



Product Application Note

TeleVantage to Time Matters™ link

October 2005

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A Product Application Note by Vertical, October 2005

Vertical TeleVantage's Computer Telephony Integration (CTI) capabilities allow Phone Numbers to be shared with Time Matters such that contacts can be dialed automatically for Outgoing Calls and Incoming Calls can "screen pop" the associated Contact, Phone or Record when calls arrive.

There are a few simple steps required to set up TeleVantage and Time Matters to interact with each other.

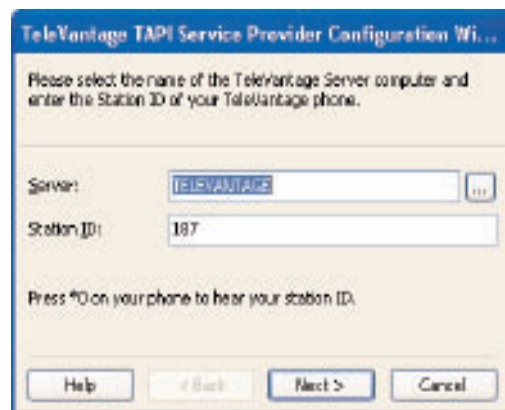
OUTGOING - Placing Calls from Time Matters

Outgoing Calls to a Time Matters contact can be dialed automatically by clicking on the Dial Phone icon (or selecting File/Dial Phone from the menu bar, or pressing Ctrl+D from the keyboard). When the Time Matters Dial pad comes up, click the Dial button to initiate the call. Depending on your TeleVantage phone settings, your speakerphone will go off-hook and the call will be placed or your phone will ring (Alerting) and when you go off-hook the call will be placed.

The inherent MS-TAPI capabilities of both TeleVantage and Time Matters allow this interaction to take place with no additional software purchase required - configuring the TAPI settings for both products is described as follows:

TeleVantage - Settings

Ensure the TeleVantage ViewPoint TAPI service provider has been installed (this is an optional part of the ViewPoint software installation - contact your system administrator for assistance) - Select the TeleVantage TAPI Service Provider Configuration Wizard from the Windows Start/Programs/TeleVantage menu and follow the steps to associate your TeleVantage phone station with your PC.

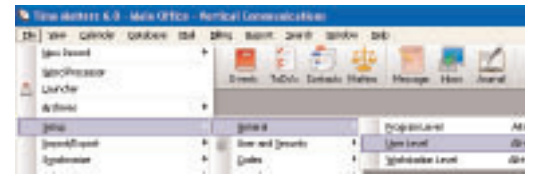


Set the Station ID (which is different from your extension number) to match the TeleVantage phone you will be using to place outbound calls from (press *0 on your phone to identify your station ID).

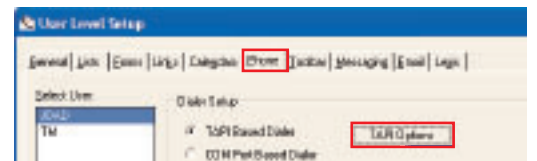
This is a one time setting that, once done, allows you to "click to dial" from any TAPI compliant application (Time Matters, Outlook, ACT!, Goldmine, etc).

Time Matters - Settings

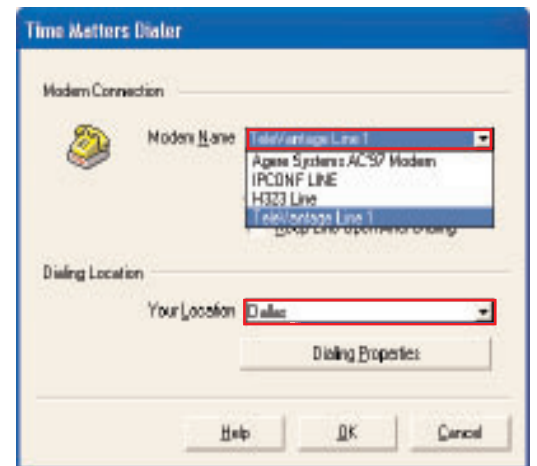
In Time Matters, select the **File/Setup/General/User Level** settings (ALT+Shift+U)



Select the **Phone Tab** and then click on the **TAPI Options** button:



Select **TeleVantage Line 1** from the Modem Name drop-down list

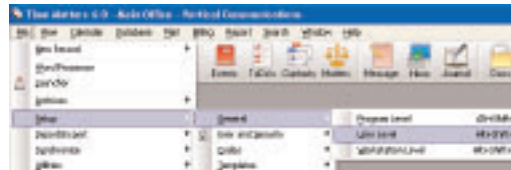


Select and edit the **Dialing Properties** to correspond to your local calling area rules and TeleVantage dialing Access code (i.e. Dial 9 for outside line) if this has not already been done for other Windows dialing applications.

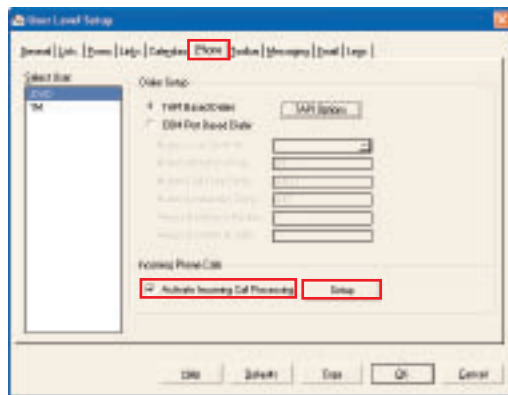
INCOMING - Receiving Calls in Time Matters

Set up Time Matters to respond to the incoming call message as follows:

In Time Matters, select the **File/Setup/General/User Level** settings (ALT+Shift+U)



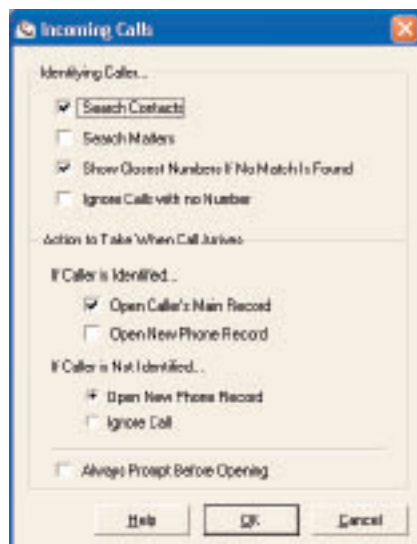
Select the **Phone Tab**:



Select the **Activate Incoming Call Processing** Check Box and then click **Setup**.

Select the options desired to tell Time Matters how to behave when a new call arrives.

Note that Time Matters contact phone numbers can be entered in any format - as such it is possible that the number sent from



TeleVantage may not match exactly with the number as it has been entered in Time Matters - for this reason it is recommended that the "If Caller is Not Identified... Open New Phone Record" button be selected to make sure a Phone record is opened even if the number is not matched (see TMLINK corresponding setting below)

TMLINK options allow you to select the format most commonly used in the Time Matters Contact records - this format will always be consistent - to ensure a match is found make sure to enter the phone numbers in Time Matters consistently as well.

To ensure a screen pop always occurs, select **Always Prompt Before Opening** - this will present a list of possible matching records from which to select.

Use the **TEST** function in the TMLINK options to see how Time Matters will react to the incoming call - see below.

TeleVantage to Time Matters Link Add-in - TVTMLINK

Once Time Matters has been configured to process incoming calls you will need to enable the TMLINK ViewPoint Add-in to send the TeleVantage Caller ID to Time Matters.

Using the ViewPoint Add-in feature available in TeleVantage 6.0 and higher, the TMLINK add-in allows Caller ID information from ViewPoint to be sent to Time Matters for record entry.

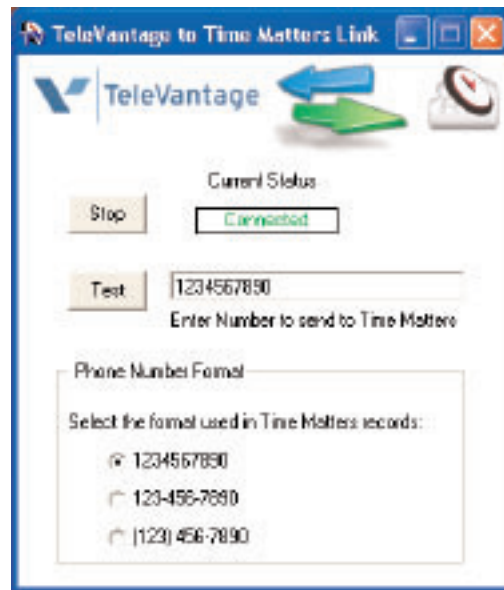
It will NOT force a screen pop to Time Matters until you request it. This eliminates the problematic issue of calls forcing undesired or untimely screen pops, and allows you to control when, and for which calls you desire to have a corresponding Time Matters record opened.

Since TeleVantage ViewPoint maintains a permanent record of all your calls and voicemails, outgoing calls and even calls that you may have missed, can be selected to be sent to Time Matters using the TMLINK. This provides you the flexibility and control to capture and record time associated with all of your TeleVantage telephone call transactions at your convenience.

The installation file **TMLINK Addin.exe** is an auto unzip which places 2 program files in **C:\ProgramFiles\TeleVantage\Client\Addins\TimeMatters** on your PC. After running this

file, select the TeleVantage ViewPoint Tools/Add-in Manager and select **Add...** - navigate to the above referenced folder and select the **TMLINK.dll** and click Open and Yes to add and enable.

Once added in you can select Options and choose the desired format for the Caller ID to match your Time Matters records, as well as the Time Matters username and optional Notes timestamp.



With both Time Matters and ViewPoint running with the TMLINK Add-in installed, use the **Test** button to check the connection and behavior of Time Matters screen pops. Select the Phone Number Format most likely used in Time Matters Phone Contact phone numbers to ensure consistent records matching. The number format option will ensure the Caller ID gets 'translated' to match the Time Matters phone record.

If Time Matters is set with the If Caller is Not Identified... Open New Phone Record option selected, and there is no match found, when the Phone Record is opened the Caller ID Name is inadvertently placed in the TO: field of the Phone Record. To overcome this anomaly the TMLINK add-in options should be set with the desired Time Matters User Name so that the appropriate entry is made in the TO: field.

TMLINK can optionally place a timestamp entry in the ViewPoint Notes field for the corresponding TeleVantage call record when call information has been passed to Time Matters to provide a record in ViewPoint that a TMLINK

transaction took place. The timestamp [TMLINK: 7/15/2005 9:39:07 AM] only indicates information was passed - the Time Matters entry/save process must still be completed and will not be reflected in ViewPoint. Erroneous entries can be manually removed from the Notes field if necessary.

If desired, TMLINK can automatically trigger a Time Matters screen-pop when a new call arrives in TeleVantage ViewPoint. With the **TMLINK - Screen pop on incoming calls** option is enabled, external calls with a status of Ringing will automatically initiate a TMLINK transaction. This option can also be toggled on and off from the ViewPoint Tools Menu.

With the TMLINK Add-in enabled, controls are placed in ViewPoint — in the Action menu, on the Toolbar, and as a 'right-click' option — so that a selected Live Call, Call Log entry, or Voice Mail record's Caller ID information can be passed to Time Matters for entry and update as desired. Select the **Pass Caller ID to Time Matters...** command or button to initiate a TMLINK transaction for the selected call entry — the Time Matters Incoming Call Processing feature will screen-pop Phone and/or Contact Records for these calls as if they were a live incoming call — allowing you to capture time or case/matter information for any calls or messages from your TeleVantage system.

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