

Act! Addin Guide

This document will guide you through configuration of the Act! addin. It is expected that you are already familiar with the Address Book and Preview window, and the basic concepts of integration and screen popping using the addins. See the User Guide for these topics.

Configuration

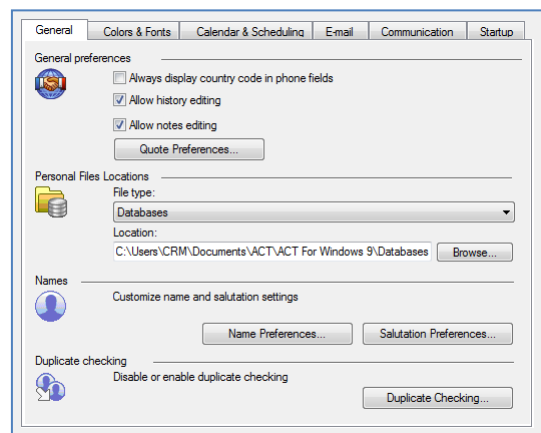


The Configuration dialog box contains the following fields and options:

- Database: [Text input field] [Browse... button]
- Username: [Text input field]
- Password: [Text input field]
- Entities: Contacts, Companies

On the 'Configuration' group, you need to enter the details of your Act! database. To find out where it is stored, go into Act!, open the 'Tools' menu and click 'Preferences'.

A new window will open with lots of tabs so click on the 'General' tab if it is not already selected. In the 'Personal File Locations' section, select 'Databases' in the 'File type' dropdown box to display the location of your Act! database - make a note of it.



The Act! Preferences dialog box (General tab) includes the following sections:

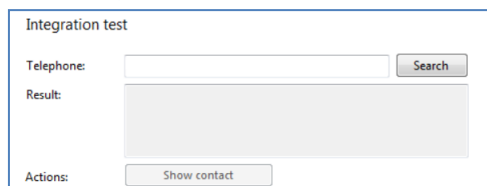
- General preferences: Always display country code in phone fields, Allow history editing, Allow notes editing, [Quote Preferences... button]
- Personal Files Locations: File type: [Databases dropdown], Location: C:\Users\CRM\Documents\ACT\ACT For Windows 9\Databases [Browse... button]
- Names: [Name Preferences... button], [Salutation Preferences... button]
- Duplicate checking: Duplicate checking, [Duplicate Checking... button]

Back on the 'Configuration' group, click the 'Browse...' button, navigate to the location you just made a note of and then click on the Act! database you wish to integrate with; you're looking for a .pad file. If you're not sure which the correct file is, consult your system administrator.

If the database is password protected, enter the 'Username' and 'Password' to use to open the database.

Select which of your Act! account modules you want to be used by ticking the corresponding boxes in the 'Entities' section.

Testing



The Integration test dialog box contains the following fields and buttons:

- Telephone: [Text input field] [Search button]
- Result: [Large empty text area]
- Actions: [Show contact button]

To test if the configuration worked, enter a phone number from your Act! account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Dialling configuration

To dial out from within Act!, dialling needs to be configured correctly.

Select the methods of dialling to use

- Clipboard dialling
- Web page dialling
- Application dialling
- TAPI dialling (requires restart)

Select the applications and web sites to use dialling from

Type	Application/Domain	Form/Page	Textbox
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Choose the criteria to use when searching for valid numbers

Minimum length: Maximum length:

Must start with:

Right-click the tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'Configuration' screen. In the 'General' group, click on the 'Dialling' option.

You can refine the criteria used to identify telephone numbers. Enter the appropriate number of digits into the 'Minimum length' and 'Maximum length' text boxes and specify a prefix that identifies telephone numbers (if there is one) by entering it in the 'Must start with' box.

Click the 'Add' button to start the Dialling wizard.

The first question in the wizard asks you about the type of application you want to dial from. Select the 'Any other type of standard Windows application' option.

Click the 'Next' button.

Set up application dialling

Select the type of application that you want to dial from:

- I have written the application myself or someone can customize it as required
- The application runs inside a web browser
- I want to dial from a Microsoft application
- The application contains 'dial' buttons or uses TAPI for dialling
- Any other type of standard Windows application
- None of the above choices work

Dialling: Standard application: Text box

A detection process is used to learn the application.

- 1) Click on the target icon below
- 2) Drag the target icon to the textbox that contains the telephone number

Detect: (Drag the target icon to the textbox that contains the telephone number)

Application:

Form:

Text box:

Open Act! and navigate to a screen that has a telephone number you'd like to dial. Back in the wizard, click and hold the target icon, drag it over the textbox containing the telephone number and then let go.

If the wizard finds a valid number, it will add the textbox to the configuration settings. Click 'Next' and then 'Close'.

You can add as many textboxes as you like, just start the process by clicking the 'Add' button and working your way through again.

Click 'Save' to store your settings and you're ready to go.

Now, a clickable icon is placed at the end of any textboxes you have configured and you just click on it to dial the number in the textbox.

