxxx* is the number selected to be dialed. After this message is displayed, the panel is updated to say, *"Press OK to complete the Conference-Acid."* See Figure 3-16.
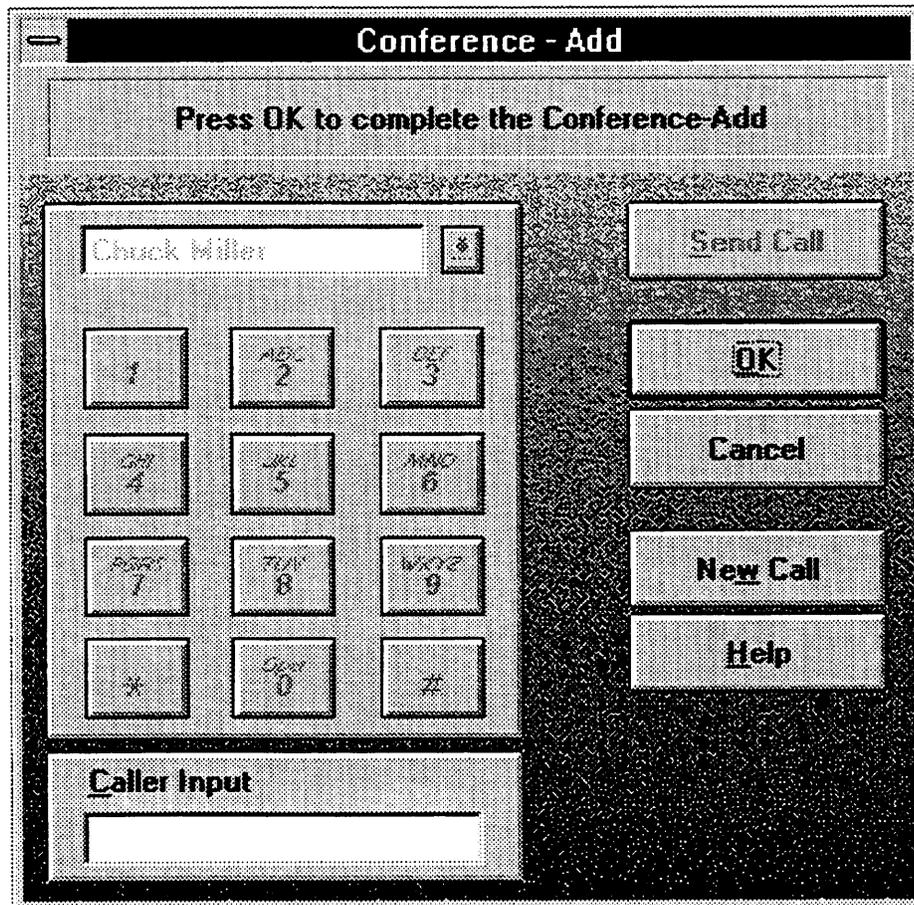
Figure 3-16. Conference - Add Dialog Box

Press the OK button to complete the conference, and the Conference - Add box closes. The FastCall - Call Control Keys window reappears with the active appearance and the *"Conference Complete!"* message showing in the Called Number field. At this time, the Conference Room icon appears, and the Conference Room feature is activated. The Conference Room feature is described later in this chapter.

The following exceptions apply to the F8 - Conference button:

- If you have no available lines, the operation fails to complete, the original call is put on hold, and the Conference - Add dialog box closes.

- If you attempt to connect to an internal busy or invalid number, the operation fails and the Conference - Add dialog box remains open. You may cancel the operation or attempt to re-establish the conference.

The following special cases apply to the Conference operation:

- When the New Call button is pressed, the Conference New Call dialog box appears (Figure 3-17). The New Call function, once confirmed, drops the consultation call. Pressing the Yes button confirms this sequence, causing the consultation call to disconnect, the dialog box to close, and the Conference - Add dialog box to reappear. Pressing the No button cancels the New Call operation, the consultation call is unaffected, and you are returned to the Conference - Add dialog box.
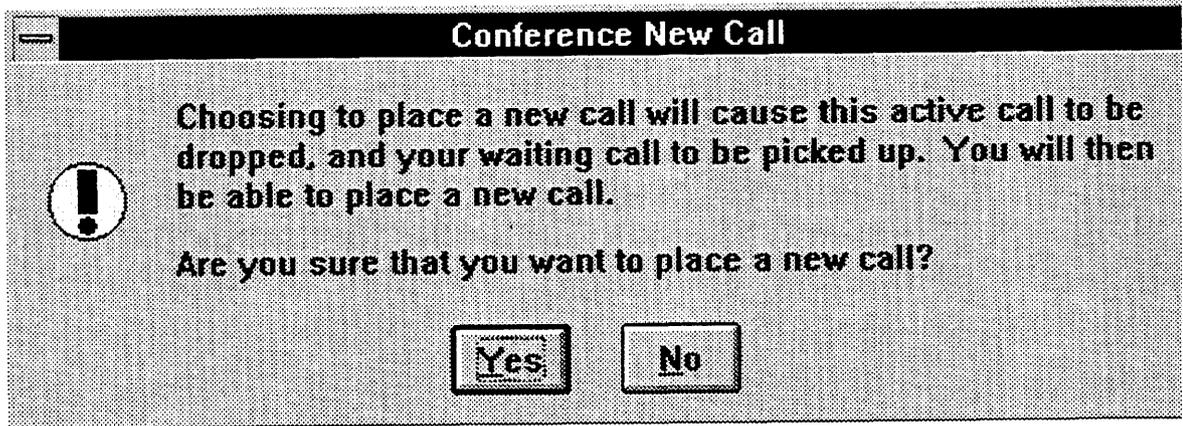
Figure 3-17. Conference New Call Dialog Box

Pressing the Cancel button when a consultation call does not exist closes the Conference - Add dialog box. If the call does exist, pressing Cancel displays the Cancel Conference - Add dialog box (Figure 3-18).
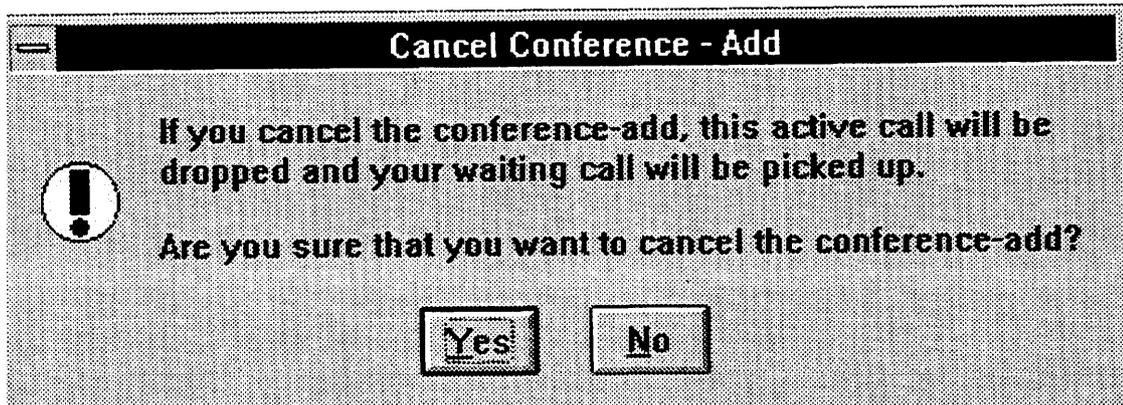
Figure 3-18. Cancel Conference - Add Dialog Box

F9 - Transfer

The F9 - Transfer button is enabled only when there is an active call. Pressing the Transfer button displays the Transfer dialog box (Figure 3-19). With FastCall Professional, caller input associated with a call will appear in the Caller Input field at the bottom of the Transfer dialog box. Caller input will follow the call to the destination extension if the destination is monitored by FastCall. You also have the option entering up to 16 characters of digits or text, and transferring that information to another monitored FastCall extension. Information transferred in the Caller Input field will show up in the Caller Input field of the FastCall - Call Control Keys window.

⇒ NOTE:
Caller Input is available with FastCall Professional only.
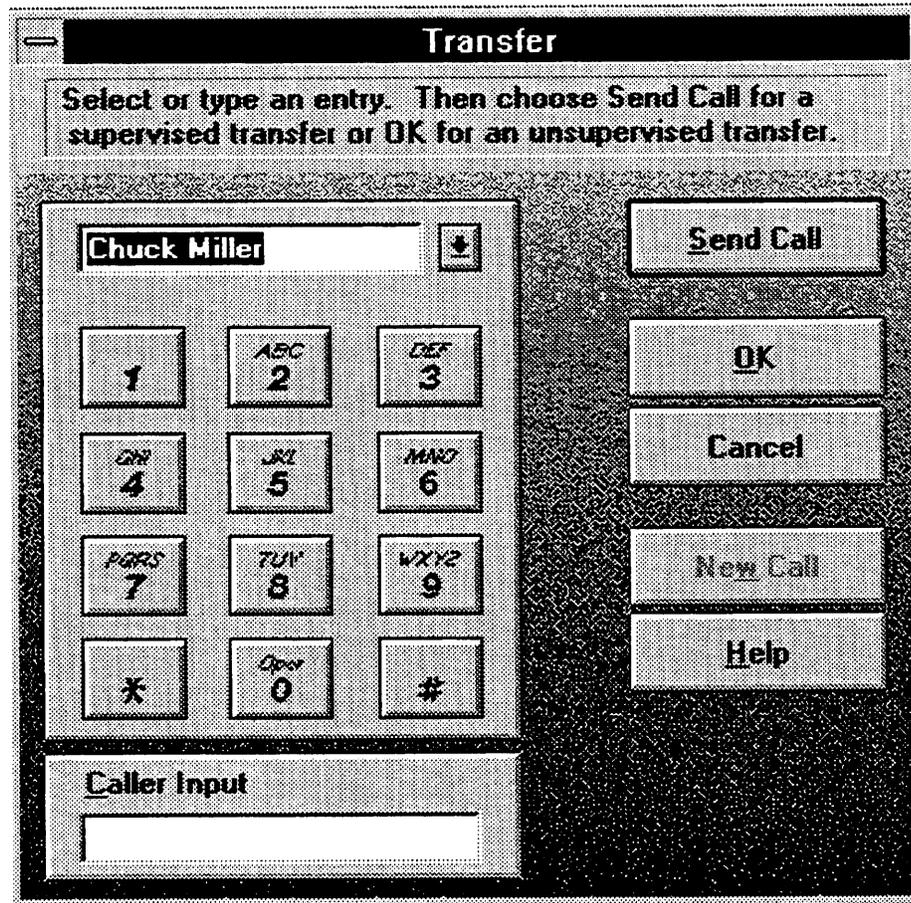
Figure 3-19. Transfer Dialog Box

How to Transfer a Call

With a call appearance active, press the F9 - Transfer button to display the Transfer dialog box. When entering this box, all options are enabled except the New Call button. See Figure 3-20.
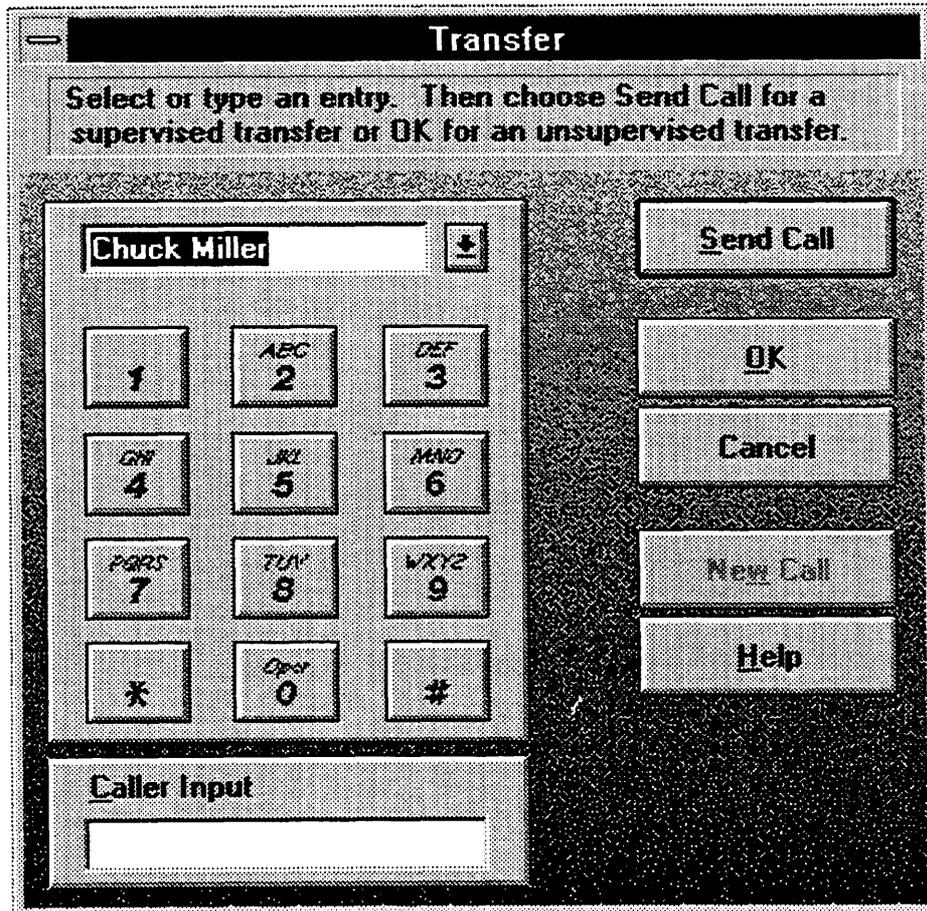
Figure 3-20. Transfer Dialog Box

Use the Selection button to display the transfer dialing list, which is a combination of the FastCall Calling Number list and Call Forward Destinations list. You may select an entry from this list or use the dialpad to enter another number. When the number desired shows in the Dialpad text field, press the Send Call button. The Send Call button is disabled, and the New Call button is enabled. The Transfer, Call in progress box will appear (Figure 3-21).
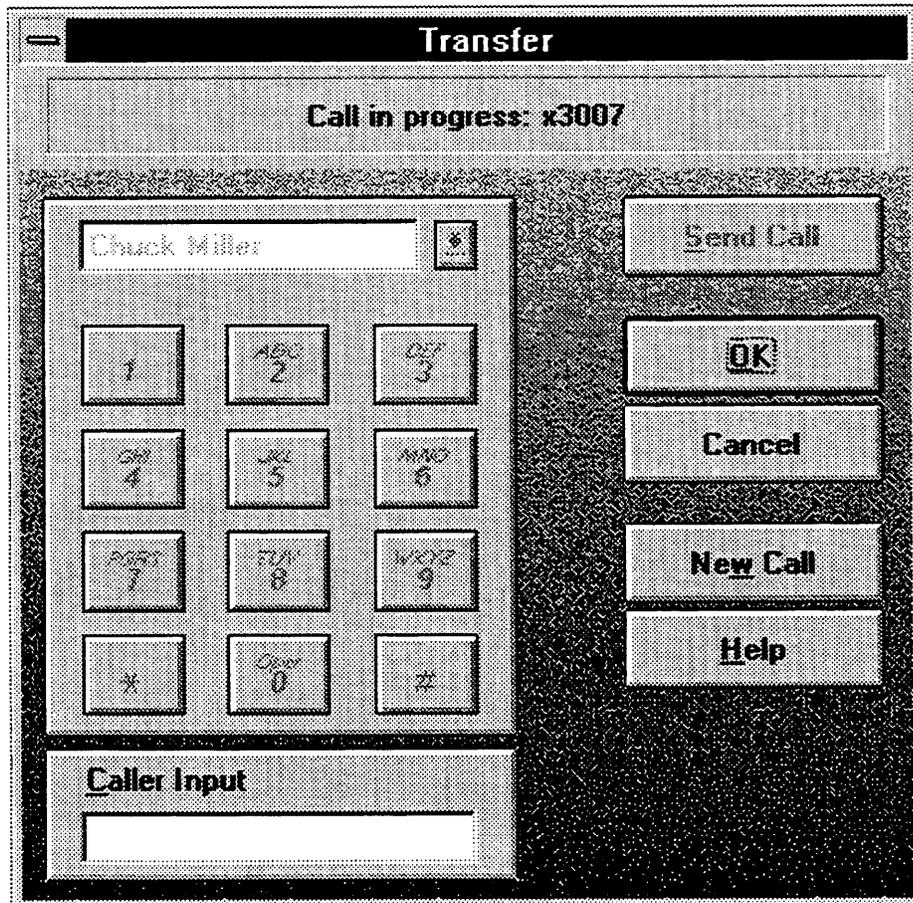
Figure 3-21. Transfer [Call in Progress]

Once the Send Call button is pressed, you must press the OK button to complete the transfer. The Transfer Information Panel will show the message, *"Press OK to complete the Transfer."* As a shortcut, you may press the OK button instead of pressing both the Send Call button and the OK button. In either case, after the OK button is pressed, the Transferring dialog box appears (Figure 3-22).
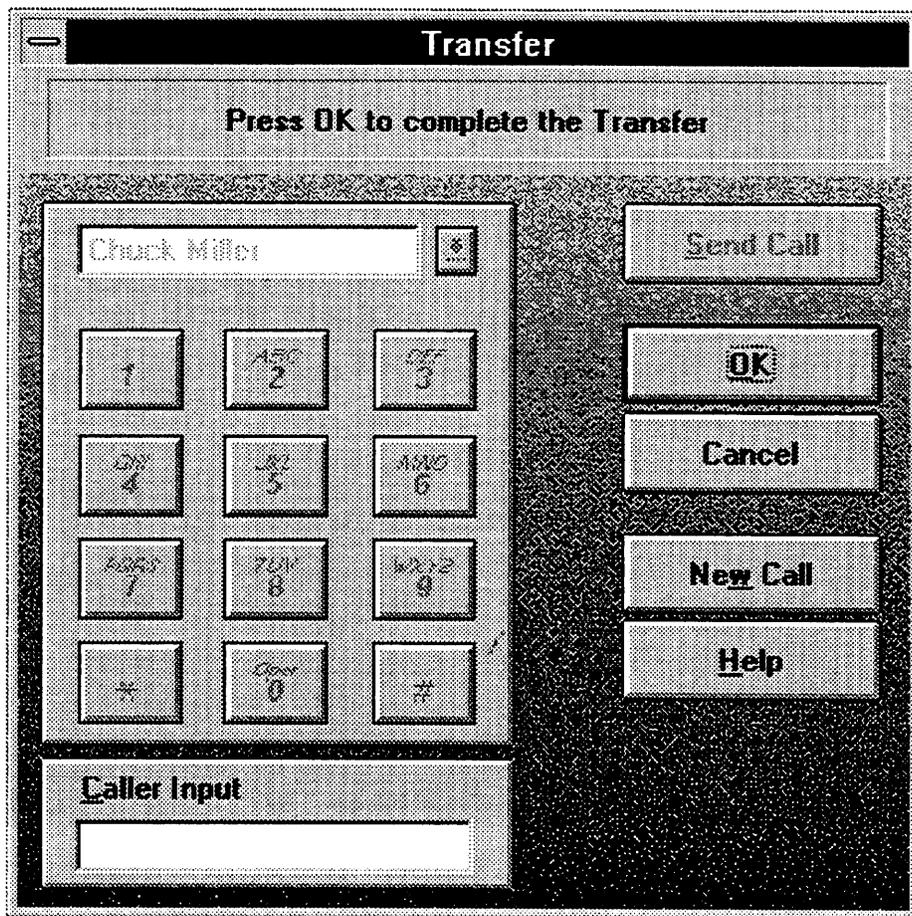
Figure 3-22. Transferring Dialog Box

When the Transfer is complete, the Transferring dialog box closes. The following exceptions apply:

■ If you have no available lines, the Transfer fails to complete, and the call being transferred is put on hold. The Transfer dialog box is closed, and the FastCall - Call Control Keys window appears.

■ If you transfer to a busy or invalid internal number, the Transfer fails to complete. The Transfer dialog box remains open, and you can cancel the operation by pressing Cancel or try to complete another Transfer operation.

The following special cases apply to the Transfer operation:

■ When the New Call button is pressed, the Transfer New Call dialog box appears (Figure 3-23). The New Call function, once confirmed, drops the consultation call. Pressing the Yes button confirms this sequence, causing the consultation call to disconnect, the dialog box to close, and the Transfer dialog box to reappear. Pressing the No button cancels the New Call operation, the consultation call is unaffected, and you are returned to the Transfer dialog box.
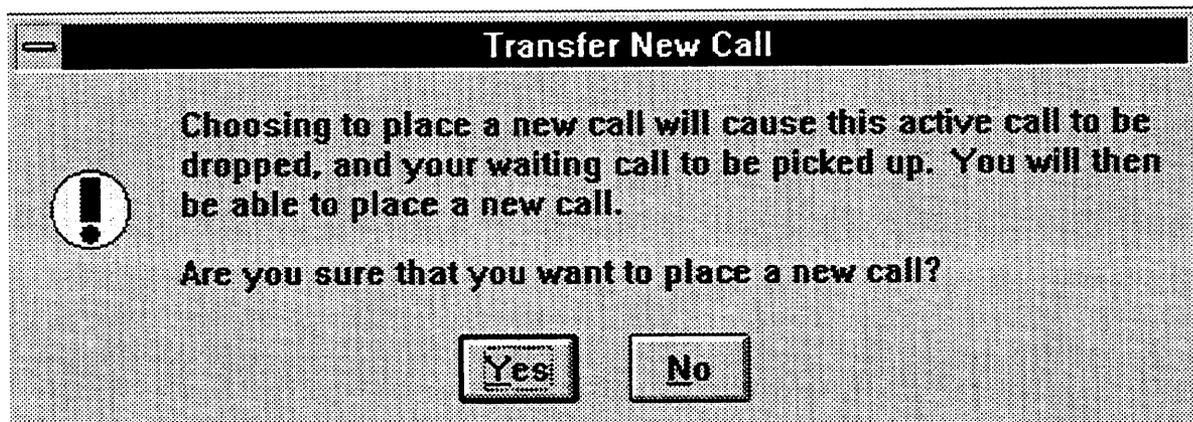
Figure 3-23. New Call Message Box

Pressing the Cancel button when a consultation call does not exist closes the Transfer dialog box. If the call does exist, pressing the Cancel button displays the Cancel Transfer dialog box (Figure 3-24).
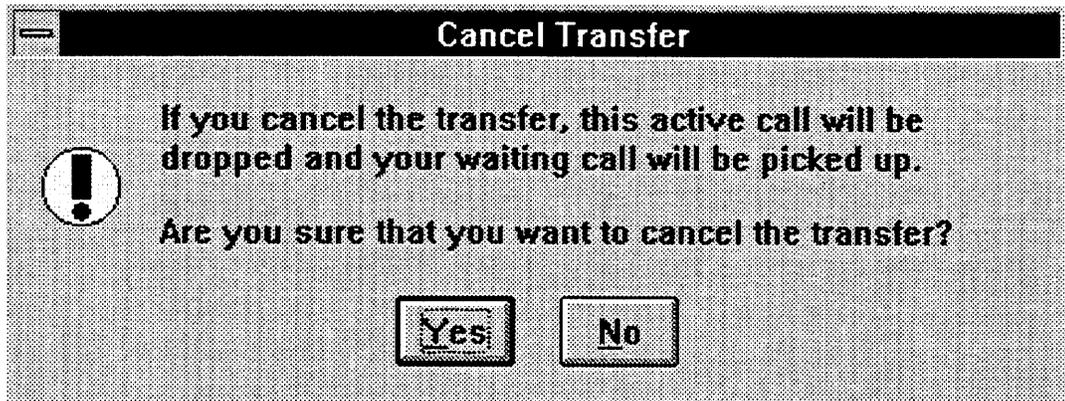
Figure 3-24. Cancel Transfer Dialog Box

F10 - Hold

The F10 - Hold button is enabled only when there are active calls. Pressing the button when a call appearance is active causes the status area of the Call Information Panel to show On Hold. The color of the formerly active appearance changes from white to gray, which represents a call on hold or ringing.

If a call placed on hold is a conference call, the Conference Room icon on the Tool bar will show the text **"On Hold"** on top of the icon.

Display Information Panel

The Display Information Panel is located at the bottom of the FastCall - Call
Control Keys window, to the left of the Tool bar. Figure 3-25 shows the
location of the Display Panel. Information displayed in this window includes:

- Last Incoming Number

- Attempt to Redirect a Call

Tool Bar

The Tool bar is located at the bottom of the FastCall - Call Control Keys
window to the right of the Display Information Panel (Figure 3-25).
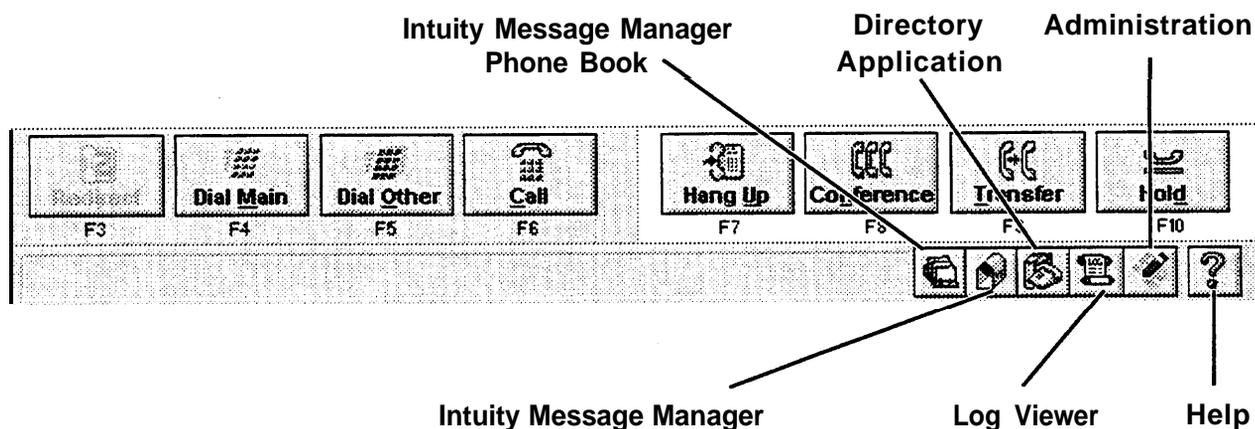
Figure 3-25. Display Panel & Tool Bar

The Tool bar contains the following buttons:

- Conference Room, which is visible when a conference is active with the Conference Room feature. For further information, see "Conference Room" later in this chapter.

- Directory Application, which starts or restores the selected Windows application that is utilized for incoming and outgoing triggers by the FastCall application. Note that for inbound and outbound application call processing, the Directory Application must be active.

- Log Viewer, which starts or restores the AT&T Log Viewer application. See Chapter 7 for further information.

- Administration, which starts or restores the FastCall Administration Program. See Chapter 4 for further information.

- Intuity™ Message Manager, which starts or restores the Intuity Message Manager program (if loaded on your desktop).

- Intuity Message Manager Phone Book, which starts or restores the Intuity Message Manager Phone Book (if loaded on your desktop).

- Help, which starts or restores the FastCall Help Utility.

Digit Dialing

You may dial one digit at a time after a call is active using the number keys if the FastCall - Call Control Keys window has the focus. The keys 0-9, *, and # are supported. Digits 0-9 may be dialed from the keyboard area as well as the number pad. "*" is dialed only from the "*" key on the number pad. "#" is dialed only from the "/" key on the number pad.

System Menu Button

The system menu button opens the Windows standard system menu. The system menu contains the following options:

- Restore, which is present when the FastCall - Call Control Keys window is in the minimized state. Pressing Restore returns the FastCall - Call Control Keys window to normal.

- Move, which allows moving the FastCall - Call Control Keys window from its current screen position to another position using standard Windows cursor positioning.

- Close, which closes (exits) the FastCall - Call Control Keys window.

- Minimize button, which minimizes the FastCall - Call Control Keys window.

Conference Room

This section describes how to perform the following tasks:

- start a conference

- add a person to a conference

- drop a person from a conference

- put a conference on hold

- return to a conference on hold

- end a conference

When you start a conference call using FastCall, the Conference Room window appears, displaying the first three people (yourself and two other people) on the conference call. Each person is represented by a panel, which displays the Caller ID information associated with the person. Figure 3-26 shows a sample Conference Room window.

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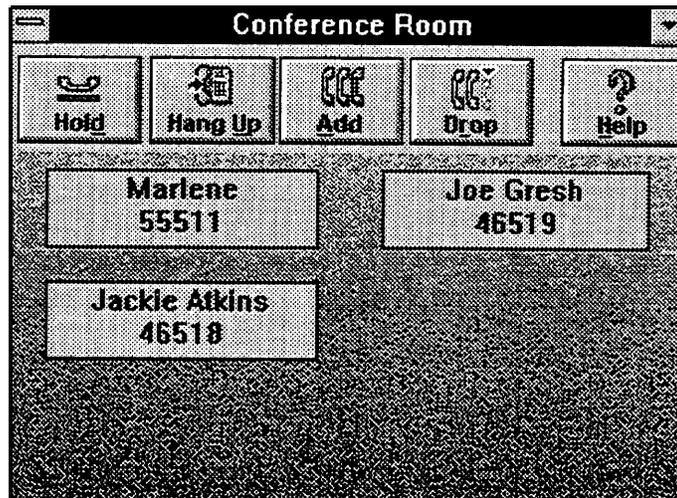
Figure 3-26. Sample Conference Room Window

If you are a participant in a conference (that is, you did not start the conference) and you choose the Conference (F8) button on the Button bar of the FastCall - Call Control Keys window, the Conference Room window appears, identifying the people on the call.

Starting a Conference

To start a conference:

1. Make sure the call you want to conference is active in the FastCall - Call Control Keys window.

2. Choose the Conference (F8) button on the Button bar.

   The active call is put on hold, and the Conference - Add dialog box appears.
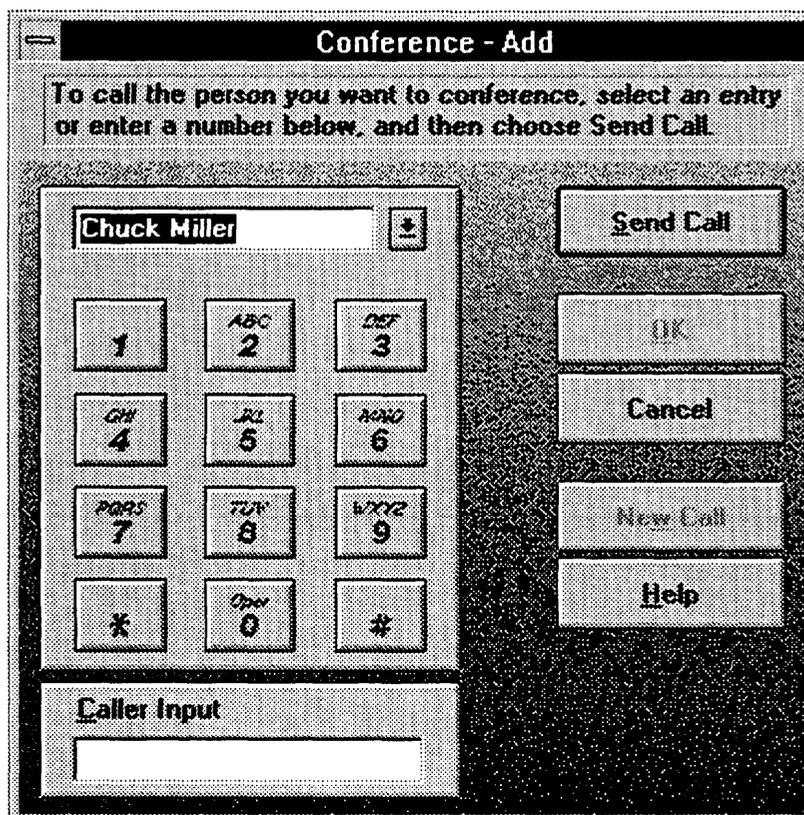
Figure 3-27. Conference - Add Dialog Box

3. Select an entry or enter a number for the person you want to add to the conference.

4. Choose the Send Call button.

   FastCall places the call.

5. After the call is answered, choose the OK button to add the person to the conference.

   The Conference Room window appears, displaying three panels. Each panel represents a member of the conference. The Conference icon appears on the Tool bar, indicating that the conference is active.

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Adding a Person to a Conference

This procedure enables you to add people to an existing conference.

NOTE:

Keep in mind the following information:

— You cannot add incoming calls to a conference.

— You cannot conference a ringing internal station and some ringing external calls.

— FastCall allows a maximum of six participants (including you) on a conference call. However, the maximum number of participants allowed by your private branch exchange (PBX) system may be different. Consult your System Administrator for more information.

To add a person to a conference:

1. Choose the Add button in the Conference Room window.

   The conference is put on hold, and the Conference - Add dialog box appears.

2. Select an entry or enter a number for the person you want to add to the conference.

3. Choose the Send Call button.

   The conference is put on hold, and FastCall places the call. The Hold button in the Conference Room window becomes outlined in red (Figure 3-28).
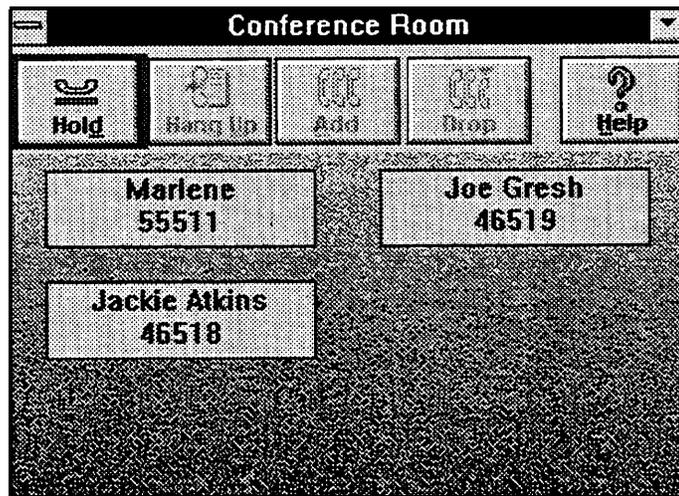
Figure 3-28. Conference Room Window when a Conference is on Hold

4. After the call is answered, choose the OK button to add the person to the conference.

The conference becomes active, and a panel for the new person appears in the Conference Room window.

Dropping a Person from a Conference

This procedure enables you to selectively drop people from the conference.

➡ **NOTE:**

Using this procedure, you can drop yourself from the conference. Depending on how your company's telephone system is administered, if you drop yourself from the conference the other people in the conference may or may not continue the conference call. Consult your System Administrator for more information.

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To drop a person from a conference:

   1. Choose the Drop button in the Conference Room window.

     The Conference - Drop dialog box appears, displaying the call labels for each person in the conference.

     ≡▷ NOTE:

     If you select the panel of the person whom you want to drop from the Conference Room window and then select the Drop button, the label for that person will already be selected in the Conference Drop dialog box.
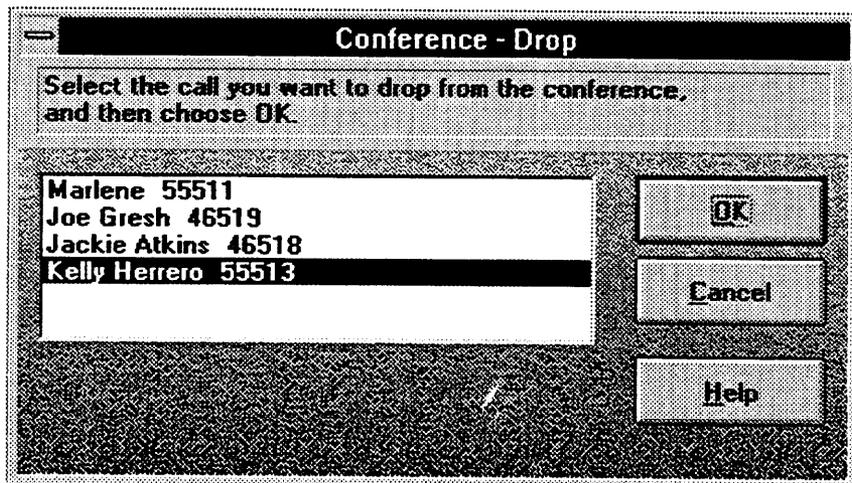
Figure 3-29. Conference - Drop Dialog Box

2. Select the person you want to drop from the call, and then choose the OK button.

   The Conference - Drop dialog box closes, and the panel for the selected person is removed from the Conference Room window.

   ➡ **NOTE:**
   The Conference Room window closes automatically if the conference contains only you and one other person. The call appearance for this person appears in the FastCall - Call Control Keys window.

Putting a Conference on Hold

To put a conference on hold, choose the Hold button in the Conference Room window.

Returning to a Conference on Hold

To return to a conference that is on hold, choose the Hold button in the Conference Room window.

Ending a Conference

To end a conference, select the Hang Up button in the Conference Room window. The Conference Room window closes. Depending on how your company's telephone system is administered, the other people in the conference may or may not continue the conference call. Consult your System Administrator for more information.

Exiting FastCall

To exit FastCall:

1. Double-click on the FastCall - Master Control Program icon.

   The FastCall - Master Control Program window appears.

2. Select Exit from the File menu.

Administering FastCall

4

Overview

This chapter includes information about FastCall administration, including identifying the calling parties, called parties, and caller input.

➯ **NOTE:**
Caller Input is only supported by FastCall Professional.

Before you begin configuring FastCall, you need to prepare the information that you will use. This information includes:

- List of telephone numbers that are to be answered, including your personal extension (Called Numbers).

- ACD agent group numbers that are to be answered (Called Numbers).

- Telephone numbers and extensions of people you call and/or people who call you (Calling Numbers).

- Numbers and extensions to which you commonly transfer, forward, or redirect calls (Call Forward Destinations).

FastCall Administration Notes

FastCall uses the North American Dialing Plan. Depending on the Outgoing Call Rule Configuration, it automatically recognizes 7 and 10 digit numbers as external phone numbers and inserts dashes. For internal calls, 1 through 7 digit numbers (and the number 0) are recognized as extensions and are prefixed with an *x.* Recognition of 7 digit numbers as internal or external numbers is accomplished by the configuration of Advanced Dialing Options in the Outgoing Call Rules. (See Chapter 6, "Configuring Call Rules.") All numbers are prefixed with an *x* when Global Dialing is enabled. Global Dialing allows up to 22 digits as well as use of special dialing characters. Global Mode will also distinguish between extensions and external numbers and dial external access codes as configured in the Outgoing Call rules.

Any configuration changes that you make are automatically saved. After configuring FastCall for your environment, you should back up the configuration using the `File, Save Configuration` as option. See "Saving a FastCall Configuration" in this chapter for more information.

> $\Longrightarrow$ **NOTE:**
> FastCall Promotional does not support the `File, Save Configuration` as option.

Note that Calling Numbers, Called Numbers, and Caller Input each include a default that specifies an unknown number, for example <NO CALLING NUMBER>. This allows you to specify trigger macros to process cases where call information is not available. This is also useful for re-routing calls that have no ANI to other users or to a call prompting device.

FastCall Administration

Use the FastCall Administration program to configure FastCall for your environment. If you did not configure FastCall during installation, you must configure FastCall before running the FastCall Controller program. The FastCall Controller program controls the FastCall - Call Control Keys window.

To run the FastCall Administration program, double-click on the FastCall Administration program icon in the FastCall program group. Once FastCall has been configured, you may also access Administration by using the Administration icon on the FastCall - Call Control Keys window Tool bar.

FastCall Password

When you double-click on the FastCall Administration icon, the FastCall Security dialog box is displayed (Figure 4-1). By default, there is no password. To administer a password, refer to "Setting the FastCall Password" later in this chapter. If you have a password, you must enter the correct password in order to access the FastCall - Administration Program window. After four incorrect attempts to enter the password, the program will exit.
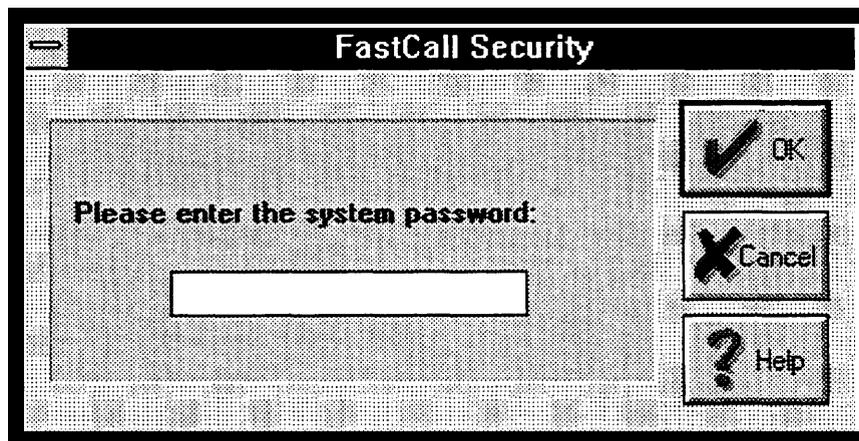
Figure 4-1. FastCall Security Dialog Box

FastCall - **Administration Program Window**

After entering the password, the FastCall - Administration Program window appears (Figure 4-2). FastCall configuration functions and options are accessed from the main window. The FastCall Administration functions are discussed in Chapters 4, 5, and 6 of this manual.

Any configuration changes that you make are automatically saved. However, after configuring FastCall for your environment, you should back up the configuration using the `File, Save Configuration` as option. See "Saving a Configuration" in this chapter for more information.

> **NOTE:**
> FastCall Promotional does not support the `File, Save Configuration` as option.

To exit from the FastCall Administration program, select `File, Exit.`

```
┌─────────────────────────────────────────────────────────────────────┐
│ ▦          FastCall - Administration Program              ▼ ▲       │
├─────────────────────────────────────────────────────────────────────┤
│ File  Configure  Logs  Help                                          │
│      ┌──────────────────────────────┐                                │
│      │ Incoming Call Rules...        │                               │
│      │ Outgoing Call Rules...        │                               │
│      ├──────────────────────────────┤                               │
│      │ Calling Numbers...            │                               │
│      │ Called Numbers...             │                               │
│      │ Caller Input List...          │                               │
│      │ Call Forward Destinations...  │                               │
│      │ Special Dialing Codes...      │                               │
│      ├──────────────────────────────┤                               │
│      │ Application Paths...          │                               │
│      │ Application Triggers        ▶ │                               │
│      ├──────────────────────────────┤                               │
│      │ Directory Application...      │                               │
│      │ FastCall HotKey...            │                               │
│      │ Call Log Parameters...        │                               │
│      │ Telephone Parameters...       │                               │
│      ├──────────────────────────────┤                               │
│      │ Preferences...                │                               │
│      └──────────────────────────────┘                               │
└─────────────────────────────────────────────────────────────────────┘
```
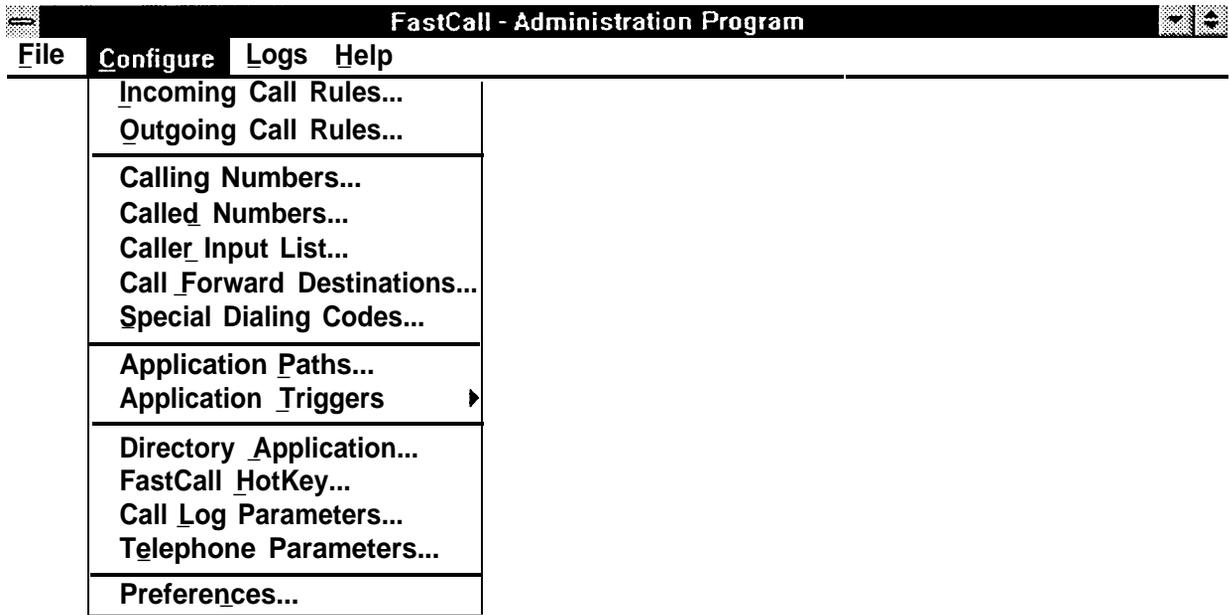
Figure 4-2. FastCall - Administration Program Window

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Configuring the FastCall - Call Control Keys Window Hotkey

The hotkey is a single keyboard key that toggles the display of the FastCall - Call Control Keys window. Pressing the hotkey while the FastCall - Call Control Keys window is visible on the screen causes the window to be minimized. Pressing the hotkey when the FastCall - Call Control Keys window is minimized or unfocused causes it to become visible and focused on the screen. The PAUSE key is the default FastCall hotkey.

> **NOTE:**
> During keystroke macro recordings and playbacks, the hotkey is disabled. It is not re-enabled until you exit the Incoming or Outgoing Call Triggers dialog box and return to the FastCall - Administration Program window.
>
> If the PAUSE key is used as part of your application, you must enter SHIFT-PAUSE when FastCall is running. This is true regardless of what you have programmed for a hotkey.

Select `Configure, Hotkey` in the FastCall - Administration Program-window to change the FastCall - Call Control Keys window hotkey. The FastCall Hotkey window is displayed (Figure 4-3). Select from the list the key that you want to assign as the hotkey and click the OK button.
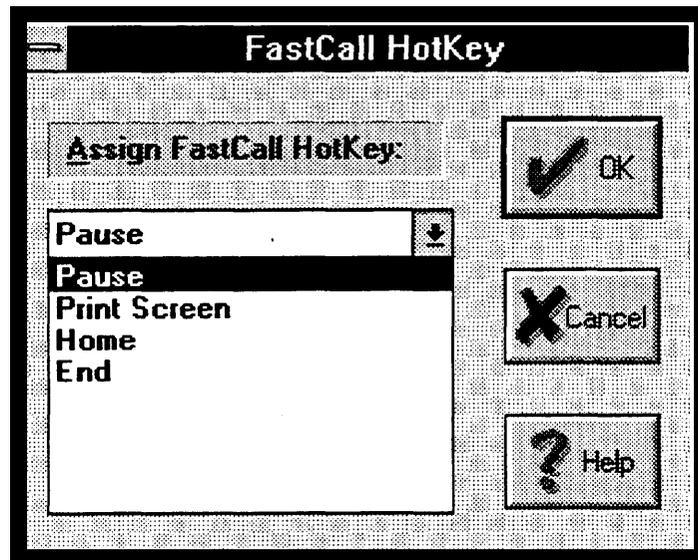
Figure 4-3. FastCall Hotkey Dialog Box

Setting the FastCall Password

The FastCall Administration program is password protected to guard against unauthorized access to the system configuration. By default, there is no password. The FastCall password *is case sensitive.*

To change the password:

1. Run FastCall Administration by double-clicking on the FastCall Administration icon in the FastCall program group.

2. Enter the current password to access the program.

3. Select `File, Set System password` in the FastCall - Administration Program window.

   The Set New System Password dialog box is displayed (Figure 4-4).
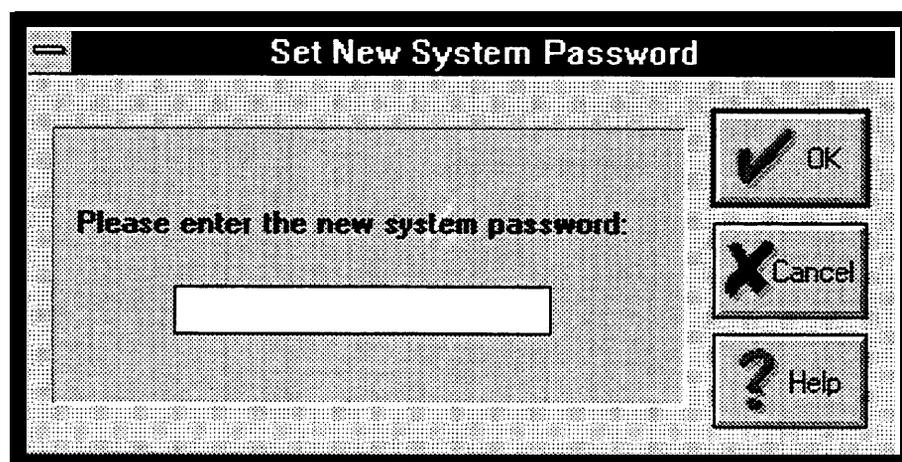
Figure 4-4. Set New Password Dialog Box

4. Enter the new password that you want to use. The password must be at least four characters and not more than 10 characters in length. The password is case sensitive.

5. Click the OK button after typing the password.

   The Confirm System Password dialog box is then displayed
   (Figure 4-5).
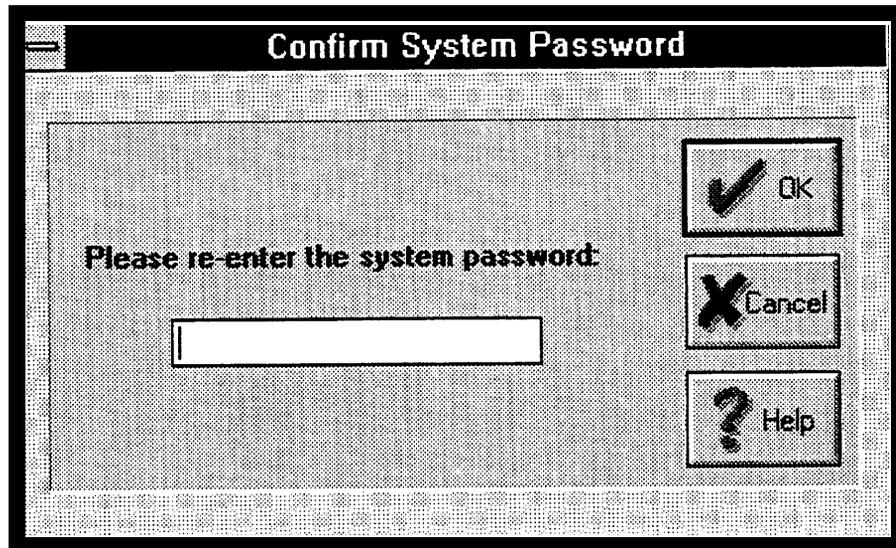
Figure 4-5. Confirm System Password Dialog Box

6. Re-enter the password in the Confirm System Password dialog box.

7. To apply the new password, you must exit from FastCall
   Administration and then restart the program. When prompted for the
   system password, use the new password to gain access to the
   program.

Configuring Calling Number List

The alphabetized Calling Number List identifies telephone numbers or extensions (ANI or CLID) of people who call you. It should also include numbers of people you call that you want in your Call list (F6), Transfer list (F9), and Conference list (F8). These keys each invoke an alphabetized list in which all configured Calling Numbers and Call Forward Destinations are merged. If there is a duplicate number, FastCall displays the number from the Calling Numbers list.

Note that these numbers represent numbers that can trigger events based on information on incoming or outgoing calls. This list does not have to include your entire personal directory. It should include the numbers for which you want to specify unique handling in terms of applications that should pop-up, calls that should be forwarded, calls that should be redirected, etc.

To configure the Calling Number List, select `Configure, Calling Numbers` from the FastCall - Administration Program window. The Calling Number List dialog box is then displayed (Figure 4-6). The Calling Number List holds a maximum of 999 entries.

Note that the Calling Number List includes a default that specifies an unknown number, given as <NO CALLING NUMBER>. This allows you to specify trigger macros to process cases where calling number information is not available. This is also useful for re-routing calls that have no ANI to other users or to a call prompting device.

Figure 4-6. Calling Number List Dialog Box

Adding Items to the Calling Number List

To add an item to the Calling Number List:

    1. Click the Add button in the Calling Number List dialog box.

       The Add Numbers dialog box appears (Figure 4-7).

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Figure 4-7. Add Numbers Dialog Box

2. Enter the telephone number in the Enter Number field without dashes or spaces in the number. FastCall automatically inserts dashes. If the number is an extension, FastCall automatically detects this and prefixes the extension with an *x.* Note that if you have configured FastCall for Global Dialing, then all of the supported characters for international dialing can be used in the Calling Number List.

3. In the Enter Description field, type a description for the number. The description can be up to 22 characters in length. This is the description that will appear in the FastCall - Call Control Keys window for the particular number entered.

4. Click the Add # button to add the number and its description to the Calling Number List.

5. Repeat steps 2 through 4 to add additional items to the list. When you are done adding items, click the OK button to close the Add Numbers box.

6. Click the OK button in the Calling Number List dialog box to close the window and return to the FastCall - Administration Program window.

Example Calling Number List

Figure 4-8 shows what the Calling Number List window might look like after adding numbers and descriptions.

Figure 4-8. Calling Number List Dialog Box

Deleting Items from the Calling Number List

To delete an item from the Calling Number List:

1. Select `Configure, Calling Numbers` from the FastCall - Administration Program window to display the Calling Numbers List.

2. Highlight the item you want to delete, or click on an item (the number or description) to select it:

3. When the description/number that you want to delete is highlighted, click the Delete button.

4. Click the OK button to close the Calling Numbers List dialog box when you are done deleting items.

To modify an entry in the list, it must be deleted from the list and then re-entered with the changes you want.

Configuring Called Number List

The alphabetized Called Number List (VDN or DNIS) identifies specific numbers called by someone that would reach you at your desk. At a minimum, this list would include your extension. It would also include any ACD or hunt group numbers that you would answer.

To configure the Called Number List, select `Configure, Called Numbers` from the FastCall - Administration Program window. The Called Number List dialog box is then displayed (Figure 4-9). The Called Number List holds a maximum of 999 entries.

Note that the Called Number List includes a default value of <NO CALLED NUMBER> that specifies an unknown number. This allows you to specify trigger macros to process cases where the called number information is not available.
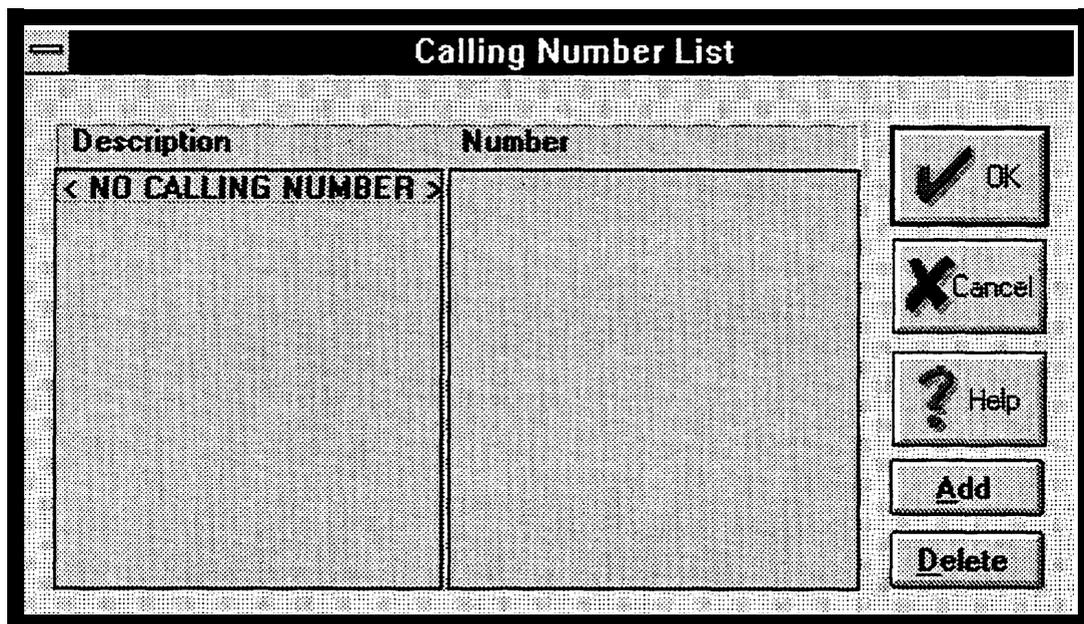

Figure 4-9. Called Number List Dialog Box

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Adding Items to the Called Number List

To add an item to the Called Number List:

1. Click the Add button in the Called Number List dialog box.

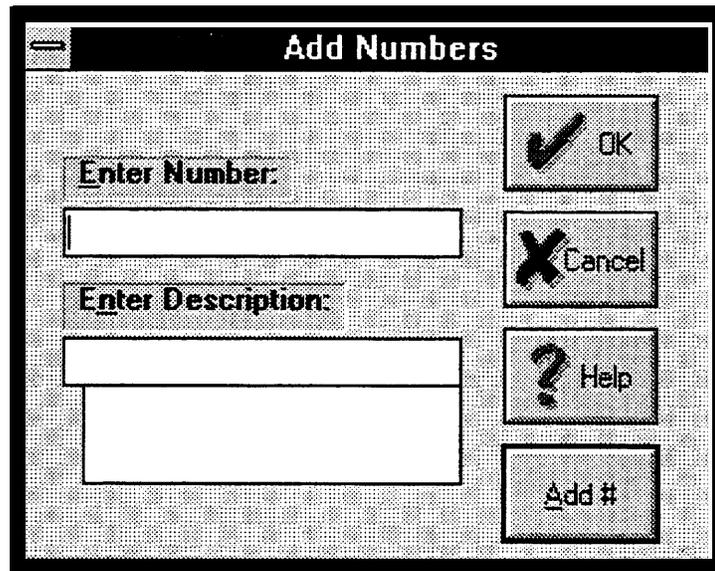   The Add Numbers dialog box is displayed (Figure 4-10).
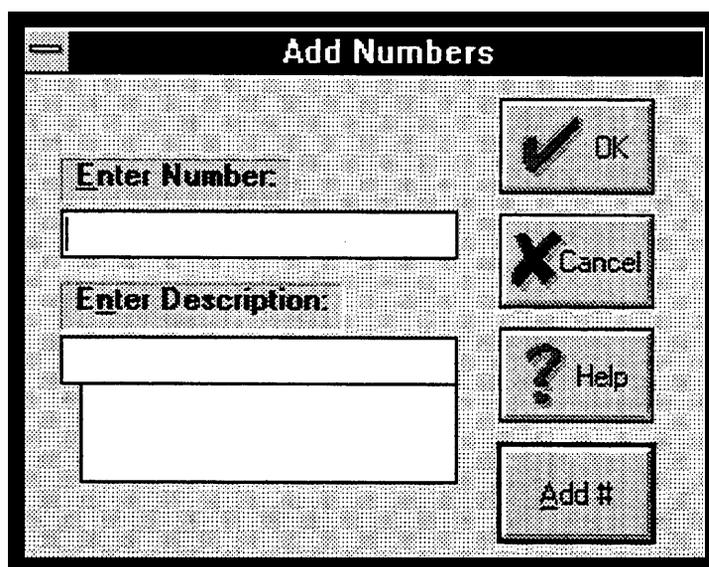
Figure 4-10. Add Numbers Dialog Box

2. Enter the telephone number in the Enter Number field without dashes or spaces in the telephone number. FastCall automatically inserts dashes. If the number is an extension, FastCall automatically detects this and prefixes the extension with an x.

3. In the Enter Description field, type a description for the number. The description can be up to 22 characters in length. This is the description that will appear in the FastCall - Call Control Keys window for the particular number entered.

4. Click the Add # button to add the number and its description to the Called Number List.

5. Repeat steps 2 through 4 to add additional items to the list. When you are done adding items, click the OK button to close the Add Numbers box.

6. Click the OK button in the Called Number List dialog box to close the window and return to the FastCall - Administration Program window.

Example Called Number List

Figure 4-11 shows what the Called Number List window might look like after adding numbers and descriptions.
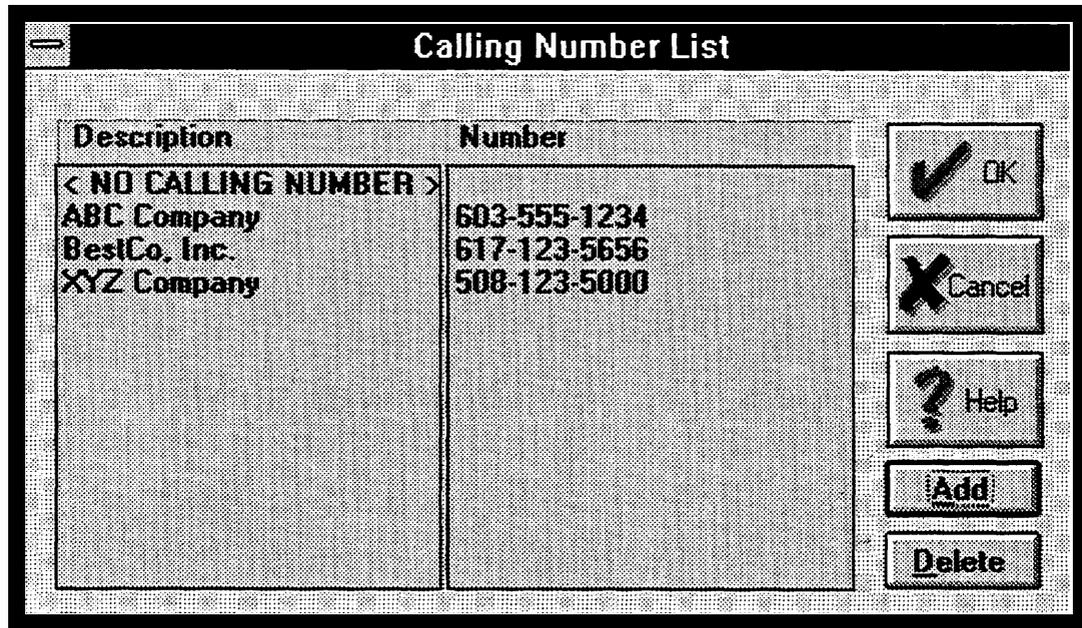

Figure 4-11. Called Number List Example

Deleting Items from the Called Number List

To delete an item from the Called Number List:

1. Select `Configure, Called Numbers` from the FastCall -
   Administration Program window to display the Called Number List
   dialog box.

2. Highlight the item you want to delete, or click on an item (the number
   or description) to select it.

3. When the description/number that you want to delete is highlighted,
   click the Delete button.

4. Click the OK button to close the Called Number List dialog box when
   you are done deleting items.

To modify an entry in the list, it must be deleted from the list and then re-
entered with the changes you want.

Configuring Caller Input List

> **NOTE:**
> This feature is supported only by FastCall Professional.

The alphabetized Caller Input List utilizes the Call Prompting feature to identify information entered via a touch-tone (DTMF) phone. Information may be an account number such as when you call a credit card company and are prompted to enter your account number. For caller input to be used by FastCall, your AT&T telephone system must be equipped with the Call Prompting feature.

> **NOTE:**
> If you are using the Call Prompting option, and you are currently active on a call when a second call arrives at your desktop, FastCall will not be able to retrieve the call prompting information for the newly arriving call until that call is answered. When no other calls are active, the call prompting information will appear automatically in the FastCall - Call Control Keys window.

To configure the Caller Input List, select `Configure, Caller Input List` from the FastCall - Administration Program menu. The Caller Input List dialog box is then displayed (Figure 4-12). The Caller Input List can hold a maximum of 999 entries.

Note that the Caller Input List includes a default that specifies an unknown number, given as <NO CALLER INPUT>. This allows you to specify incoming trigger macros to process cases when call prompting information is not available.
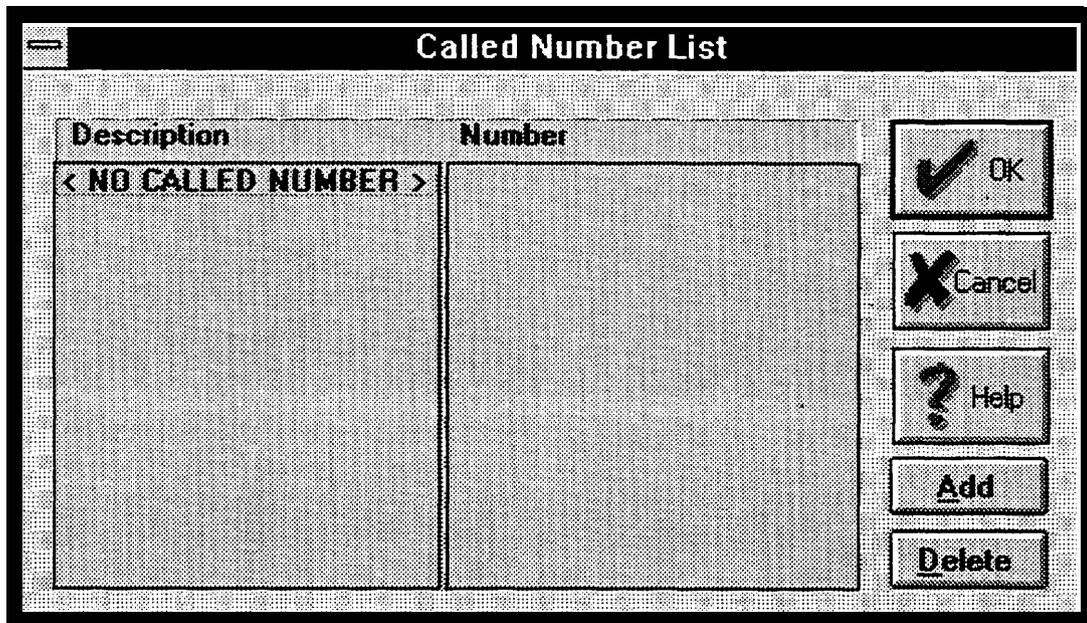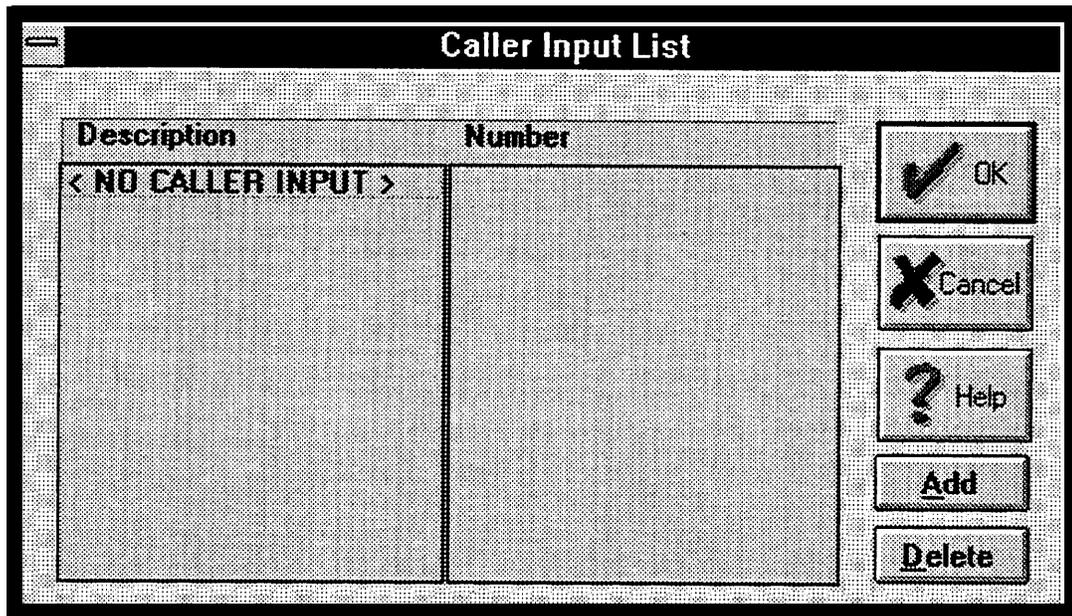
Figure 4-12. Caller Input List Dialog Box

Adding Items to the Caller Input List

To add an item to the Caller Input List:

> 1. Click the Add button in the Caller Input List dialog box.
>
> The Add Numbers dialog box is displayed (Figure 4-13).
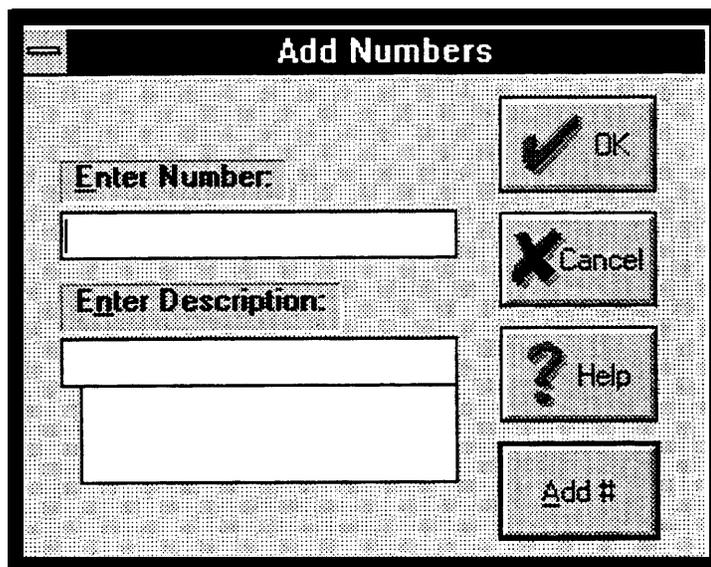
Figure 4-13. Add Numbers Dialog Box

2. Enter the caller input information (for example, account number) in the
   Enter Number field without dashes or spaces.

3. In the Enter Description field, type a description for the number. The
   description can be up to 22 characters in length.

4. Click the Add # button to add the number and its description to the
   Caller Input List.

5. Repeat steps 2 through 4 to add additional items to the list. When
   you are done adding items, click the OK button to close the Add
   Numbers box.

6. Click the OK button in the Caller Input List dialog box to close the
   window and return to the FastCall - Administration Program window.

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Example Caller Input List

Figure 4-14 shows what the Caller Input List might look like after you have configured it.
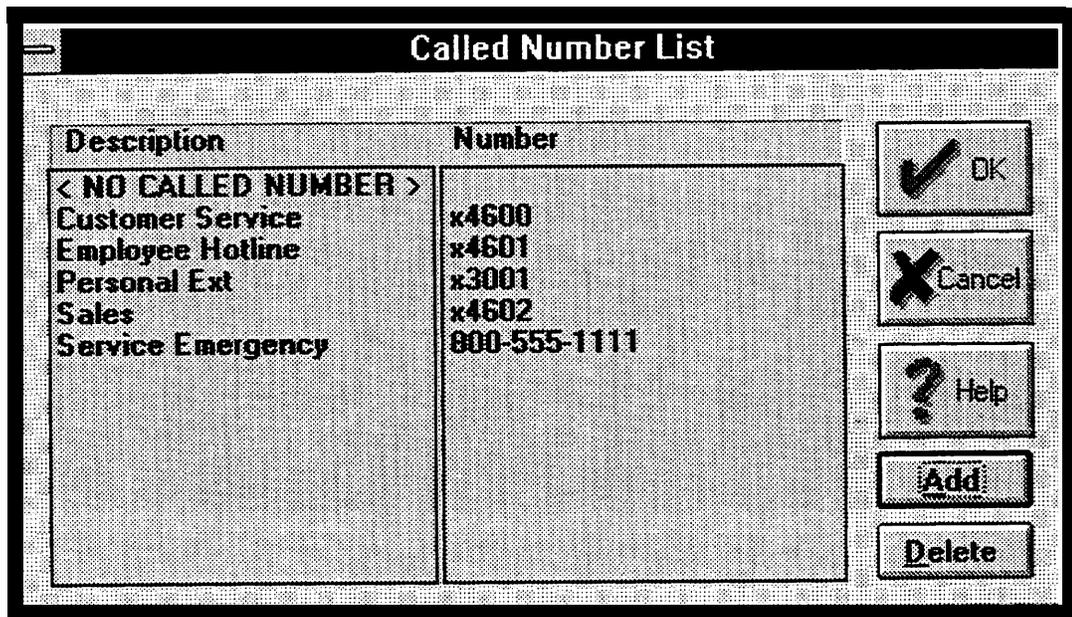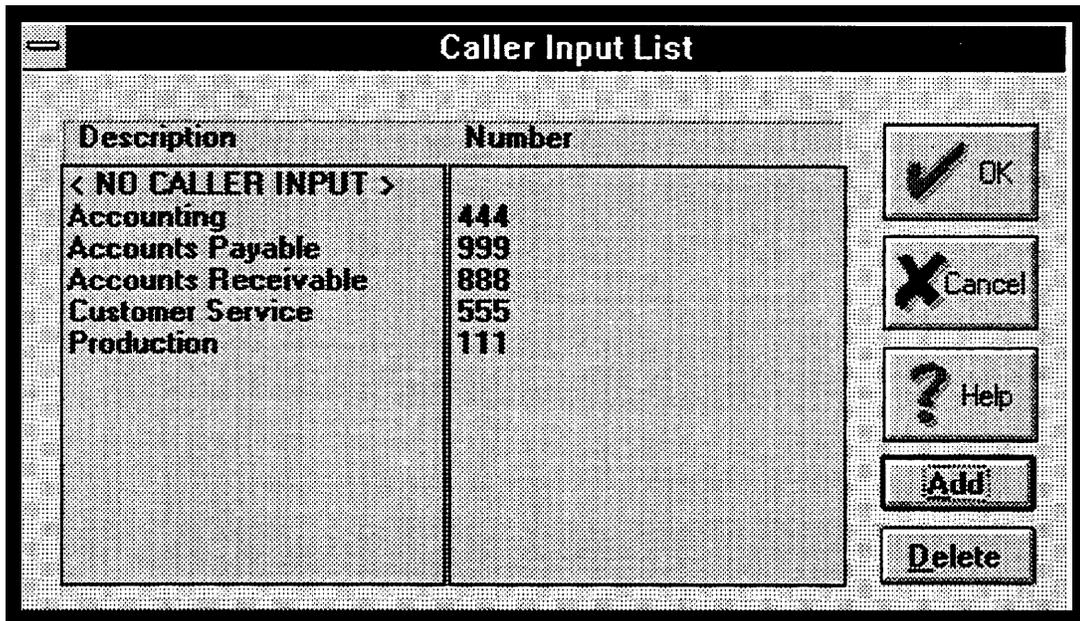

Figure 4-14. Caller Input List Example

Deleting Items from the Caller Input List

To delete an item from the Caller Input List:

1. Select `Configure, Caller Input List` from the FastCall - Administration Program window to display the Caller Input List dialog box.

2. Highlight the item you want to delete, or click on an item (the number or description) to select it.

3. When the description/number that you want to delete is highlighted, click the Delete button.

4. Click the OK button to close the Caller Input List dialog box when you are done deleting items.

To modify an entry in the list, it must be deleted from the list and then re-entered with the changes you want.

Configuring Call Forward Destinations

The alphabetized Call Forward Destinations List identifies numbers or extensions to which you commonly transfer or redirect incoming calls. The Call Forward Destinations list that you create is invoked when you press the F3 - Redirect button in the FastCall - Call Control Keys window. It is merged with the FastCall Calling Number list when you press the F6 - Call button, F9 - Transfer button or F8 - Conference button in the FastCall - Call Control Keys window.

To configure the Call Forward Destinations List, select `Configure, Call Forward Destinations` from the FastCall - Administration Program menu. The Call Forward Destinations List dialog box is then displayed (Figure 4-15).
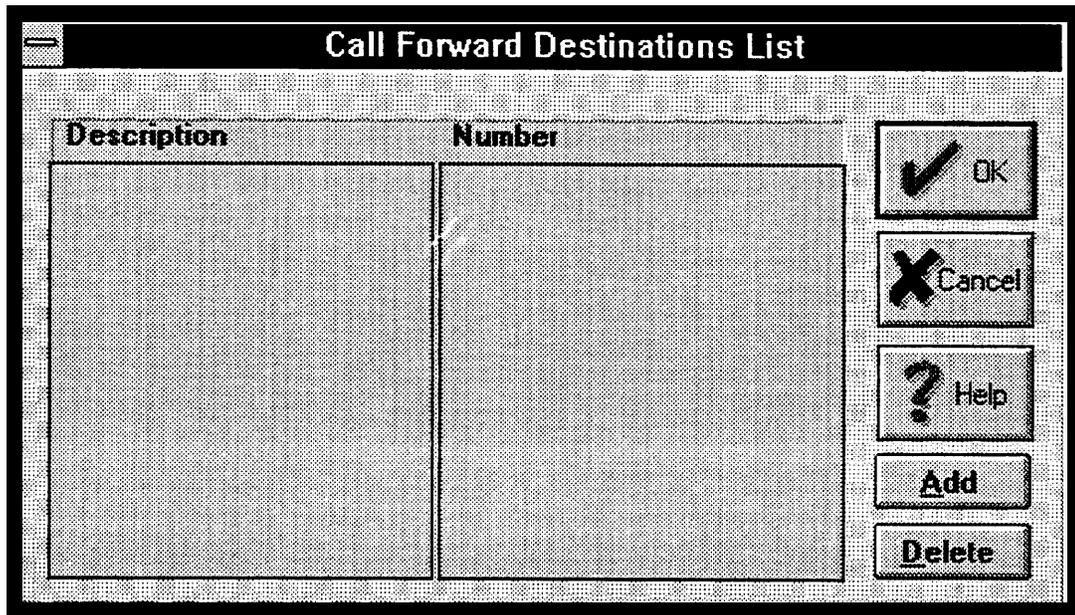
Figure 4-15. Call Forward Destinations List Dialog Box

Adding Items to the Call Forward Destinations List

To add an item to the Call Forward Destinations List:

1. Click the Add button in the Call Forward Destinations List dialog box.

   The Add Numbers dialog box is displayed (Figure 4-16). Note that the list includes the default destinations of Attendant and Voice Mail. At a minimum, you should add one of these destinations to the Call Forward Destinations list. This assures that a forwarded call always reaches a destination where a message can be left.

Figure 4-16. Add Numbers Dialog Box

2. Enter the telephone number in the Enter Number field without dashes or spaces in the telephone number. FastCall automatically inserts the dashes. If the number is an extension, FastCall automatically detects this and prefixes the extension with an *x.*

3. In the Enter Description field, type a description for the number in this field. The description can be up to 22 characters in length. This description is displayed in the Speed Dial, Transfer, Redirect and Conference lists.

4. Click the Add button to add the number and its description to the Call Forward Destinations List.

5. Repeat steps 2 through 4 to add additional items to the list. When you are done adding items, click the OK button to close the Add Numbers box.

6. Click the OK button in the Call Forward Destinations List to close the window and return to the FastCall - Administration Program window.

Example Call Forward Destinations List

Figure 4-17 shows what the Call Forward Destinations List dialog box might look like after it has been configured.
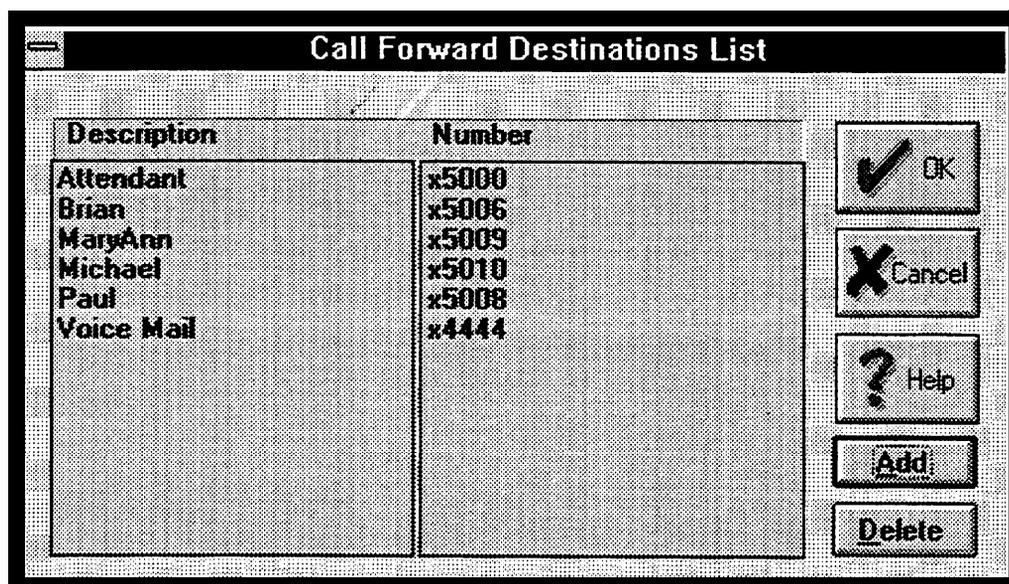
Figure 4-17. Call Forward Destinations List Example

Deleting Items from the Call Forward Destinations List

To delete an item from the Call Forward Destinations List:

1. Select `Configure, Call Forward Destinations` from the FastCall - Administration Program window to display the Call Forward Destinations List dialog box.

2. Highlight the item you want to delete, or click on an item (the number or description) to select it.

3. When the description/number that you want to delete is highlighted, click the Delete button.

4. Click the OK button to close the Call Forward Destinations List dialog box when you are done deleting items.

Configuring Special Dialing Codes

The Special Dialing Codes list enables you to configure FastCall to automatically use any internal codes required for your phone system. It can also be used to enter special dialing sequences for international calls. Dialing codes can specify things such as:

Action:	Example Code:
Call Forwarding Activation Code:	*21
Call Pickup Access Code:	*67
Send All Calls Activation Code:	*20
Send All Calls Deactivation Code:	#20
Transfer to AUDIX® Code:	*15
Login Access Code:	*45,2000
Logout Access Code:	*46

The Dialing Codes list appears when you press F6 - Call, and select the Special Codes option in the Call dialog box.

Supported Characters for Special Dialing Codes

The following characters can be used as part of the special dialing codes that you configure. Note that these characters and their functions are supported only for the Special Dialing Codes when the FastCall default configuration is used (the North American Dialing Plan). When FastCall is configured for Global Dialing Mode (see "Preferences" in this chapter), these characters can be used anywhere within the FastCall system.

Character	Meaning
, (comma)	wait approximately 1.5 seconds
: (colon)	wait approximately 4 seconds

To configure dialing codes, select Configure, Special Dialing Codes in the FastCall - Administration Program window. The Special Dialing Codes List dialog box is then displayed (Figure 4-18). The list can hold up to 999 entries.
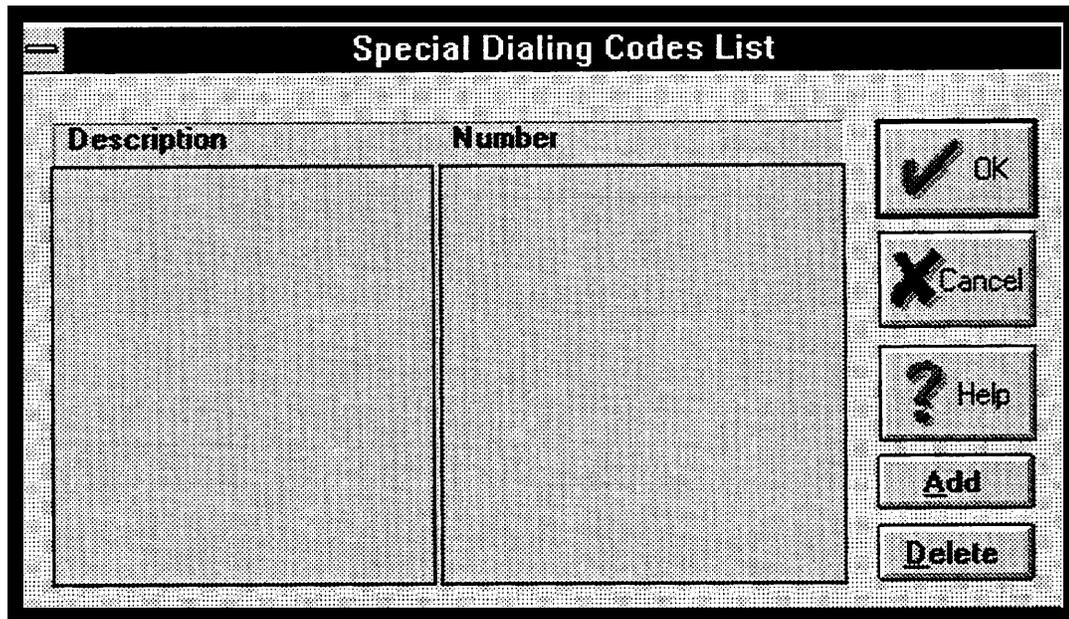
Figure 4-18. Special Dialing Codes List Dialog Box

Adding Items to the Special Dialing Codes List

To add an item to the Special Dialing Codes List:

  1. Click the Add button in the Special Dialing Codes List dialog box.
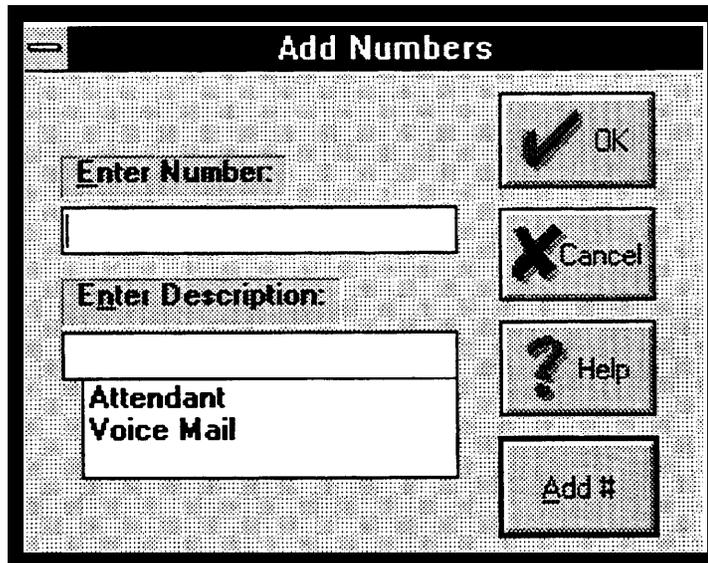
    The Add Numbers dialog box is displayed (Figure 4-19).
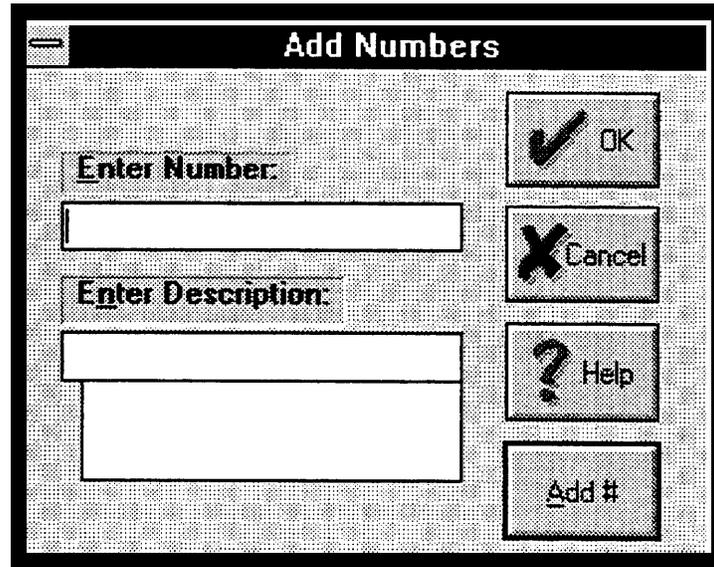
Figure 4-19. Add Numbers Dialog Box

2. Enter the code number in the Enter Number field without dashes or spaces. FastCall automatically adds the prefix x. You can enter numbers, *, #, ,, or :.

3. In the Enter Description field, type a description of up to 22 characters for the code.

4. Click the Add # button to add the number and its description to the Special Dialing Codes List.

5. Repeat steps 2 through 4 to add additional items to the list. When you are done adding items, click the OK button to close the Add Numbers dialog box and return to the Special Dialing Codes List window.

6. Click the OK button in the Special Dialing Codes List dialog box to close the window and return to the FastCall - Administration Program window.

Example of Special Dialing Codes List

Figure 4-20 shows what the Special Dialing Codes List might look like after it has been configured.
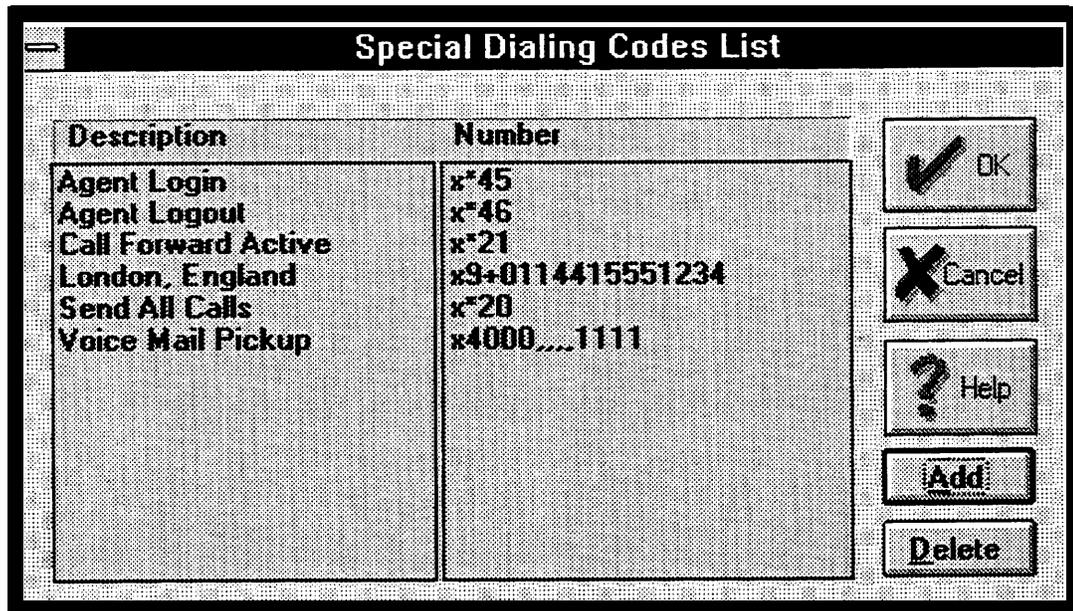
Figure 4-20. Special Dialing Codes List Dialog Box

Deleting Items from the Special Dialing
Codes List

To delete an item from the Special Dialing Codes List:

1. Select `Configure, Special Dialing Codes` from the FastCall - Administration Program window to display the Special Dialing Codes List.

2. Highlight the item you want to delete, or click on an item (the number or description) to select it.

3. When the description/number that you want to delete is highlighted, click the Delete button.

4. Click the OK button to close the Special Dialing Codes List window when you are done deleting items.

Configuring Telephone Parameters

> **NOTE:**
> Telephone parameters usually are configured when installing the
> FastCall software. If you skipped this step during installation, you must
> configure telephone parameters before running the FastCall software.

You must configure the FastCall Telephone Parameters to match the phone
system that you are using. You may require the assistance of a technician
familiar with the phone set.

Select `Configure, Telephone Parameters` in the FastCall -
Administration Program window to configure the telephone display. The
Telephone Parameters dialog box is displayed (Figure 4-21).
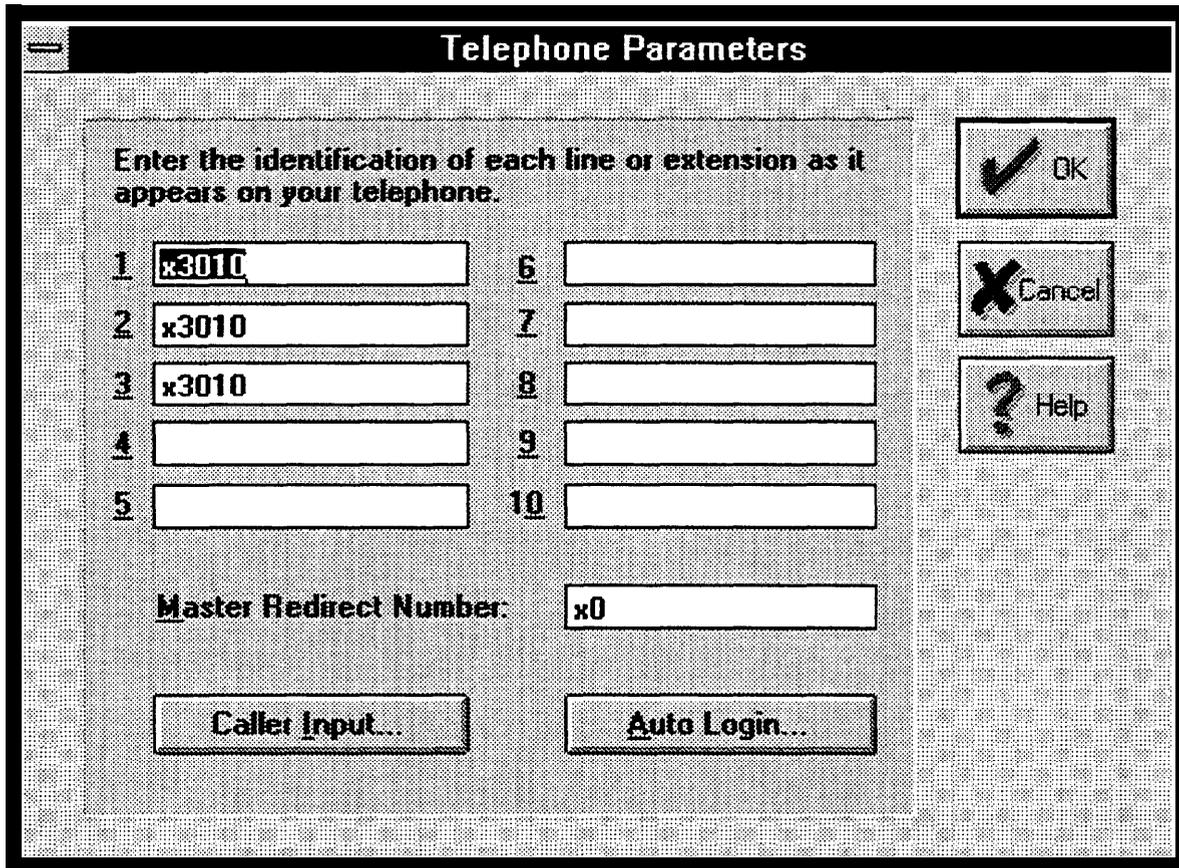
Figure 4-21. Telephone Parameters Dialog Box

Extension of Connected Phone

Enter in this field the extension number for each available call appearance of the phone attached to the system.

Master Redirect Number

The Master Redirect Number applies to incoming calls that are affected by a rule. If the rule redirects the call to a busy or invalid number or extension, the call will be re-routed to the Master Redirect Number. The Master Redirect Number field specifies the number or extension to which calls should be redirected or forwarded in the event that the original destination is busy or invalid. Enter in this field the number to which all calls should be redirected in such cases.

Number of Line Appearances

Enter in this field the number of line appearances that are connected to your phone system. Valid entries for this field are in the range 1 to 10. FastCall supports up to 10 line appearances.

Caller Input (supported by FastCall Professional)

Double-click this button and the Caller Input dialog box is displayed (Figure 4-22).

4-35
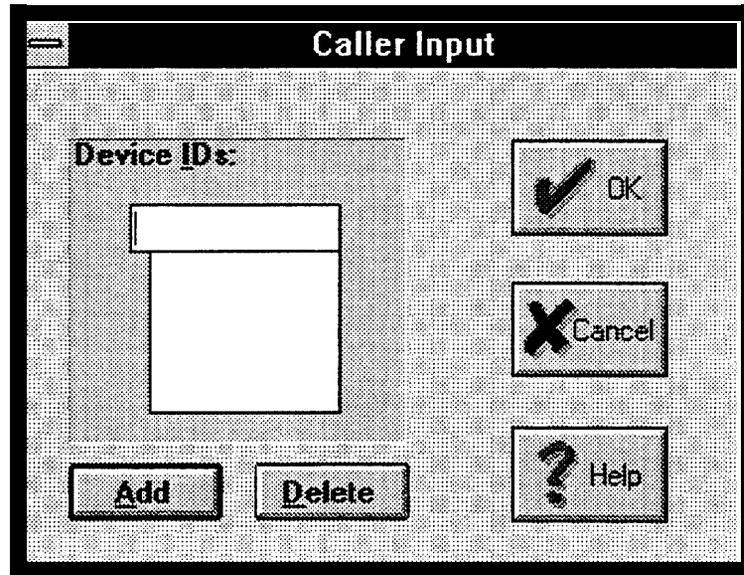
Figure 4-22. Caller Input Dialog Box

When using PassageWay Solution Telephony Services, Caller Input is enabled by the use of a "monitoring" VDN. This VDN is vectored to by the original VDN where Call Prompting digits are collected. Telephony Services monitors this second VDN for Call Prompting information. Enter the device identification of the VDN which is being used for monitoring purposes. This monitoring VDN will be routed to an agent or queued to an ACD split. The monitoring VDN must have access rights to monitor devices set in Telephony Services Administration. Refer to the *Passage Way Telephony Services Administration Guide* for further information.

Auto Login

Double-click the Auto Login button and the Telephony Server Auto Login dialog box appears (Figure 4-23). This box will appear each time the FastCall Controller is started unless Auto Login is configured here.
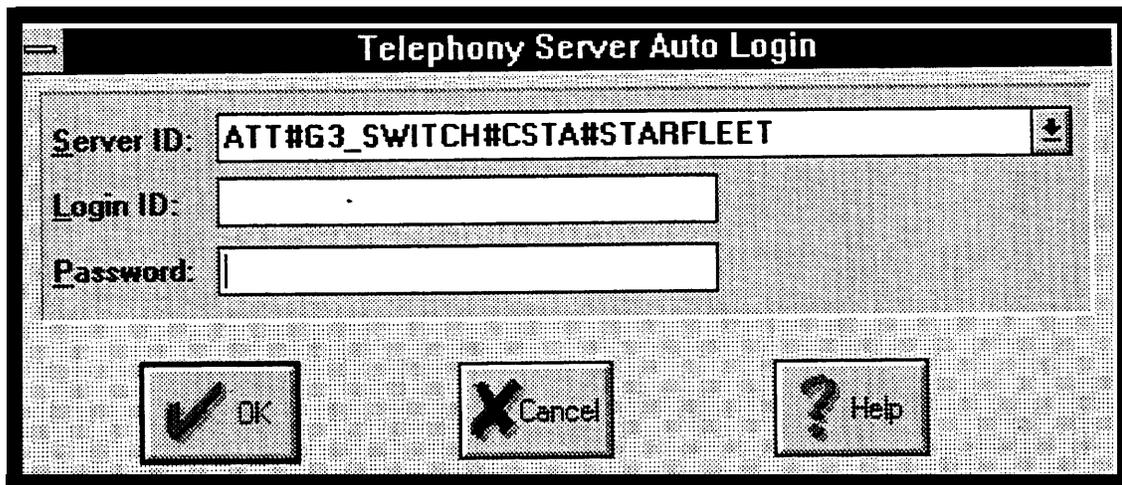
Figure 4-23. Telephony Server Auto Login Dialog Box

Server ID

Select from the drop down list the name of the Telephony Server to which you wish to be attached.

Login ID

Enter your Telephony Services (NetWare) user login name.

Password

Enter your Telephony Services user password.

⇒ **NOTE:**
You must restart the FastCall - Call Control Keys window after changing any Telephone Parameters, Preferences, or Outgoing Call Rules in order for the changes to take effect. To restart the FastCall - Call Control Keys window, double-click on the FastCall Controller icon in the FastCall program group, then click the Yes button or press ENTER when the dialog box asks if you want to restart the FastCall Controller.

Configuring the Directory Application

This Administration function allows you to select the application that will be started or restored when the Directory Application Icon on the FastCall - Call Control Keys window is pressed. The option is selected by highlighting the Directory Application option in the Configure list. The Directory Application window will appear as shown in Figure 4-24. Application Paths (see Chapter 5 for further information) must be configured for the application to show in the Description drop down list.

Note that only one application may be selected to be started or restored by the Directory Application icon.

If the Application Path has been configured, the status for the selected application in the description field will be "Found."
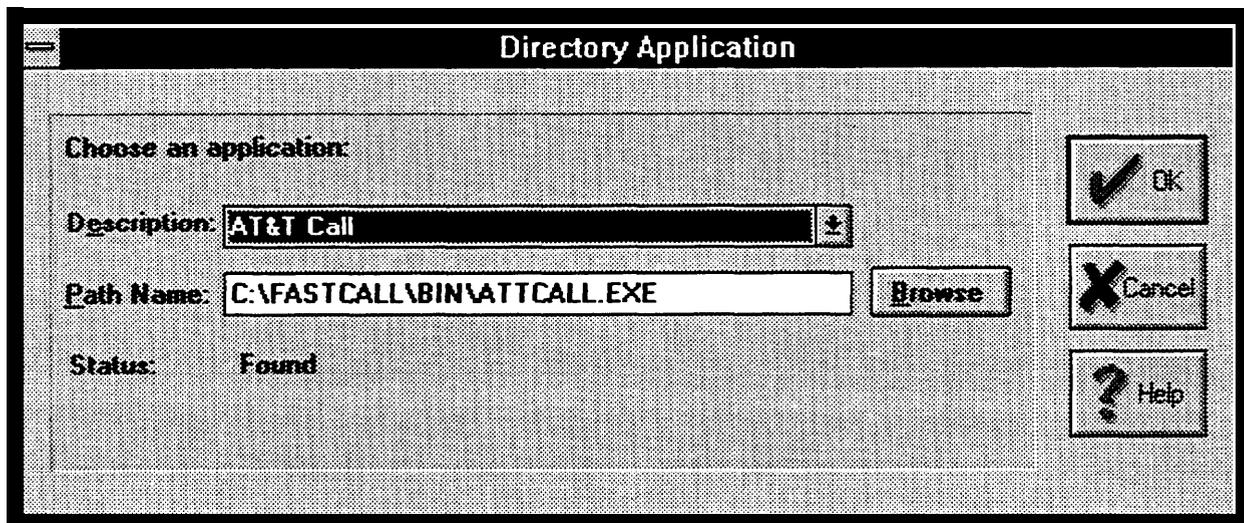
Figure 4-24. Directory Application Dialog Box

Configuring Preferences

Select `Configure, Preferences` in the FastCall - Administration Program
window to configure the FastCall Preference options (Figure 4-25). Features
are enabled by selecting the check box next to each description. Shown
below are the default settings for Preferences options. *You must restart the
FastCall - Call Control Keys window after making changes to FastCall
Preferences in order for the changes to take effect.* See Chapter 3 for
information on restarting the FastCall - Call Control Keys window.
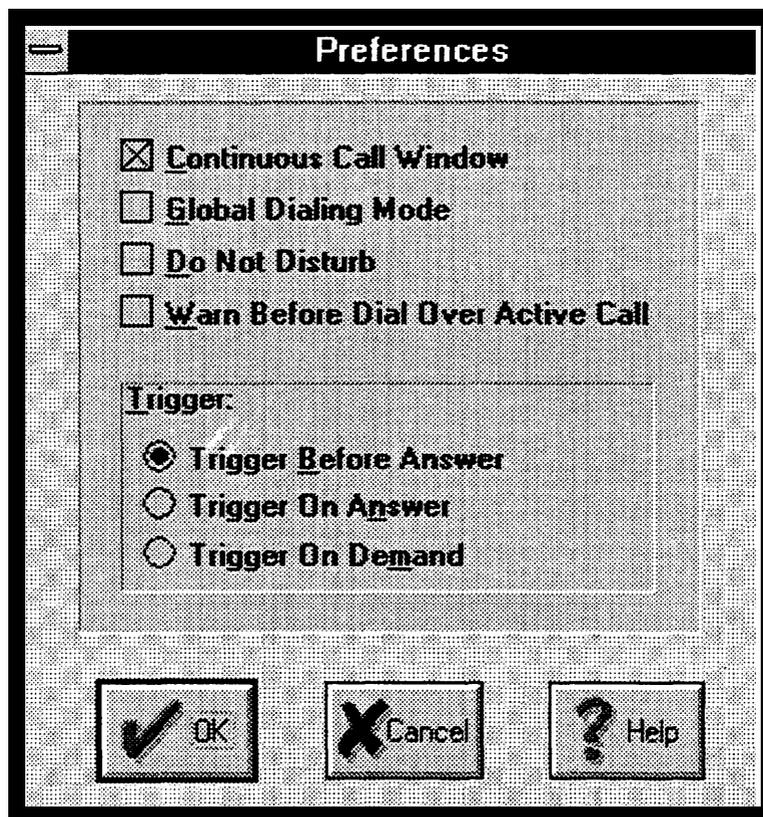
Figure 4-25. Preferences Dialog Box

Enabling/Disabling Preferences Options

Preferences options are toggled between enabled and disabled. When you check an option that is disabled (not checked), you are enabling it. When you check an option that is enabled (checked), you are disabling it. To select a Preferences option, click on `Configure, Preferences,` and then click on the option you want by selecting the appropriate check box.

Continuous Call Window (Enabled by default)

Enable Continuous Call Window to allow the FastCall - Call Control Keys window to show all non-idle call appearances. With this option enabled, all incoming and outgoing calls are shown in the FastCall - Call Control Keys window. When Continuous Call Window is disabled, the FastCall - Call Control Keys window does not display call information - it displays only the call control keys. The window temporarily displays call information when multiple calls are present and you choose any function that requires the selection of one of the multiple calls.

Global Dialing Mode

Select this option to disable North American Dialing Plan (NADP) dialing. In Global Mode, you may dial up to 22 digits including any characters supported as Special Dialing Codes. When this mode is selected, Outgoing Call Rules must be set to define the external access number and the maximum of digits for an extension. Refer to Chapter 6 for more information.

Do Not Disturb

When Do Not Disturb is selected, the FastCall - Call Control Keys window will not pop up automatically on incoming calls. The FastCall - Call Control Keys window will not be displayed until the hotkey is pressed. Triggers configured to run before answer *will run* when Do Not Disturb is enabled.

Warn Before Dial Over Active Call

When the Warn Before Dial Over Active Call option is checked, you will be alerted by a message box when attempting to place a call without putting the active call on hold. When this option is disabled, you will not see a message box, and placing a call with a call appearance active will cause the active appearance to be dropped before the outgoing call is dialed. See Chapter 3 for more information.

Trigger

This option displays a submenu of trigger options.

Trigger Before Answer (Enabled by Default)

Enable this option to cause the triggers associated with calls to run before answering a call provided there are no other calls active. This is probably the setting you will most commonly want. This enables you to have pertinent information on-screen before beginning to speak to the caller.

If this option is enabled, the trigger runs as soon as FastCall detects ringing. If this option is disabled, the trigger will not occur until you press F2- Answer (if Auto Trigger On Answer is enabled) or until you run the trigger manually (On-Demand).

Trigger On Answer

Enable this option to cause triggers to run when the call is answered.

If this option is enabled, the trigger will execute when you press F2 - Answer or the Answer button in the FastCall - Call Control Keys window. *However, If you pick up the telephone handset instead of using the FastCall - Call Control Keys window options, the trigger will not run.* This gives you the option of running or not running the trigger.

Trigger on Demand

Enable this option to cause triggers to run only on demand. Pressing SHIFT + n where n is the call appearance number will cause the trigger to be run.

In order to avoid macro conflicts and possible data corruption, if a second call arrives during the execution of a trigger (before trigger), the trigger for the second call will not run automatically. The trigger for the second call can be run manually, or on demand, by pressing SHIFT+n, where n is the line appearance.   If you press a key while the macro is executing, the macro is suspended.

➡ **NOTE:**

The FastCall hotkey and all other keyboard inputs are disabled while a trigger is running.

Importing and Exporting Triggers

Exporting Triggers

If you wish to export triggers to a Library file either on your hard disk or to a diskette, select `File, Export Triggers` in the FastCall Administration main window. The Select the Library Directory dialog box is then displayed (Figure 4-26).
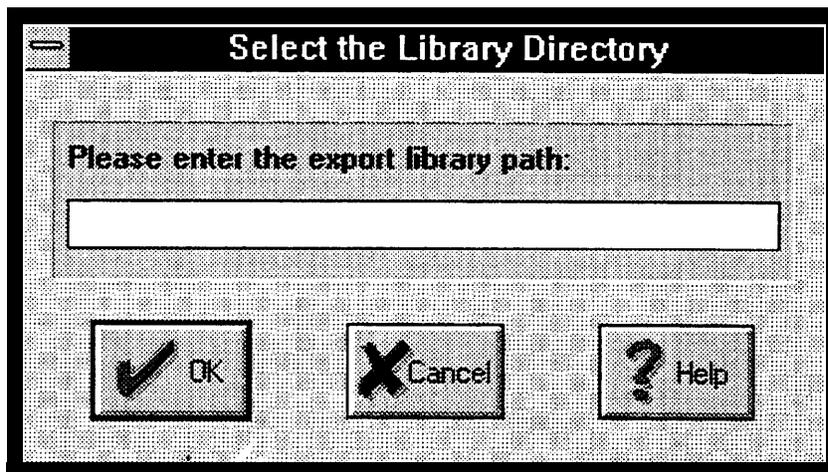
Figure 4-26. Select the Library Directory Dialog Box

Trigger information is exported to the directory that you specify in this dialog box. This directory must be created before it can be selected as part of the path statement. Other drives or directories may be used, including floppy disk drives.

Once you have selected a valid path, you will have the opportunity to select which triggers you wish to export (Figure 4-27). The selected path will be displayed along with a list of available triggers. Select any or all of the triggers by highlighting them. Click the check boxes for either incoming triggers, outgoing triggers or both. FastCall will then export the selected triggers to the directory specified.
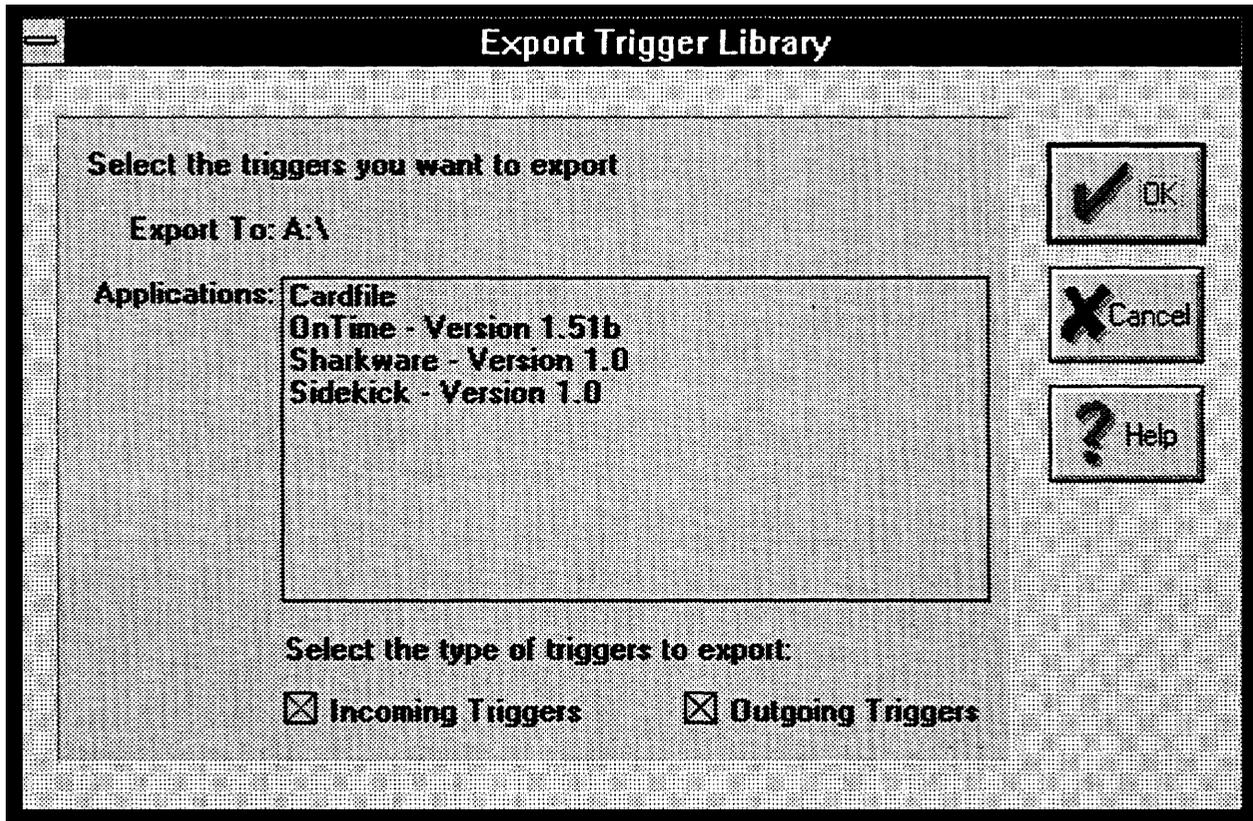
Figure 4-27. Export Trigger Library Dialog Box

Importing Triggers

If you wish to import triggers from a file or from the FastCall Macro Library diskette, select `File, Import Triggers` from the FastCall Administration main window. The Select the Library Directory dialog box is then displayed (Figure 4-28).
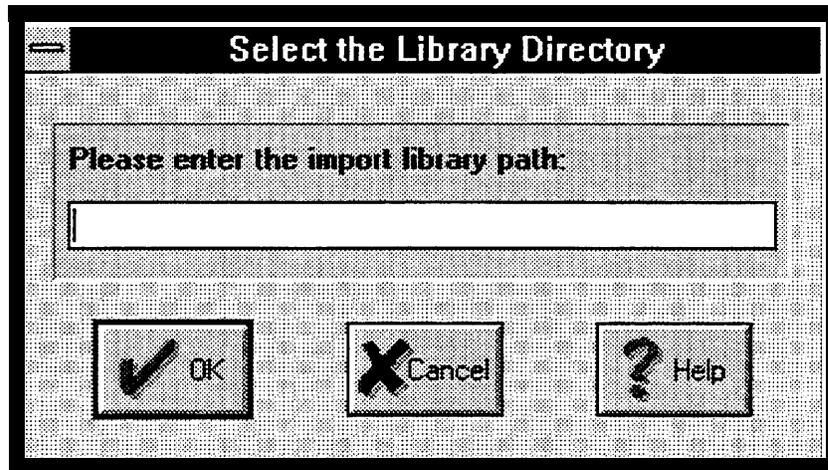
Figure 4-28. Select the Library Directory Dialog Box

Trigger information is imported from the directory that you specify in this dialog box. This directory must contain a valid trigger library, such as one exported from FastCall, or it may be a floppy drive with the FastCall Library Macro diskette installed.

Once you have selected a valid path, you will have the opportunity to select which triggers you wish to import (Figure 4-29). The selected path will be displayed along with a list of available triggers. Select any or all of the triggers by highlighting them. Click the check boxes for either incoming triggers, outgoing triggers or both. FastCall will then import the selected triggers and make them part of the FastCall installation. Triggers already installed will not be affected.
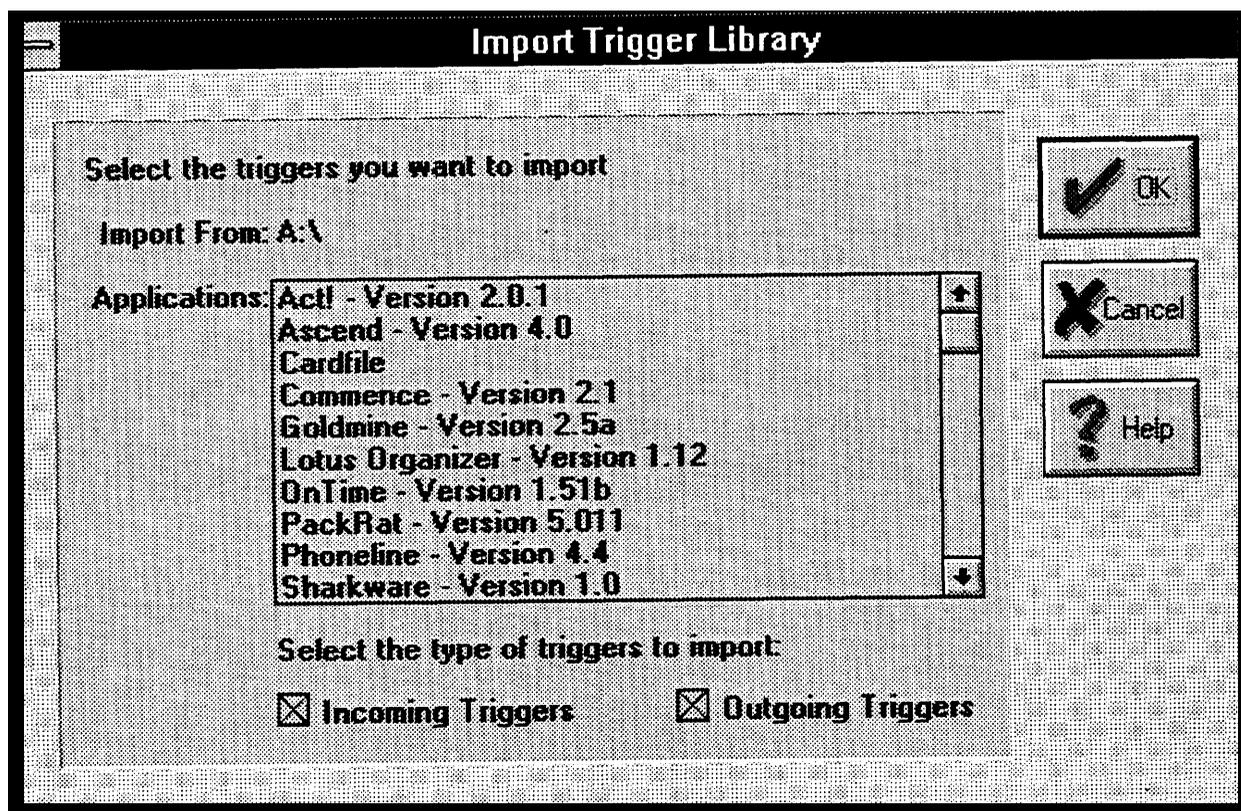
Figure 4-29. Import Trigger Library Dialog Box

Saving and Loading Configurations

Saving a FastCall Configuration

NOTE:
Features that are not available for FastCall Runtime and Promotional will be grayed out.

When you have completed configuring FastCall, save the configuration information by selecting `File, Save Configuration` as in the FastCall - Administration Program window. The Save Configuration dialog box is then displayed (Figure 4-30).
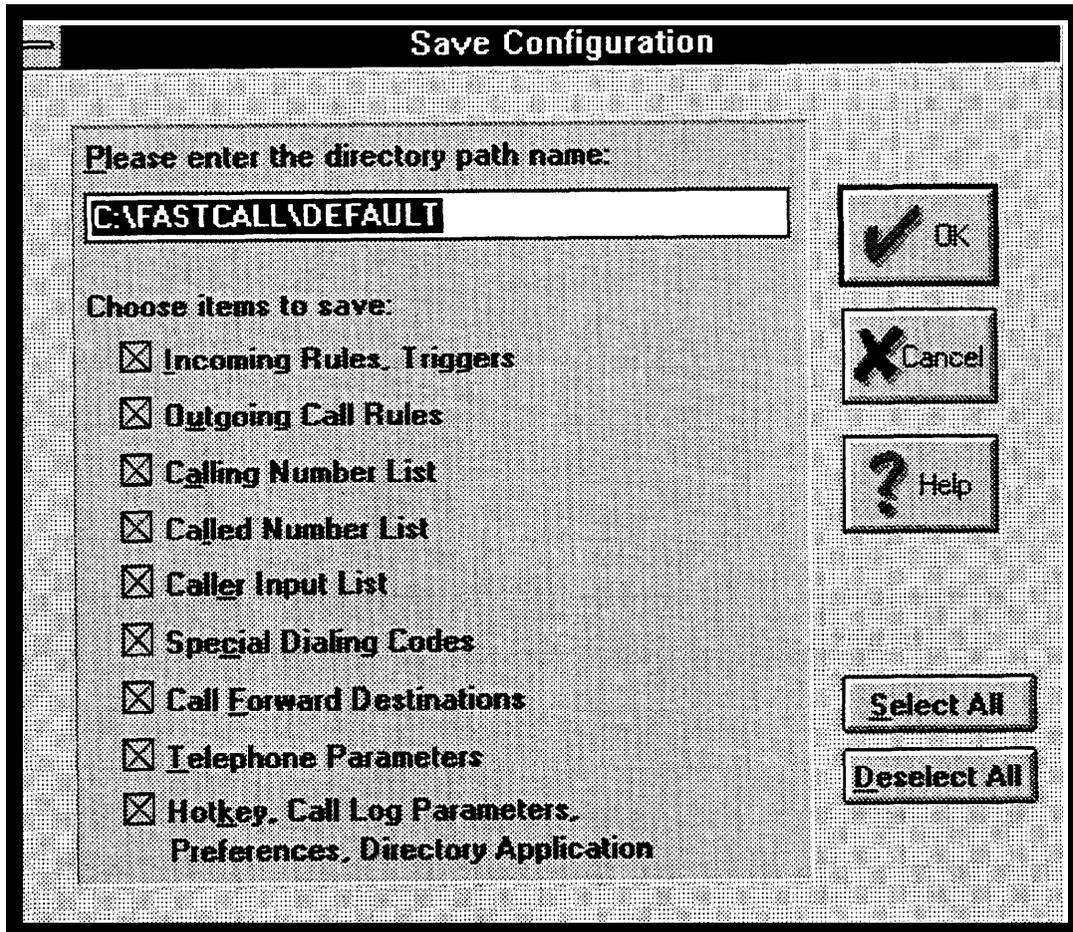
Figure 4-30. Save Configuration Dialog Box

FastCall configuration information is saved in the directory that you specify in this dialog box. The default configuration directory is the FastCall directory, C:\FASTCALL\DEFAULT, as shown in Figure 4-30. Other drives or directories may be used, including floppy disk drives.

You can save any number of FastCall configurations. However, each configuration must be saved in its *own directory.* The directory *must already exist* and it *must not* be the root (for example, C:\) directory. If you save a configuration to a directory that already has a set of configuration files, they are overwritten by the new information.

You also may select the configuration information that you wish to save. Selecting the check box next to each item listed will save that particular item. If you wish to save the entire configuration, select the check boxes for all of the items.

The configuration information consists of a set of files that are saved in the specified directory. These files contain all of the information that you have selected, such as calling party numbers, called numbers, caller input lists, dialing codes, rules, and triggers.

Loading a FastCall Configuration

> **NOTE:**
> Features that are not available for FastCall Runtime and Promotional will be grayed out.

You can load a FastCall configuration by selecting `File, Load Configuration` in the FastCall - Administration Program window. The Load Configuration dialog box is then displayed (Figure 4-31). Specify the pathname of the directory containing the configuration that you want to load.
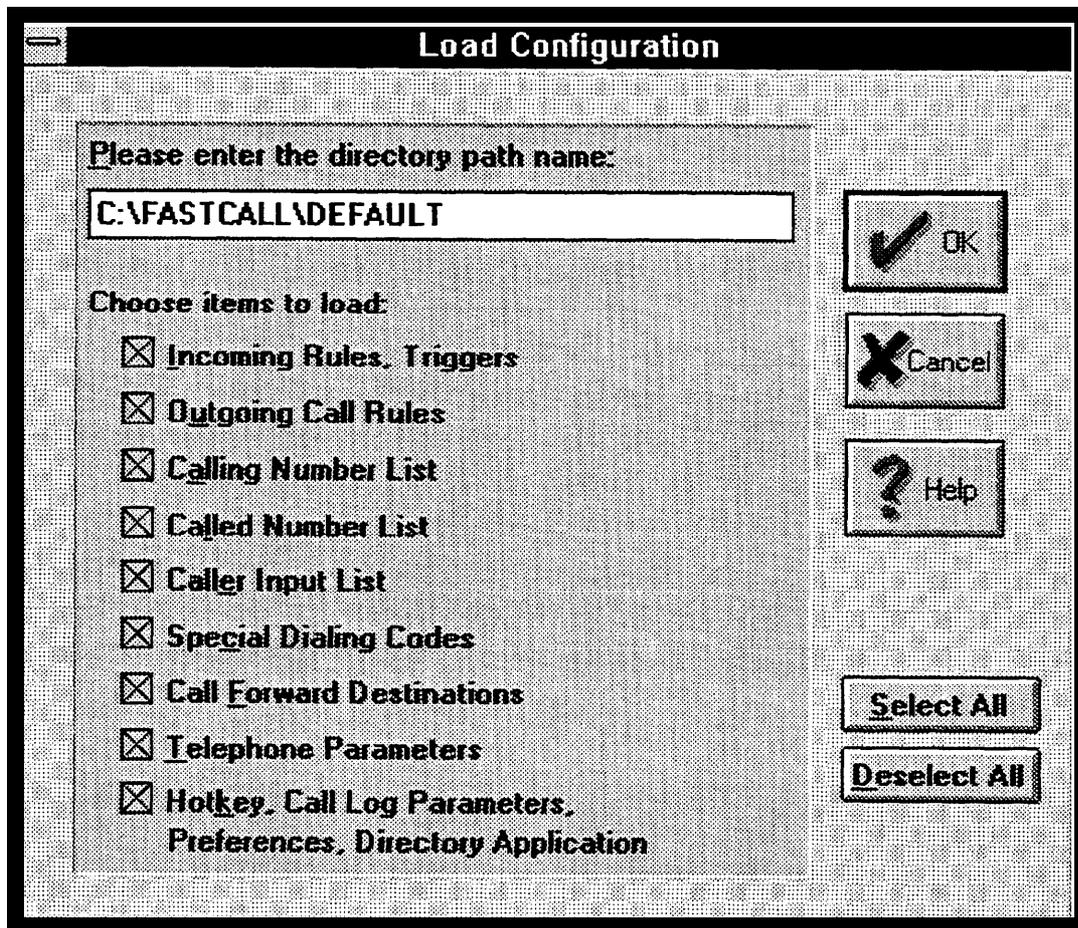
Figure 4-31. Load Configuration Dialog Box

Loading FastCall Configurations on Agent Systems

The Load Configuration and Save Configuration features allow you to create a single configuration that can be copied to multiple systems. You must load a FastCall configuration on each agent system. To do this, the FastCall Administration program must be installed on each agent system. Note that the password is not loaded as part of the FastCall Load Configuration process. This enables a unique password to be configured at each system.

FastCall configuration information is loaded in the directory that you specify in this dialog box. The default configuration directory is the FastCall directory, C:\FASTCALL\DEFAULT, as shown in the dialog box. Other drives or directories may be used, including floppy disk drives.

You also may select the configuration information that you wish to load. Selecting the check box next to each item listed will load that particular item. If you wish to load the entire configuration, select the check boxes for all of the items.

The configuration information consists of a set of files that are loaded in the specified directory. These files contain all of the information that you have selected, such as calling party numbers, called numbers, caller input lists, dialing codes, rules, and triggers.

Typically, the System Administrator would configure FastCall at his or her terminal. The System Administrator would then load the configuration on each agent system via a network or by saving the configuration to a diskette and then using the diskette or network to load the configuration on each system.

Setting Up Applications

5

Overview

> **NOTE:**
> The FastCall Promotional and Runtime products do not allow creation of call triggers. Triggers for your application of choice, or installation of triggers from the Macro Library are accomplished automatically. Access to the Macro Library is allowed with the Professional and Runtime products. FastCall Professional has access to all of the functionality described in this chapter.

This chapter provides instructions for setting up your applications to work with FastCall. To set up applications for use with FastCall, you must:

- Determine the Windows applications that you intend to use

- Arrange your desktop by starting and minimizing all necessary applications

- From the FastCall Administration main window:

  — Set up the Application Paths

  — Configure Incoming Call Triggers

  — Configure Outgoing Call Triggers

Call Triggers

Call triggers are actions that occur when a call is received or originated. A call trigger executes the actions in an application needed for a specific call. Triggers can be configured for incoming and outgoing calls.

Triggers work in conjunction with call rules. In summary, a rule is a set of predefine conditions that a call must meet. When a call meets the conditions of a rule, it causes the trigger(s) defined in the rule to run.

⇒ NOTE:

Triggers may only be created with the FastCall Professional version.

There are incoming and outgoing call rules. Call Rules are discussed in Chapter 6 of this user's guide.

Determining Your Application Requirements

Before configuring FastCall, determine how you want the telephone calls you receive to be handled by FastCall. Determine the applications that you want to "pop up" in Windows when calls are received. You must be familiar with the applications to know the keystrokes required to find the correct information. This is necessary because FastCall utilizes a macro language to pop up applications and locate specific information within applications. FastCall triggers make use of the macros to automatically perform defined actions.

> **NOTE:**
>
> Database records need to have the calling or called number as an index inside a cardfile card.
>
> The PBX needs to be equipped with the Call Prompting option so that touch tone (DTMF) input collected from the caller provides information that can be used to pop up the correct record. For example, Call Prompting could be used to collect an account number from people calling their bank to get information. FastCall could use this account number to retrieve and pop up the caller's account record when the call is routed to a bank representative. FastCall calls this Caller Input. (See Chapter 4.)
>
> You need to use the Look-Up Conversion option (discussed later in this chapter).

Arranging Your Windows Desktop

Figure 5-1 shows how your screen, or Windows desktop, may be arranged after launching and minimizing the applications that are typically part of your working environment. Arrange your desktop with the applications that you intend to use before configuring Application Paths and Call Triggers.

You may want to configure agent systems, the computers that the phone agents will be using, to automatically run Windows and launch all of the standard applications and FastCall Controller. This can be done using the Windows StartUp group and Windows macros capabilities. This enables you to create a standard environment that is fully functional any time the computer is turned on.

Example Desktop

In the example desktop shown in Figure 5-1, we are running AT&TCall, a Windows spreadsheet, and the Windows Clock. FastCall - Call Control Keys, FastCall - Master Control Program, and FastCall Administration are also running and minimized.

5-4
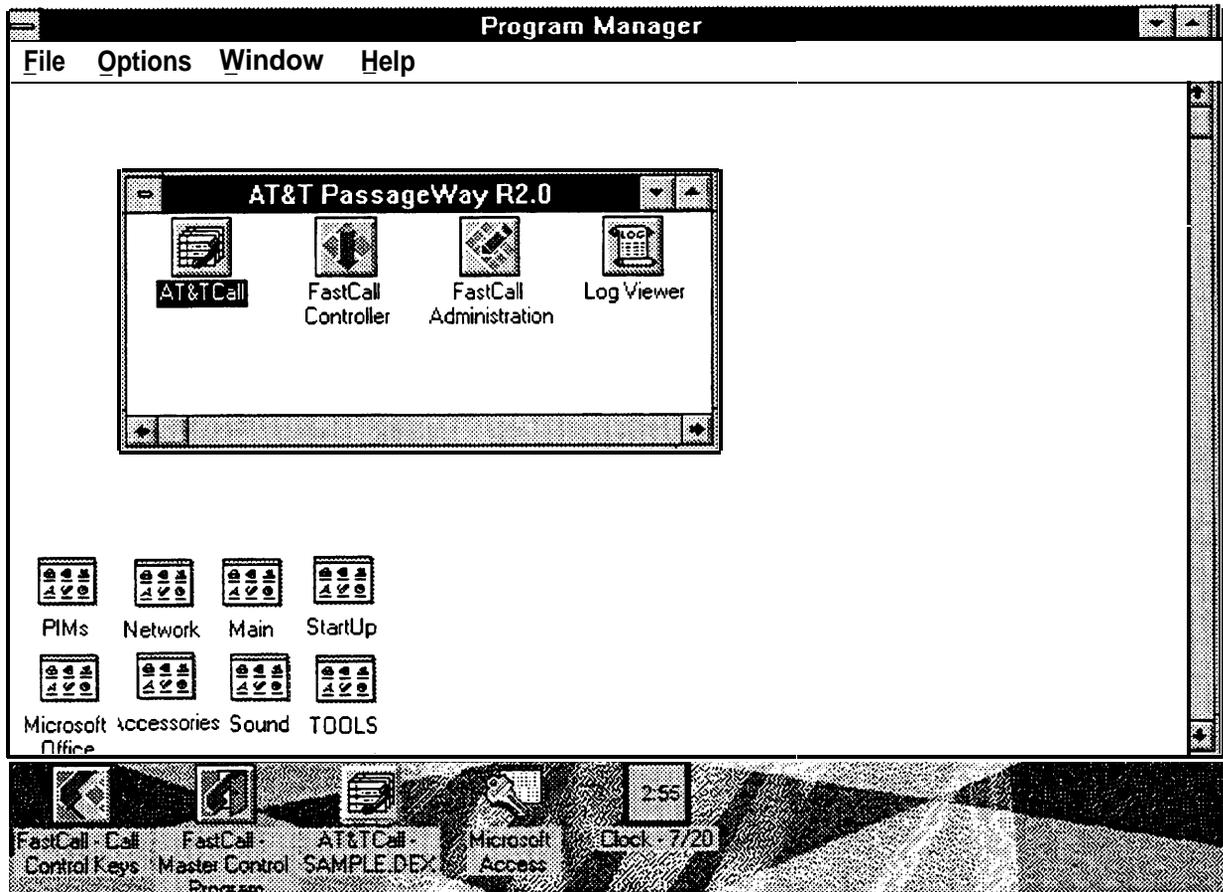
Figure 5-1. Sample Desktop

Configuring Application Paths

To configure application path assignments, first start all of the applications that you plan to use with FastCall. After starting an application, it can be minimized (iconized). If the application is not active or minimized you may access the path by utilizing the "Browse" option.

Select Configure, Application Paths from the FastCall Administration main window to set up the application paths. The Application Path Assignment dialog box is then displayed (Figure 5-2). You can configure a maximum of 100 application path assignments.
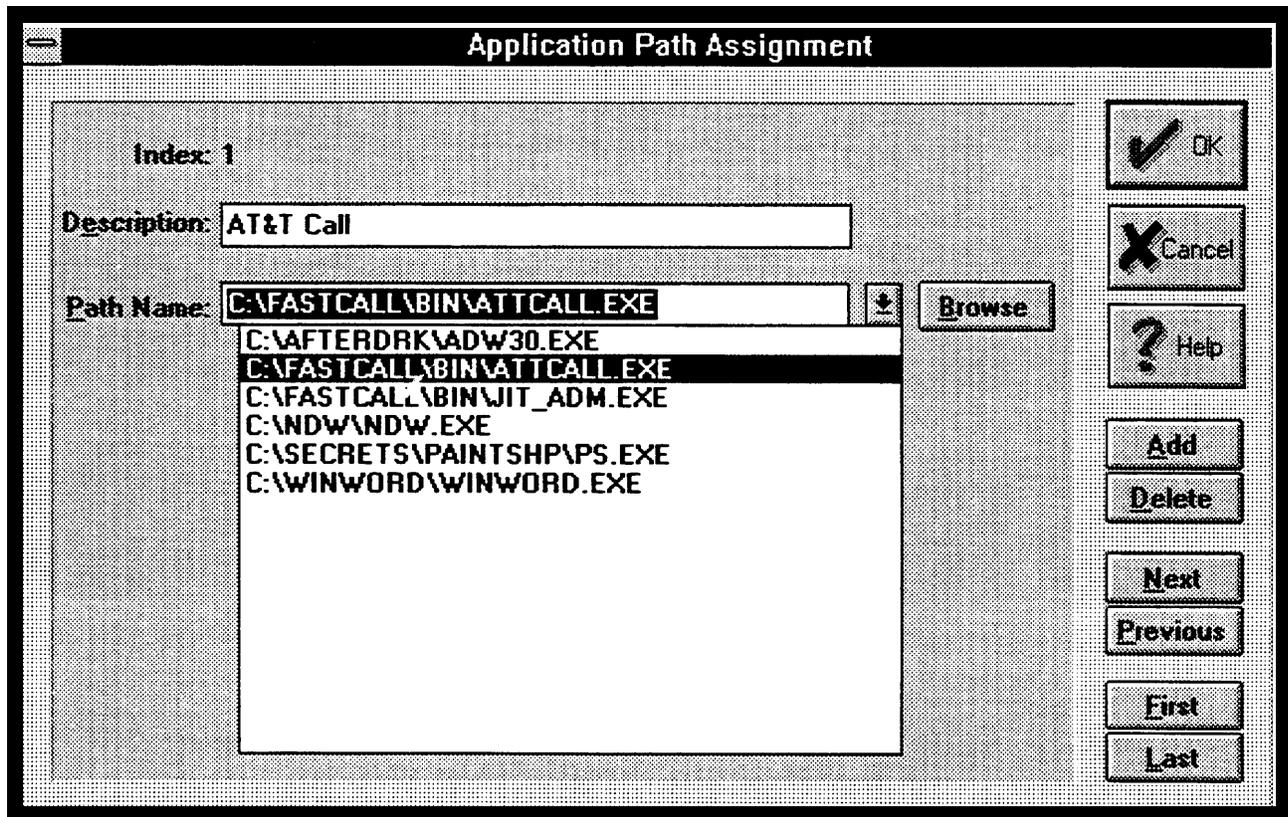
Figure 5-2. Application Path Assignment Dialog Box

To configure application path assignments:

1. In the Description field, enter a unique description that you intend to use to identify the application. This description will be tracked by FastCall and used in the call triggers screen to determine the application to be accessed.

2. Click on the drop-down list arrow in the Pathname field to see the list of currently active applications.

3. In the list, click on the application you want to match to the description you entered in the Description field. If scrolling through the list, stop scrolling when the desired application path is displayed in the field.

4. Click the OK button to complete the application path assignment.

➡ **NOTE:**

If the application that you want to use is not included in the Pathname drop-down list, it means that the application is not active. In that case, use the Browse option to find the correct path. Remember that the application must be running in order to record Keystroke macros, and to enable screen pops when FastCall is active.

Configuring Application Triggers

FastCall triggers utilize macros. A macro is a sequence of instructions to execute any number of functions and actions. By recording commonly performed keystroke sequences as a macro, you can automate the performance of multiple tasks. FastCall has adapted the concept to create dynamic keystroke macros that incorporate the telephone numbers of callers and telephone numbers to be dialed. The keystroke macros are associated with your applications to create "triggers" that FastCall uses to integrate the handling of incoming and outgoing calls with your applications.

The execution of application triggers is determined by selecting or deselecting the *Auto Trigger Before Answer* in the FastCall Preferences. Refer to the "Configuring Preferences" in Chapter 4 for more information.

Configuring Triggers for Incoming Calls

> **NOTE:**
> This feature allows access to the Library Macros in FastCall Runtime and allows creation of new macros and editing of Library Macros in FastCall Professional.

Triggers for incoming calls include a unique description (name of the trigger), the application that the trigger will pop up in Windows, a specific window within the application, and the type of trigger. Both keystroke macros and Dynamic Data Exchange (DDE) are supported trigger types. The applications that you intend to define triggers for *must be running.* They can be minimized.

The Incoming Call Triggers Dialog Box

Select `Configure, Application Triggers, Incoming Calls` in the FastCall Administration main window. The Incoming Call Triggers dialog box is then displayed (Figure 5-3). Use this dialog box to configure all the triggers you will use for incoming calls. You can configure a maximum of 100 incoming call triggers.
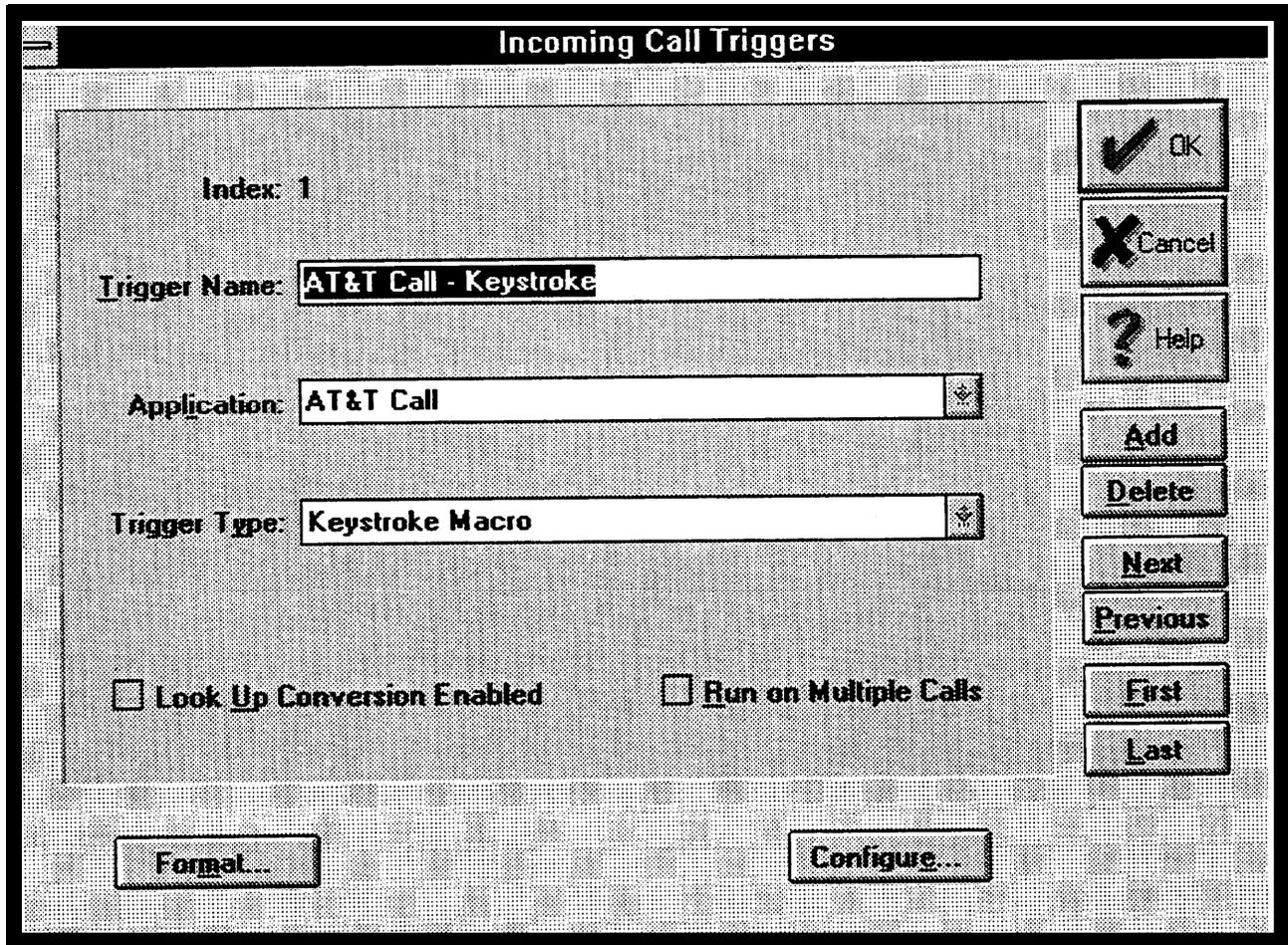
Figure 5-3. Application Triggers Dialog Box

About the Incoming Call Triggers Dialog Box

Index

The Index number indicates the order in which Call Triggers have been defined and will run if multiple triggers are selected for an incoming call rule.

Look-Up Conversion Enabled

When the Look-Up Conversion Enabled option is selected, FastCall overrides the input specified in the trigger keystroke macro and scans the look-up data in one of the following files in the FastCall \DATA directory, relative to the input specified in the macro:

File Scanned	Macro Input
LOOKING.DAT	Calling Number
LOOKED.DAT	Called Number
LOOKER.DAT	Caller Input

If FastCall doesn't find a matching entry in the file, it uses a null string. If the required look-up file does not exist, it uses a null string. Each file is in ASCII and can be created using the Windows Notepad or a text editor. This feature is provided in cases where you want to map the call data to other data. For example, if you have a client who has several numbers on which they can call you but you maintain a single account number for that client, then you would set up the Calling Number List to include each number and set up your trigger macro to use the Calling Number data in the trigger. You would then create an ASCII file named LOOKING.DAT and enable the Look-Up Conversion option. In LOOKING.DAT, you would have a list of all the phone numbers of the client each followed by the client's account number. When the client calls from any of these numbers, FastCall would scan LOOKING.DAT and use the account number in the trigger. The table below shows how the LOOKING.DAT file would be set up:

555-1234,1234567
555-4321,1234567
555-7890,1234567
555-0987,1234567

5-10

Description

Enter a unique description, up to 30 characters, to identify the trigger. Since the descriptions are used by FastCall to identify the trigger in other places such as in the Call Rules configuration dialog boxes, it is important that you can recognize your trigger descriptions. This is discussed further in Chapter 6.

Application

Select from the application list the application that this trigger will pop up on screen. The applications are listed by the descriptions that you give them in the Application Path Assignment dialog box.

Window

A Windows application can have multiple files open, each in a separate window and each identified by a title bar. For each containing a different database table. Within the application select the specific window you want to pop up on screen by selecting the title bar of the window you want to pop up.

If you wish to pop the application, and use whichever to pop Access and have the ability to access all three database tables (as described above) select the application window option.

Trigger types

The currently supported trigger types include keystroke macros and Dynamic Data Exchange (DDE).

Format

Selecting the Format option allows calling or called numbers utilized in macros to be formatted to match the constraints of the telephone number field in some windows programs (Figure 5-4). For example, some programs will not recognize dashes or non-numeric characters in telephone number fields.
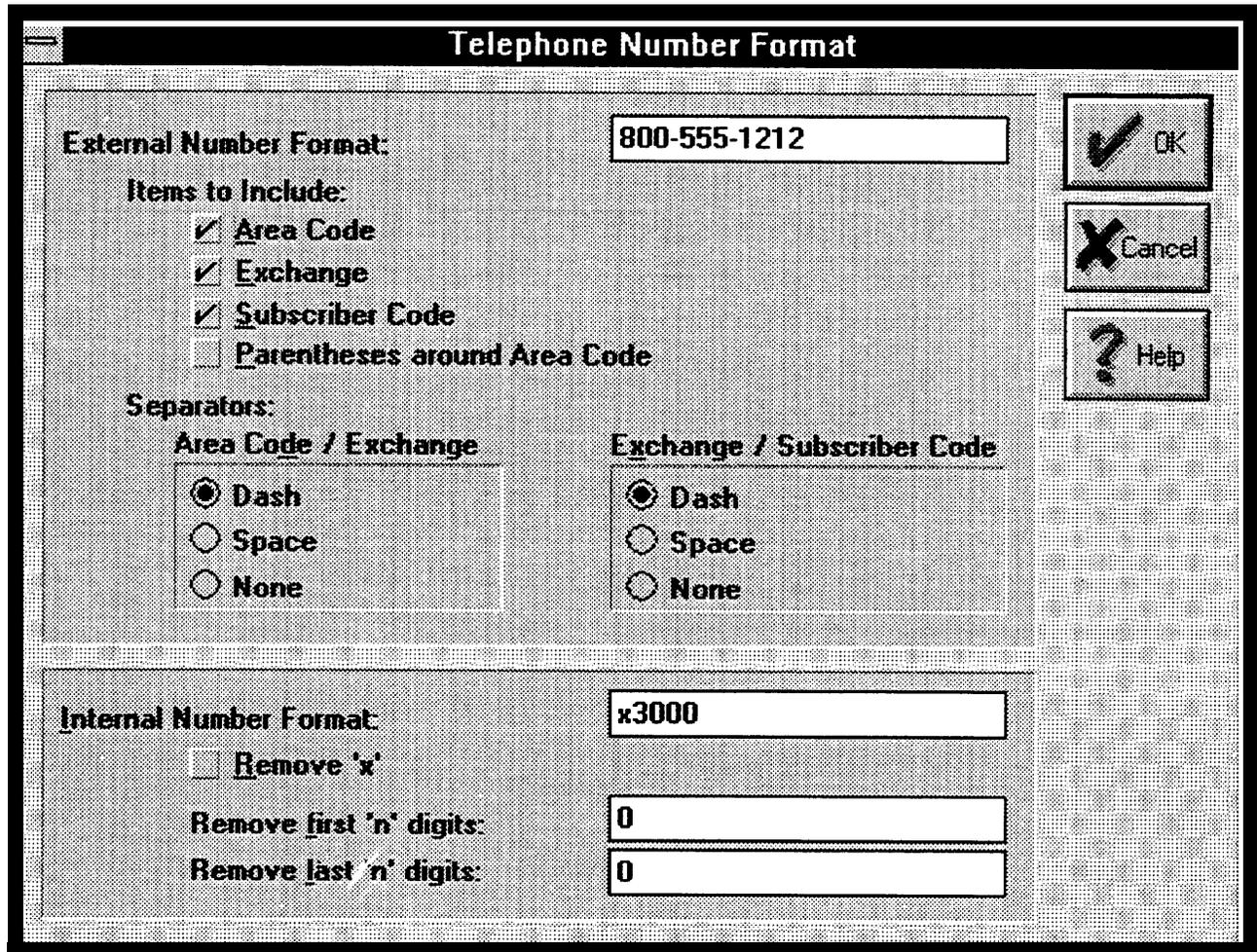
Figure 5-4. Telephone Number Format Dialog Box

For external numbers, use the check boxes to indicate which items to include in the telephone number string, Separators for the area code, exchange, and subscriber code can be set for dashes, spaces, or none. Internal numbers may also be formatted to remove the "x" from extension numbers or to remove numbers from the extension string.

The boxes to the right of External and Internal number format display what the telephone number will look like after formatting.

Recording a Macro for an Incoming Call Trigger

To record a keystroke macro, you must know how to use the keyboard to perform the desired functions within the applications for which you are defining triggers. It is recommended that you practice the process before you record the macro, making certain you know what keystrokes to use to accomplish the actions you want the macro to perform. These actions can include searching for specific fields within a database or other application.

When recording keystroke macros for Incoming Call Triggers, *you must take care* not to create macros that might cause application malfunctions or corrupt your application or files. The following guidelines are recommended when recording macros:

- Remember that macros may run when you are not at your desk or not using your computer. You must take care that if the applications and windows associated with the trigger are running, the macro will run correctly from any cursor position or screen position in which you may have left the application.

- Make sure the macro contains keystrokes to bring the application to a known starting point, from which the intended operations will occur, from any of these likely cursor or screen positions. Often this can be accomplished by a sequence of keys that always brings you to a main menu or a general database query screen. You may need to consult the documentation or help screens for your applications to determine the best keystroke sequence.

- Make sure that both incoming and outgoing call macros contain keystrokes that bring the application back to a known position when the macro completes. This helps ensure that the triggers associated with the next call will execute correctly.

- To receive the benefits of FastCall's automated incoming call triggers, make sure that the applications for which triggers are assigned are returned to an appropriate screen or cursor position when you are finished using the application. Often this can be done by assigning or recording a hotkey sequence.

■ Since you may interrupt macros and it is possible to prematurely abort a macro, it is important to record macros with care and return all associated applications to a known "FastCall-friendly" state after using the applications.

The next section provides an example of how to record a macro for use with the AT&TCall application.

≡⊳ **NOTE:**

You can not record macros while the FastCall - Call Control Keys window is running. Close the FastCall - Call Control Keys window if it is running before you record your macros. After recording the macros, exit from the Incoming Call Triggers dialog box and restart the FastCall - Call Control Keys window.

Do not use the mouse when recording macros. The mouse is unreliable for macros because application windows may be located in different areas of the screen between user sessions. The operation of the mouse is based on its screen location.

If it is necessary to use the PAUSE key in your application, and you want to use it within your keystroke macro, enter SHIFT + PAUSE during recording and PAUSE will be entered as a keystroke.

To record the macro, enter or select the required information in the Incoming Call Triggers dialog box (Figure 5-5), including the description or name of the trigger, the application that the trigger will pop up in Windows, a specific window within the application or the "(application window)" option (that is, whichever window was active last in the application), and the type of trigger.
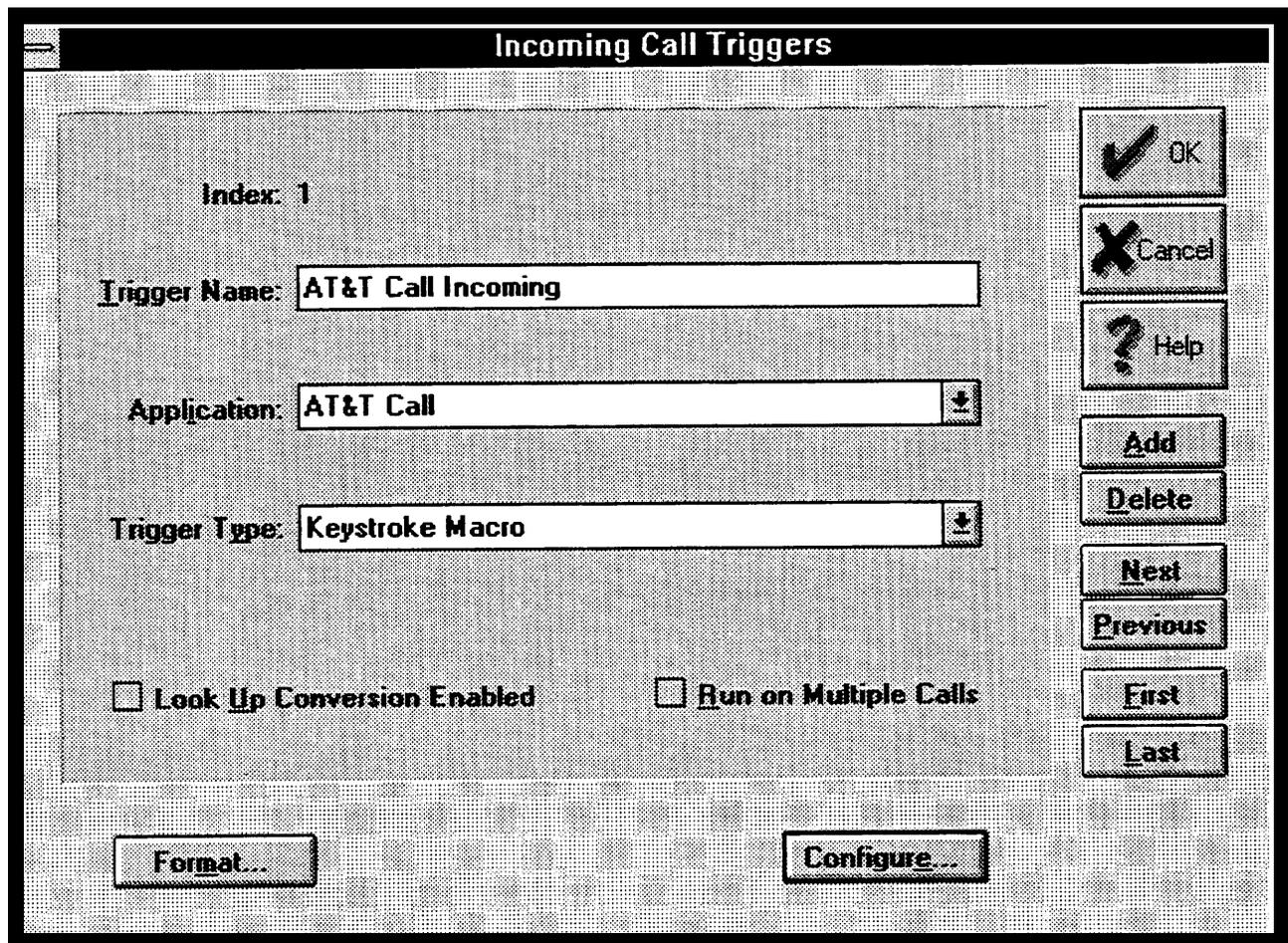
Figure 5-5. Incoming Call Trigger Example

Press Configure to select the specific window within the application or the "application window" option (that is, whichever window was active last in the application).

5-15
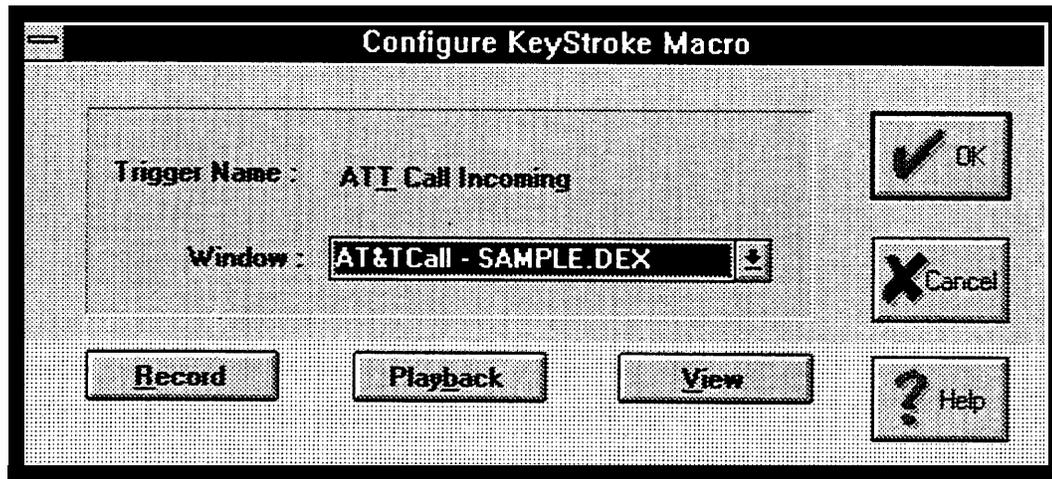
Figure 5-6. Configure Keystroke Macro Dialog Box

Click the Record button to begin recording the macro. The following
message is displayed (Figure 5-7).
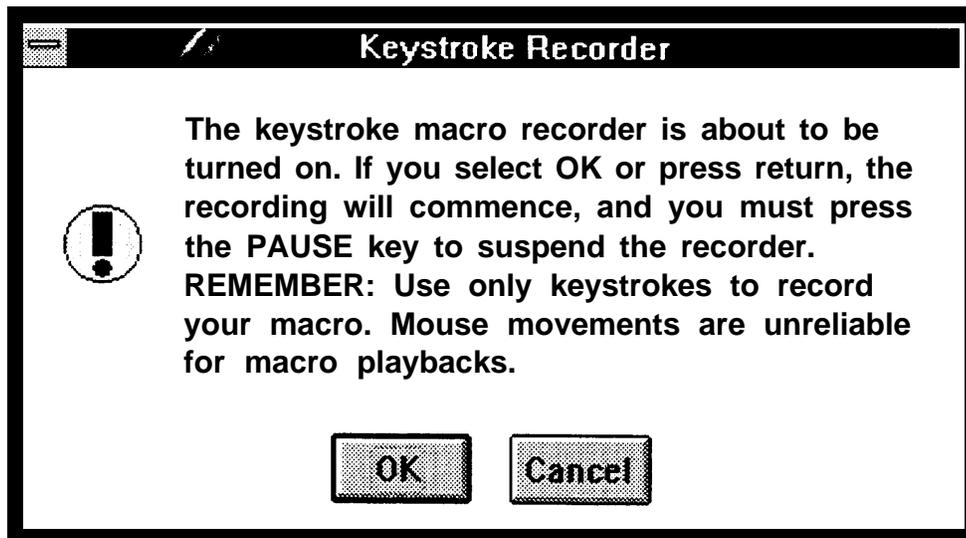
Figure 5-7. Keystroke Macro Warning Box

Click the OK button to begin recording the keystroke macro. When you reach
a point at which you want to insert the called number, the calling number or
the caller input, press the PAUSE button to suspend the macro recording.
The following dialog box is displayed. Use the DOWN ARROW key to select
the input you want to use with this macro, then click the OK button to continue
recording the keystroke macro.
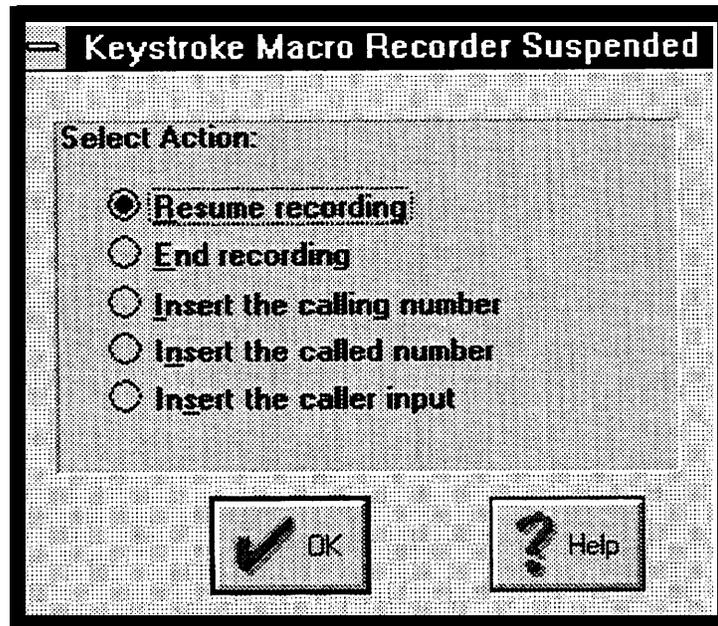
Figure 5-8. Macro Suspended Dialog Box

To end the macro recording, press the PAUSE key to display the Keystroke
Macro Recorder Suspended dialog box, then press the DOWN ARROW key
once to select the End Recording option button and select the OK button.

Playback

Click the Playback button to playback the macro that you just recorded. This
lets you test the macro to see that it works correctly.

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View

Click the View button to see the keystrokes that have been recorded for the selected trigger (Figure 5-9).


```
 ═                C:\FASTCALL\DATA\MACRO.TXT                ▼ ▲
  Incoming  trigger  #1:  AT&T  Call  Incoming                    ◆

  -----------------------------------------------

  [ALT]+L
  [CONTROL]+F
  [DELETE]
  [Insert  the  calling  number]
  [ALT]+F
  [ESC]




                                                               ◆
 ◄                                                          ►
```
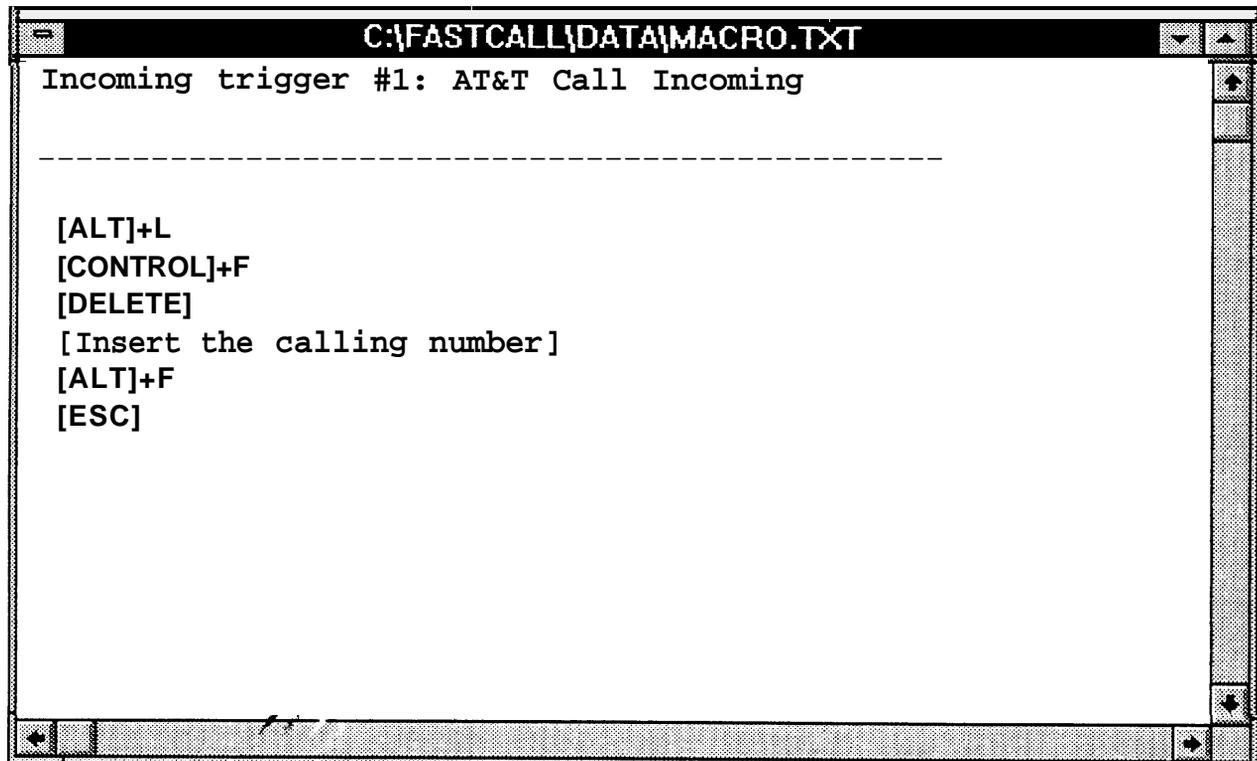
Figure 5-9. View Keystroke Window

Incoming Call Trigger - Example

This example defines a trigger and keystroke macro to work with AT&TCall.
Note that the keystrokes used in this example are the keystrokes for the
AT&TCall application. The example is intended to show you the methods and
procedures for creating an incoming call trigger. The keystrokes that you
record depend on the application that you are setting up to work with
FastCall.

1. Select `Configure, Application Paths` to configure the path for
   AT&TCall.

2. Select `Configure, Application Triggers, Incoming Calls`
   from the FastCall Administration main window.

3. Make the appropriate selections and entries in the incoming Call
   Triggers dialog boxes as shown in the Figures 5-10 and 5-11.
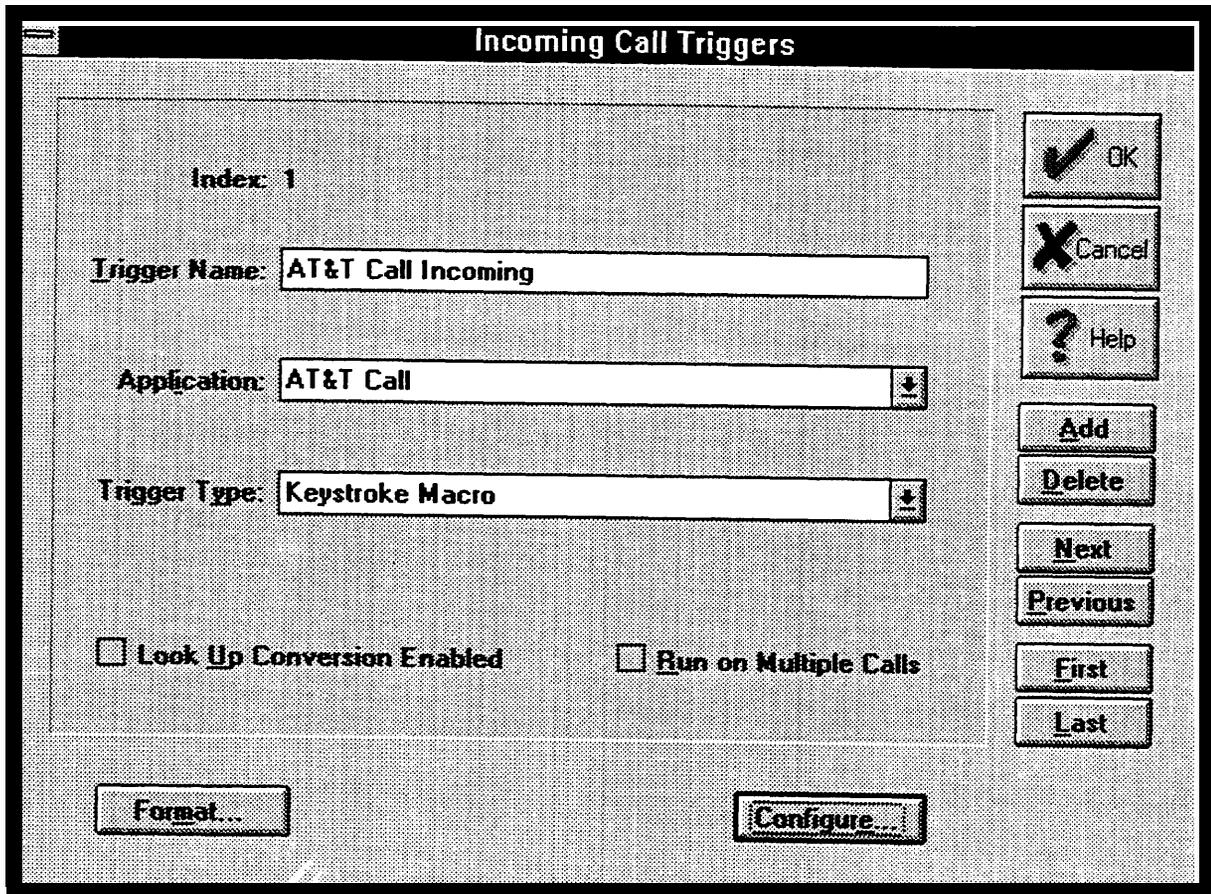
Figure 5-10. Incoming Call Triggers Dialog Box
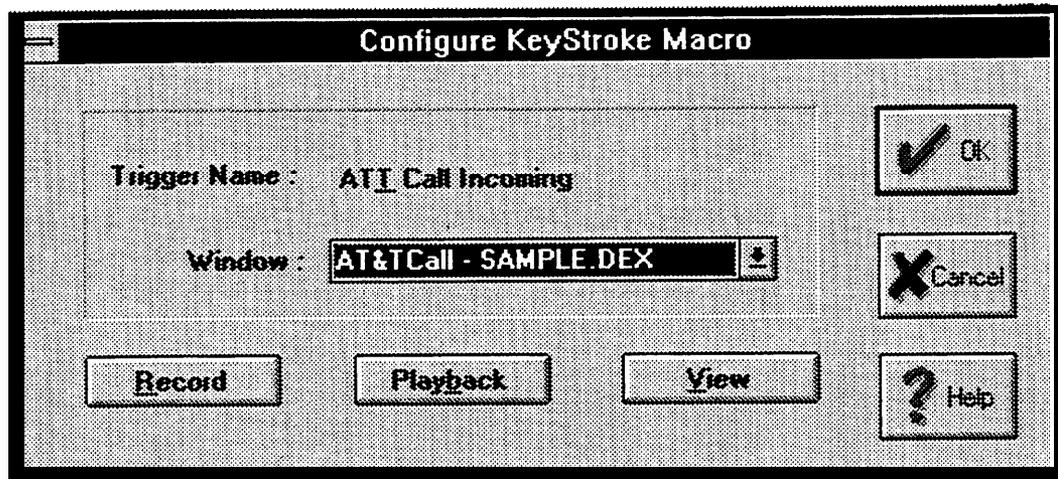
Figure 5-11. Configure Keystroke Macro Dialog Box

4. Click the OK button to add the trigger, and then click the Record button to begin recording the macro.

   The following message is displayed (Figure 5-12).

Keystroke Recorder

The keystroke macro recorder is about to be
turned on. If you select OK or press return, the
recording will commence, and you must press
the PAUSE key to suspend the recorder.
REMEMBER: Use only keystrokes to record
your macro. Mouse movenents are unreliable
for macro playbacks.

OK   Cancel
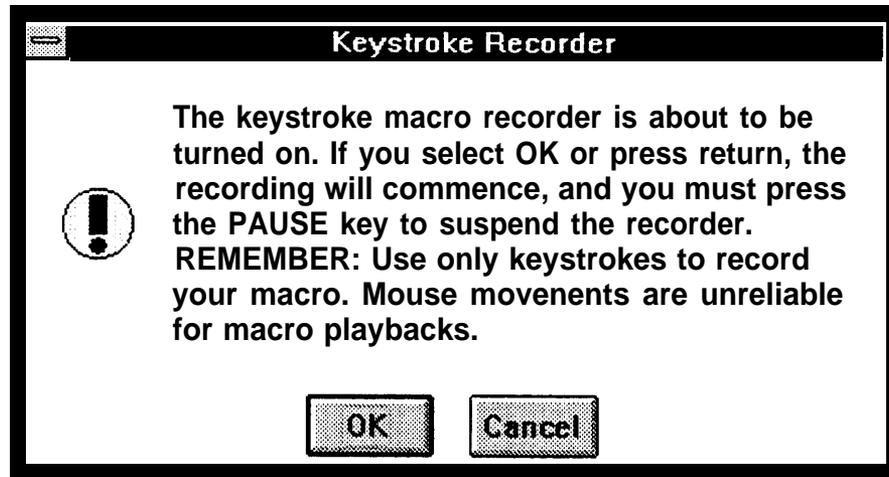
Figure 5-12. Keystroke Recorder Dialog Box

 5. Click the OK button to continue and begin recording the keystroke
     macro.

     The application window specified for this trigger, AT&TCall, is
     displayed (Figure 5-1 3).
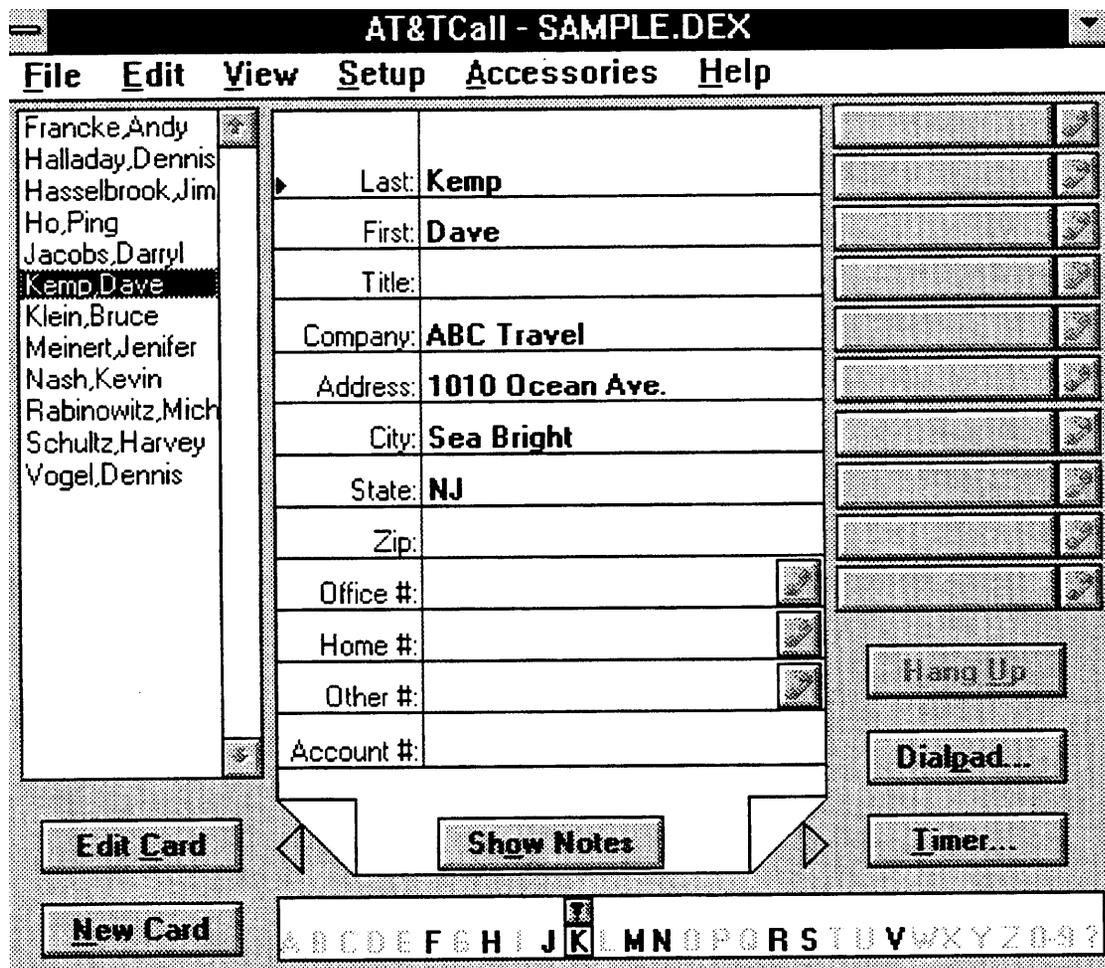
Figure 5-13. Incoming Call Triggers

6. Press ALT + L to cancel out of Edit mode or New Card mode.

7. Press ALT + I to Hide Notes.

8. Press HOME to place you on the first card in the bank.

9. Press CTRL + F to select the AT&TCall Search and Find command.
    The AT&TCall Find dialog box is displayed (Figure 5-14).
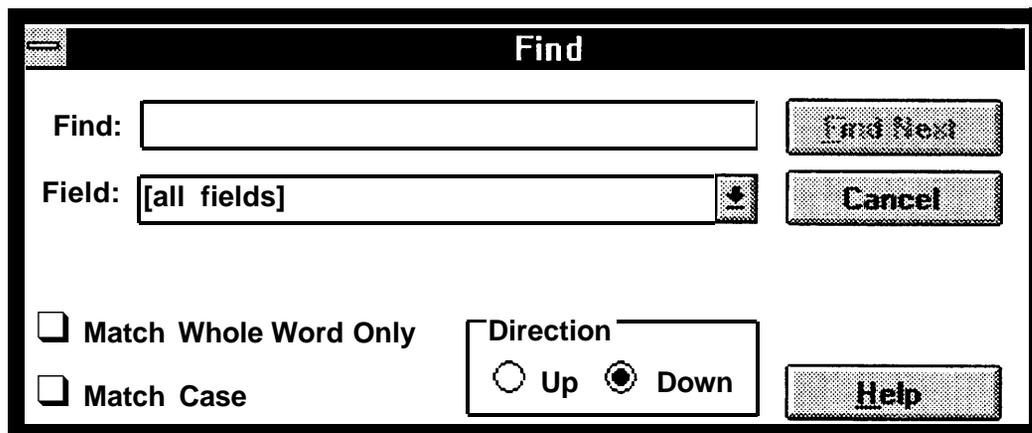
Figure 5-14. AT&TCall Find Dialog Box

10. Press the DEL button to remove any text or characters currently
    displayed in the Find field.

11. Press the PAUSE button to suspend the macro recording.

The following Keystroke Macro Recorder Suspended dialog box appears (Figure 5-15).

Figure 5-15. Keystroke Macro Recorder Suspended Dialog Box

12. Select the Insert the calling number option button and then press the ENTER key.

The Keystroke Macro Recorder dialog box is then displayed (Figure 5-16). This dialog box provides a way of supplying data (the number) during the recording that will normally be supplied by the system. We have entered the extension x5000 in the example dialog box below because this is a valid number in AT&TCall.
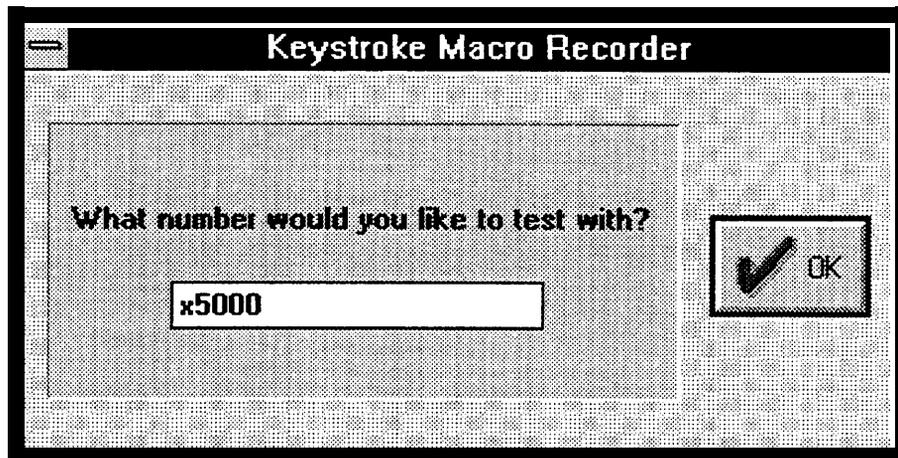
Figure 5-16. Keystroke Macro Recorder Dialog Box

13. Enter a valid number that you want to use to test the macro, and then
    press the ENTER key. The number must be entered exactly as it is
    formatted in AT&TCall for a successful find. Note that in real-time
    operation, (that is, when the FastCall Controller is running) in order for
    the Incoming Call Trigger to work properly for calling and called
    numbers, the application must be formatted in the FastCall format. If
    not, use the FastCall Telephone Number Format option to insure the
    macro telephone number format matches your application's format.
    Also, caller input numbers must be present without embedded
    dashes or non-numeric characters.

    The Keystroke Macro Recorder Suspended dialog box is displayed
    again, with the Resume recording option selected (Figure 5-17).
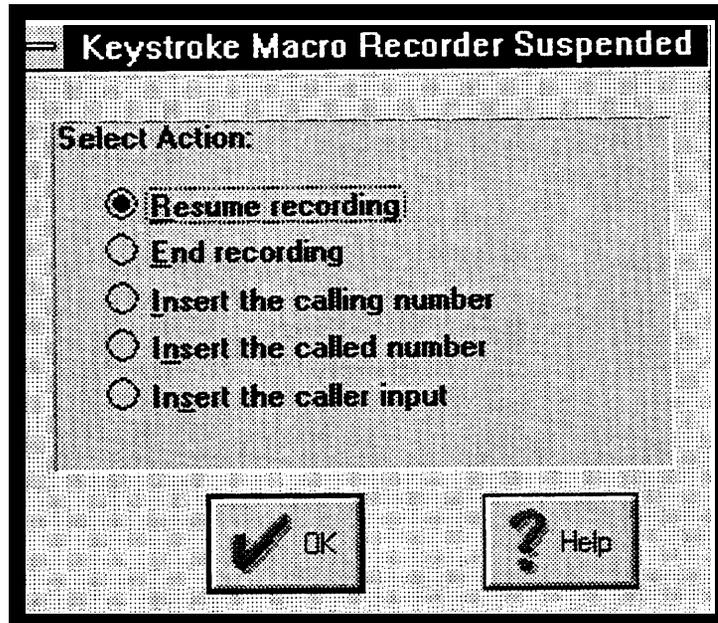
Figure 5-17. Keystroke Macro Recorder Suspended Dialog Box

14. Click the OK button to continue recording the macro.

    The AT&TCall Find dialog box is then displayed (Figure 5-18). The test number, x5000, has been inserted into the Find field.
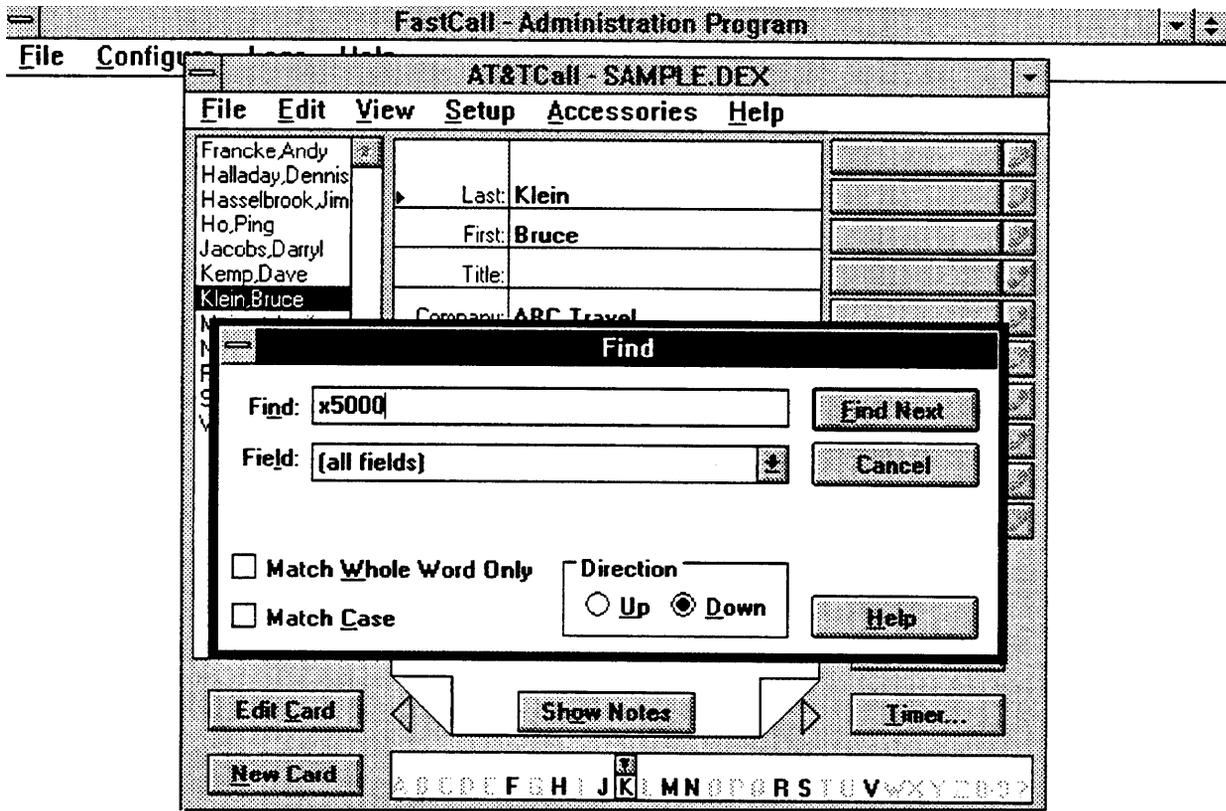
Figure 5-18. AT&TCall Find Dialog Box

15. Press ALT + F to execute the Find Next button in the AT&TCall Find dialog box.

    AT&TCall will search for the next occurrence of the extension x5000.

16. Press ESC once to close the Find dialog box and to ensure that if the number is not found the application will return to its original state when the macro has completed.

17. Press the PAUSE button to suspend the macro recording.

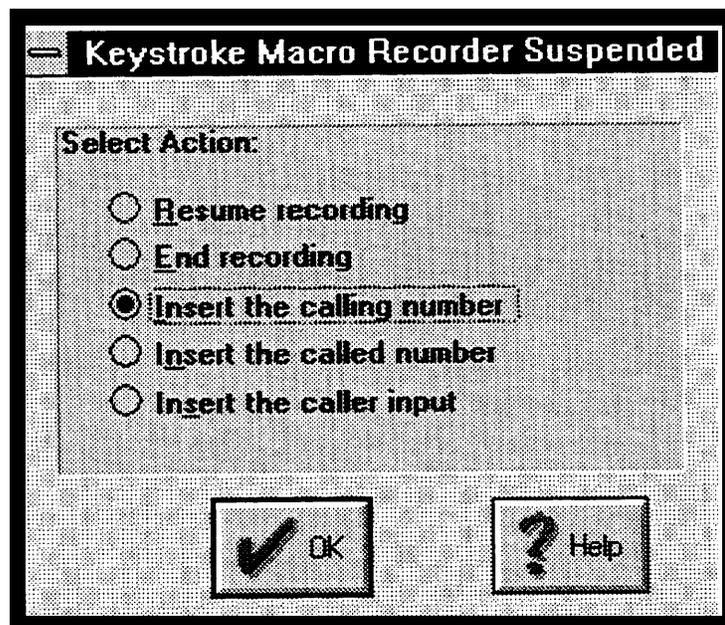The Keystroke Macro Recorder Suspended dialog box is displayed
(Figure 5-19).
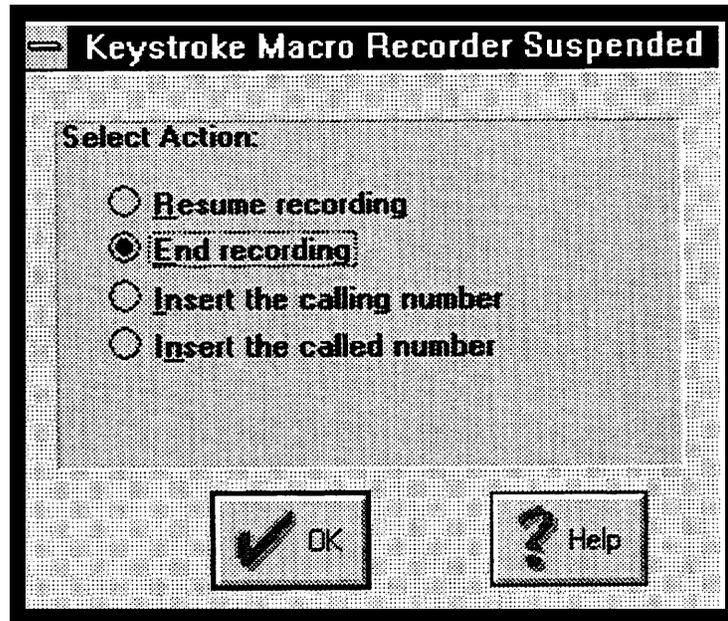
Figure 5-19. Keystroke Macro Recorder Suspended Dialog Box

18. Select the End recording option button and then press the ENTER
key.

The macro recording for the incoming call trigger is now complete.

19. Click the Playback button to play the macro to confirm its performance.

    During the playback, you will need to enter a valid number to test the macro.

20. When the playback is completed, go to the AT&TCall application to verify that the correct card is displayed. If the correct card does not pop-up on screen, re-record the macro.

Configuring Triggers for Outgoing Calls

> ≡> **NOTE:**
>
> Outgoing Triggers can only be created with FastCall Professional. With the FastCall Promotional product, triggers for your application of choice and Library Macros are installed automatically. You can edit macros in the trigger library in the Runtime and Professional versions of FastCall.

Outgoing call triggers are macros that run a set of actions when an agent selects F4 - Dial Main or F5 - Dial Other in the FastCall - Call Control Keys window. Triggers for outgoing calls include a unique description, or name of the trigger, the application with which the trigger is associated, a specific window within the application, and the type of triggers (keystroke macros or DDE). It is not necessary to define an application path if you have already done so for an incoming trigger.

Additionally, outgoing triggers may be configured to automatically add the name and phone number dialed from your windows application to the FastCall Calling Number list.

The Outgoing Call Triggers Dialog Box

Select `Configure, Application Triggers, Outgoing Calls` in the FastCall Administration main window. The Outgoing Call Triggers dialog box is then displayed (Figure 5-20). Use this dialog box to configure all of the triggers that you want for outgoing calls.
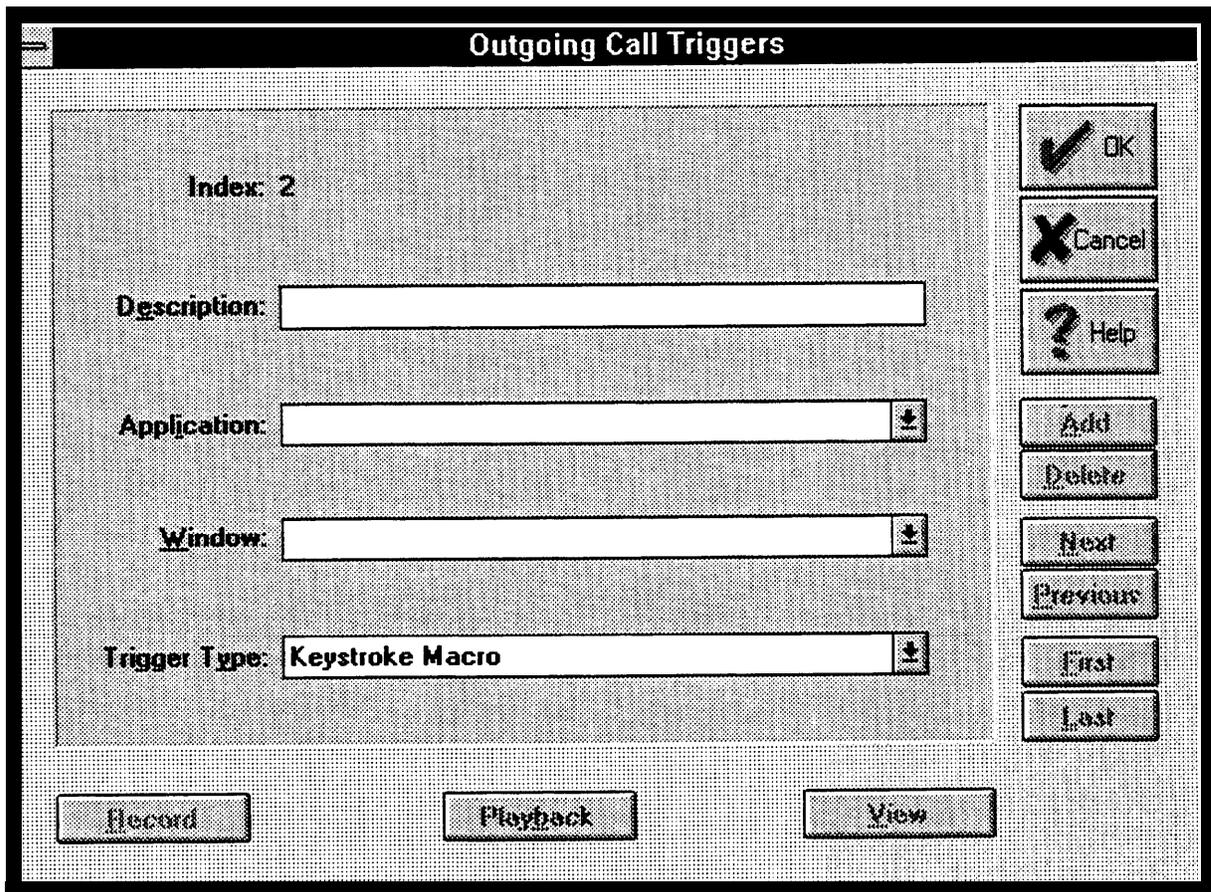
Figure 5-20. Outgoing Call Triggers Dialog Box

About the Outgoing Call Triggers dialog box

Index

The Index number indicates the order in which Call Triggers have been
defined, and is used internally by FastCall. If multiple triggers are assigned,
FastCall uses the trigger with the lowest index number available to execute
when the F4 or F5 keys are pressed.

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Description

Enter a unique description, up to 30 characters, to identify the trigger.

Application

Select from the application list the application associated with this trigger. This would be the application in which you store information such as telephone numbers and extensions.

Window

A Windows application can have multiple files open, each in a separate window and each identified by a title bar. For example, you could be running Microsoft Access and have three windows open, each containing a different database table. Within the application select the specific window you want to pop up on screen by selecting the title bar of the window you want to pop up.

If you wish to pop the application, and use whichever window was active last rather than a specific window, select the "(application window)" option from the drop down list. For example, if you wanted to pop Access and have the ability to access all three database tables (as described above) select the application window option.

Trigger Types

Supported trigger types include keystroke macros and Dynamic Data Exchange (DDE).

Recording a Macro for an Outgoing Call Trigger

Click the Record button to begin recording the macro. The Keystroke Macro Control selection dialog box is then displayed. Select the button for the macro that you want to record. A message box is displayed that advises you that you are about to begin recording the macro. Click the OK button to continue.

➡ NOTE:

You can not record macros while the FastCall - Call Control Keys window is running. Close the FastCall - Call Control Keys window if it is running before you record your macros. After completing the macro recordings, exit from the Outgoing Call Triggers dialog box and restart the FastCall - Call Control Keys window.

Do not use the mouse when recording macros. The mouse is unreliable for macros because application windows may be located in different areas of the screen between user sessions. The operation of the mouse is based on its screen location.

About Main and Other Macros

For each outgoing call trigger you may record two macros, one for the F4 - Dial Main key and one for the F5 - Dial Other key. For each application and window combination there should be only one trigger. If multiple triggers are assigned, FastCall uses the trigger with the lowest index number available to execute when the F4 or F5 keys are pressed.

Select Main to record the actions that are to occur when an agent presses the FastCall - Call Control Key F4 - Dial Main. This macro will locate the last active Windows application, which will typically be a database file or other application in which you store information about people. It will then search for the location of the Main number (for example, the person's office number), select it and copy it to the clipboard. FastCall will take the number from the Windows clipboard and pass it through the computer and telephone system, automatically dialing the Main number.

Select Other to record the actions that are to occur when an agent presses the FastCall - Call Control Key F5 - Dial Other. This macro will be similar to the Main macro, but it will search for the Other telephone number (for example, the person's home number), select it and copy it to the clipboard, where FastCall would take over.

Database records should be indexed and files should be organized in consistent manners so the macro functions efficiently.

Figure 5-21 shows the relationship between the outgoing call dialing keys and the Main and Other macros.
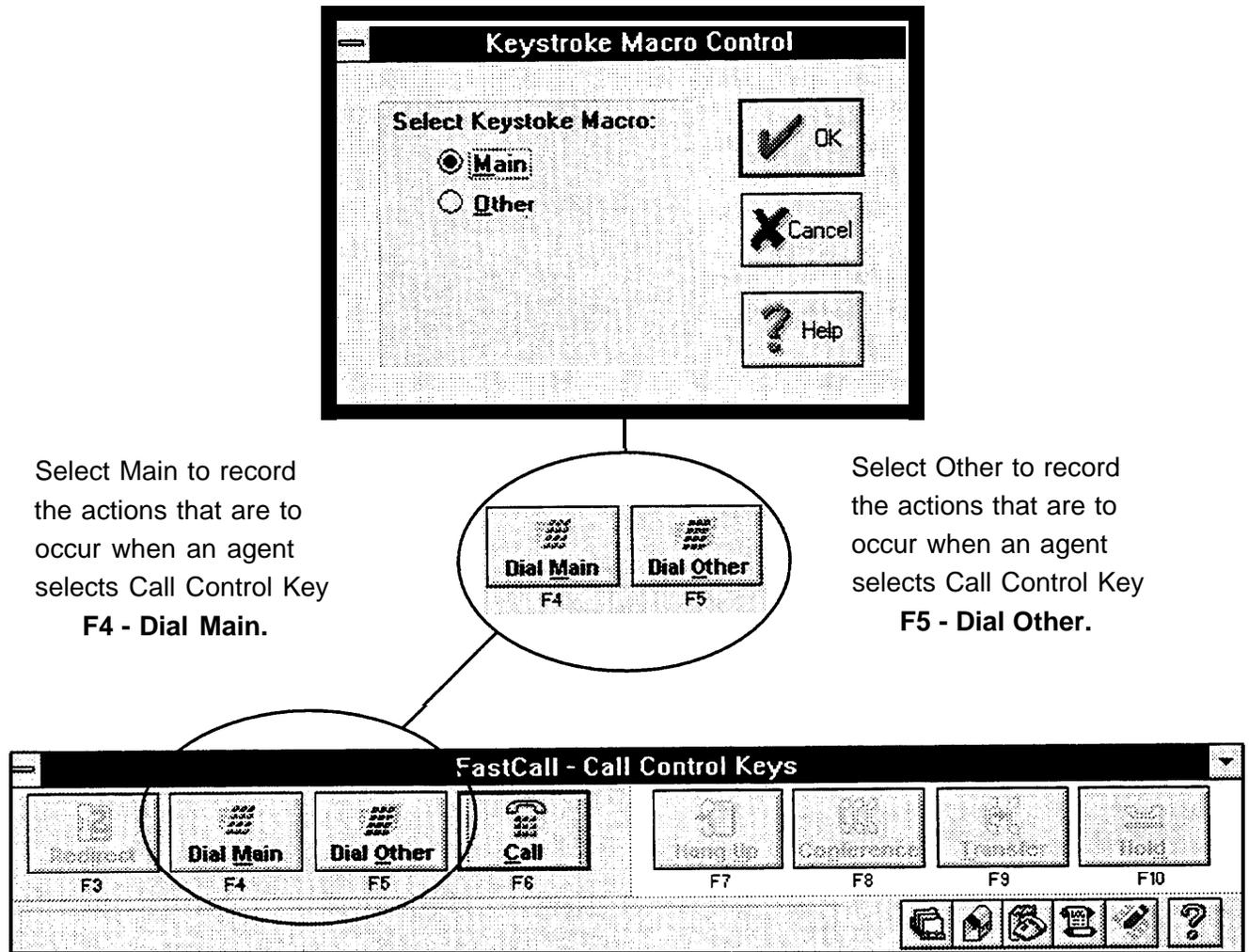
Figure 5-21. Outgoing Macro Diagram

Outgoing Call Trigger - Example

The following example shows how you can configure an Outgoing Call Trigger using the AT&TCall application. If AT&TCall were the application that you use to store the names of personal, professional and business contacts, you would set up a trigger as in this example. This trigger would run when an agent presses the F4 - Dial Main button in the FastCall - Call Control Keys window.

1. Select `Configure, Application Paths` to configure the path for the AT&TCall application if this has not been done yet.

2. Select `Configure, Application Triggers, Outgoing Calls` from the FastCall Administration main window to configure the triggers for the AT&TCall application.

   The Outgoing Call Triggers dialog box is displayed.

3. Make the appropriate selections and entries in the Outgoing Call Triggers dialog box (Figure 5-22).
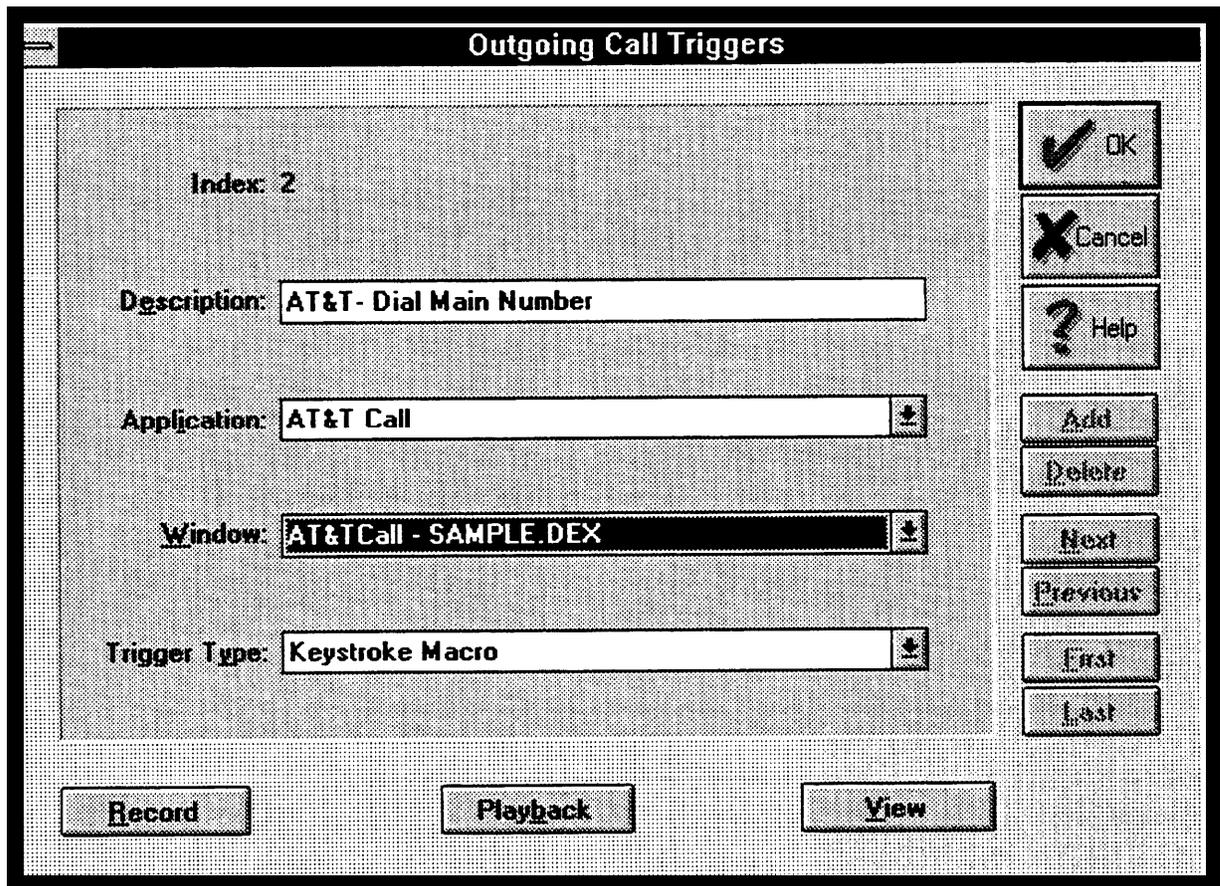
Figure 5-22. Outgoing Call Triggers Dialog Box

4. Click the OK button to add this trigger to the index of outgoing call triggers.

5. Click on the Record button to begin recording the keystrokes that will be executed for this trigger.

The Keystroke Macro Control selection dialog box is then displayed.

6. Select the Main button to record the macro for dialing a contract's primary phone number.

The warning dialog box is then displayed (Figure 5-23).

Keystroke Recorder

The keystroke macro recorder is about to be turned on. If you select OK or press return, the recording will commence, and you must press the PAUSE key to suspend the recorder. REMEMBER: Use only keystrokes to record your macro. Mouse movements are unreliable for macro playbacks.

OK   Cancel
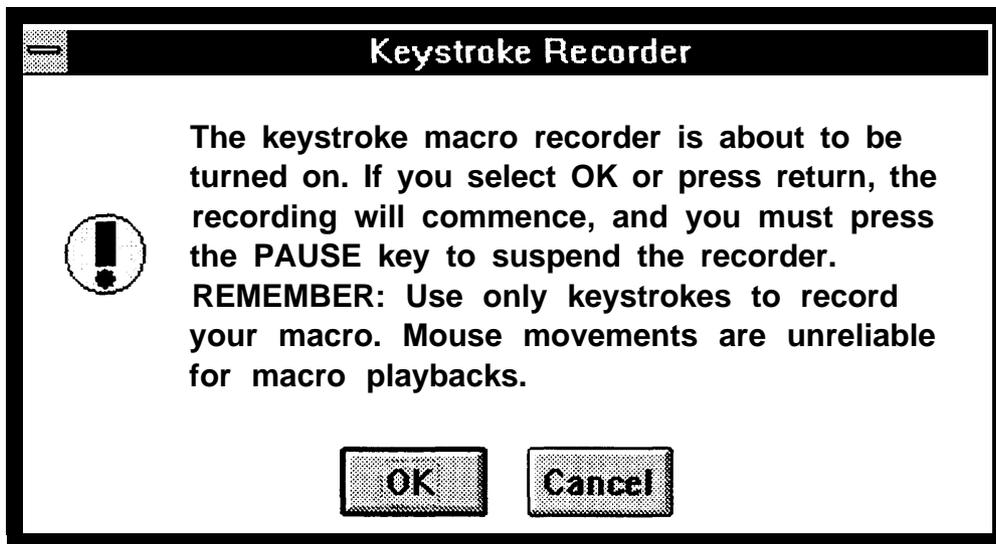
Figure 5-23. Warning Screen

7. Click the OK button to continue with the macro recording.

The AT&TCall application pops up on screen (Figure 5-24). Note the AT&TCall Office # field location.
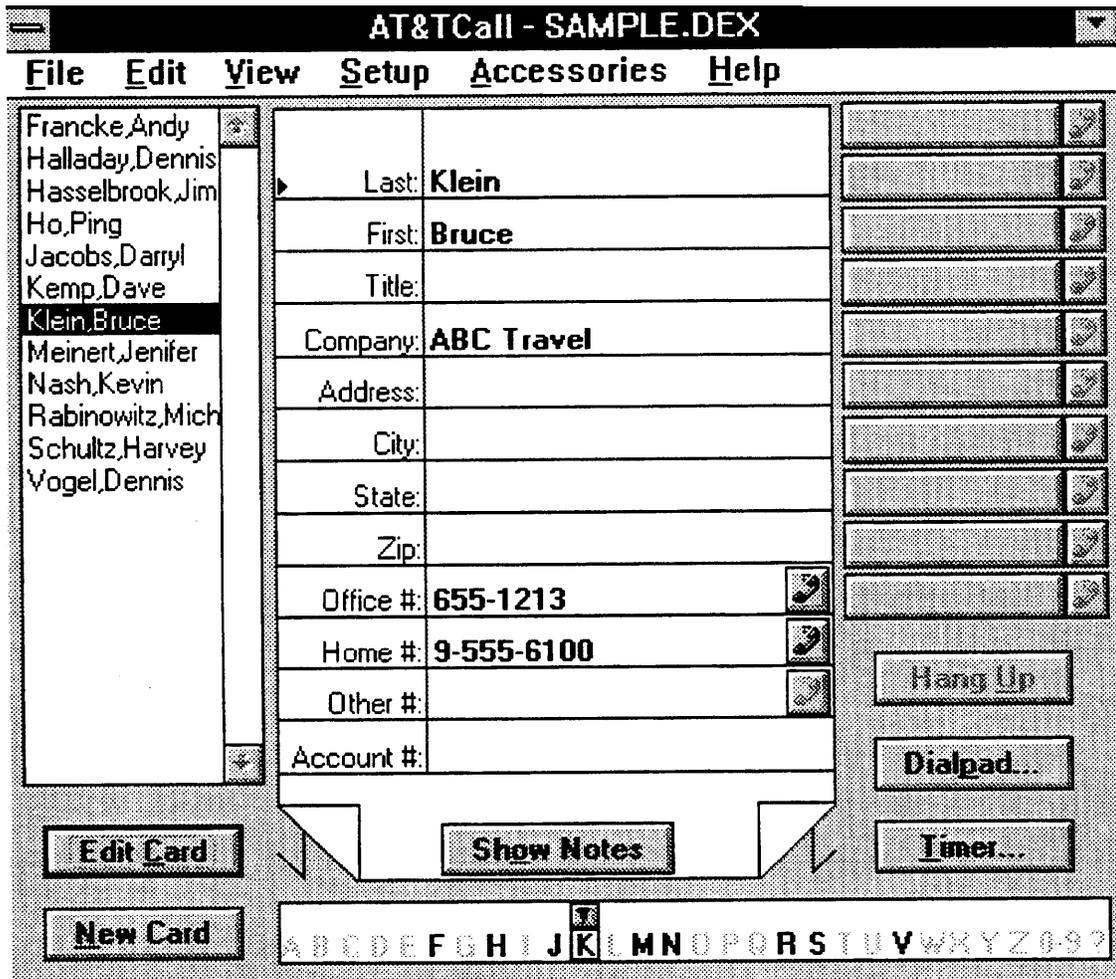
Figure 5-24. AT&TCall Application

8. Go to Edit Card, ALT + C, then press the TAB key eight times to move to the Office # field.
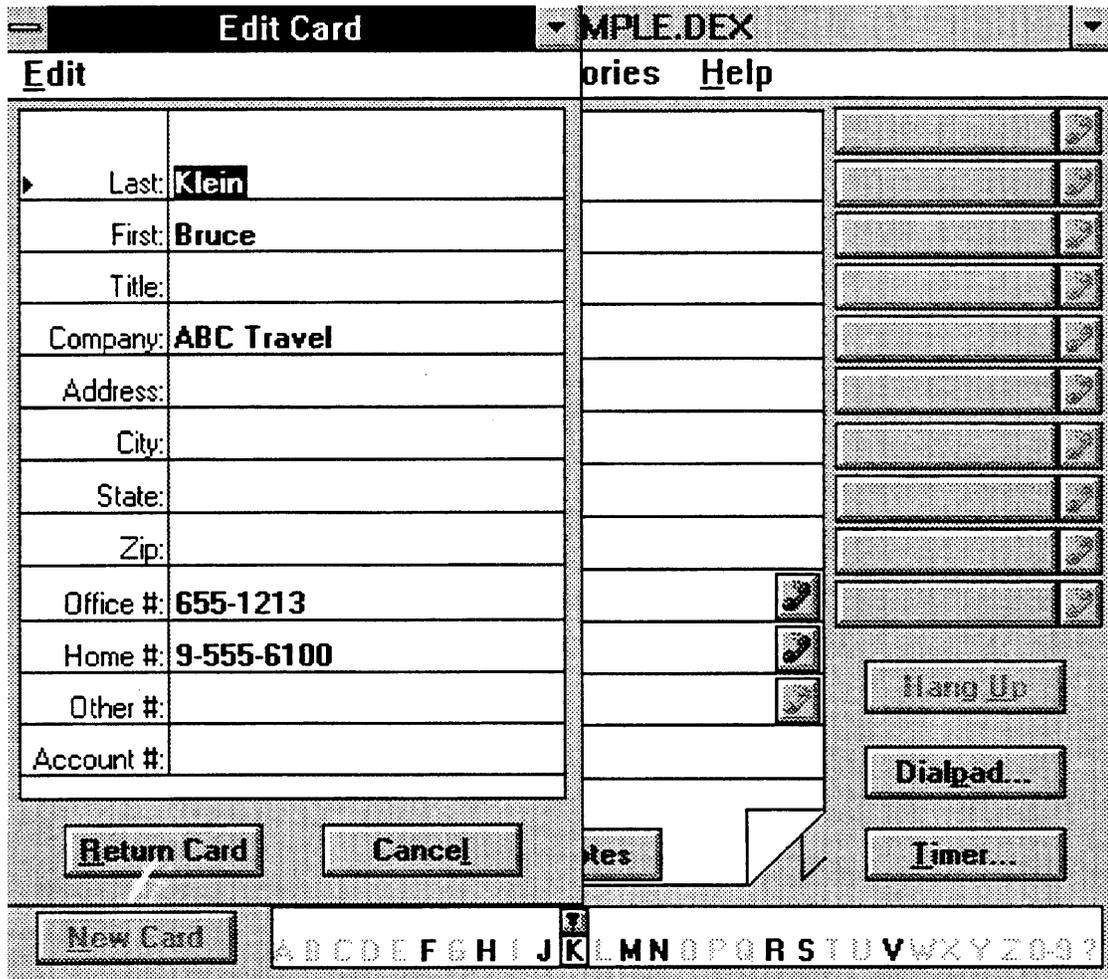
Figure 5-25. Edit Card

9. Press CTRL + C to copy Office # field to the Windows Clipboard.

➡️ **NOTE:**
FastCall removes non-dialable, unsupported characters from the string before dialing. Supported, dialable characters include numeric characters (0-9), * (star), # (pound), , (comma), : (colon), and + (plus). It is therefore okay to have extra characters in the string as long as they are non-dialable. See "Supported Characters for Special Dialing Codes" in Chapter 4.

10. Press PAUSE to suspend the macro recording.

The options box shown in Figure 5-26 is displayed. (Selecting Copy first, middle or last characters of name from Clipboard copies the name and phone number of the number dialed by the outgoing macro into the FastCall Calling Number List.)
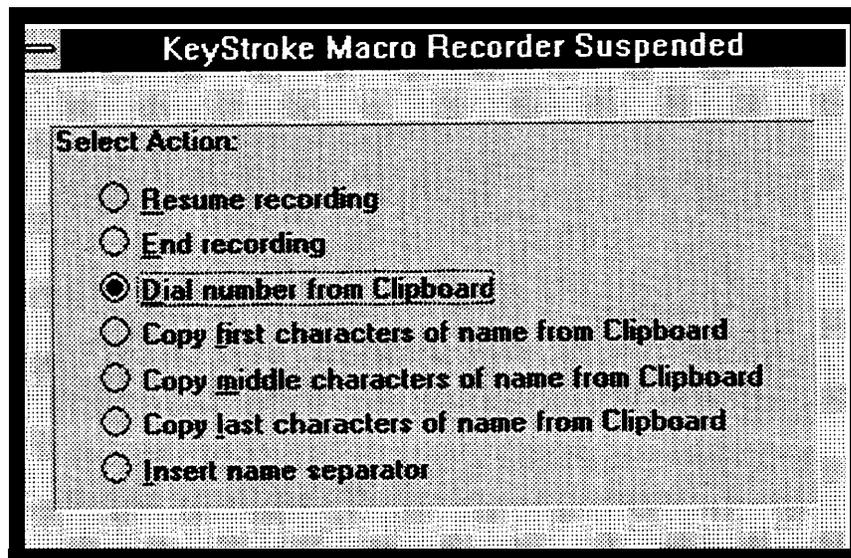
Figure 5-26. Keystroke Macro Recorder Suspended Dialog Box

11. Select the Dial from Clipboard option button, and then press ENTER.

    The Keystrokes Macro Recorder Suspended dialog box appears again.

12. Press ENTER or click the OK button to resume recording.

13. Press ALT + L to close the Edit Card dialog box and leave AT&TCall in a "clean" state.

14. Press PAUSE to suspend the macro recording.

    The Keystroke Macro Recorder Suspended dialog box appears again (Figure 5-27).
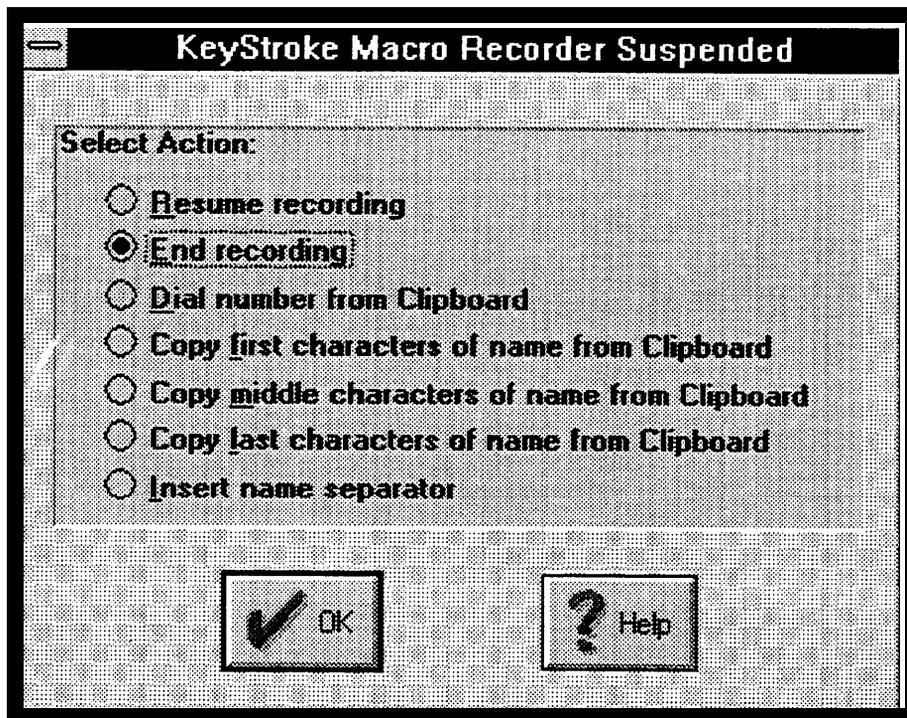
Figure 5-27. Keystroke Macro Recorder Suspended Dialog Box

15. Press the DOWN ARROW key to select the End recording option button, and then click the OK button.

    This completes the recording of the outgoing call trigger.

16. Click the Playback button to play the macro to confirm its performance.

    If the macro works correctly, the message box shown in Figure 5-28 will appear, showing the selected text which was copied to the Windows clipboard.
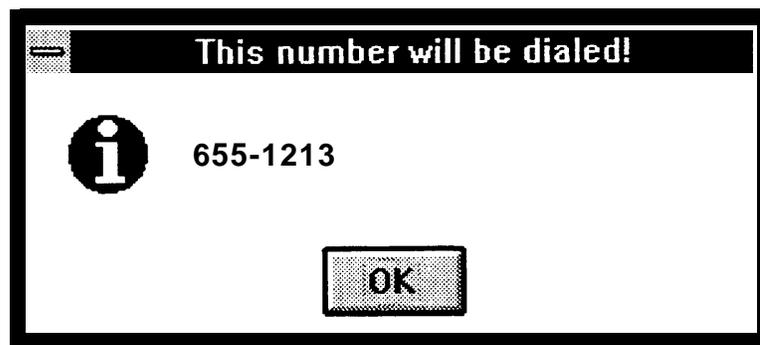
Figure 5-28. Message Box

Recording a Dynamic Data Exchange (DDE) for an Incoming Call Trigger

> **NOTE:**
> This feature is enabled for FastCall Professional only.

In a DDE conversation, the client's application initiates and controls the conversation and the application that responds is the server. The client is application requests information from the server and sends information and commands to it. The server application serves the needs of the client application by returning information, accepting information and carrying out commands.

Incoming Call Triggers

To record the macro, enter or select the required information in the Incoming Call Triggers dialog box (Figure 5-29), including the name of the trigger, the application that the trigger will pop up in the Windows, and the type of trigger.
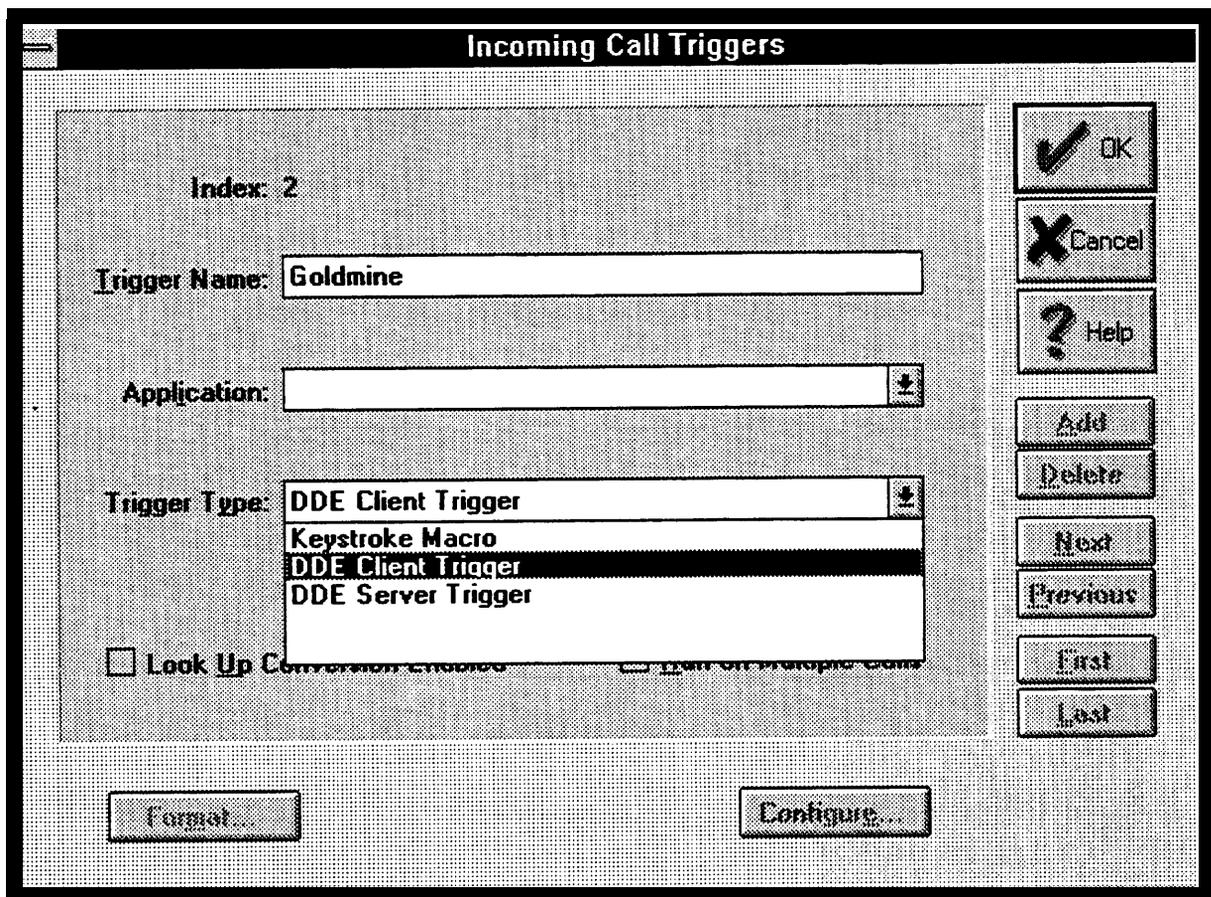
Figure 5-29. Incoming Call Triggers Dialog Box

Configure DDE Client

Press Configure to select the specific DDE parameters to configure and make the appropriate selections and entries as shown in the diagram. When you begin a DDE conversation you must specify:

- The name of the application it wants to talk to (the server)

- The subject of the conversation (the topic)

- The reference to a data that is meaningful to the server application (item)

- The format that supports the data

NOTE:
There is no user interface to go along with the outgoing DDE. It is always running when the FastCall - Call Control Keys are running.
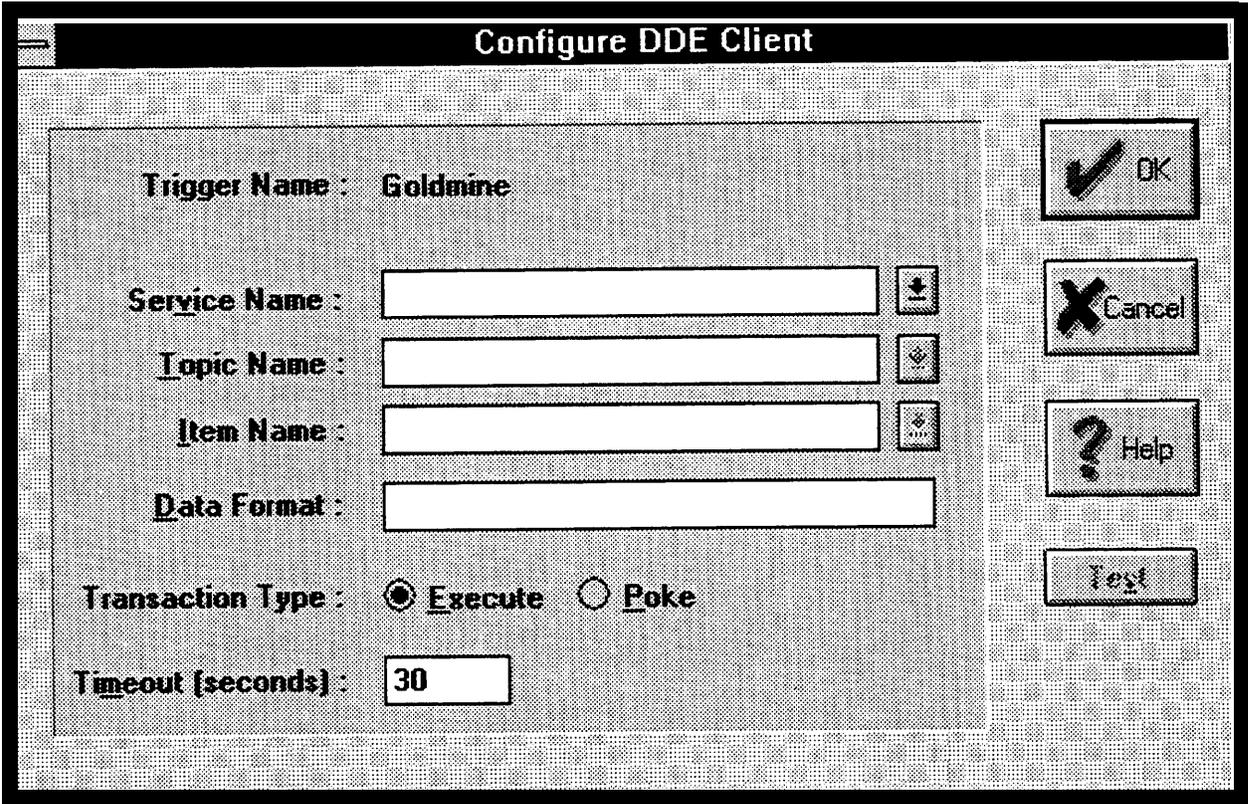
Figure 5-30. Configure DDE Client Dialog Box

Saving Trigger Configurations

When you have completed configuring your applications and triggers, you should save the configuration information. See "Saving a FastCall Configuration" in Chapter 4 for more information.

Configuring Call Rules

6

Overview

This chapter provides instructions for configuring the rules that will apply to calls received or placed by FastCall.

Call rules are filters that enable you to configure FastCall to handle calls in particular ways. Incoming calls and outgoing calls are handled separately, so you must configure both Incoming Call Rules and Outgoing Call Rules. In general, a call is handled according to:

- How the rule's criteria filter the call.

- What action is selected for the rule.

Rules-Based Call Processing

The flow chart shown in Figure 6-1 shows how an incoming call is processed according to rules. Rules are applied on a priority basis. If a call does not meet the criteria of a rule, it is compared to the criteria of the next priority rule, and so on, until it meets the criteria of a rule. The call is processed according to the instructions of the first rule with which it complies.
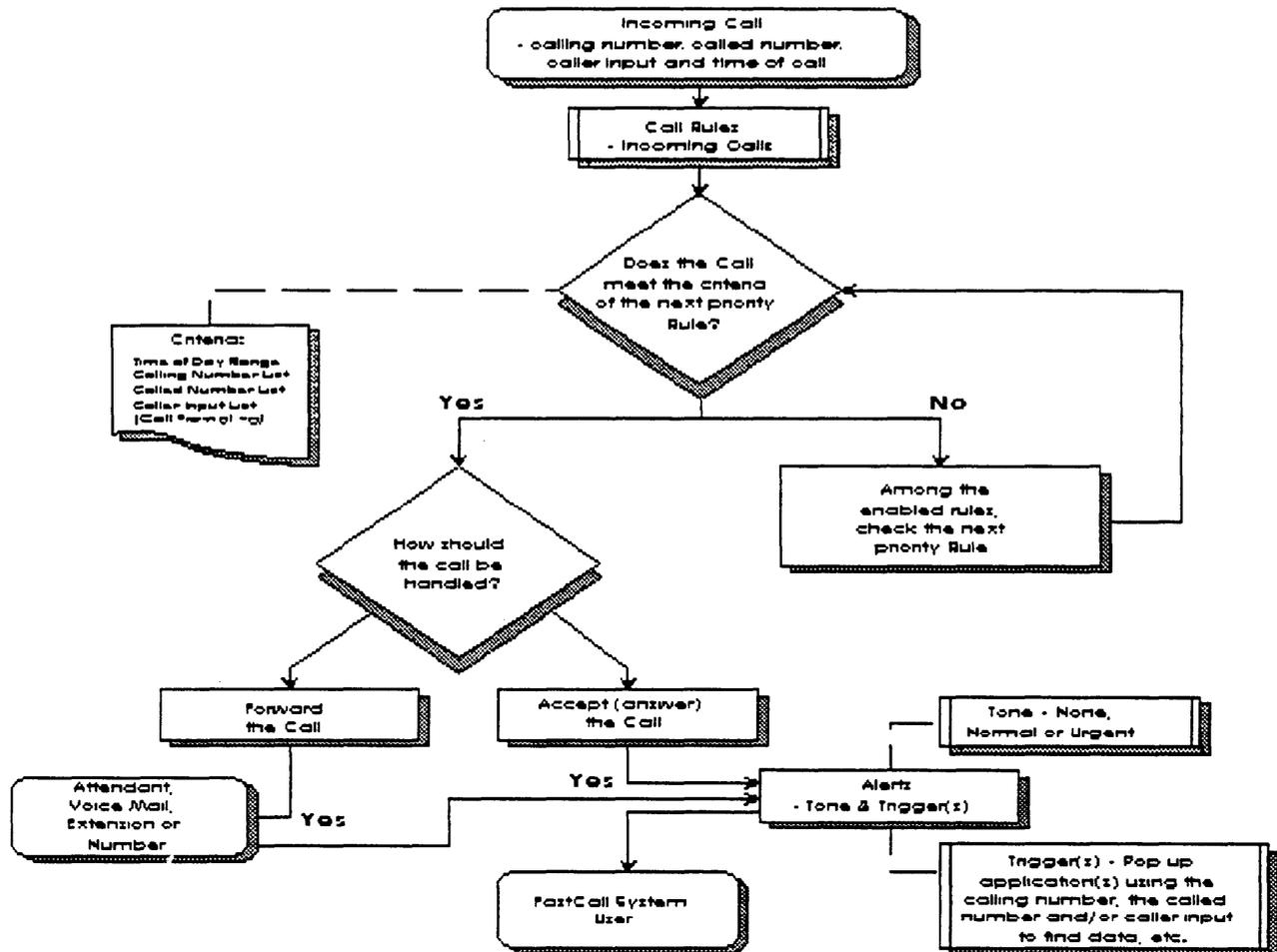
Figure 6-1. Rules Based Call Processing

Incoming Call Rules

Select `Configure, Incoming Call Rules` in the FastCall - Administration Program window. The Incoming Call Rules dialog box is displayed (Figure 6-2). Use the Incoming Call Rules Dialog box to define the rules that are to apply to incoming calls. With FastCall Professional you can define a maximum of 100 incoming call rules. The dialog box is described in the following section.
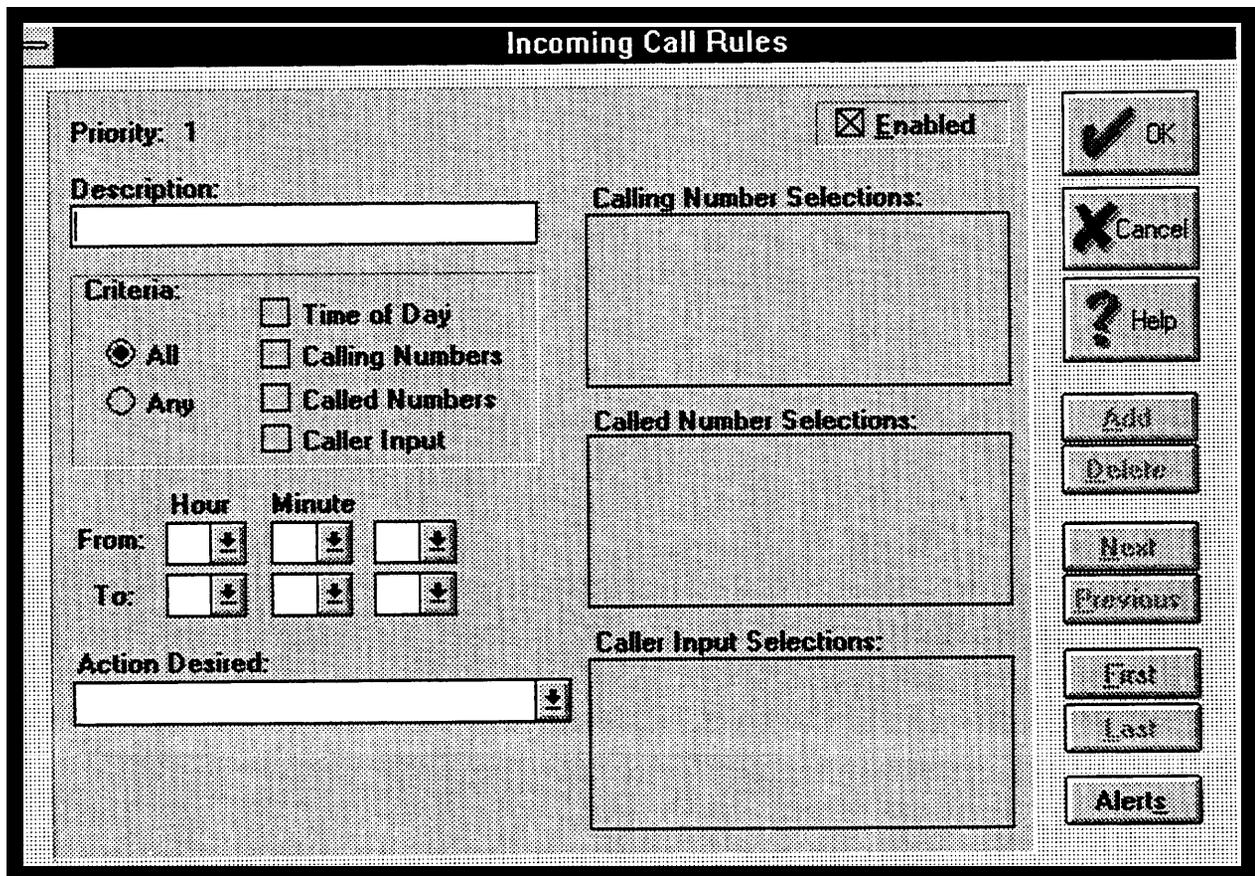
Figure 6-2. Incoming Call Rules Dialog Box

About the Incoming Call Rules Dialog Box

Priority (FastCall Professional only)

The priority of a rule determines the order in which a call is compared to the rule's criteria. The priority of a rule is based on the order in which it is defined. That is, the first rule that you define is priority 1, the next is priority 2, the next priority 3, etc. You can alter the priority assignments by adding rules between rules. For example, if you are viewing the Priority 2 rule and click the Add button, a new rule is inserted after rule 2 and becomes the new priority 3 rule. The old priority 3 rule becomes rule 4.

Calls are processed according to the instructions of the first rule with which they comply. Calls are not checked against disabled rules. For example, if you have four rules defined, priority 1 through priority 4, and you disable rule 3, calls will be checked in order against 1, 2 and 4.

The following Rules parameters are selectable for all Rules configured with FastCall Professional. All parameters with the exception of Caller Input are also in effect for the call rules enabled with FastCall.

Enabling/Disabling the Rule

Use the Enabled check box to enable or disable the rule. A rule is in effect when it is enabled. A rule is not in effect when it is disabled. An X is in the check box when the rule is enabled. The default setting is enabled. Press ALT + E or click on the Enabled field to toggle the setting between on and off.

The Rule Description

Enter in the description field the name of the rule, up to 30 characters. We recommend that you use descriptive names that you will find easily recognizable.

Criteria of the Rule

Use the Criteria area of the dialog box to select the items that a call must match in order for the rule to apply to the call. The criteria let you filter calls by time of day, calling numbers, called numbers and caller input.

Select All criteria to specify that the call must meet all of the checked criteria items in order for the action defined in the rule to occur. This is a logical AND of the selected criteria.

Select Any criteria to specify that if the call meets any one of the selected criteria filters, do the action defined by the rule. This is a logical OR of the selected criteria.

Time of Day

Select Time of Day criteria to filter calls based on the time of day that the call is received according to the clock in your computer. Specify the range of time to apply to the call using the time selection fields. For example, if you wanted to answer incoming calls between 8:00 AM and 5:00 PM, you would select the Time of Day check box, and then in the time selection fields select *From 8:00 AM* to *5:00 PM.*

Calling Numbers

Click on Calling Numbers to filter incoming calls based on the Calling Number. Select all items in the Calling Number Selections list that you want to have included by the rule. The numbers available in the Calling Number Selections list are those that you configure in the Configuring Calling Number List section. (Refer to Chapter 4). You can select any number of Calling Numbers from the selections list. Only the items selected apply to the rule.

Note that the Calling Number Selections list includes a default value of <NO CALLING NUMBER> that specifies an unknown number. This allows you to specify trigger macros to process calls where the calling information is not available. This is also useful for re-routing calls that have no ANI or CLID to other users or to a call prompting device.

Called Numbers

Click on Called Numbers and select all items in the Called Number Selections list that you want to have included, or affected by the rule. The descriptions listed in the Called Number Selections list are those that you configure in the Configuring Called Number List section. (Refer to Chapter 4). You can select any number of Called Numbers from the list. Only the numbers selected in the list apply to the rule.

Note that the Called Number Selections list includes a default value of <NO CALLED NUMBER> that specifies an unknown number. This allows you to specify trigger macros to process calls where the called number information is not available.

Caller Input (FastCall Professional only)

Select Caller Input to filter incoming calls based on caller input information (Call Prompting data). Select the items from the Caller Input Selections list that you want to include in the rule. You can select any number of items from the list. Only items selected from the list apply to the rule.

Note that the Caller Input Selections list includes a default value of <NO CALLER INPUT> that specifies an unknown number. This allows you to specify trigger macros to process calls where call prompting information is not available.

Action of The Rule

Select the action that you want to occur when a call meets the criteria of the rule from the drop-down list in the Action Desired field.

Accept Call

Select Accept Call when you want the call to be answered. If desired, you may then click the Alerts button to configure what is to occur to alert you to the incoming call.

Forward to Voice Mail

Select Forward to Voice Mail when you want a call that meets the conditions of the rule to be redirected to the Voice Mail extension assigned in the Call Forward Destinations list. The description of this number must be Voice Mail (initial capital letters). If desired, you may then click the Alerts button to configure the Alerts for this rule.

Forward to Attendant

Select Forward to Attendant when you want a call that meets the criteria of a rule to be redirected to the phone attendant extension assigned in the Call Forward Destinations list. The description for the attendant's number must be Attendant (initial capital letter). If desired, you may then click the Alerts button to configure the Alert for this rule.

Forward to...

Select Forward to when you want a call that meets the conditions of the rule to be forwarded to a number or extension. The Forwarding Destinations list (see "Configuring Call Forward Destinations" in Chapter 4) is displayed (Figure 6-3). Select a destination from this list or enter the number in the Select or Enter Number field. If desired, you may then click the Alerts button to configure the Alert for this rule.
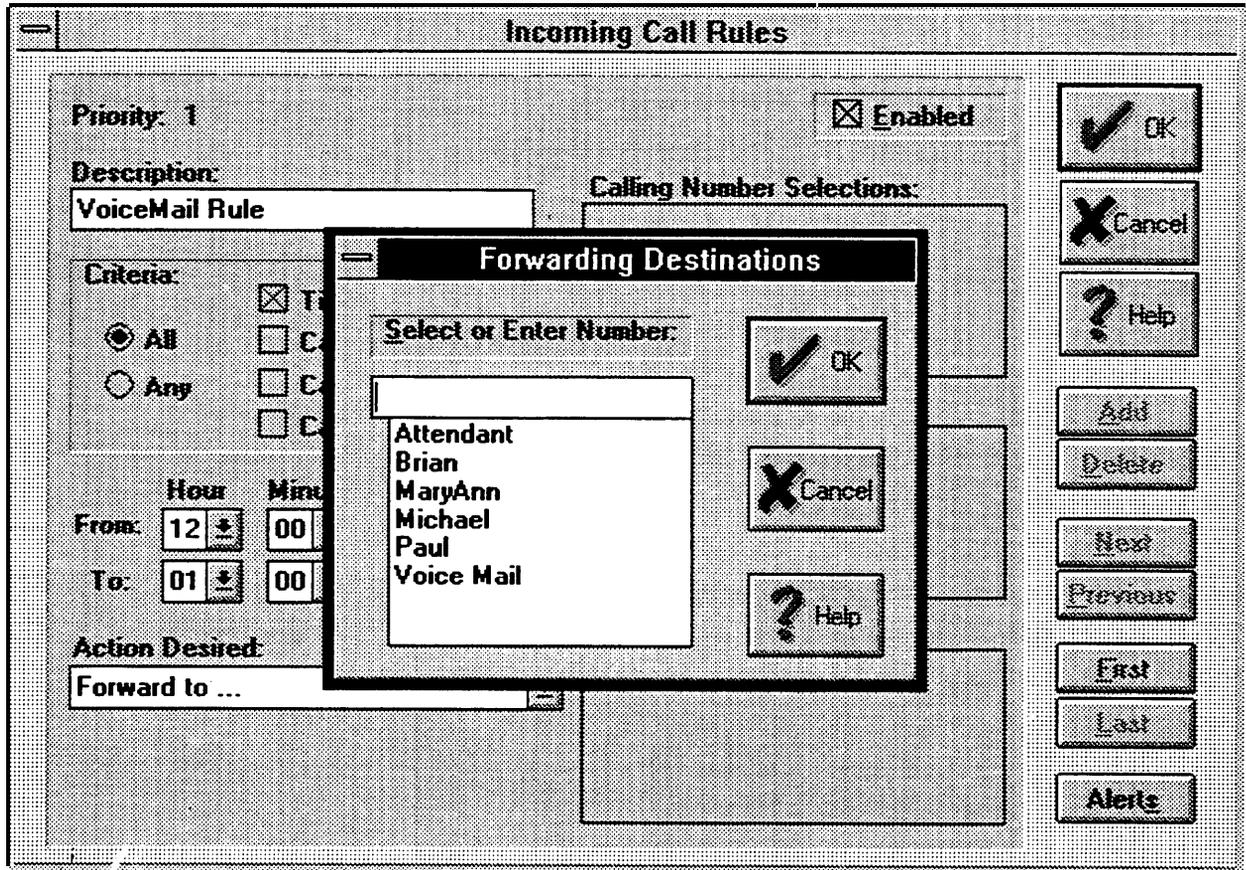
Figure 6-3. Forwarding Destinations Dialog Box

Alerts

Click the Alerts button to configure what actions to take when the rule applies to a call. The Call Alert Options dialog box appears (Figure 6-4).
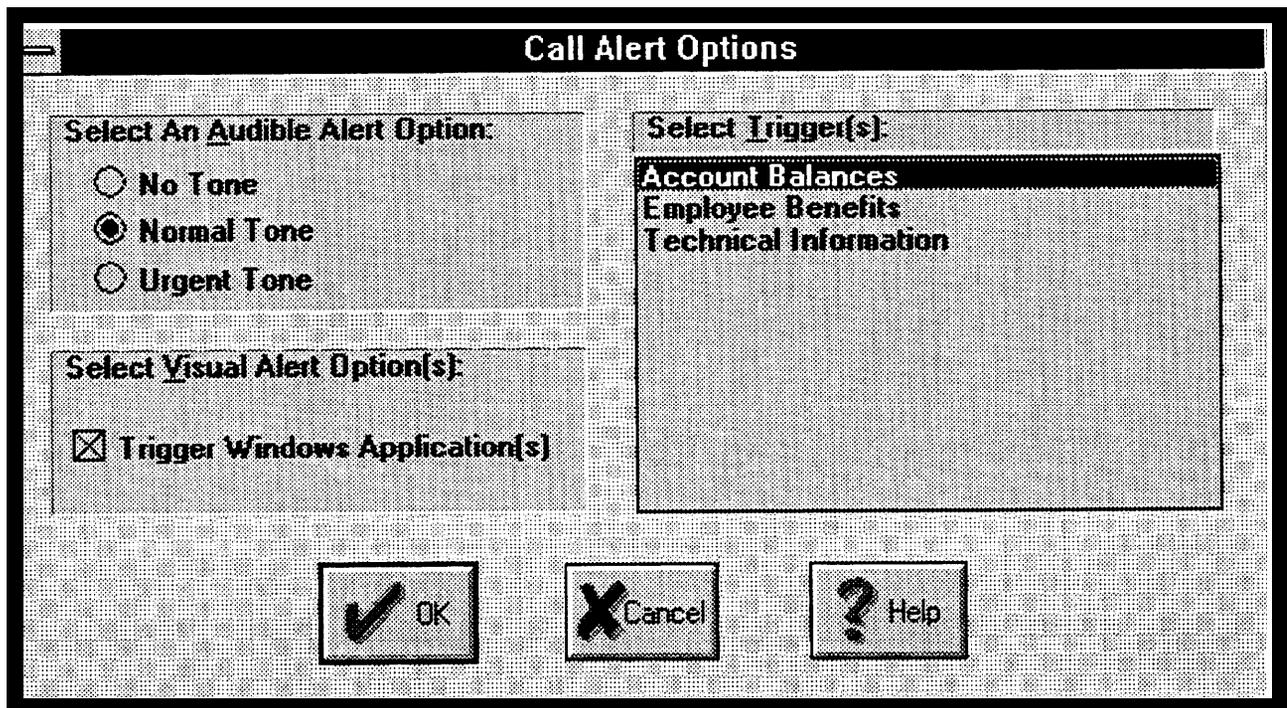
Figure 6-4. Call Alert Options Dialog Box

Audible Alert Option

Select the audible alert option that you want for this call rule. *Normal Tone* is one beep on the computer; *Urgent Tone is* multiple beeps.

Visual Alert Option

Select the visual alert option when you want to trigger Windows applications.

Trigger(s)

Select the incoming call trigger(s) that you want to run when a call that has met the criteria of the rule is supposed to be answered. You must select and highlight a trigger from the list (even when only one trigger is listed). You can select multiple triggers from the list. Highlight each trigger that you want to select by clicking on it.

Configuring an Incoming Call Rule

To configure an incoming call rule:

1. Select `Configure, Incoming Call Rules` from the FastCall - Administration Program window.

   The FastCall Incoming Call Rules dialog box is then displayed.

2. Enter a descriptive name for the rule in the Description field.

3. Select the Criteria that you want to apply to calls under this rule.

4. Select the Action Desired that you want to occur when a call meets the criteria of this rule.

5. If you select Accept Call as the Action desired, click the Alerts button to configure what is to occur when you answer the call.

6-10

Incoming Call Rules — Examples

Example #1

We have configured the Incoming Call Rule shown in Figure 6-5 to say:

Accept all incoming calls between 7:00 AM and 6:00 PM that are dialed in on the Called Numbers of Customer Service or Support. (See Chapter 4 for information about configuring Called Numbers, Calling Numbers and Caller Input.)

In other words, this rule says to accept all calls made to Customer Service or Support between 7:00 AM and 6:00 PM.

This call rule determines that the incoming call must meet All Criteria, including: Time of Day criterion (From 7:00 AM To 6:00 PM) and Called Numbers criterion (Customer Service and Support) for the action of Accept Call to occur.
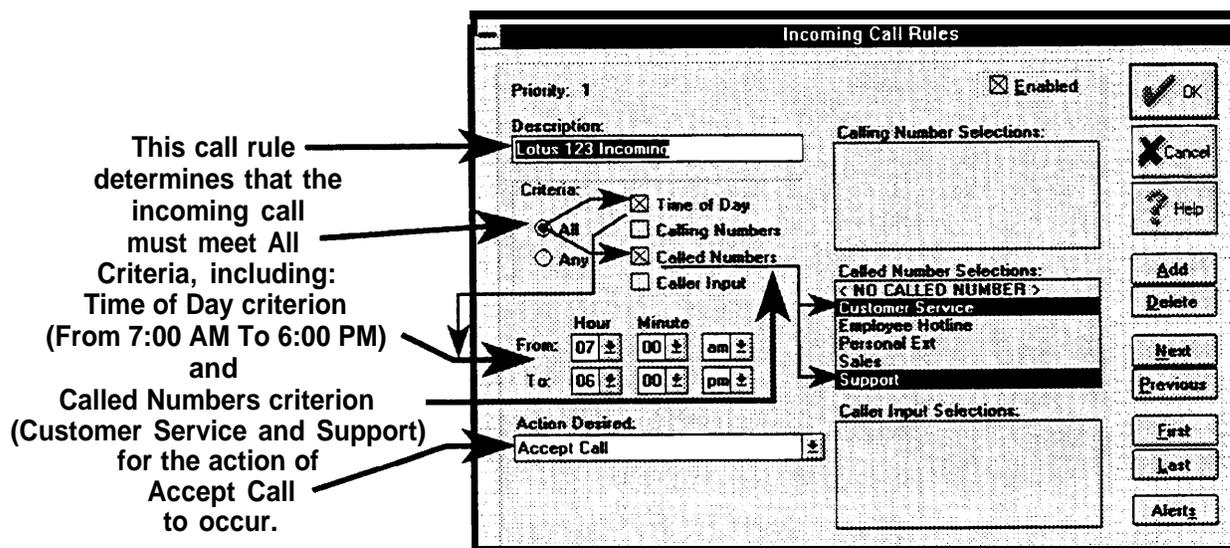
Figure 6-5. Incoming Call Rules

Example #1a - Alerts

When a call meets the criteria of the rule in Example #1, the action *Accept Call* occurs. To alert the agent to an incoming call that should be answered, we have configured the Alert shown in the figure below. This alert causes the FastCall - Call Control Keys window to pop up, the computer to generate a single beep, and causes the keystroke macro specified in the *Account Balances* trigger to be played.
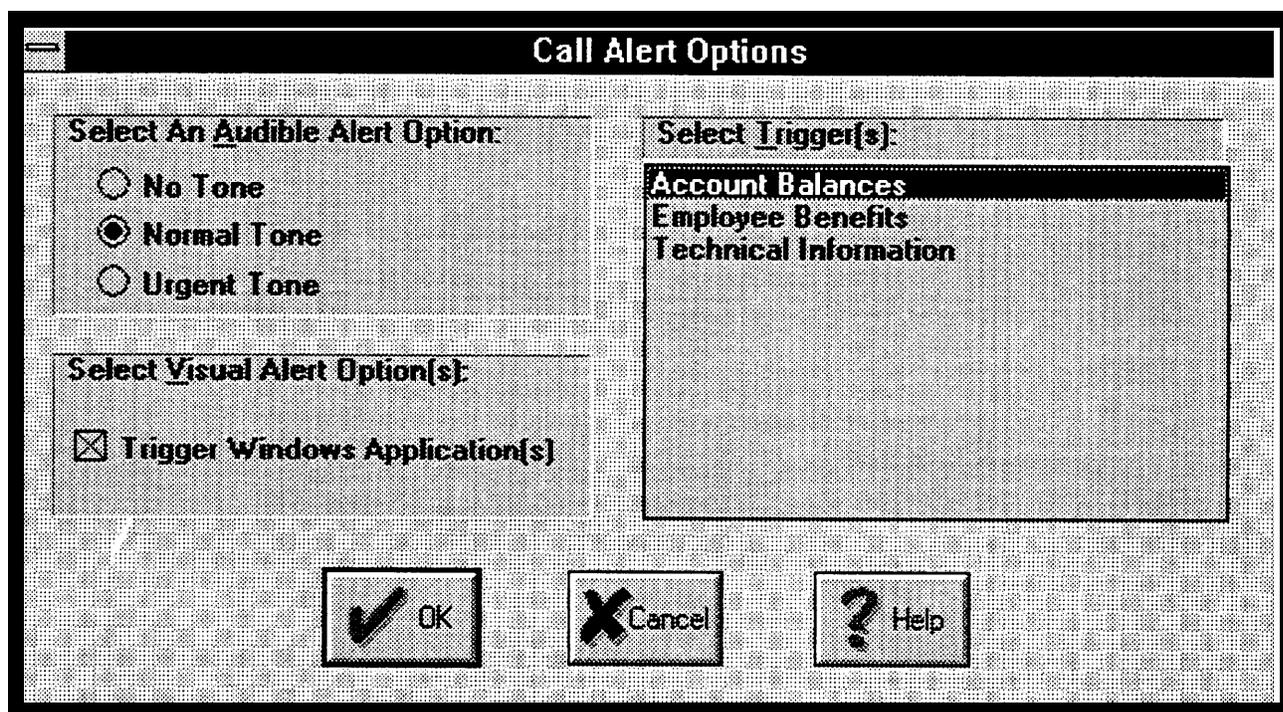
Figure 6-6. Call Alert Options Dialog Box

Example #2

We have configured the rule in this example to say:

Forward to Voice Mail all calls made by the highlighted Calling Number selections, and received between 7:00 AM and 6:00 PM.
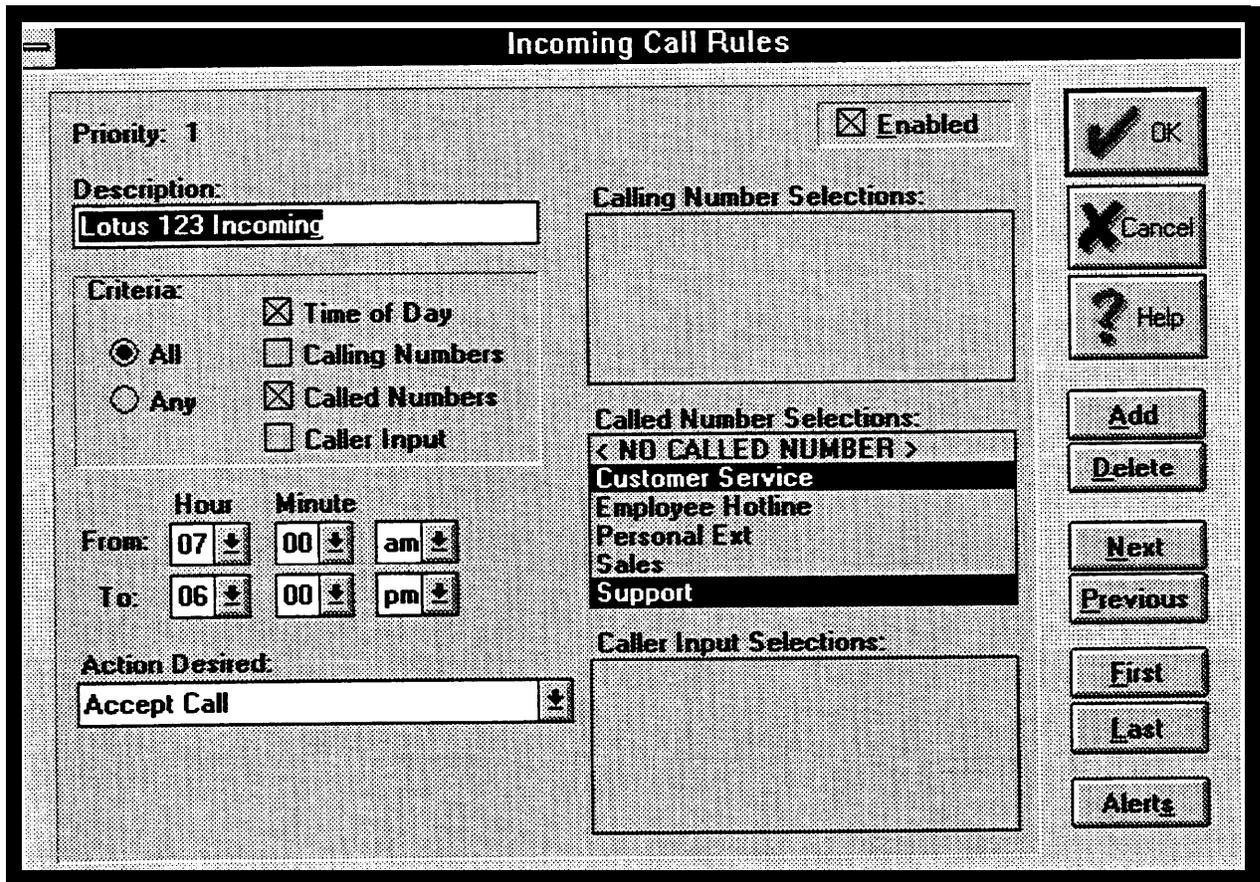
Figure 6-7. Incoming Call Rules Dialog Box

Example #3

We have configured the rule in this example to say:

Forward to Attendant all calls received between 12:00 PM (noon) and 1:30 PM from parties identified by the highlighted Calling Number selections.

This rule might be set up for important calls that you don't want to miss while you are at lunch or otherwise pre-occupied.
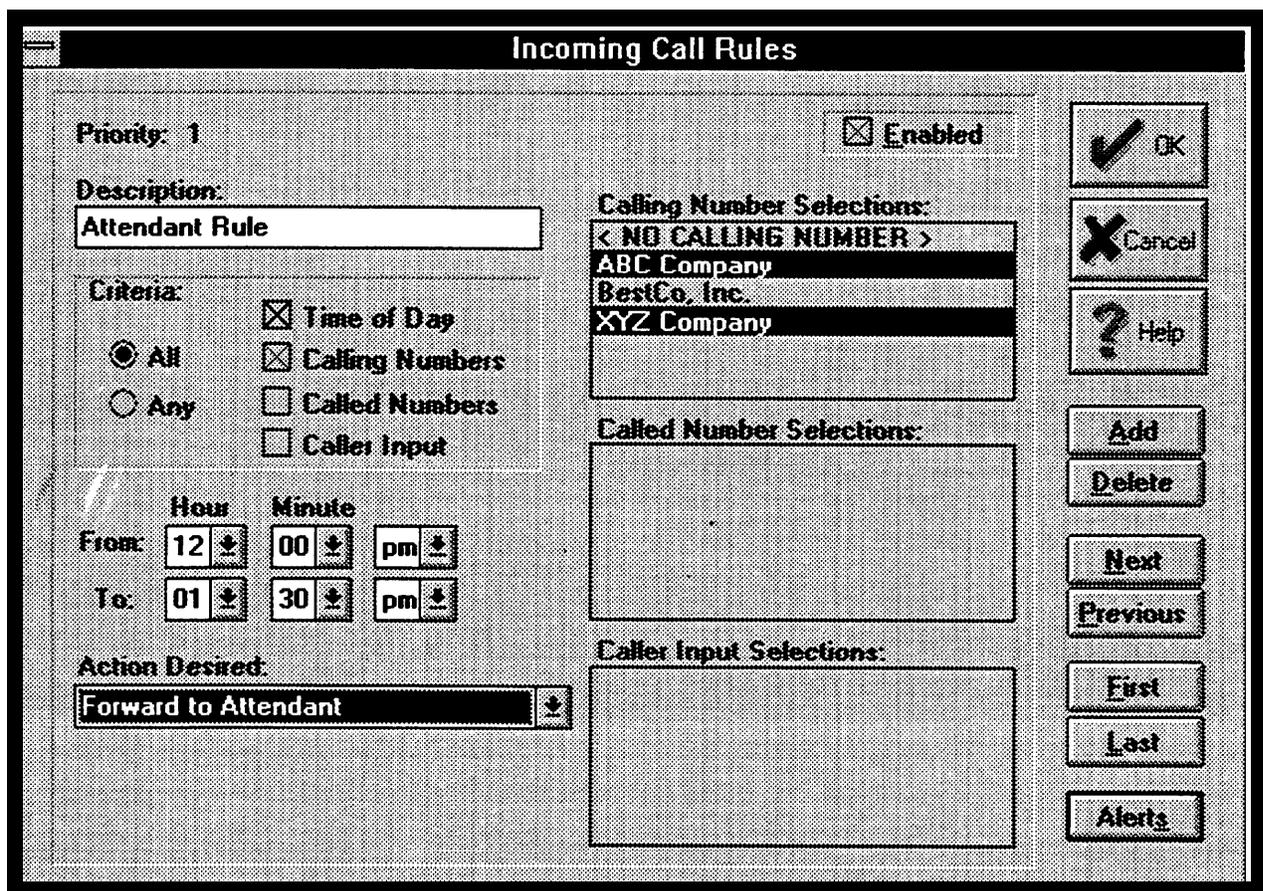
Figure 6-8. Incoming Call Rules Dialog Box

Example #4

The rule in this example says:

Accept all incoming calls from 7:00 AM to 6:00 PM that are made to Accounting or Accounts Receivable.

The highlighted Caller Input selections, together with the specified time range, are filtering the calls in this rule. If a call comes in and Caller Input indicates the caller wants Accounting or Accounts Receivable, but the time is 7:30 PM, this rule will not apply because the call is outside the specified time range.
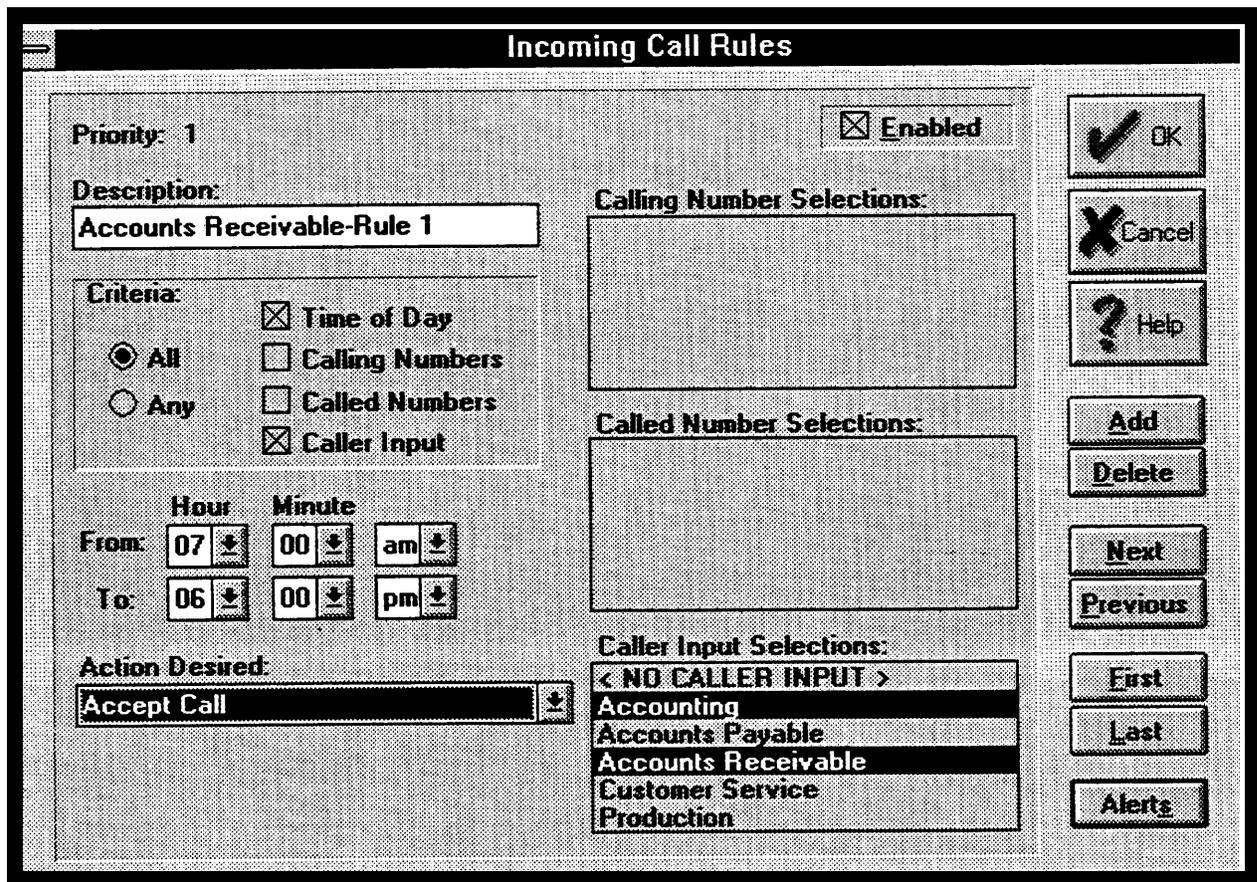
Figure 6-9. Incoming Call Rules Dialog Box

Configuring Outgoing Call Rules

Select `Configure, Outgoing Call Rules` in the FastCall - Administration Program window to configure the rules for outgoing calls. The Outgoing Call Rules dialog box is displayed.

Rules for outgoing calls specify information about area codes and exchanges based on the North American Dialing Plan. If Global Dialing mode is used, refer to the section "Outgoing Call Rules, Global Dialing Mode" later in this chapter. Enter the information appropriate to your phone system in this dialog box to configure the rules for outgoing calls.

NOTE:

You must restart the FastCall Controller program after making any changes to Outgoing Call Rules in order for the changes to take effect. See the section "Starting FastCall" in Chapter 3 for information on restarting the FastCall Controller program.

Figure 6-10. Outgoing Call Rules - North American Dialing Dialog Box

About the Outgoing Call Rules Dialog Box

Local Area Code

Enter the local, three-digit area code in this field. The local area code is the area code from which you are dialing.

Local Line Prefix

If your telephone system requires that you dial a prefix to access a local outside line, enter the prefix in this field. FastCall automatically dials this prefix when you press a FastCall - Call Control Key to make an outside call.

Long Distance Line Prefix

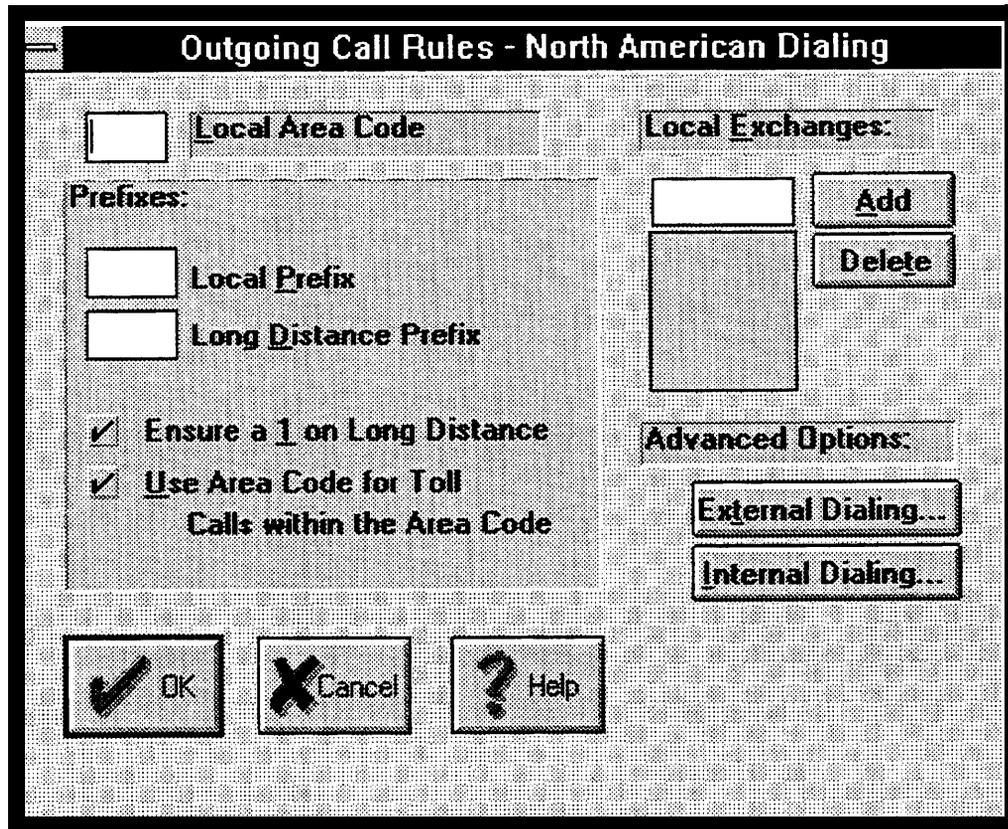If your telephone system requires that you dial a prefix to access a long distance line, enter the prefix in this field. FastCall automatically dials this prefix when you press a FastCall - Call Control Key to make a long distance outside call.

Ensure a 1 on Long Distance

Check this box if it is necessary for FastCall to dial "1" for long distance dialing. If your PBX automatically dials "1," leave this box unchecked.

Use Area Code with Toll Calls within the Area Code

Check this box if it is necessary to dial the area code when dialing toll calls within your local area code.

Local Exchanges

Enter in this list the three-digit exchange numbers that you call for which it is *not necessary* to dial a one before dialing the exchange. When placing calls that are beyond the local dialing range within some area codes, it is necessary to dial a one before the exchange number. If this is not required within your area code, you can enter ALL in the Exchanges list to indicate that all exchanges within the area code do not require a one to be dialed.

To add an exchange, type the number in the text field and click the Add button. To delete an exchange number from the list, click on the number to highlight it, and then click the Delete button.

Advanced Dialing Options (External)

The Advanced External Dialing Options dialog box configures FastCall for use with the enhanced North American Dialing Plan (Figure 6-11).
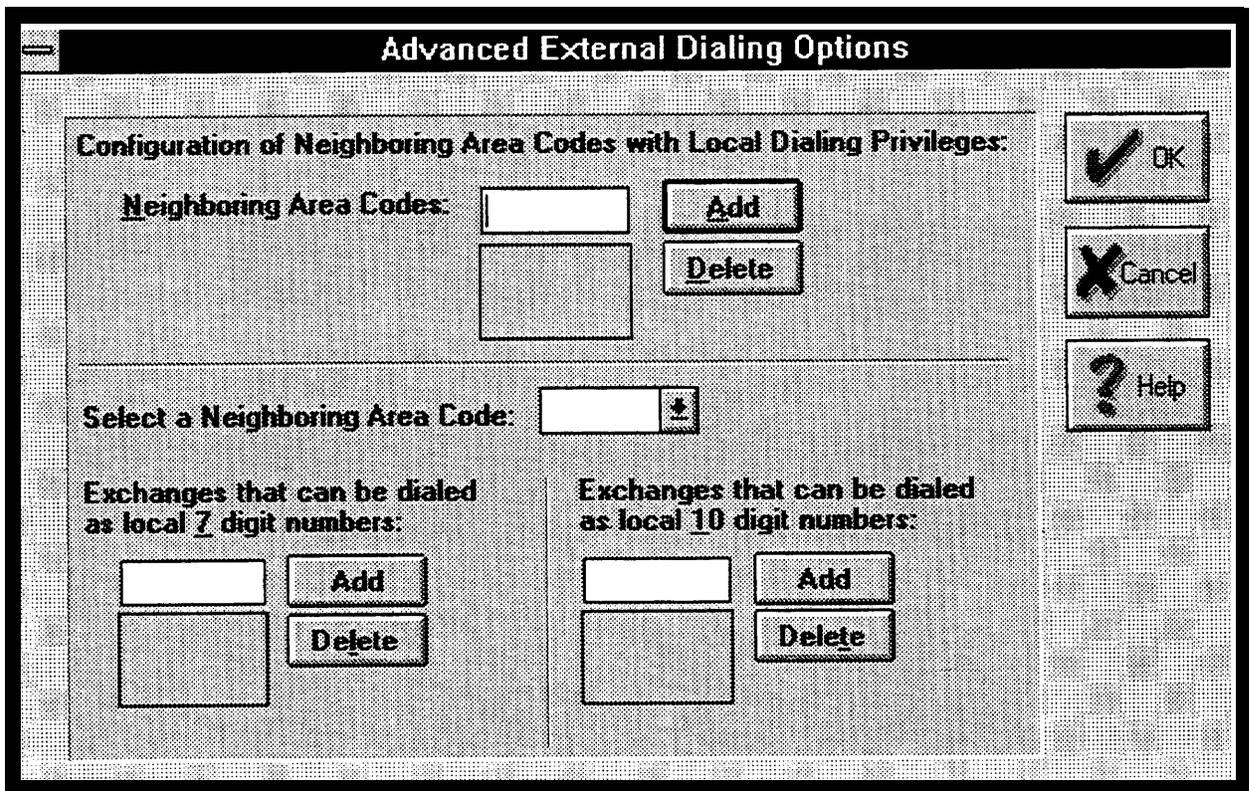
Figure 6-11. Advanced External Dialing Options Dialog Box

Neighboring Area Code Index

Add any additional area codes, to a maximum of 3, where it is not necessary to dial a "1." If an area code added here also appears as a Local area code in the Outgoing Call rules, the Outgoing Call rules apply.

Local Exchanges (7) Digit

Add any exchanges for each neighboring area code where it is not necessary to dial a "1" or include the area code.

Local Exchanges (10) Digit

Add any exchanges for each neighboring area code where it is not necessary to dial a "1" but the area code must be included as part of the dialed string.

$\Longrightarrow$ **NOTE:**

If there are duplicate entries in the 7 and 10-digit exchange list, FastCall defaults to the 7-digit list.

Advanced Dialing Options (Internal)

The Advanced Internal Dialing Options dialog box configures FastCall for use with internal extensions (Figure 6-12).
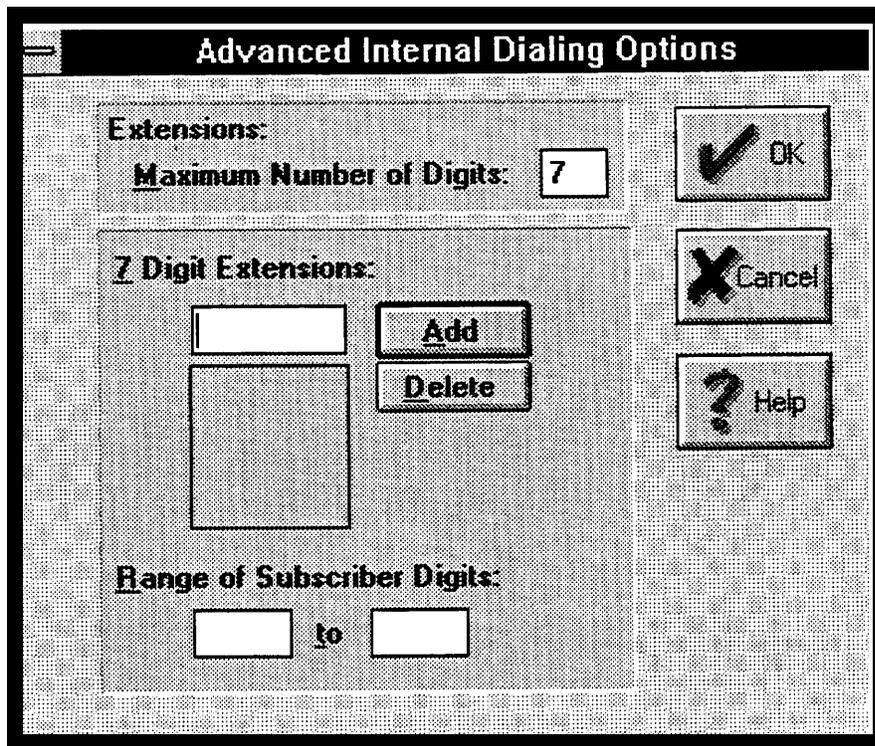
Figure 6-12. Advanced Internal Dialing Options Dialog Box

Maximum Number of Digits

FastCall supports extension lengths from 1 to 7 digits. Enter maximum extension length here.

Seven Digit Extensions/Exchanges

To distinguish between 7 digit extensions and 7 digit external numbers, enter all exchanges that are used as part of 7 digit extension numbers.

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Range of Subscriber's Digits

Enter the range for the last four digits of any seven digit extensions that have been added to the Exchange list.

Outgoing Call Rules, Global Dialing Mode

If you have selected Global Dialing Mode, the Outgoing Call rules for NADP are disabled and the rules dialog box shown in Figure 6-13 is used to select the outgoing call rules.
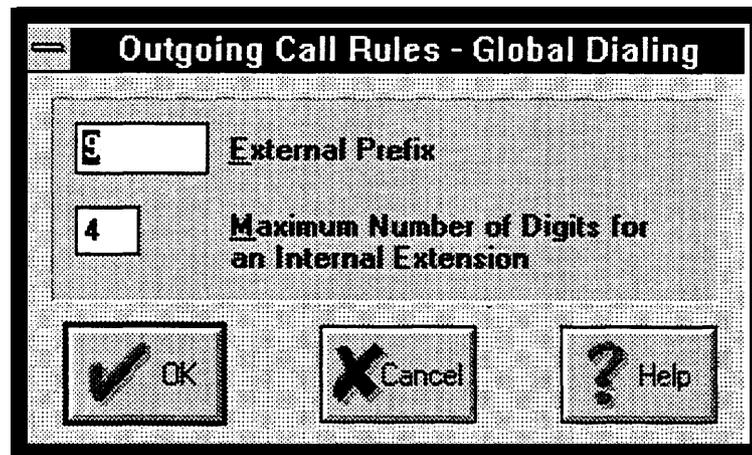
Figure 6-13. Outgoing Call Rules - Global Dialing Dialog Box

External Prefix

If your DEFINITY system requires a prefix number to dial outside calls, enter it here.

Max Digits for Internal Extension

Select the maximum number of digits allowed as internal extension numbers. The allowed range is 1 to 7 digits. FastCall will consider all numbers greater than the maximum to be external numbers.

Special Dialing Information

When using NADP, a number preceded by "011" will be dialed as entered. FastCall will allow up to 19 digits after the 011.

Saving Call Rule Configurations

When you have completed configuring your call rules, you should save the configuration information. See "Saving a FastCall Configuration" in Chapter 4 for more information.

Using Log Viewer

7

Overview

This chapter provides the following information:

- a description of Log Viewer

- helpful hints when using Log Viewer

- the procedures for running Log Viewer

- the tasks you will perform regularly while using Log Viewer

- a description of all the Log Viewer menu options

What is Log Viewer?

Log Viewer is an application that enables you to view entries that are stored in the PassageWay call log. The call log stores a record entry of the following calls:

- Every call you make while FastCall is running.

- All incoming calls you received. The call log only stores entries of calls that arrive while FastCall is running.
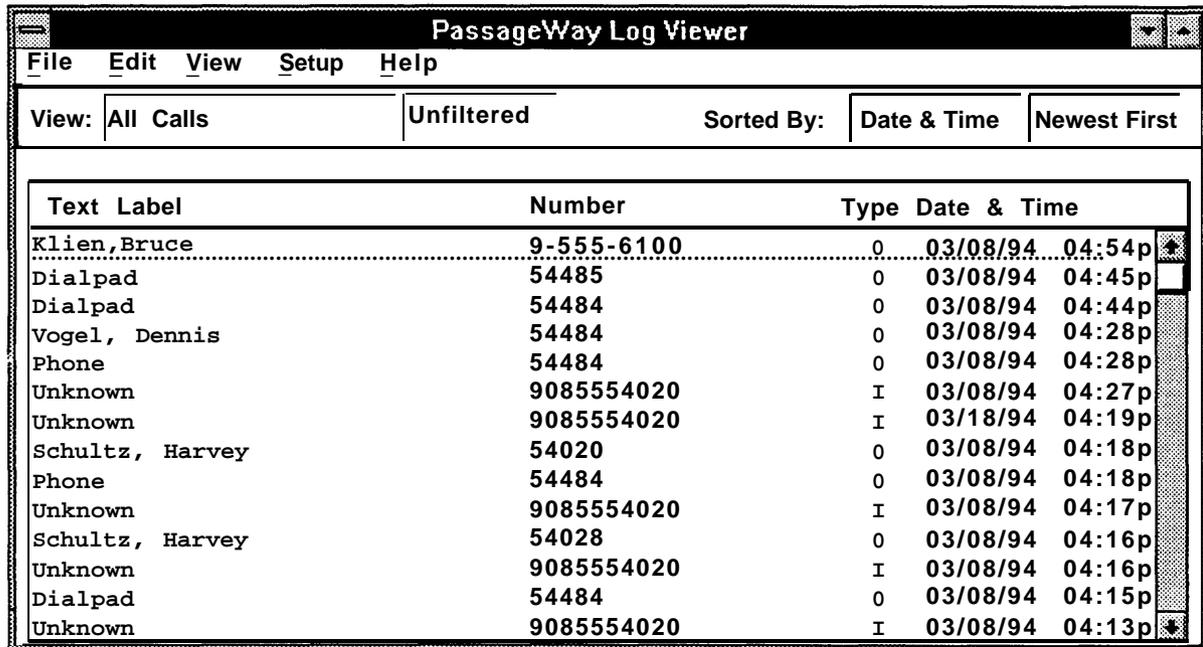
Figure 7-1 shows the Log Viewer window.

```
┌─────────────────────────────────────────────────────────────────────┐
│ ▓                    PassageWay Log Viewer                      ▼  ▲ │
│  File    Edit   View    Setup    Help                                │
│ ┌──────────────────────────────────────────────────────────────────┐│
│  View: All Calls              Unfiltered      Sorted By: Date & Time │
│                                                         Newest First │
│ ┌──────────────────────────────────────────────────────────────────┐│
│   Text Label              Number          Type  Date & Time          │
│  ┌─────────────────────────────────────────────────────────────────┐│
│  Klien,Bruce              9-555-6100        0   03/08/94  04:54p  ▲  │
│  Dialpad                  54485             0   03/08/94  04:45p     │
│  Dialpad                  54484             0   03/08/94  04:44p     │
│  Vogel, Dennis            54484             0   03/08/94  04:28p     │
│  Phone                    54484             0   03/08/94  04:28p     │
│  Unknown                  9085554020        I   03/08/94  04:27p     │
│  Unknown                  9085554020        I   03/18/94  04:19p     │
│  Schultz, Harvey          54020             0   03/08/94  04:18p     │
│  Phone                    54484             0   03/08/94  04:18p     │
│  Unknown                  9085554020        I   03/08/94  04:17p     │
│  Schultz, Harvey          54028             0   03/08/94  04:16p     │
│  Unknown                  9085554020        I   03/08/94  04:16p     │
│  Dialpad                  54484             0   03/08/94  04:15p     │
│  Unknown                  9085554020        I   03/08/94  04:13p  ▼  │
└─────────────────────────────────────────────────────────────────────┘
```

Figure 7-1. Log Viewer Window

The call log can store a maximum of 8,000 entries. When this maximum is reached, the oldest call entry (that is, entry 1) is overwritten by the newest entry (that is, entry 8001). Each call log entry consists of the following components:

- the primary and secondary labels of the card associated with the call. (For incoming calls, you only get this information if a match exists between the caller ID and an AT&TCall file card.)

- the account code associated with the call

- the telephone number associated with the call (that is, the dialed number for outgoing calls and the caller ID, if available, for incoming calls)

- the type of call ("O" for outgoing calls, and "I" for incoming calls)

- the date and time the call started (that is, when the outgoing call was dialed or the incoming call started ringing)

Log Viewer enables you to perform the following tasks with the entries in the call log:

- view selected entries

- sort selected entries

- delete entries

- move entries from the log to a permanent archive file

- print entries

7-3

Helpful Hints

When using Log Viewer, keep in mind the following information:

■ When the Log Viewer window is open, select the Refresh option from the View menu to make sure you are viewing all of the entries you have specified. If you make a call while the Log Viewer window is open, that entry will not be displayed in the Log Viewer. The Refresh option insures that all relevant entries are displayed.

■ The call log stores a maximum of 8,000 calls. Entry 8001 overwrites the oldest entry in the call log.

■ By default, the system automatically adds deleted entries to the call log archive file. The call log archive is an ASCII file in which each field of data is separated by a tab. The archive file is called PWLOG.ARC and is located in your Windows directory. This file can be viewed, edited, or modified by any program that can access ASCII files. If you do not wish to keep your call log entries permanently, turn off the "Add auto. deleted entries to archive file" option from the Preferences option in the Setup menu.

Tasks

This section describes the tasks that you will use with the Log Viewer.

Deleting Entries from the Call Log

To delete entries from the call log:

1. Select the entries that you want to delete from the Log Viewer window. If you want to select all of the entries in the Log Viewer, select `Select All` from the Edit menu.

   The entries that you selected are highlighted.

2. Perform one the following steps:

   — If you want to add these entries to the call log archive file, select `Move to Archive` from the Edit menu.

   The PassageWay Log Viewer dialog box appears, displaying the number of entries that will be deleted from the call

   Select the OK button.

   The entries are deleted from the log and added to the archive file.

   — If you do not want to add these entries to the call log archive file, select `Delete` from the Edit menu.

   The PassageWay Log Viewer dialog box appears, displaying the number" of entries that will be deleted from the call log.

   Select the OK button.

   The entries are deleted from the log.

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Printing Log Entries

Log Viewer enables you to print the entries that are displayed in its window. To print log entries:

1. Using the Filter/Sort Options option from the View menu, view the calls that you want to print.

   The specified calls are displayed in the Log Viewer window.

2. Select `Print View` from the File menu.

   The entries displayed in the Log Viewer window are printed.

Setting the Log Viewer Preferences

You can set Log Viewer to perform the following procedures automatically:

- delete entries after a specified number of days

- add automatically deleted entries to the call log archive file

   ### ⇒ NOTE:
   By default, the call log archive keeps a copy of all entries that are deleted automatically by the program (for example, exceeding the maximum number of entries or deleting entries after a certain number of days). These entries will not be added to the call log if the "Add auto. deleted entries to archive file" option is turned off.

- display a warning when a specified percentage of the call log is filled

To set the preferences:

1. Select `Preferences. . .` from the Setup menu.
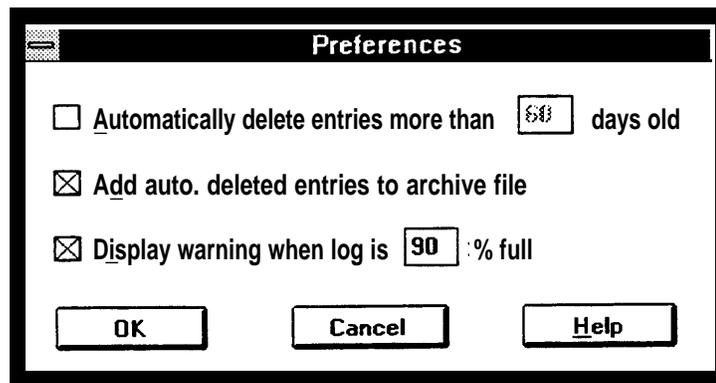
   The Preferences dialog box appears.

Figure 7-2. Preferences Dialog Box

    2. Select the preferences you want.

    3. Select the OK button.

Sorting Call Log Entries

Log Viewer enables you to specify the criteria for sorting call log entries and the-order in which these sorted entries are displayed. You can sort the displayed entries according to the following criteria:

- text label

- telephone number

- account number

- date and time the telephone number was dialed or received

Sorted entries can be displayed in order of oldest first or newest first.

To sort entries in the Log Viewer:

1. Select `Filter/Sort Options. . .` from the View menu.

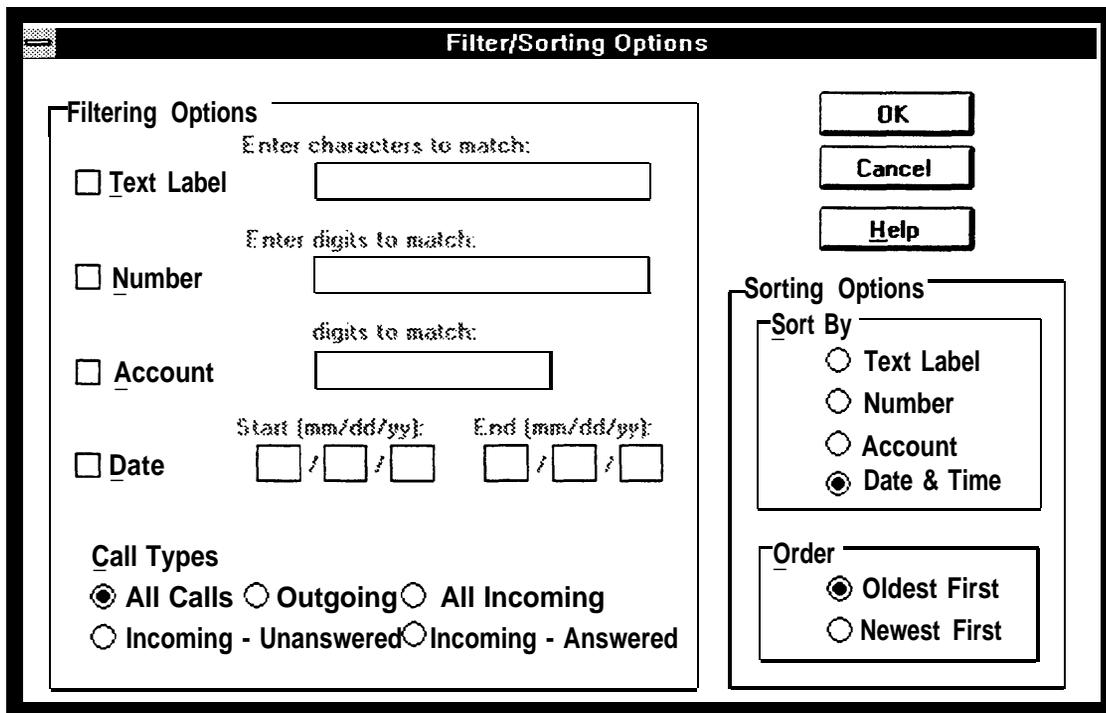   The Filter/Sorting Options dialog box appears.

Figure 7-3. Filter/Sorting Options Dialog Box

2. Select the option button of the Sort By option you want.

3. Select the option button of the Order option you want.

4. Select the OK button.

   The Log Viewer displays the call log entries in the order in which you requested. The top of the window displays the current sorting options.

Specifying the Call Log Entries to be Displayed

Log Viewer enables you to specify which call log entries you want displayed in the Log Viewer window. You can specify entries according to the following criteria:

- text label

- telephone number

- account number

- date

- call type

To specify the calls to be displayed:

1. Select Filter/Sort Options. . . from the View menu.
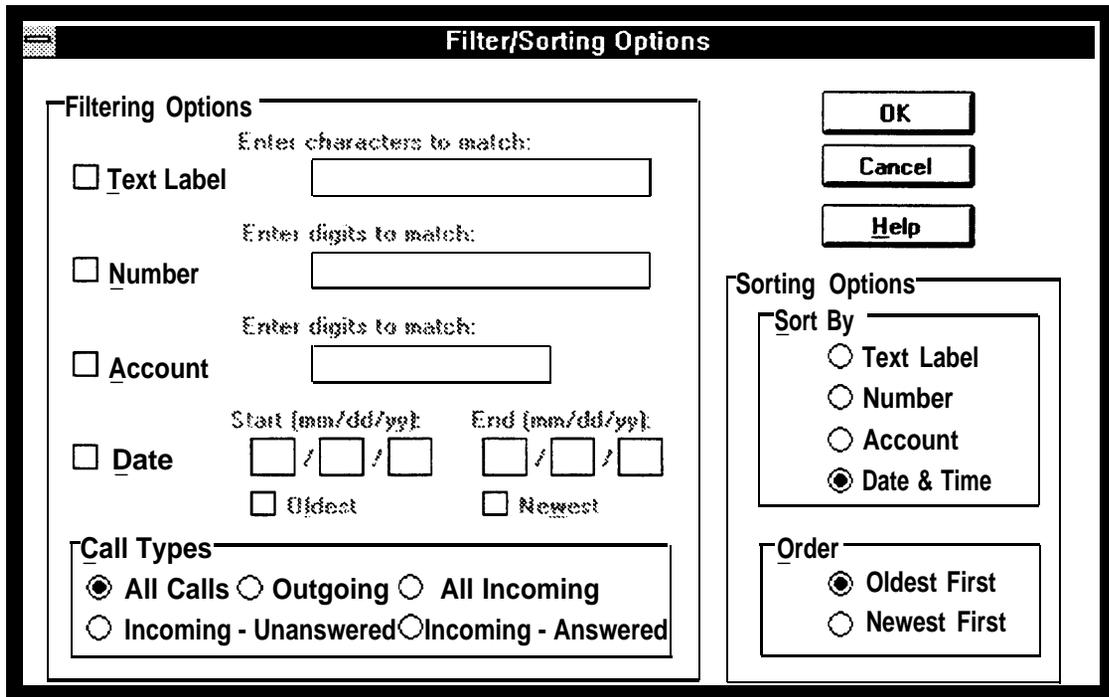
    The Filter/Sorting Options dialog box appears.

Figure 7-4. Filter/Sorting Options Dialog Box

2. Select the filtering options you want.

3. Select the OK button.

Log Viewer displays the call log entries that meet the filtering options you specified. The top of the window displays the viewing selection.

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Log Viewer Menu Bar Options

This section describes the options contained in each Log Viewer menu.

File

This section describes the File menu options.

Print View

Prints the entries that meet the criteria you specified.

Print Setup...

Displays the Windows printer setup window, allowing you to modify the printer settings (for example, paper size and orientation).

Exit

Exits the Log Viewer application.

Edit

This section describes the Edit menu options.

Copy

Copies the currently selected information from the Log Viewer window and places it in the Windows Clipboard.

Delete

Deletes the currently selected information from the Log Viewer window. Once deleted, this information is no longer present in the call log.

Move to Archive

Deletes the currently selected information from the Log Viewer window and adds it to the call log archive file.

Select All

Selects all of the entries currently displayed in the Log Viewer window.

View

This section describes the View menu options.

Filter/Sort Options...

Enables you to specify which calls you want displayed in the Log Viewer (that is, filter), and the order in which you want the calls displayed (that is, sort).

Refresh

Updates the information displayed in the Log Viewer.

Hide Account Field

Enables you to either show or hide the account codes associated with the calls displayed in the Log Viewer. A check next to this option indicates that the account codes will not be displayed for each call.

Setup

This section describes the Setup menu option.

Preferences...

Enables you to set Log Viewer to perform the following procedures automatically:

- delete entries after a specified number of days

- add automatically deleted entries to an archive file

- display a warning when a specified percentage of the call log is filled

Help

This section describes the Help menu options.

Contents

Enables you to access the on-line help for Log Viewer.

Search for Help on...

Enables you to access help information on a certain topic.

How to Use Help

Describes how to use the on-line help for Log Viewer.

About PassageWay Log Viewer

Displays the number of entries currently in the view (that is, the number of entries that meet the criteria you specified), the capacity of the call log, and the number of entries in the call log.

Using AT&TCall

8

Overview

AT&TCall is a card file application that enables you to maintain information such as names, addresses, and telephone numbers. You specify the information that you want to store. With AT&TCall, you can place calls directly from your PC.

This chapter provides the following information:

- a description of AT&TCall

- a tutorial describing how to use AT&TCall

- helpful hints when using AT&TCall

- the procedures for running AT&TCall

- the tasks you will perform regularly while using AT&TCall

- a description of all the AT&TCall menu options

⯮ **NOTE:**
You can use AT&TCall with FastCall, or you can use AT&TCall as a standalone application. If you run AT&TCall with FastCall, you can make calls from FastCall just using AT&TCall as the directory application, or you can make calls directly from AT&TCall. If you run AT&TCall as a standalone application (that is, without running FastCall), you make calls from AT&TCall. If you use AT&TCall to make calls, you must log into the Telephony Server from AT&TCall before you can make any calls.

Before using AT&TCall, you Should consult the following sections of this chapter:

■ "What is AT&TCall?," which describes AT&TCall and provides tasks that you can perform with AT&TCall

■ "Getting Started," which is a tutorial that shows you how to use AT&TCall

■ "Helpful Hints," which provides some "inside" tips and shortcuts that maximize your time and effort when using AT&TCall

What is AT&TCall?

As mentioned previously, AT&TCall is a card file application. To understand how AT&TCall operates, it is helpful to recall how a card file works. A card file is a unit that stores separate index cards, which are sorted according to whatever method you want (usually alphabetical order) and contain specific information you enter. When you obtain a new card file, it is usually empty. You must then enter data on a card and add the card to the card file. Eventually, the card file contains a "bank" of cards. If you want to modify a card in the card file, you must find the card in the card file, remove it, make your changes, and then place it back to its position in the bank. If you want to remove a card, you must locate the card in the card file and remove it (usually, you throw it away).

Each AT&TCall file can be thought of as being a separate card file unit. Each AT&TCall file contains separate data entries, which are referred to as "cards." The collection of these cards is referred to as a "bank." Each AT&TCall file can contain a maximum of 2000 cards in its bank. These cards are sorted in whatever manner you specify (via the Sort option in the View menu) and contain specific information that you enter. Figure 8-1 shows the components of an AT&TCall window.
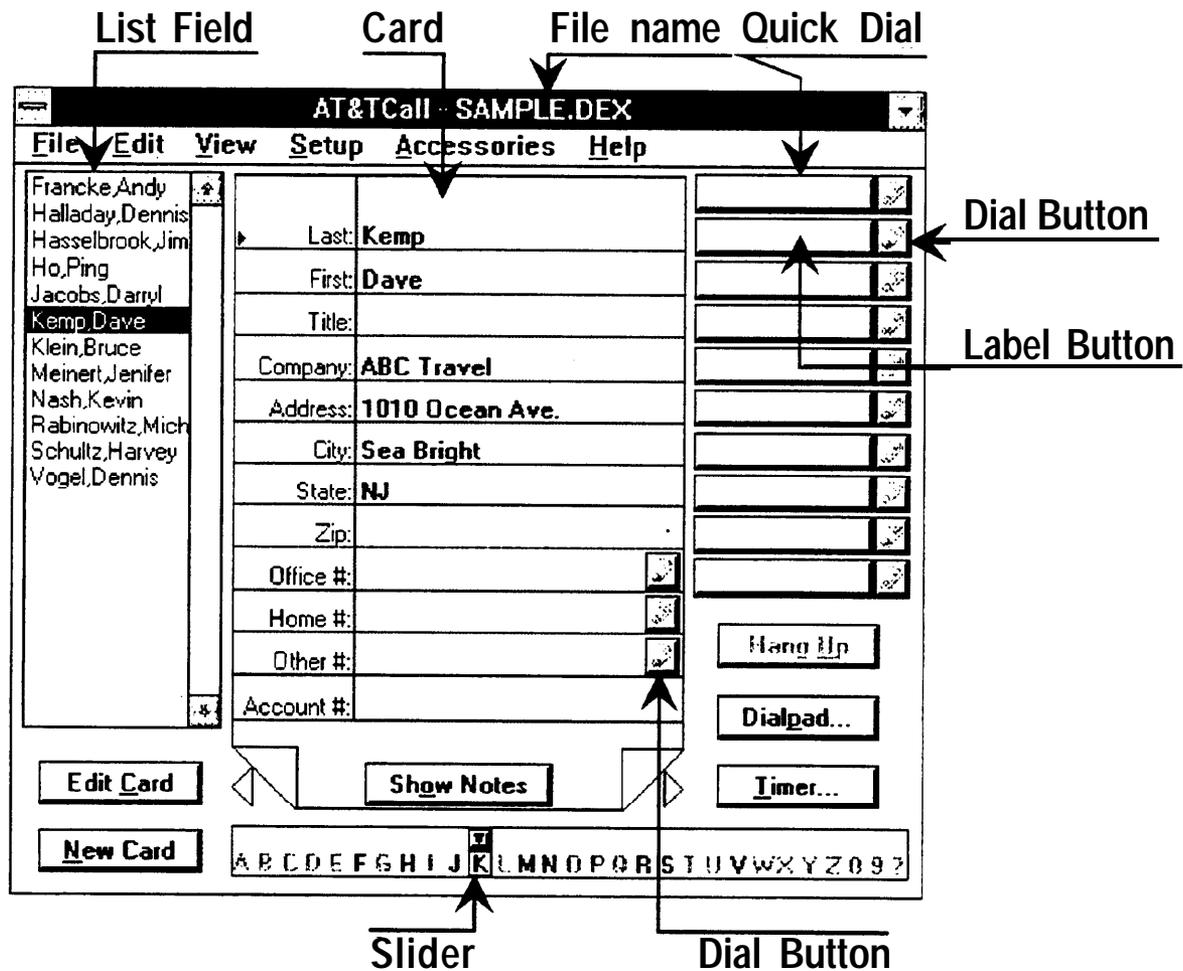
Figure 8-1. Components of an AT&TCall Window

When you create a new AT&TCall file, it does not contain any cards. The List field, which lists the cards present in the file, is empty, and the screen displays a blank card. As with a card file, you must then access a new, blank card (via the New Card button), enter data on the blank card, and add the new card to the bank of the AT&TCall file (via the Add Card button).

If you want to modify a card in the AT&TCall file, you must find the card that you wish to modify, remove it from the card bank, make your changes to the card (via the Edit Card button), and then place it back in the bank (via the Return Card button). If you want to delete a card, you must locate the card in the AT&TCall file and delete it (via the Delete Card option in the Edit menu) from the bank of the AT&TCall file. If you make changes that you want to save, you must save the entire card bank to a file (via the Save or Save As options in the File menu).

Unlike a card file, AT&TCall enables you to perform the following tasks quickly and easily:

- place calls directly from a card

- sort cards in a AT&TCall file any way you want

- modify the card labels for all the cards in the AT&TCall file

- keep track of all the calls you make

- include notes for each card

- implement passwords to prevent unauthorized use of your AT&TCall files

Each AT&TCall file also provides a "desktop" with Quick Dials, which are similar to autodial buttons on your telephone. AT&TCall provides a maximum of 50 Quick Dials (two sets of 25) per file. However, if you need no more than 20 Quick Dials, you can set AT&TCall to display a maximum of 20 Quick Dials (two sets of 10). AT&TCall also enables you to hide all of the cards in your AT&TCall file. In this situation, only the Quick Dials, Hang Up button, Dialpad button, Timer button, and Quick Shift button (if 50 Quick Dials are used) are displayed.

Depending on the number of Quick Dials you specified and whether the card is hidden, your AT&TCall file desktop can have four different "looks." Figures 8-2, 8-3, 8-4, and 8-5 show these different desktop looks.
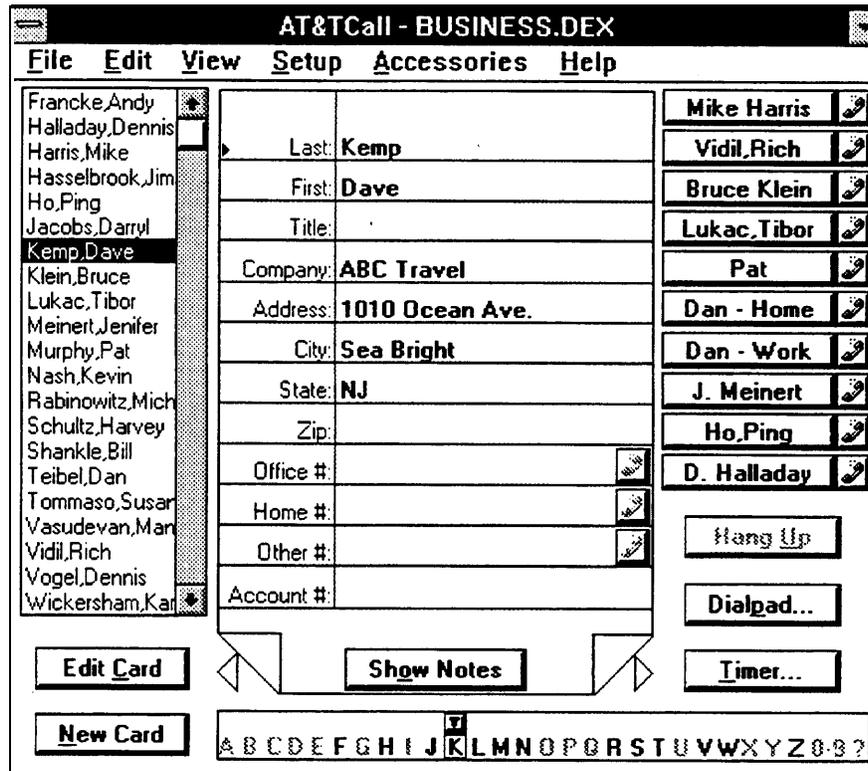
8-5

Figure 8-2. Desktop with 10/20 Quick Dials and Card Shown
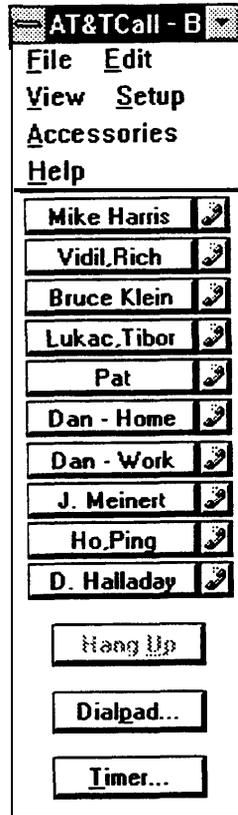
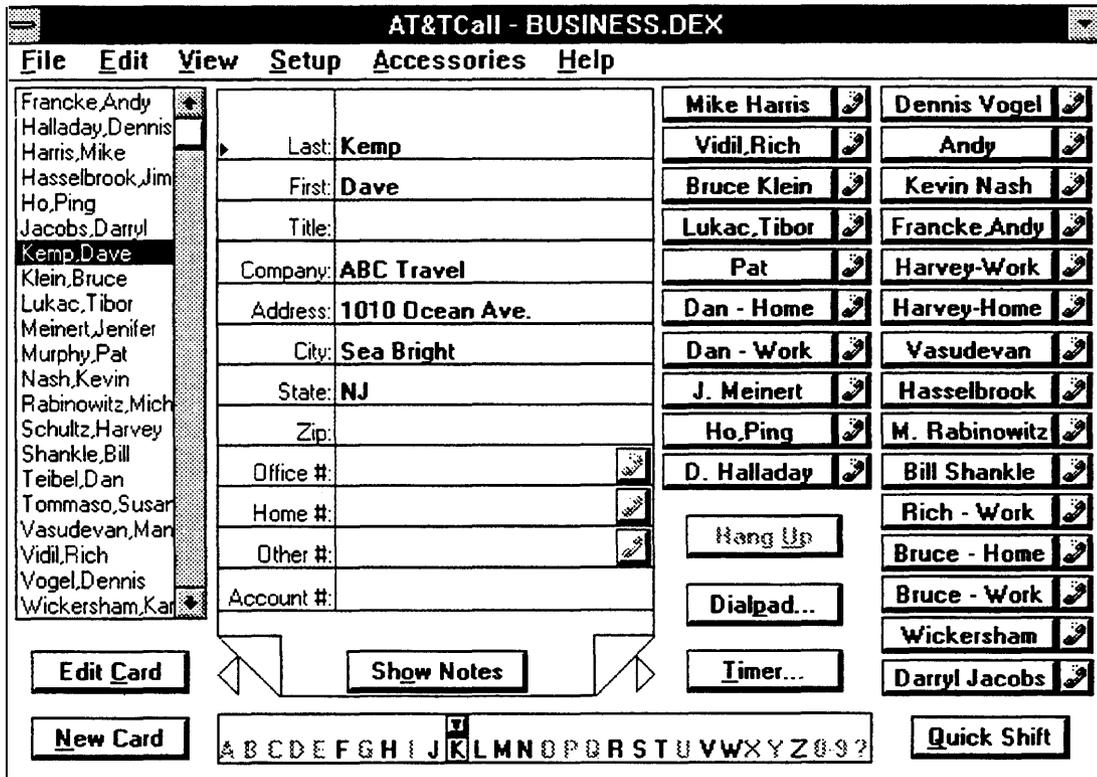**Figure 8-3. Desktop with 10/20 Quick Dials and Card Hidden**

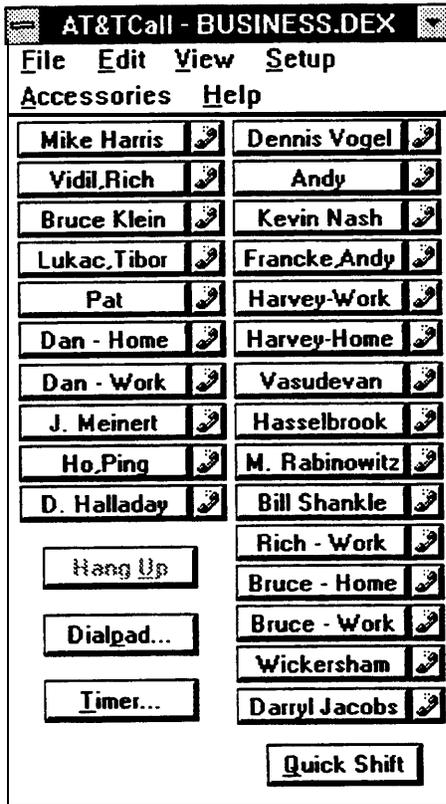**Figure 8-4. Desktop with 25/50 Quick Dials and Card Displayed**

Figure 8-5. Desktop with 25/50 Quick Dials and Card Hidden

Getting Started

If you are using AT&TCall for the first time, it is a good idea for you to perform the tutorial, which provides the basic procedures for using AT&TCall. This tutorial takes approximately 15 minutes to complete and shows you how to perform the following tasks:

1. Run AT&TCall.

2. Open an existing AT&TCall file.

3. Modify an existing card.

4. Create a new card.

5. Enter notes for a card.

6. Make a telephone call from AT&TCall.

7. Save an existing file.

8. Create a new file.

9. Customize the labels in a file.

10. Assign a telephone number to a Quick Dial.

11. Save a new file.

12. Exit AT&TCall.

After completing this tutorial, you will have performed most of the basic procedures necessary to use AT&TCall.

Step 1: Running AT&TCall

Before you can perform any AT&TCall tasks, you must run AT&TCall. In order to run AT&TCall, you must first access Windows and open the program group that contains the PassageWay Solution applications. To run AT&TCall, double-click on the AT&TCall icon. The Telephony Server Identification dialog box appears.
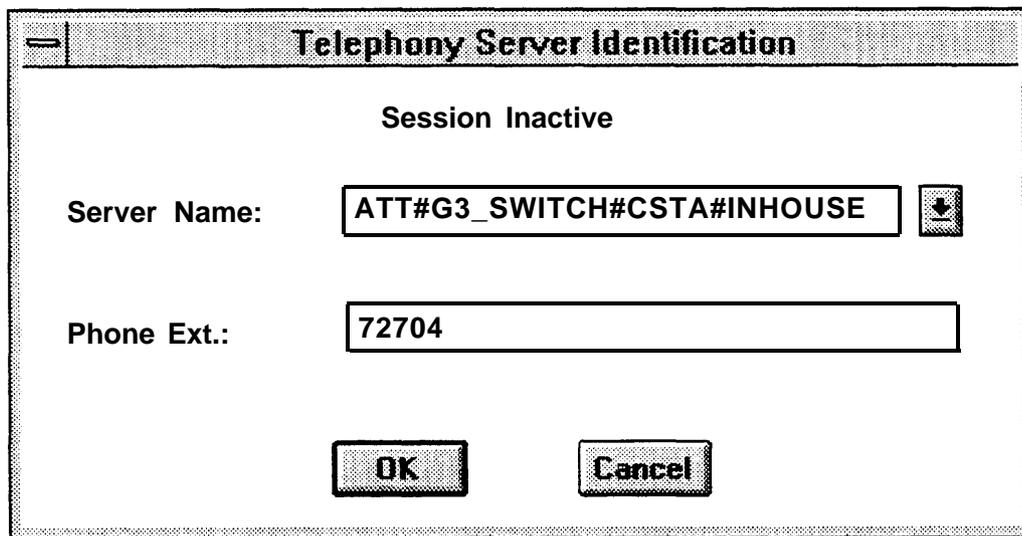

Figure 8-6. Telephony Server Identification Dialog Box

The Telephony Server Identification dialog box contains the following information:

- the name of the server

- your telephone extension

The first time you run AT&TCall, the Telephony Server Identification dialog box contains "sample" information for the Server Name and Phone Ext. fields (Figure 8-7).
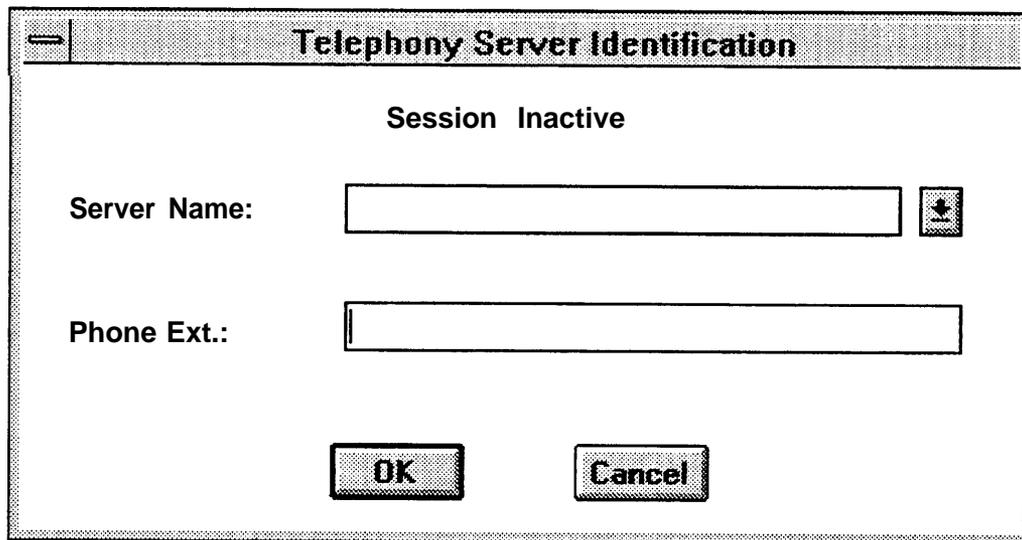
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Figure 8-7. Initial Telephony Server Login Dialog Box

Every time you access AT&TCall, you will be prompted to enter your password for the Telephony Server in order to log into the Telephony Server. You can use AT&TCall without logging into the Telephony Server, but you will be unable to make calls using AT&TCall.

If you are running AT&TCall for the first time, perform the following steps:

1. Enter the name of the server or select the name of the server in the Server Name box.

2. Enter your telephone extension in the Phone Ext. box.

3. Select the OK button.

   The Telephony Server Login dialog box appears.

4. Enter your login ID on the Telephony Server in the Login ID box.

5. Enter your password in the Password box, and then select the OK button.

If the information you entered in this dialog box is correct, an untitled AT&TCall window appears, displaying a blank card.

If you have run AT&TCall before, perform the following steps:

1. Select the OK button in the Telephony Server Identification dialog box.

   The Telephony Server Login dialog box appears. Your login ID and password are displayed.

2. Select the OK button.

If the login ID and password entered in the Telephony Server Login dialog box are correct, an untitled AT&TCall window appears, displaying a blank card.

At this point, you can either enter information into this new file (by adding new cards) or open an existing file. For this tutorial, you will open an existing file.

Step 2: Opening an Existing AT&TCall File

In this step you will learn how to open an existing file by opening the file "sample. dex." This file was copied to your PC when you installed the PassageWay Solution applications.

To open an existing AT&TCall file, perform the following steps:

1. Select `Open. . .` from the File menu.

   The Open dialog box appears.

2. Select `sample.dex` from the File Name box, and select the OK button.

   The AT&TCall file titled "SAMPLE.DEX" appears. This file was copied to your hard disk during the installation procedure. AT&TCall displays the last state of the card bank. Whenever you open an existing

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AT&TCall file, AT&TCall displays the last card that was displayed before you saved and exited that file.

$\Longrightarrow$ **NOTE:**

You can only run one instance of AT&TCall at a time.

Step 3: Editing an Existing Card

In this step, you will learn how to modify the information that is present in an existing card (that is, a card that was already created and added to the card bank).

The displayed card information cannot be modified directly. To make any changes to this information, you must "edit" the card. However, before you can edit an existing card, you must first locate the card in the bank. AT&TCall provides several methods for selecting a card:

- clicking on the card in the List field

- clicking on the Next and Previous arrow buttons located on each side of the Show Notes button

- clicking on the appropriate letter in the Slider, located at the bottom of the AT&TCall window. For example, if the name you wanted started with the letter "w," you could click on the "w" on the Slider. The first card that began with the letter "w" would be selected and displayed.

To edit a card, perform the following steps:

1. Select the card "Kemp, Dave" from the card bank using one of the methods described above.

   The card for Dave Kemp appears.

2. Select the Edit Card button, which is located beneath the List field.

   The Edit Card window appears and displays all the information for the selected card. The cursor is located in the top label field ("Last"), and the name "Kemp" is highlighted. The Edit Card button removes the card from the card bank, enabling you to modify the card.

   ➡️ **NOTE:**

   In the AT&TCall window, the Edit Card and the New Card buttons are "grayed" while you are editing or adding a card. Only one card can be "out" of the card bank of an AT&TCall file at one time.

   You can move the cursor from field to field in the Edit Card window by performing one of the following actions:

   — pressing TAB or ENTER to move the cursor to the next field

   — pressing SHIFT+TAB or SHIFT+ENTER to move the cursor to the previous field

   — clicking the mouse on the field you want to select

3. Using one of the methods described above, move the cursor to the "Title" field, and type *Manager.*

4. Using one of the methods described above, move the cursor to the "City" field, delete Sea Bright , and type *Asbury Park.*

5. Select the Return Card button.

   The Edit Card window disappears, and the changes you made are displayed. The modified card for Dave Kemp is returned to the bank

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Step 4: Creating a New Card

In this step, you will learn how to create a new card, enter information into it, and add the card to the bank.

To add a new card to the card bank, you must get a new, blank card, enter the data in it, and then add the card to the bank.

To add a new card to the card bank, perform the following steps:

1. Select the New Card button

   The New Card window appears, and the cursor is located in the "Last" field. The contents of this window is a new, blank card.

2. Type *Meyer.*

3. Using one of the methods described previously, move the cursor to the "First" field, and type *Fred.*

4. Select the Add Card button.

   The New Card window disappears, the labels for the new card appear in he List field, and the information for the new card is displayed. The new card is now part of the card bank.

Now create a new card for someone you know. When entering the information in the new card, be sure to include that person's phone number in either the Office # or Home field. Enter the phone number the same way as you would when you are dialing it from your telephone. For example, if you must enter a "9" before dialing the phone number, include "9" at the beginning of the phone number in the card. You will use this new card again in Step 6. After creating this card, select the card "Meyer, Fred" from the card bank, and proceed to Step 5.

Step 5: Entering Notes for a Card

In this step, you will learn how to enter notes for the card that you created in Step 4.

AT&TCall enables you to enter notes for each card in a card bank. The Notes field can contain up to 32K. When a card contains notes, the Notes icon appears to the left of the Show Notes button. To enter notes for a card, perform the following steps

1. Select the Show Notes button.

   The card display is replaced by a blank "note pad."

2. Select `Insert Timestamp` from the Edit menu.

   The day, date, and time are inserted at the top of the note pad.

3. Type **Must call tomorrow** , and then select the Hide Notes button.

   The card display replaces the note pad. The Notes icon appears to the left of the Show Notes button, signifying that notes are present for this card.

Step 6: Making Calls

In this step, you will learn how to make a call from the card you created in Step 4 for someone you know and also make a call fro the dialpad.

➡ NOTE:
You should perform this step only if you logged in from AT&TCall.

AT&TCall provides the following ways for you to make phone calls while in a file:

- the Dial buttons on each card

- the Quick Dials in the AT&TCall window

- the Dialpad

Making a phone call with a Dial button on a card consists of clicking on the Dial button next to the phone number on the displayed card. To make a call from a card, perform the following steps:

1. Select the card you created in Step 4.

   The card appears.

2. Click on the Dial button next to that person's phone number.

   If you do not have a speakerphone, pick up the handset. AT&TCall places the call. you have five seconds to go off hook (that is, pick up the handset) after clicking on the Dial button. If you pick up the handset after the five second interval expires, the call is denied. You can also place a call by lifting the handset before clicking on the Dial button.

   If you have a speakerphone, your speakerphone activities, and AT&TCall places the call.

3. Select the HangUp button, or hang up the handset to disconnect the call.

The Hang Up button is enabled whenever you make an outgoing call via AT&TCall or your telephone while AT&TCall is running. As long as the call you make is active, the Hang Up button remains enabled. For example, if you place a call on hold via your telephone, the Hang Up button is disabled. However, as soon as you return to the call on hold, the Hang Up button is enabled

Making a phone call with Quick Dial consists of clicking on the Dial button of a Quick Dial that you have already programmed with a telephone number. (If you do not have a speakerphone, you must pick up the handset.) This procedure is described later in this tutorial.

Making a phone call using the Dialpad feature is similar to dialing a phone number on your telephone.

To make a call from the Dialpad, perform the following steps:

1. Select the Dialpad button

   The Dialpad window appears.

2. Using the PC keyboard or clicking on he buttons in the Dialpad window, enter a phone number.

   When entering the telephone number, make sure you enter the number the same way as you would when you are dialing it from your telephone. For example, if you must enter a "9" before dialing a telephone number outside of your telephone system (that is, an outside call), enter a "9" in the beginning of the phone number. At any time, you can edit the digits that you enter in the Dialpad window.

   AT&TCall also enables you to copy telephone numbers to the Windows clipboard. You may then paste the telephone numbers to the Dialpad window.

3. Click on the Dial button.

   If you do not have a speakerphone, pick up the handset. AT&TCall places the call, and the Dialpad window closes automatically. You have five seconds to go off hook (that is, pick up the handset) after clicking on the Dial button. If you pick up the handset after the five second interval expires, the call is denied. You can also place a call by lifting the handset before clicking on the Dial button.

   If you have a speakerphone, the speakerphone activates, and AT&TCall places the call. The Dialpad window closes automatically.

4. Select the Hang Up button, or hang up the handset to disconnect the call.

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Step 7: Saving an Existing File

In this step, you will learn how to save to the hard disk of you PC the changes that you made to the existing file.

Now that you are done making the cards in the "sample.dex" file you must save your changes to disk. Select `Save` from the File menu. This procedure saves the changes you made to "sample,dex" to the hard disk of your PC.

Step 8: Creating a New AT&TCall File

In this step, you will create a new AT&TCall file. New files are empty (that is, they have no cards in the bank) and untitled. You will use this new file to learn how to customize the labels of the card display in a file (Step 9).

To create a new AT&TCall file, select `New` from the File menu. An untitled, empty AT&TCall file appears. This file is empty and displays a blank card.

Step 9: Customizing the Labels

In this step, you will learn how to customize the labels of the card display of the new file you created in Step 8.

When you initially access a new AT&TCall file, AT&TCall displays the default labels for the cards (for example, "Last:," "First:," "Title:," and "Company:"). However, you can change these labels at any time, enabling you to create custom templates for the cards in your AT&TCall files. Whatever changes you make to the labels apply only to the cards in the AT&TCall file in which you are working. As a result, you can have AT&TCall files with different labels on their cards. However, all the cards in the file have the same labels.

To customize the labels, perform the following steps:

1. Select `Edit Labels. . .` from the Setup menu.

   The Edit Labels dialog box appears.

2. Using the methods described previously, move the cursor to Text Field #7.

3. Delete State:, and enter *Country:.*

4. Select the OK button.

   The Edit Labels dialog box appears, and the new field label is displayed on the card template.

Step 10: Programming a Quick Dial

In this step, you will learn how to program a Quick Dial in a new AT&TCall file that you created.

$\Longrightarrow$ **NOTE:**

You should perform this step only if you logged in from AT&TCall.

AT&TCall enables you to program Quick Dials for each AT&TCall file. Quick Dials consist of two components: a Label button and a Dial button. The Label button displays information you want to be displayed on the button (for example, the person's name). The Dial button dials the phone number you specified on the related card. AT&TCall Quick Dials act the same way as autodial buttons on your telephone.

The card bank in this new AT&TCall window is empty. Since a Quick Dial dials the phone number from a specified card, you must create a card before you can program a Quick Dial.

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To create a card, perform the following steps:

1. Select the New Card button

   The New Card window appears.

2. Fill out the card for someone you know. Make sure you enter a telephone number for the person

   When entering the telephone number, make sure you enter the number the same way as you would when you are dialing it from your telephone. For example, if you must enter a "9" before dialing a telephone number outside of your telephone system (that is, an outside call), enter a "9" in the beginning of the phone number

3. When finished, select the Add Card button.

   The new card is displayed.

After creating a card, you can program the phone number for that card to a Quick Dial.

To program a Quick Dial, perform the following steps:

1. Press and hold down SHIFT and click on a Label button of a Quick Dial.

   The Create Quick Dial dialog box appears, displaying the label that will appear on the Quick Dial Label button and the telephone number that the Quick Dial will dial. You may modify the label to make it more descriptive to you and select the option button of the phone number that you want this Quick Dial to dial (if more than one telephone number is available).

   When programming Quick Dials, you may want to modify the labels. For example, suppose you want to program a Quick Dial for a friend's office telephone number, and also program a Quick Dial for that person's home telephone number. If you do not modify the Label buttons when programming these Quick Dials, you will have two Quick Dials that have the same labels, but dial different telephone numbers. By looking at the Label buttons of these Quick Dials, you

will be unable to determine which Quick Dial dials the office telephone number, and which Quick Dial dials the home telephone number. In this case, it would make sense to include terms such as "Home" or "Office" in the labels to differentiate what each of the Quick Dials will dial

2. When finished, select the OK button.

The Create Quick Dial dialog box closes, and the label appears on the Label button of the Quick Dial.

Step 11: Saving a New File

In this step, you will learn how to save the new file to the hard disk of your PC.

To save this new file to disk, perform the following steps:

1. Select Save As. . . from the File menu.

   The Save As dialog box appears.

2. Enter *trial* in the File Name box.

   ### ⇛ NOTE:
   AT&TCall automatically adds the ".dex" suffix to the file name you enter. If you prefer, you may enter another suffix. However, it is recommended that you use the ".dex" default to make it easier to identify and load AT&TCall files.

3. Select the OK button.

   The Save As dialog box appears, and "AT&TCall-TRIAL.DEX" appears in the title bar of the AT&TCall window.

Step 12: Exiting AT&TCall

In this step, you will learn how to exit AT&TCall.

Now that you have completed the AT&TCall tutorial, exit AT&TCall. To exit AT&TCall, select Exit from the File menu. The AT&TCall window closes.

Helpful Hints

Once you have completed the tutorial, refer to the following hints:

- Keep all AT&TCall files in the same directory.

  By default, AT&TCall saves and opens files from the directory in which the PassageWay Solution applications are installed. By keeping all the AT&TCall files in the same directory, you can easily access your files.

- Determine whether you need more than 20 Quick Dials.

  AT&TCall enables you to program a maximum of 50 Quick Dials (two sets of 25, which are accessed via either the Quick Shift button or the Quick Shift option in the View menu). However, if you need no more than 20 Quick Dials, you can set AT&TCall to display a maximum of 20 Quick Dials (two sets of 10, which are accessed via the Quick Shift option in the View menu). See "Changing the Number of Quick Dials Displayed," described later in this chapter.

- Administer a password for your AT&TCall files.

  To prevent unauthorized individuals from accessing your files, administer passwords for your AT&TCall files. See "Protecting an AT&TCall File with a Password," described later in this chapter.

Running AT&TCall

In order to run AT&TCall, you must access Windows and open the program group that contains the PassageWay Solution applications. To run AT&TCall, double-click on the AT&TCall icon. The Telephony Server Identification dialog box appears.

```
┌─────────────────────────────────────────────────────┐
│ ═│        Telephony Server Identification            │
├─────────────────────────────────────────────────────┤
│                   Session Inactive                   │
│                                                      │
│  Server Name:     ┌──────────────────────────┐  ┌─┐ │
│                   │ ATT#G3_SWITCH#CSTA#INHOUSE│  │▼│ │
│                   └──────────────────────────┘  └─┘ │
│                                                      │
│  Phone Ext.:      ┌──────────────────────────────┐  │
│                   │ 72704                        │  │
│                   └──────────────────────────────┘  │
│                                                      │
│              ┌─────────┐      ┌─────────┐           │
│              │   OK    │      │ Cancel  │           │
│              └─────────┘      └─────────┘           │
└─────────────────────────────────────────────────────┘
```
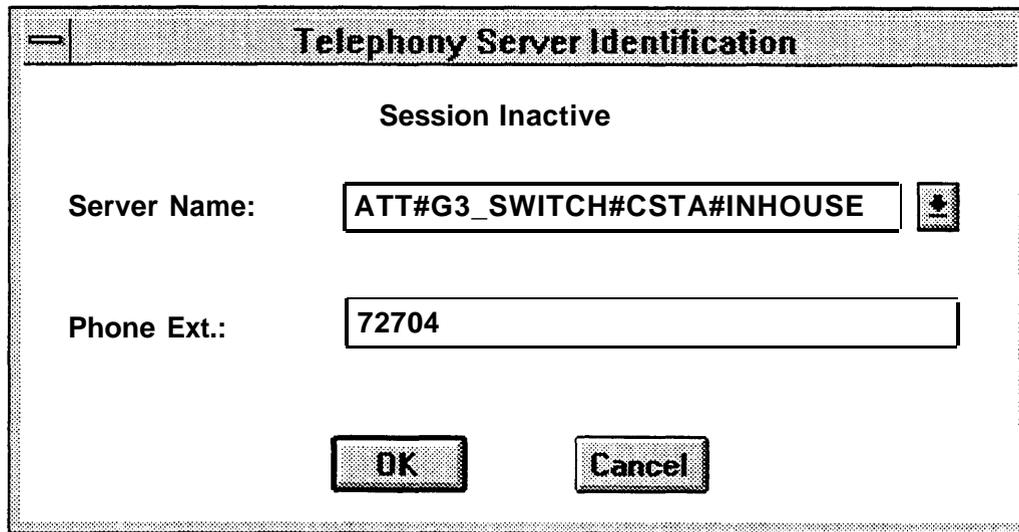
Figure 8-8. Telephony Server Identification Dialog Box

The Telephony Server Identification dialog box contains the following information:

- the name of the server

- your telephone extension

The first time you run AT&TCall, the Telephony Server Identification dialog box contains "sample" information for the Server Name and Phone Ext. fields (Figure 8-9).
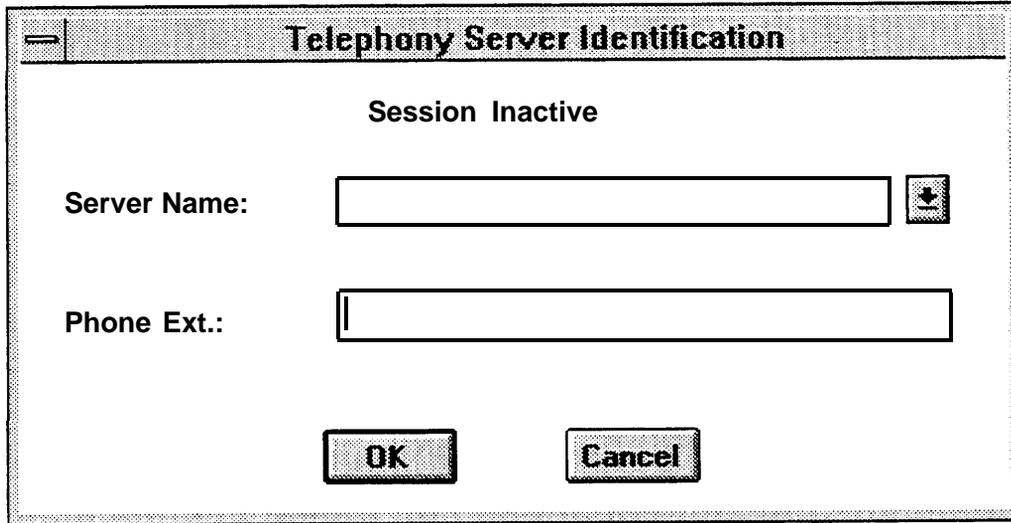
Figure 8-9. Initial Telephony Server Identification Dialog Box

Every time you run AT&TCall, you will be prompted to enter your password for the Telephony Server in order to log into the Telephony Server. You can use AT&TCall without logging into the Telephony Server, but you will be unable to make calls using AT&TCall.

If you have run AT&TCall before, perform the following steps:

1. Select the OK button in the Telephony Server Identification dialog box.

    The Telephony Server Login dialog box appears. Your login ID and password are displayed.

2. Select the OK button.

If the information you entered in this dialog box is correct, an untitled AT&TCall window appears, displaying a blank card.

If you are running AT&TCall for the first time, perform the following steps:

1. Enter the name of the server or select the name of the server in the Server Name box.

2. Enter your telephone extension in the Phone Ext. box.

3. Select the OK button.

   The Telephony Server Login dialog box appears.

4. Enter your login ID on the Telephony Server in the Login ID box.

5. Enter your password in the Password box, and then select the OK button.

If the information you entered in this dialog box is correct, an untitled AT&TCall window appears, displaying a blank card.

File Tasks

This section describes the tasks that you will perform when working in an AT&TCall file.

Changing How Cards are Sorted in an AT&TCall File

AT&TCall enables you to change the order in which cards are organized in the card bank. To change how cards are sorted in your AT&TCal file:

1. Select `Sort. . .` from the View menu.

   The Sort dialog box appears.
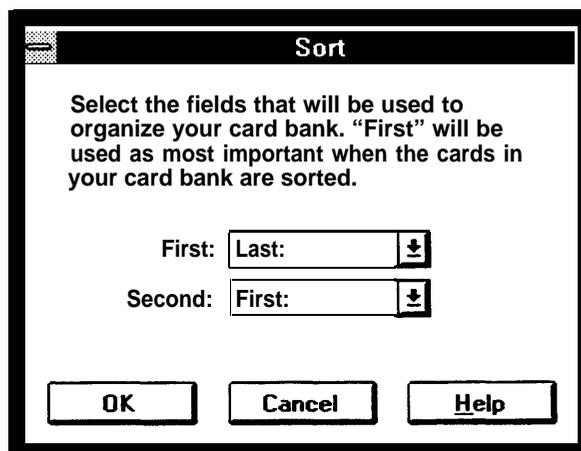
Figure 8-10. Sort Dialog Box

2. Select the First box, and select the label of the field that you want AT&TCall to sort by first.

3. Select the Second box, and select the label of the field that you want AT&TCall to sort by second.

4. Select the OK button.

    The Sort dialog box closes, and the cards are now sorted in the card bank according to your specifications.

Creating a File Template

AT&TCall enables you to create a template for all new AT&TCall files that you open. Once you create a template, all of your new AT&TCall files will have the attributes (for example, specific labels or the number of Quick Dials that you want displayed) that you specified in the template. For example, suppose you want 25 Quick Dials, a card with your home phone number, and the first Quick Dial programmed with your home phone number in every file that you create. If you specify these attributes in your template, every new file that you create will automatically have 25 Quick Dials, a card with your home phone number, and the first Quick Dial programmed with your home phone number. At any time, you can modify or delete this file.

To create a template:

1. Select `New` from the File menu.

    A new, untitled AT&TCall window appears.

2. Customize the file to your specifications. For example, modify the labels, add any cards that you want to appear in all of your new AT&TCall files, and specify the number of Quick Dials you want in all of your new AT&TCall files.

3. When you are finished, select `Save As. . .` from the File menu.

    The Save As dialog box appears.

4. Enter **attcall.tpl** in the Filename box, and select the OK button.

    The template is now saved. Every new file you open will now contain the attributes that you specified in your template.

Creating a New AT&TCall File

To create a new AT&TCall file:

1. Select `New` from the File menu.

   A new, empty AT&TCall file with the title "(UNTITLED. DEX)" appears. When you save this file, AT&TCall will prompt you to name the file.

2. Enter your information in this file.

3. When you are finished working and want to save this file, select `Save As. . .` from the File menu.

   AT&TCall prompts you to name this file.

4. Enter the file name in the File Name box, and then select the OK button.

   The name of the file appears in the title bar of the window.

Dialing a Phone Number with the DialPad

⇒ **NOTE:**
You should perform this procedure only if you logged in from AT&TCall.

To dial a phone number with the Dialpad:

1. Select the Dialpad button.

   The Dialpad window appears.

2. Using your PC keyboard or clicking on buttons in the Dialpad window, enter the phone number.

   When entering the telephone number, make sure you enter the number the same way as you would when you are dialing it from your telephone. For example, if you must enter a "9" before dialing a

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telephone number outside of your telephone system (that is, an outside call), enter a "9" in the beginning of the phone number. At any time, you can edit the digits that you enter in the Dialpad window.

AT&TCall also enables you to copy telephone numbers to the Windows clipboard. You may then paste the telephone numbers to the Dialpad window.

3. Click on the Dial button.

If you do not have a speakerphone, pick up your handset. AT&TCall places the call, and the Dialpad window closes automatically. You have five seconds to go off hook (that is, pick up the handset) after clicking the Dial button. If you pick up the handset after the five-second interval expires, the call is denied. You can also place a call by lifting the handset before clicking on the Dial button.

If you have a speakerphone, the speakerphone activates, and AT&TCall places the call. The Dialpad window closes automatically.

4. When the call is completed, select the Hang Up button, or hang up the handset to place your telephone on hook.

Exiting AT&TCall

To exit AT&TCall, select Exit from the File menu.

Exporting AT&TCall Information

AT&TCall enables you to export a single card or an entire AT&TCall file to a file in the comma separated values format (".csv"), which can be used in other applications. During the export procedure, AT&TCall takes the 12 fields on a card and the associated Notes field and writes them out in a horizontal line in a ".csv" file. This line of information from a card is referred to as a "record." If you export an AT&TCall file that has 20 cards, the ".csv" file will have 20 records.

To export an AT&TCall file or card:

1. Open the file that has the information you want to export.

   The AT&TCall window appears.

   ### ⇛ NOTE:
   If you only want to export one card, select that card in the bank.

2. Select `Export` from the File menu.

   A second menu appears.

3. Select `All Cards. . .` if you want to export the entire AT&TCall file, or select `Current Card. . .` if you want to export the currently displayed card.

   The Export dialog box appears.
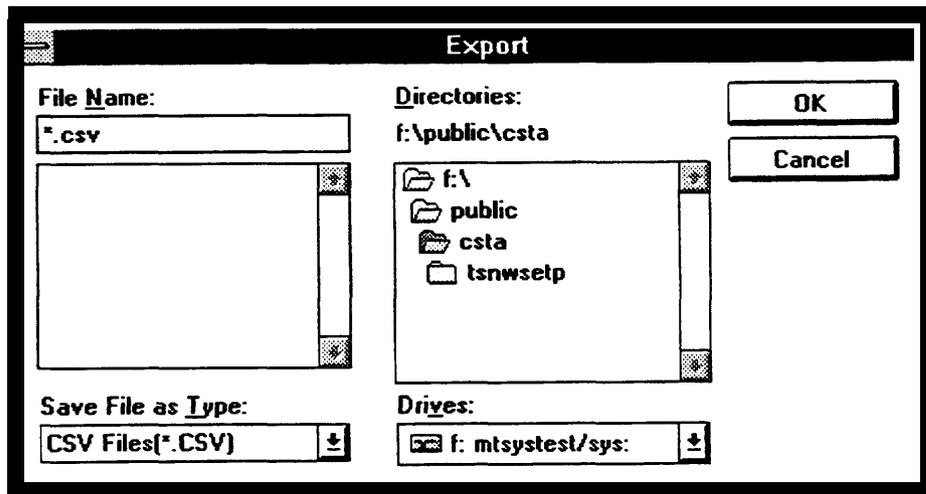
Figure 8-11. Export Dialog Box

4. Enter the name of the file to which you want to save this information and select the OK button.

The Export dialog box closes, and the new file is created.

Importing Files into AT&TCall

AT&TCall enables you to import files that were created in other applications. To be imported by AT&TCall, these files must be in the comma separated values format (". csv"). A ". csv" file consists of "records," which are horizontal fields of data. Each field of data is separated from the next field by a comma (,). Fields containing commas and/or fields consisting of more than one line must be surrounded by quotes (""). Each record is one group of related data.

The end of each record is signified by a carriage return. A ".csv" file can have numerous fields in a record. However, AT&TCall will only import 13 fields of data from each record in a ".csv" file. Three records in a ".csv" file may look like this:

```
Nolan, Pat, "ABC Travel, Inc."
Ricker, Lisa, "ABC Travel, Inc."
Vidil, Rich, "ABC Travel, Inc."
```

AT&TCall imports 13 horizontal data fields from the ".csv" file, and then places the information in the 13 vertical fields of a card in an AT&TCall file (that is, the 12 card fields and the Notes field). If there are more than 13 fields of data in a record, AT&TCall ignores the remaining data in that record and proceeds to the next record. If there are less than 13 fields of data in a record, AT&TCall assumes that the remaining fields in the record are blank and proceeds to the next record. For example, if each record only contained two fields of information, AT&TCall would place the information in the first two fields in a card (for example, the "Last" and "First" label fields) and make the remaining fields in that card blank. It would then proceed to a new card and enter the information for the next record.

During the import procedure, AT&TCall scans the file to be imported, verifying that the file is valid (that is, it is in the correct format) and that only numeric characters will reside in the telephone number fields (that is, the ninth, tenth, and eleventh fields) in a card in an AT&TCall file. The telephone number fields in a card accept all numeric digits, *, #, (,), hyphens, spaces, and commas.

To import a file:

1. Open the AT&TCall file in which you want the imported data to reside.

   The AT&TCall file window appears.

   $\Longrightarrow$ **NOTE:**

   > If you are importing data into an existing AT&TCall file, the new data will be sorted automatically as it is imported. As a result, this new information will be mixed in with your existing information.

2. Select Import. . . from the File menu.

   The Import dialog box appears.

3. Select the file that you want to import, and select the OK button.

   AT&TCall scans the file and then imports the records from the file (if the file is valid). A dialog box appears, stating the number of cards (that is, records) that were imported from the ".csv" file.

4. Select the OK button.

   The dialog box closes, and the new information is displayed in the AT&TCall window.

Modifying the Telephony Server Login Parameters

➡ **NOTE:**

You should perform this procedure only if you are using AT&TCall as a standalone application (that is, you are not running AT&TCall with FastCall).

AT&TCall enables you to modify the following information that you use to log into the Telephony Server:

- your login ID

- your password

- the name of the server

- your telephone extension

If any of this information is incorrect, you will be unable to access the Telephony Server, preventing you from making calls using AT&TCall. You cannot change your actual login and password on the Telephony Server using the Telephony Server Login dialog box. This dialog box only enables you to modify the information that AT&TCall sends to the Telephony Server when you attempt to log in.

➡ **NOTE:**

You cannot modify the Telephony Server Login information while you are logged into the Telephony Server (that is, while you are in an active session).

To modify the login information:

1. Make sure that you are not logged into the Telephony Server. (Refer to "Verifying the Connection with the Telephony Server" to determine whether you are logged in.)

   If you are already logged into the Telephony Server, exit AT&TCall and then double-click on the AT&TCall icon. The Telephony Server Identification dialog box appears.

   If you are not logged into the Telephony Server, select `Telephony Server Login. . .` from the Setup menu. The Telephony Server Identification dialog box appears.

2. Modify the appropriate information, and then select the OK button.

   The Telephony Server Login dialog box appears.

   Modify the appropriate information.

3. When you are finished, enter your password for the Telephony Server, and select the OK button.

Opening an Existing AT&TCall File

To open an existing AT&TCall file:

1. Select `Open. . .` from the File menu.

   The Open dialog box appears, showing a list of the available ".dex" files in the current directory and disk drive.

2. Select the AT&TCall file you want from the File Name box, and select the OK button. You may use the drive and directory controls to switch drives and/or directories.

   The file is loaded, and AT&TCall displays the last state of the card bank. Whenever you open an existing AT&TCall file, AT&TCall displays the last card that was displayed before you saved and exited that file.

8-37

Printing a Card List

AT&TCall enables you to print a list of the cards in an AT&TCall file. You may specify the labels of the information that you want printed for each card. For example, if you want the list to contain the last name, first name, and office # for each card in the file, you must specify these labels in the Print List dialog box. In this example, one field would contain "Last:," one field would contain "First:," one field would contain "Office #:," and the three remaining fields would each contain "(None)." "(None)" signifies that no label was selected and that no information will be printed in this field. You may select up to six labels whose information you want printed.

To print a list of the cards in an AT&TCall file:

1. Select `Print List. . .` from the File menu.

   The Print List dialog box appears.
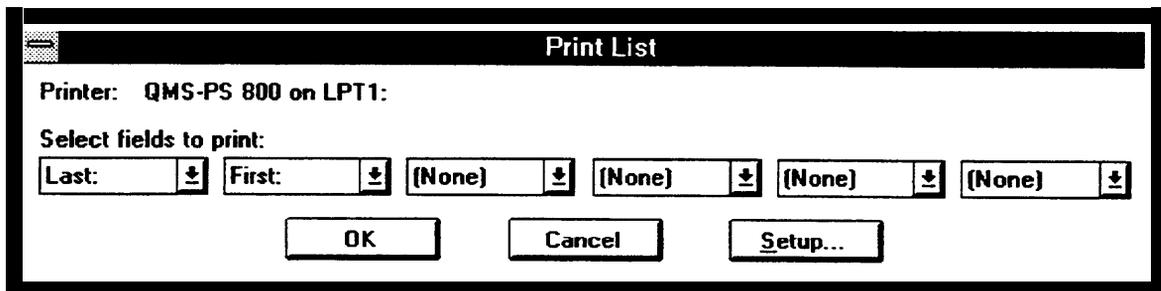
Figure 8-12. Print List Dialog Box

2. In each field, select the label of the information that you want printed for each card.

3. When finished, select the OK button.

   Printing begins, and a dialog box is displayed, which enables you to cancel printing.

Printing an AT&TCall File or Card

AT&TCall enables you to print either all of the cards in an AT&TCall file or only the card that is currently displayed. When printing a file or card, you may specify whether you want the notes associated with the card(s) displayed. If you specify that you want the notes displayed, AT&TCall will print out each card and its notes on its own page. The top of each page will contain the label for the card, and the bottom of each page will contain the date, page number, and file name.

If you specify that you do not want the notes displayed, AT&TCall will print out four cards on each page. The top of each page will contain the labels for the first and last cards on the page. The bottom of the page will contain the date, page number, and file name. Figure 8-13 shows how the cards look with and without the notes printed.
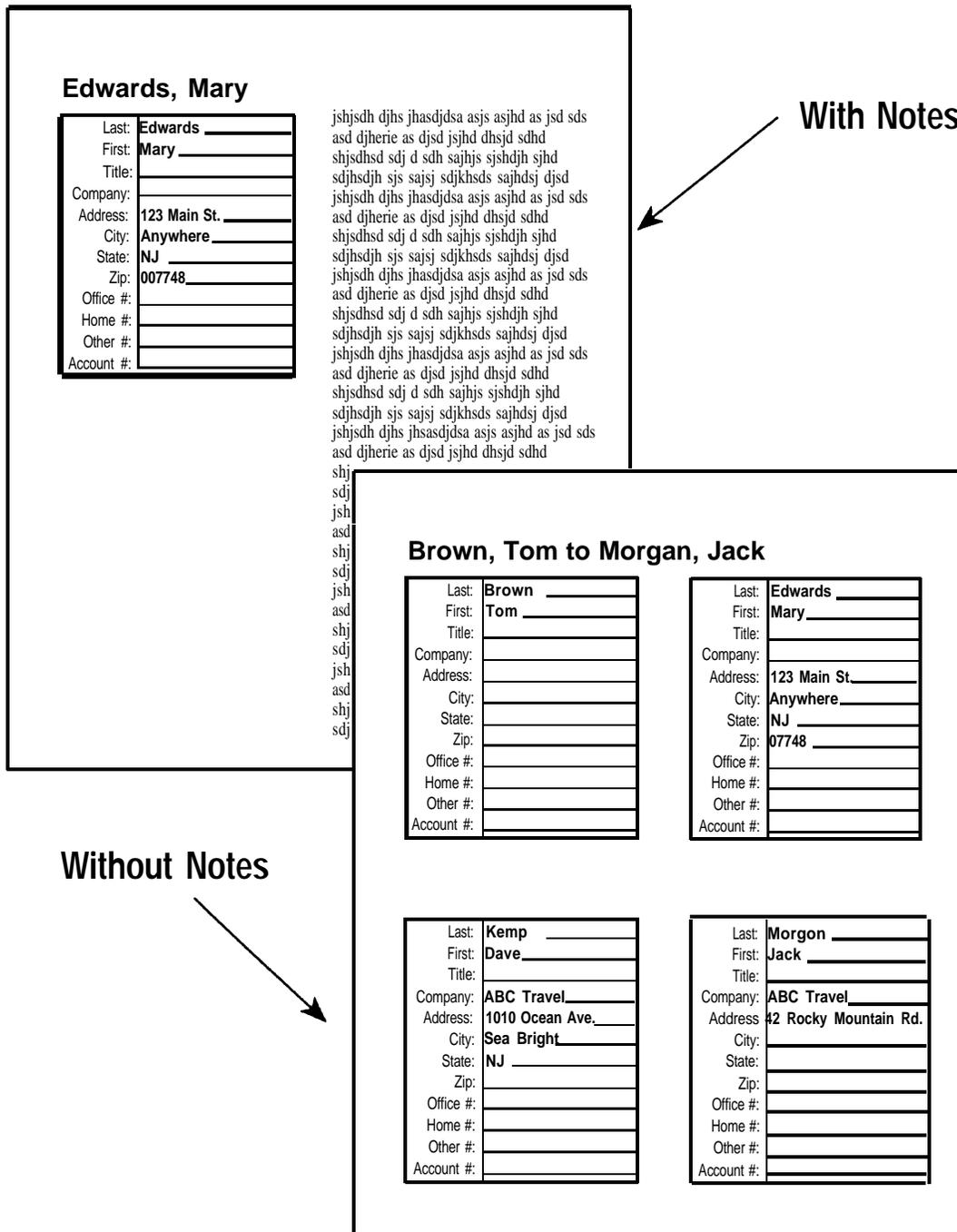
Figure 8-13. Printing Cards With and Without the Notes

To print an AT&TCall file or card:

1. Select Print Cards. . . from the File menu.

    The Print Cards dialog box appears.
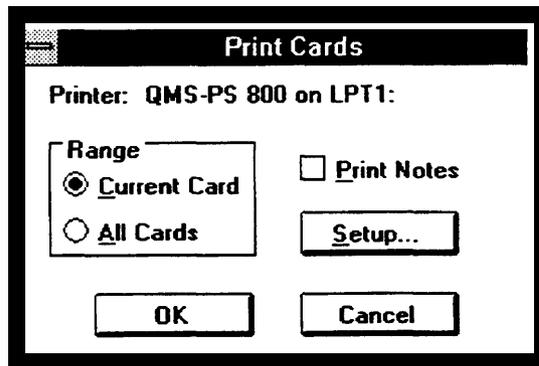
Figure 8-14. Print Cards Dialog Box

2. Perform one of the following steps:

    — If you want to print the card that is displayed currently, select the option button for Current Card.

    — If you want to print all the cards in the file, select the option button for All Cards.

3. Select the Print Notes check box if you want to print the notes associated with the card(s).

4. When finished, select the OK button.

    Printing begins, and a dialog box is displayed, which enables you to cancel printing.

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Protecting an AT&TCall File with a Password

AT&TCall enables you to administer a password for each file, preventing
unauthorized people from accessing the file. Passwords may consist of up to
eight printable characters (that is, letters, numbers, and punctuation marks)
and are case sensitive (that is, AT&TCall can differentiate between capital
letters and lowercase letters). After a password is administered for a file,
AT&TCall prompts you to enter a password every time you attempt to access
that file. You may administer passwords for as many AT&TCall files as you
like.

To administer a password for an AT&TCall file:

1. Select `Save As`. . . from the File menu.

    The Save As dialog box appears.

2. Select the Password button.

    The Password dialog box appears.
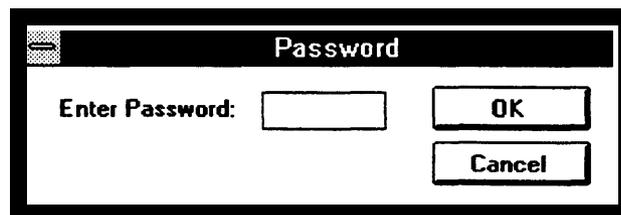
Figure 8-15. Password Dialog Box

3. Enter your password, and select the OK button.

    The Confirm Password dialog box appears.

4. Re-enter your password, and select the OK button.

5. Select the OK button.

   The next time you attempt to open this file, AT&TCall will prompt you for the password.

Removing the Password from an AT&TCall File

To remove the password from an AT&TCall file:

1. Open the AT&TCall file whose password you want to remove.

   The file is loaded.

2. Select `Save As. . .` from the File menu.

   The Save As dialog box appears.

3. Select the Password button.

   The Password dialog box appears.

4. Delete the password from the Enter Password field, and select the OK button.

5. Select the OK button.

   The next time you attempt to open this file, AT&TCall will not prompt you for the password.

Saving an AT&TCall File

To save any changes to an existing AT&TCall file, select `Save` from the File
menu. If the file is new, and has not been saved yet, select `Save As. . .` from
the File menu.

> **NOTE:**
> AT&TCall automatically adds the ".dex" suffix to the file name you enter.
> If you prefer, you may enter another suffix. However, it is recommended
> that you use the ".dex" default to make it easier to identify and load
> AT&TCall files.

Setting the Account Code Options

AT&TCall enables you to automate the process of account code entry if your
company uses account codes regularly. If you activate the account code
option, AT&TCall will use the contents of the last field (that is, the bottom field)
of each card as the default account code for calls made from that card. If no
account code is present, or the field contains information other than a valid
account code, AT&TCall will prompt you to provide one.

> **NOTE:**
> The Account Code Entry Feature Access Code must precede the
> Account Code.

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To set the Account Code options:

1. Select Account Code Options. . . from the Setup menu.

   The Account Code Options dialog box appears.
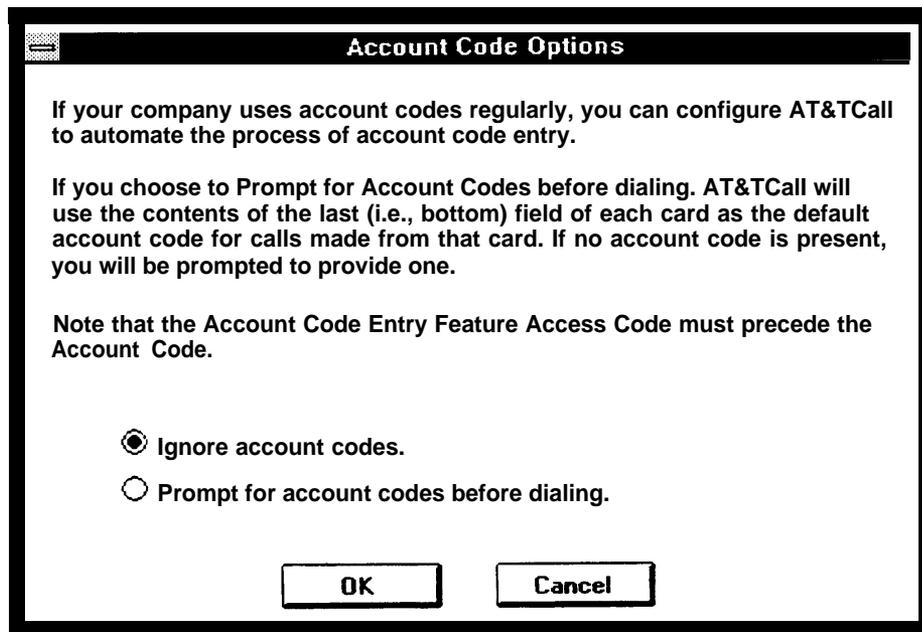
Figure 8-16. Account Code Options Dialog Box

2. Select the appropriate option button.

3. Select the OK button.

Setting the AT&TCall Window To Always Be
on Top of Other Windows

AT&TCall enables you to specify that you want the AT&TCall window to be located on top (that is, in front) of all the other open windows, including the active window. This option is especially useful when you are using AT&TCall in the Card Hidden mode and want to keep a set of programmed Quick Dials readily accessible.

To specify that the AT&TCall window is always on top of other windows, select `Always on Top` from the Setup menu. A check mark appears next to the Always on Top option, indicating that the option is activated. The AT&TCall window will now remain in front of all the other windows you open, even if it is not the active window.

Setting the Dial Options

AT&TCall enables you to specify a prefix and/or suffix that AT&TCall will add to all telephone numbers dialed via Dial buttons in the associated AT&TCall file. For example, if you must enter a "9" before dialing a telephone number outside of your telephone system (that is, an outside call), you can specify the prefix "9" in the Dial Option dialog box. However, if you specify a Dial Option, the system will use that option for each and every call you initiate from any Dial button in that AT&TCall file. Therefore, if you use Dial Options, make sure all of the telephone numbers in all of the cards in that AT&TCall file require the same Dial Option.

➤ NOTE:

If you are using AT&TCall with FastCall and you want to specify a dial prefix and/or suffix, make sure you specify this information in FastCall.

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To set Dial Options:

1. Select Dial Options. . . from the Setup menu.

   The Dial Options dialog box appears.
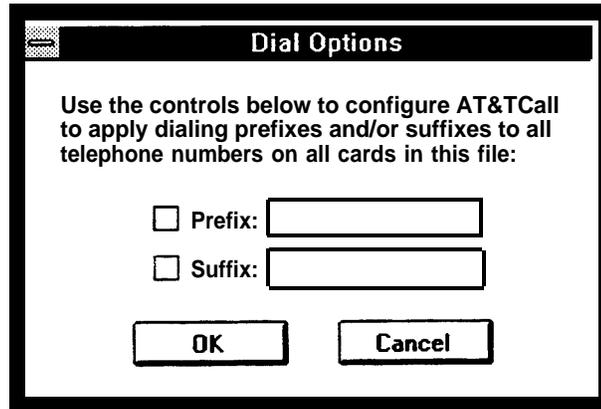
Figure 8-17. Dial Options Dialog Box

2. Select the Prefix check box and/or the Suffix check box, depending on your requirements.

   The box next to the option you selected is checked.

3. In the field next to the option you selected, type the prefix or suffix.

4. Select the OK button.

   The Dial Options dialog box closes.

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Specifying an AT&TCall File To Be Loaded Automatically

AT&TCall enables you to specify a file that will be loaded automatically every time you access AT&TCall. To specify a file to be loaded automatically:

1. Exit AT&TCall.

2. Locate the AT&T PassageWay group window in Program Manager.

3. Select the AT&TCall icon with a single click.

   The AT&TCall icon is highlighted.

4. Select `Properties. . .` from the File menu of Program Manager.

   The Program Item Properties dialog box appears.

5. Place the cursor in the Command Line box.

6. Move the cursor to the end of the Command Line box, after ATTCALL.EXE.

7. Press the spacebar on your keyboard, and then enter the name and extension of the AT&TCall file that you want to be loaded automatically. If the file does not reside in the same directory as AT&TCall, you must specify the path in front of the file name.

   $\Longrightarrow$ **NOTE:**
   You must include *.dex* at the end of the file name. Otherwise, AT&TCall will be unable to load this file automatically.

   Figure 8-18 shows how the Program Item Properties dialog box would look if you set the "sample.dex" file to be loaded automatically.
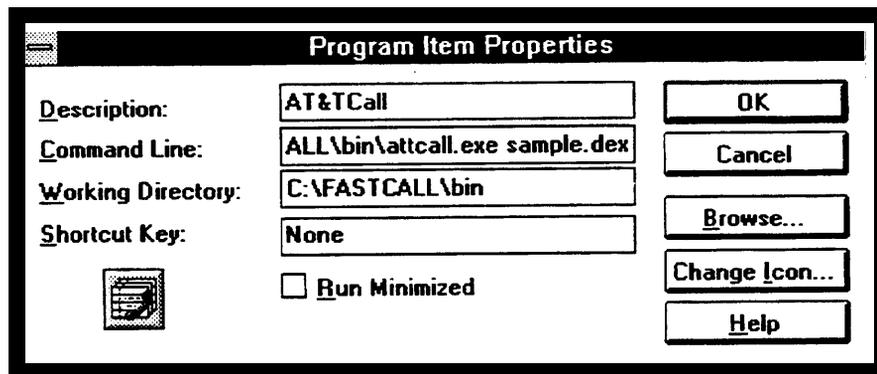
Figure 8-18. Sample File to be Loaded Automatically

8. Select the OK button.

   The Program Item Properties dialog box closes. The next time you access AT&TCall, the file you specified will be automatically loaded.

Verifying the Connection with the Telephony Server

> **NOTE:**
> You should perform this procedure only if you are using AT&TCall as a standalone application (that is, you are not running AT&TCall with FastCall).

To determine whether you are logged into the Telephony Server, select `Telephony Server Login. . .` from the Setup menu. The Telephony Server Identification dialog box appears. The top of the dialog box displays the status of your session.

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If you are logged into the Telephony Server, the message session `Active` in displayed. When the session is active, all of the fields in the Telephony Server Identification dialog box are disabled. Figure 8-19 shows a Telephony Server Identification dialog box for an active session.
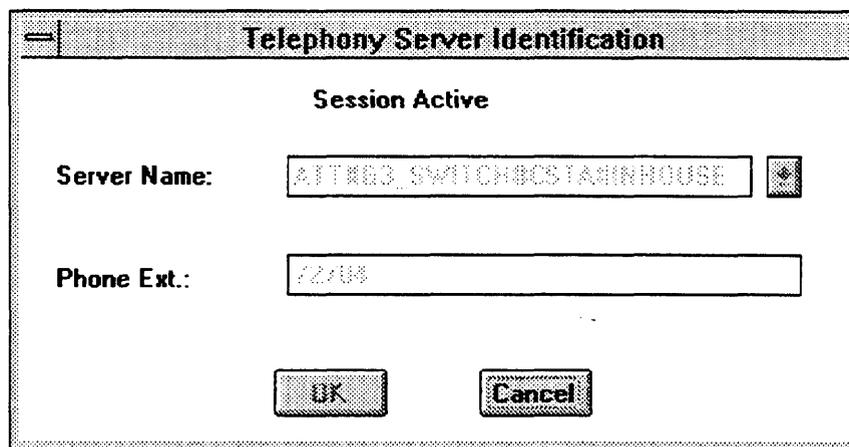
Figure 8-19. Sample Telephony Server Identification Dialog Box

Select the Cancel button to close the Telephony Server Identification dialog box.

If you are not logged into the Telephony Server, the message `Session Inactive` is displayed.

8-50

If you want to log into the Telephony Server, perform the following steps:

1. Select the OK button.

   The Telephony Server Login dialog box appears.

2. Enter your password in the Password box

3. Select the OK button.

If you do not want to log into the Telephony Server, select the Cancel button.

Card Tasks

This section describes the tasks that you will perform when working on cards in an AT&TCall file. These tasks are presented in alphabetical order.

Accessing the Notes Field

AT&TCall enables you to maintain notes for each card. The Notes icon appears to the left of the Notes button when the card has information in the Notes field. The Notes field can contain up to 32K. To access the Notes field for a card:

1. Select the card of which you want to access the Notes field.

   The selected card appears.

2. Select the Show Notes button.

   The Notes field appears.

3. Enter information in the Notes field or modify the existing information (if any) in the field.

4. When you are finished, select the Hide Notes button.

   The card is displayed.

Changing the Field Labels in the Cards

AT&TCall enables you to change the field labels for the cards in the bank. This only applies to the bank you are in. To change the field labels:

1. Select Edit Labels. . . from the Setup menu

   The Edit Labels dialog box appears.

2. Make your changes.

3. When you are finished, select the OK button.

   The Edit Labels dialog box closes, and your changed are displayed on the card.

Creating a New Card

To create a new card:

1. Select the New Card button.

   The New Card window appears, and the cursor is located in the first field.

2. Enter the appropriate information in each field that you use.

3. When you are finished entering information in this card, select the Add Card button.

   The New Card window closes, the labels for the new card appear in the List field, and the information for the new card is displayed.

Deleting a Card

To delete a card:

> ⮕ **NOTE:**
> When you delete an existing card, all Quick Dials associated with that card are deleted.

1. Select the card you want to delete.

   The selected card is displayed.

2. Select `Delete Card` from the Edit menu.

   The Delete Card dialog box appears.
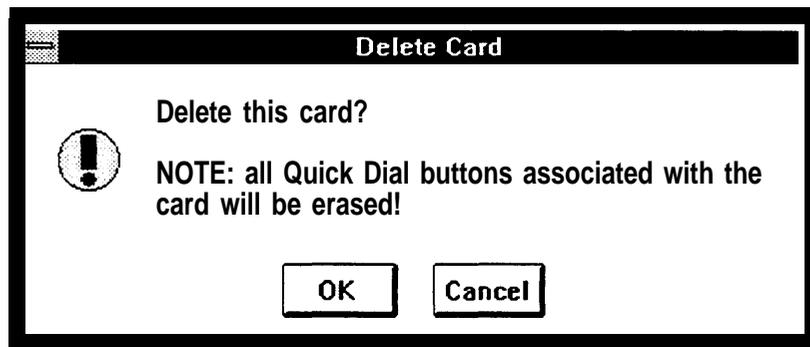
Figure 8-20. Delete Card Dialog Box

3. Select the OK button.

   The card is deleted from the bank, and the next card in the bank is displayed.

Dialing a Phone Number from a Card

> **NOTE:**
> You should perform this procedure only if you logged in from AT&TCall.

To dial a phone number from a card:

1. Select the card that contains the phone number that you want to dial.

   The selected card is displayed.

2. Click on the Dial button located to the right of the phone number that you want to dial.

   If you do not have a speakerphone, pick up the handset. AT&TCall places the call. You have five seconds to go off hook (that is, pick up the handset) after clicking on the Dial button. If you pick up the handset after the five-second interval expires, the call is denied. You can also place a call by lifting the handset before clicking on the Dial button.

   If you have a speakerphone, you speakerphone activates, and AT&TCall places the call.

   After the call is completed, select the Hang Up button, or hang up your handset to place your telephone on hook.

Editing an Existing Card

To edit an existing card:

1. Select the card you want to edit.

   The card is displayed.

2. Select the Edit Card button.

   The Edit Card window appears containing the current information for the card.

3. Make your changes to the card.

4. When you are finished, select the Return Card button.

   The Edit Card window closes, and the update card is displayed.

Hiding/Showing the Card Display

AT&TCall enables you to hide the card display and view only the Quick Dials, the Hang Up button, the Dialpad button, the Timer button, and the Quick Shift button (if the 25/50 Quick Dial Buttons option is selected). To hide the card display, select `Hide Card` from the View menu.

To show the card display after hiding it via the Hide Card option in the View menu, select `Show Card` from the View menu.

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Using the Timer

AT&TCall provides a stopwatch that enables you to time anything that you want. You can use the Timer to time the length of a call, but you need to manually start and stop the Timer. The Timer is not tied to the call.

To use the Timer:

1. When you want to start the timer, select the Timer button.

    The Timer window appears and immediately starts keeping time. The Timer measures time in hours, minutes, and seconds. To rest the timer, select the Reset button. To stop the timer, select the Stop button. To restart the timer after it has been stopped, select the Start button.

2. When you are finished using the timer, select `Close` from the Control-menu box of the Timer window.

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Quick Dial Tasks

This section describes the tasks you will perform when using Quick Dials in an AT&TCall file. These tasks are presented in alphabetical order.

⇒ **NOTE:**
   You should perform these tasks only if you logged in from AT&TCall.

Accessing Information for a Quick Dial

To view the information for a Quick Dial:

1. Press and hold down SHIFT, and then click on the Dial button of the Quick Dial in which you are interested.

    The Quick Dial Information dialog box appears. This dialog box present the label and phone number for this Quick Dial.

2. When you are finished, select the OK button.

If you want to display the card associated with the Quick Dial, click on the Label button of the Quick Dial in which you are interested. The associated card is displayed.

Assigning a Phone Number to a Quick Dial

To assign a phone number to a Quick Dial:

1. Select the card that contains the telephone number that you want to program to a Quick Dial.

    The selected card is displayed.

2. Press and hold down SHIFT, and then click on the Label button of the Quick Dial that you want to program.

    The Create Quick Dial dialog box appears. AT&TCall provides a default label.

3. Enter the label that you want to appear on the Label button of the Quick Dial.

4. Select the option button of the telephone number that you want this Quick Dial to dial.

5. Select the OK button.

   The label you entered appears on the Label button of the Quick Dial you selected.

Changing the Number of Quick Dials Displayed

AT&TCall allows you to program a maximum of 50 Quick Dials (two sets of 25, which are accessed via either the Quick Shift button or the Quick Shift option in the View menu). However, if you need no more than 20 Quick Dials, you can set AT&TCall to display a maximum of 20 Quick Dials (two sets of 10, which are accessed via the Quick Shift option in the View menu).

To specify the number of Quick Dials you want to access, select either `10/20 Quick Dial Buttons` or `25/50 Quick Dial Buttons` from the Setup menu.

Changing the Setup of the Quick Dial Labels

AT&TCall enables you to display the information on the Label buttons of Quick Dials as left-justified or centered. This setting applies to all AT&TCall files. To change the setup of the information on the Label buttons of Quick Dials:

1. Select `Quick Dial Labels. . .` from the Setup menu.

   The Quick Dial Label Setup dialog box appears.

2. Select the option button for the setup you want.

3. Select the OK button.

Dialing a Phone Number from a Quick Dial

⇒ **NOTE:**
You should perform this task only if you logged in from AT&TCall.

To dial a phone number from a Quick Dial, click on the Dial button of the Quick Dial in which you are interested.

If you do not have a speakerphone, pick up the handset. AT&TCall places the call. You have five seconds to go off hook (that is, pick up the handset) after clicking on the Dial button. If you pick up the handset after the five second interval expires, the call is denied. You can also place a call by lifting the handset before clicking on the Dial button.

If you have a speakerphone, your speakerphone activates, and AT&TCall places the call.

After the call is completed, select the Hang Up button or hang up your handset to place your phone on hook.

Erasing a Quick Dial

To erase the label and telephone number assigned to a Quick Dial:

1. Press and hold down SHIFT, and then click on the Label button of the Quick Dial that you want to erase.

   The Change Quick Dial dialog box appears.

2. Select the Erase button.

   The information for that Quick Dial is erased, and the Label button for the Quick Dial is blank.

Re-Assigning an Existing Quick Dial

To assign a phone number to a Quick Dial that has been assigned previously:

1. Select the card that contains the telephone number that you want to program to the Quick Dial.

   The card is displayed.

2. Press and hold down SHIFT, and then click on the Label button of the Quick Dial that you want to change.

   The Change Quick Dial dialog box appears.

3. Select the Create New button.

   The Create Quick Dial dialog box appears.

4. Enter the label that you want to appear on the Label button of the Quick Dial.

5. Select the option button of the telephone number that you want this Quick Dial to dial.

6. Select the OK button.

   The label you entered appears on the Label button of the Quick Dial you selected.

AT&TCall Menu Bar Options

This section describes the options contained in each AT&TCall menu.

File

This section describes the File menu options.

New

Creates a new, empty AT&TCall file. When selected, this option presents a default screen with no entries. The window title displays "AT&TCall-(UNTITLED.DEX)."

Open

Enables you to open an existing AT&TCall file. When selected, this option lists the existing AT&TCall files. You may scroll through the list and select a specific file.

Save

Saves the changes made to the AT&TCall file on which you are working.

Save As...

Prompts you to name the file on which you are working. The default extension for every AT&TCall filename is ".dex."

Import...

Enables you to import files that are in the comma separated values format (.cvs).

Export

Enables you to export the current card or all cards in an AT&TCall file to a file that is in the comma separated values format (.csv).

Print Setup...

Displays the Windows printer setup window, allowing you to modify the printer settings (for example, paper size and print orientation).

Print Card...

Enables you to print either all cards in an AT&TCall file or the card displayed currently. When printing the card(s), you may specify whether you want the notes associated with the card(s) printed also.

Print List...

Enables you to print specific label fields for each card in an entire AT&TCall file. You may select a maximum of six labels.

Exit

Exits the AT&TCall application.

Edit

This section describes the Edit menu options.

$\Longrightarrow$ **NOTE:**

You can use the Undo, Cut, Copy, and Paste option when you are performing one of the following tasks:

— editing an existing card

— adding a new card

— working in the Notes field of a card

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Undo

"Undoes" the last editing action you performed in a field. For example, if you change the information in a field and then select "Undo," the field displays its previous information (that is, the information that was changed).

Cut

Deletes information selected from a field and places it in the Windows Clipboard while you are editing a card.

Copy

Copies information selected from a field and places it in the Windows Clipboard while you are editing a card.

Paste

Pastes infromation from the Windows Clipboard into the current field while you are editing a card.

Insert Timestamp

Places the day, date, and time in the Notes field for the card displayed. This information appears in front of the cursor and can be placed anywhere in the Notes field.

Clear Notes

Erases the contents of the Notes field for the card displayed.

Edit Card

Enables you to edit the card displayed on the screen.

New Card

Enables you to add a new card to the AT&TCall file.

Delete Card

Enables you to delete the card displayed on the screen.

Find...

Enables you to search for specific characters in each specified field or all fields on each card in the AT&TCall file.

Find Next

Enables you to find the next card that matches the criteria you specified for the Find option.

View

This section describes the View menu options.

Hide Card

Displays only the Quick Dials, the Hang Up button, the Dialpad button, the Timer button, and the Quick Shift button (if the 25/50 Quick Dial Button option is selected).

Show Card

Displays the entire card along with Quick Dials.

Hide Notes

Closes the Notes field associated with the selected card.

Show Notes

Displays the Notes field associated with the selected card.

Quick Shift

Enables you to toggle between the first and second set of Quick Dials.

Next Card

Displays the next card in the AT&TCall file (as sorted).

Prev Card

Displays the previous card in the AT&TCall file (as sorted).

Next Letter

Enables you to "jump" to the next letter that contains a card in the AT&TCall file.

Prev Letter

Enables you to "jump" to the previous letter that contains a card in the AT&TCall file.

Sort...

Enables you to specify the primary and secondary labels by which the cards in your AT&TCall file are sorted.

Setup

This section describes the Setup menu options.

Edit Labels...

Enables you to modify any of the labels in the card template for your AT&TCall file. When selected, this option displays a sample card with the current labels. You may modify any of these labels.

Dial Options...

Enables you to enter a prefix and/or suffix that you want dialed with every number. For example, if your telephone system requires that first you dial a "9" before making a call using an outside line, you can specify "9" in the "Dial Option..." prefix. By specifying your prefix, you do not need to include a "9" in front of every phone number on every card.

Account Code Options...

Enables you to administer one of the following account code options:

- Ignore account codes, which ignores the account code.

- Prompt for account codes before dialing, which prompts you to enter an account code before dialing the number if the card does not contain an account code. Entering an account code is optional. If you do not want to enter an account code, select the Cancel button in the Account Code Options dialog box.

Telephony Server Login...

Enables you to

- determine whether you are logged into the Telephony Server

- change the login parameters

- log into the Telephony Server

Quick Dial Labels...

Enables you to display the Label button infromation for the Quick Dials as left-justified or centered.

10/20 Quick Dial Buttons

Provides 20 Quick Dials for you to program and use. AT&TCall only displays 10 Quick Dials at a time. To access the second set of 10 Quick Dials, select the Quick Shift option from the View menu.

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25/50 Quick Dial Buttons

Provides 50 Quick Dials for you to program and use. When you select this option, AT&TCall only displays 25 Quick Dials at a time. To access the second set of 25 Quick Dials, either select the Quick Shift button in the lower-right corner of the AT&TCall window or select the Quick Shift option from the View menu.

Always on Top

Keeps the AT&TCall window on top of all other open windows, including the active window. This prevents the AT&TCall window from being obscured by other windows.

Accessories

This section describes the Accessories menu options.

- Call Log
- Timer

Call Log

Enables you to access the Call Log, which contains information on all of the calls you made from an AT&TCall file.

Timer

Displays the Timer window, which contains a timer that immediately starts running.

Help

This section describes the Help menu options.

Contents

Displays the topics in on-line Help.

Search for Help on...

Opens the Search dialog box for on-line Help. You can look up Help information by entering keywords in the dialog box.

How to Use Help

Describes how to use on-line Help.

About AT&TCall...

Displays the AT&TCall version number, the Microsoft Windows version number, the mode in which Microsoft Windows is operating, the amount of free memory (KB) available on your system, and the size of the largest contiguous block of memory (KB) available.

Troubleshooting

A
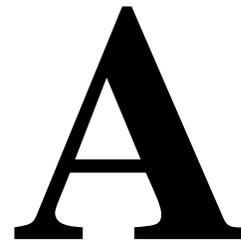
Overview

This chapter provides information that can assist you in solving problems that you might encounter with FastCall.

FastCall Problems

Problem 1: Configuration changes are not taking effect

You must restart the FastCall Controller program in order for certain changes to take effect. These include:

- Telephone Parameters
- User Modes
- Outgoing Call Rules

To restart the FastCall Controller program, first exit from it by using ALT + TAB to select the FastCall Master Control Program task, then press ALT + F, X or select `File, Exit.` Or click on the FastCall Master Control Program icon once and select Close from the pop up menu. Then reactivate the FastCall - Call Control Keys by double-clicking on the FastCall Controller icon in the FastCall program group. If you prefer, you may omit exiting from the FastCall Controller program before reactivating it. In this case, the following dialog box will be displayed.
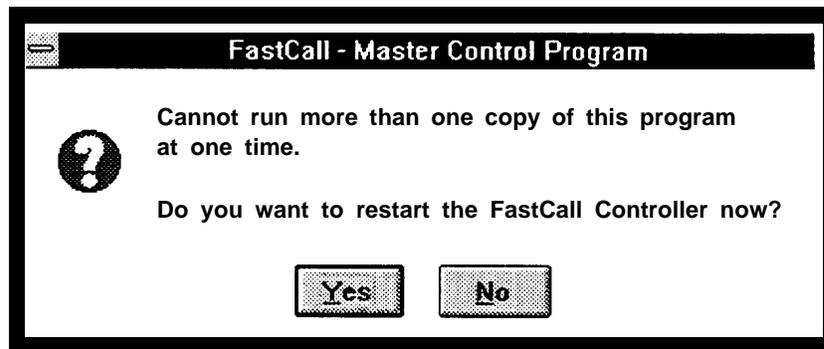
Figure A-1. FastCall - Master Control Program Dialog Box

Click on the Yes button to restart the FastCall Controller.

Problem 2: When you attempt to change the password, the error message box displays Password not confirmed. Password change canceled.

1. The following message appears when changing the password if you enter the new password incorrectly in the Password Confirmation screen. Try to change the password again, being sure to enter the same password in both screens.

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Figure A-2. FastCall Error Message Box

2. Also remember that the FastCall password is case sensitive. Check whether the CAPS LOCK key is on.

Problem 3: No screen pops.

1. Check the parameters of your Incoming Call Rules.

2. Check the Alerts to make sure that a trigger is selected and highlighted.

3. Verify the trigger operation using the Playback button.

4. Check to be sure that you're using the correct input for the macro.

5. Verify that the application is running, and check that the computer system clock is set correctly.

6. If you are experiencing problems in popping up the correct screen for an incoming call, and your keystroke macro appears to be working properly, you may not have your database entries correctly formatted. If your keystroke macro includes either the called number or calling number, the format of the telephone number may be adjusted by using the Format Option in the Incoming Call Triggers screen. See Chapter 5 for information about the Telephone Number formatting option.

Problem 4: Call triggers are not operating.

1. Insure that trigger entry is highlighted in Select Trigger Window in Call Alert Option of Incoming Call Rules.

2. Check that Incoming Call Rules are enabled.

3. Verify that the application is running.

4. Verify that the selected window is available.

5. If the application screen is popping, but keystrokes are not being entered or appear to be playing too fast for the application to keep up, your windows application may not have the ability to buffer keystrokes. if this is the case, the fastcall.ini file in the FastCall directory may be modified to delay the keystroke string. Change the setting of the Key Delay from zero to a value which will delay each keystroke by that number of milliseconds. For example, changing the Key Delay to 10 will delay the keystrokes by 10 milliseconds.

Problem 5: FastCall is not answering calls.

1. Make sure FastCall Controller is running.

2. Make sure phone line(s) are connected.

3. Make sure phone is properly configured in AT&T Switch Admin.

Problem 6: You cannot dial with F4 - Dial Main or F5 - Dial Other.

1. Make sure that the number conforms to the dialing format selected under User Modes, either NADP or International Mode.

2. Make sure that there are macros recorded for each trigger and that both Dial Main and Dial Other macros are recorded if you wish to use both F4 and F5 for the same applications.

3. Make sure that there is only one trigger for each application/window combination. If multiple triggers are assigned, FastCall uses the trigger with the lowest index number available to execute when the F4 or F5 keys are pressed.

4. Make sure you do not have multiple copies of the same Windows application running.

5. Remember that the colon (:) is a dialable character. FastCall strips out non-dialable, unsupported characters, but if there is a colon typed on the card before the number to be dialed, it will not be stripped out. Reformat your entries to eliminate colons and other undesired dialable characters before the number. See the section on "Supported Characters for Special Dialing Codes" in Chapter 4.

6. If you attempt to use the F4 - Dial Main or F5 - Dial Other keys to invoke outgoing call triggers and their associated keystroke macros, and FastCall fails to dial, make sure that the last active window before the F4 or F5 key was pressed was the window for which the desired trigger is defined.

7. Applications in Windows that are set to "always on top" (that is, clock, some application toolbars) will prevent Outgoing Macros from running. Disable this option if you wish to use outgoing call macros.

Problem 7: FastCall Controller is not starting.

1. The telephone set is not configured in Telephony Service Admin.

2. The telephone set is not configured in FastCall Admin.

3. The User Login to the server is invalid.

4. The user does not have proper file permissions.

5. CSTA.DLL is not loaded in windows or the system path statement.

Problem 8: Transfers, Conferences or Redirects are not operating.

1. Make sure FastCall is set for the proper number of call appearances.

2. Call appearances must be administered contiguously. In other words, if two appearances are set they must be on line appearances 1 and 2. Three appearances would be lines 1, 2, and 3. Setting two appearances on line appearance 1 and 4 would cause transfers, conference, and redirect to not operate.

AT&TCall Problems

Problem 1: You are unable to log into the Telephony Server via AT&TCall

NOTE:
This problem may occur only if you are running AT&TCall as a standalone application (that is, without running FastCall).

This problem may be caused by the following circumstances:

- Information in the Telephony Server Identification dialog box is incorrect.

  Check the information in this dialog box. .

- You do not have permission to manipulate your telephone from your PC.

  Contact your network administrator to determine if you have permission to manipulate your telephone from your PC.

Problem 2: You are unable to access AT&TCall

You may not have all of the DLLs required to run AT&TCall. Contact your network administrator.

Problem 3: When you attempt to log into the Telephony Server, the Server Name box displays server instead of the server name you specified previously

➡ **NOTE:**
> This problem may occur only if you are running AT&TCall as a standalone application (that is, without running FastCall).

The Telephony Server may be "down." Whenever the Telephony Server is down, its name does not appear in the Server Name box. Select the Cancel button to close the Telephony Server Login dialog box, and then try to log in when the Telephony Server is "up." When the Telephony Server is up, its name appears in the Server Name box.

Problem 4: When you try to make a call, AT&TCall displays a message that you are already active on a call, even though you are not active on a call.

➡ **NOTE:**
> This problem may occur only if you are running AT&TCall as a standalone application (that is, without running FastCall).

Access the Telephony Server Identification dialog box (via the Telephony Server Login option in the Setup menu) to verify the following information:

- The server you are logged into is the Telephony Server on which your phone is administered.

- The phone extension specified is the telephone from which you are trying to make the call.

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Keyboard Shortcuts

B

Overview

This appendix provides some keystroke combinations for performing common Windows tasks. For more information, refer to your MS-Windows documentation.

Table B-1. Keyboard Shortcuts

Press:	To:
ALT + TAB	Switch between currently active applications. You must keep the ALT key pressed while pressing and releasing the TAB key. Each time you press the TAB key, a task window is displayed in the center of your screen with the name of an active application. When the application that you want to switch to is shown in the task window, release the ALT key.
ALT + SPACEBAR, X	Maximize the current window. Press the ALT key and then the Spacebar, release them, and then press the letter X key. The currently active window will be maximized.
ALT + SPACEBAR, N	Minimize the current window. Press the ALT key and then the Spacebar, release them, and then press the letter N key. The currently active window will be minimized to an icon.
ALT + *letter*	An underlined character in a screen or menu indicates the letter to press with the ALT key to access that function. Sometimes you have to press another letter also to select a command, as in submenus.
ESC	To exit from a dialog box or pull-down menu.
ARROW keys	To move up and down in list boxes.
SPACEBAR	Press the Spacebar to select/deselect an option button or check box, or to highlight items in a list.
TAB	To move the cursor around in a dialog box.

Glossary

A

ACD
Automatic Call Distribution. This is a telephone system feature that routes calls to agents automatically.

active call
A call in which you can speak to someone else (that is, the call is not ringing at your phone or on hold).

agent
The person using a FastCall system in an ACD or Call Center environment.

ANI
Automatic Number Identification. This is another name for call ID (CLID). ANI is typically a 10-digit number that is delivered by the network to identify the incoming caller.

AT&TCall
A card file application that enables you to maintain names, addresses, telephone numbers, and other information you desire, Each AT&TCall file created is a calling directory from which you can place calls.

B

bank
The collection of cards in an AT&TCall file.

blind transfer
A transfer during which the person transferring the call completes the transfer without talking to the person receiving the call.

C

call appearance
An icon that represents each call that is active, ringing, or on hold at your telephone, Call appearances are displayed in the call appearance area of the FastCall Controller window.

call log
A file that stores an entry of every call you make using FastCall or AT&TCall (including calls you make from the Dialpad window). This is the file PWLOG.LOG in your Windows directory.

call log archive file
A file in which you may store call log entries that were removed from the call log. This is an ASCII file in which each field of data is separated by a tab. This is the file PWLOG.ARC in your Windows directory.

Call Prompting
A telephone system feature that enables a person calling to provide information (for example, social security number, account number, area code) via a touch-tone (DTMF) phone. This is also referred to as caller input.

call rule
A set of conditions that filters calls to enable FastCall to handle calls in the ways that you want them to be handled.

called number
The telephone number called by someone. You may have many numbers through which incoming calls may be received. The called number is the specific number dialed by the caller. A called number can also be an extension.

caller
Person placing a call.

caller ID
The information associated with each call you make or receive.

Caller ID Label
The description of a telephone number as displayed in the Calling or Called Number fields. The description is entered when configuring the Calling or Called Number Lists in FastCall Administration.

caller input
> Information entered by a calling party via a touch-tone (DTMF) phone. This information may be an account number, such as when you call a credit card company and are prompted to enter your account number. See also *Call Prompting.*

calling number
> The number from which someone is calling.

card
> A data record in an AT&TCall file. This record contains 13 data fields.

CLID
> Caller Identification. This is another name for ANI.

comma separated values format
> A text file that contains lines of data. Each field of data on a line is separated from the next field by a comma (,).

Conference Room window
> The window in FastCall that identifies each participant involved in the conference call. Each participant is represented in the Conference Room window by a panel. The Conference Room window is opened when you have an active call and select the Conference button on the Call bar. From this window, you can place the conference on hold, return to a conference that is on hold, drop participants from the conference, and end the conference.

consultative transfer
> A transfer during which the person transferring the call speaks to the person who will receive the call before completing the transfer.

CTI
> Computer Telephone Integration. The combining of computer and telephone technologies that allows each technology to use the other and in many cases, such as with FastCall, augments the capabilities of each technology.

D

DCP

Digital Communications Protocol. Used for signaling between an AT&T digital telephone (7400 Series) and the AT&T DEFINITY G1/G2/G3 system or System 75/85.

Dialpad window

A window in AT&TCall that lets you dial telephone numbers.

DID

Direct Inward Dialing. This is a telephone system feature that enables specific numbers to be reached from a common exchange.

DNIS

Dialed Number Identification Service. This is a telephone system feature that identifies a number that is dialed.

DTMF

Dual Tone Multiple Frequency. This is a term for touch-tone telephones.

Dynamic Data Exchange (DDE)

A method of exchanging data between Windows applications.

Dynamic Link Library (DLL)

A Windows program that is used by other programs, A DLL provides services for another program.

E

exchange

A three-digit prefix specific to a calling area.

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F

FastCall Professional
    The full-featured version of FastCall.

FastCall Promotional
    A version of FastCall that has a subset of the functionality of FastCall Runtime.
    Promotional does not support the Caller Input feature and does not allow the creation
    and recording of incoming or outgoing triggers.

FastCall Runtime
    A version of FastCall that has a subset of the functionality of FastCall Professional.
    Runtime does not support the Caller Input feature, but does allow the creation
    incoming or outgoing triggers of Library macros.

H

handset
    The handheld part of the telephone that you pick up, talk into, and listen from. Also
    known as the receiver.

I

inside call
    A call in which both parties are using the company's internal telephone network (that
    is, neither party is using the public telephone network).

K

keystroke macro
A recorded sequence of instructions to execute any number of function and actions to automate the performance of multiple tasks.

knowledge worker
A person using FastCall system in a non-call center environment.

L

line
An instance or point of access to an extension number used for placing and receiving phone calls. Also known as *line appearance* or *call appearance.*

local area network (LAN)
A data communications network consisting of a group of interconnected computers sharing applications, data, and peripheral devices (for example, printers).

Log Viewer
An application that lets you view call entries in the call log.

N

NADP
North American Dialing Plan. The telephone numbering conventions used on the North American continent.

NetWare Telephony Services
Software that provides telephone-related services to members of a local area network (LAN).

network administrator
The person responsible for managing the operation of your local area network (LAN). The actual title of this person in your company may be different.

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O

off hook

When the handset is removed from the cradle (for example, when you lift the handset to place or answer a call) or the speakerphone is not activated.

on hook

When the handset is left in the cradle or the speakerphone is not activated.

outside call

A call in which one of the parties is using the public telephone network.

P

panel

An icon in the Conference Room window that represents a participant of the conference call. Each panel may display a person's name and telephone number.

PBX

Private Branch Exchange. The equipment that controls a company's private telephone network and connects the private telephone network to the public telephone network, Also referred to as a *switch.*

Q

Quick Dial

A button in the AT&TCall application that you program to dial a telephone number automatically. Each Quick Dial has a Dial button and a Label button. Clicking on the Dial button dials the telephone number that you programmed. The Label button displays the information you want associated with the telephone number you programmed. Each AT&TCall file can have up to 50 Quick Dials.

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S

speakerphone
> A device that lets you listen to a telephone caller on a loudspeaker and talk to the caller using a voice-activated microphone. It is unnecessary to hold the telephone handset or to wear a headset.

T

telephony
> The application of voice transmission technology.

Telephony Server
> A computer on a local area network (LAN) that has the specific purpose of providing services related to telephones.

trigger
> Information and instructions that execute actions defined by configuring application paths and recording keystroke macros. When a call meets the criteria of a call rule, a trigger is executed, making applications and data pop up on the screen.

Index

D

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H

I