



Sage ACT! plug-in for 3CX Phone System

User's Manual

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Version 1.0

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Contents

Introduction	1
1.1 What is the Sage ACT! plug-in for 3CX Phone System?	1
1.2 System requirements	1
1.3 Free Trial and License Activation	1
1.3.1 Introduction	1
1.3.2 Activating the trial	2
1.3.3 Activating a product key	2
1.3.4 Moving a product key from one PC to another	2
Configuring Sage ACT! plug-in for 3CX Phone System	4
2.1 General configuration	4
2.2 Login Information	4
2.3 Contact Lookup	5
Inbound call behavior	6
Launching calls from Sage ACT!	7
4.1 Introduction	7
4.2 Configuring the dialer	7
4.3 Launching calls from the Sage ACT! interface	7
Troubleshooting Sage ACT! integration	8
5.1 Problems with the database connection	8
5.2 Problems opening a contact in Sage ACT!	8

Figures

Figure 1: 3CX Assistant Sage ACT! plug-in activation dialog	2
Figure 2: ProductKey Remover	3
Figure 3: Sage ACT! plug-in for 3CX Phone System configuration (Login Information)	4
Figure 4: Sage ACT! plug-in for 3CX Phone System configuration (Contact Lookup)	5
Figure 5: Error opening contact in Sage ACT!	8

1

Introduction

1.1 What is the Sage ACT! plug-in for 3CX Phone System?

The Sage ACT! plug-in for 3CX Phone System integrates 3CX Phone System with Sage ACT! 2010 and Sage ACT! 2011. It works in conjunction with 3CX Assistant, and allows looking for contact information in Sage ACT!.

The plug-in is able to look for contact information in the Contacts and / or Companies tables using all the phone related fields, show the contact details in a screen pop-up, opening the contact record in Sage ACT!, create a new contact if it has not been found, and save the call information in the contact's history.

Launching outbound calls from the Sage ACT! interface is already available using the 3CX TAPI service provider. You just need to press the "Phone Contact" button, and the call will be launched and automatically connected to your extension!

1.2 System requirements

The Sage ACT! plug-in for 3CX Phone System requires the following:

- 3CX Assistant version 9.13537 or up installed
- 3CX Assistant should be installed with CRM option selected in setup
- Sage ACT! Pro 2011, Sage ACT! Premium 2011, Sage ACT! 2010 Standard, Sage ACT! 2010 Premium, Sage ACT! 2009 Standard or Sage ACT! 2009 Premium

1.3 Free Trial and License Activation

1.3.1 Introduction

The first time the plug-in is loaded by 3CX Assistant, the following registration dialog will be shown:

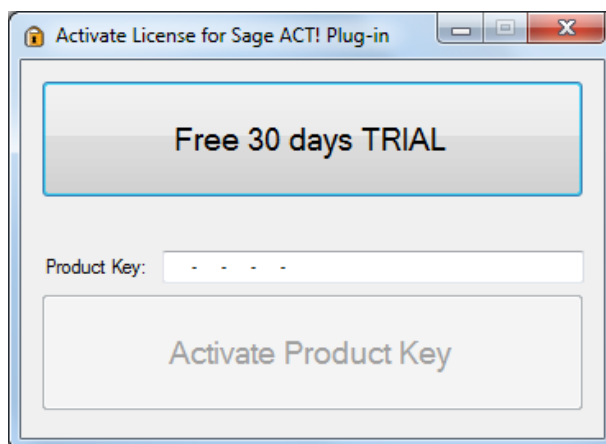


Figure 1: 3CX Assistant Sage ACT! plug-in activation dialog

The activation procedure, whether to activate the trial or a valid product key, requires that you have a working internet connection, because it needs to register your copy in the License Server.

1.3.2 Activating the trial

By clicking the “Free 30 days TRIAL” button you will start your trial period. Every feature of the plug-in will work during the trial period, just as in a licensed installation. When the trial period expires, you will need to enter a valid product key in order to continue using the plug-in.

1.3.3 Activating a product key

You will receive from BORTECH one product key for each purchased license. Each product key can be activated all the times you need in the same PC. For example, you will not have any problem to activate the license again if you need to reinstall your PC. But you will get an error if you try to activate it on another PC.

In order to activate a product key, just enter it into the Product Key field and click the “Activate Product Key” button. A message will be shown with the result of the activation, whether it was successful or not. If the activation fails, a complete error description will be provided.

1.3.4 Moving a product key from one PC to another

If you need to move your plug-in installation from one PC to another, for example when buying a new laptop or when changing your desktop because of any reason, you can clear a product key to be reused in another PC. After a product key has been cleared, you will be able to apply it and license the plug-in on other PC. The PC that originally had the plug-in installed will get it automatically unlicensed. If you try to run the plug-in again in the old PC, it will behave as if no product key was ever applied.

In order to clear a product key, we provide a program named “ProductKey Remover”, which is installed with the plug-in. Launch it and you will see the following dialog:

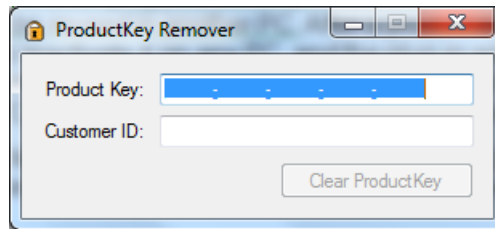


Figure 2: ProductKey Remover

There you can enter the Product Key that you need to move from one PC to another, and your Customer ID, which you will get from BORTECH when buying your license. Then clicking the "Clear Product Key" button will do the job, and the product key will be ready to be reused wherever you need.

2

Configuring Sage ACT! plug-in for 3CX Phone System

2.1 General configuration

In order to enable the integration with Sage ACT!, check the “Enable Sage ACT! Plug-in” option.

If you also want to automatically create call logs in the contact's activity history, you must check the “Store Call Information in Sage ACT!” option. When this option is set, the plug-in will create a new call activity for the contact in Sage ACT! after the call has ended.

2.2 Login Information

Now, you need to fill the Login Information section. If you have access to the database file via the file system, you need to select “Local File” login type. If you need to connect to the database through the network, then choose “Database” login type.

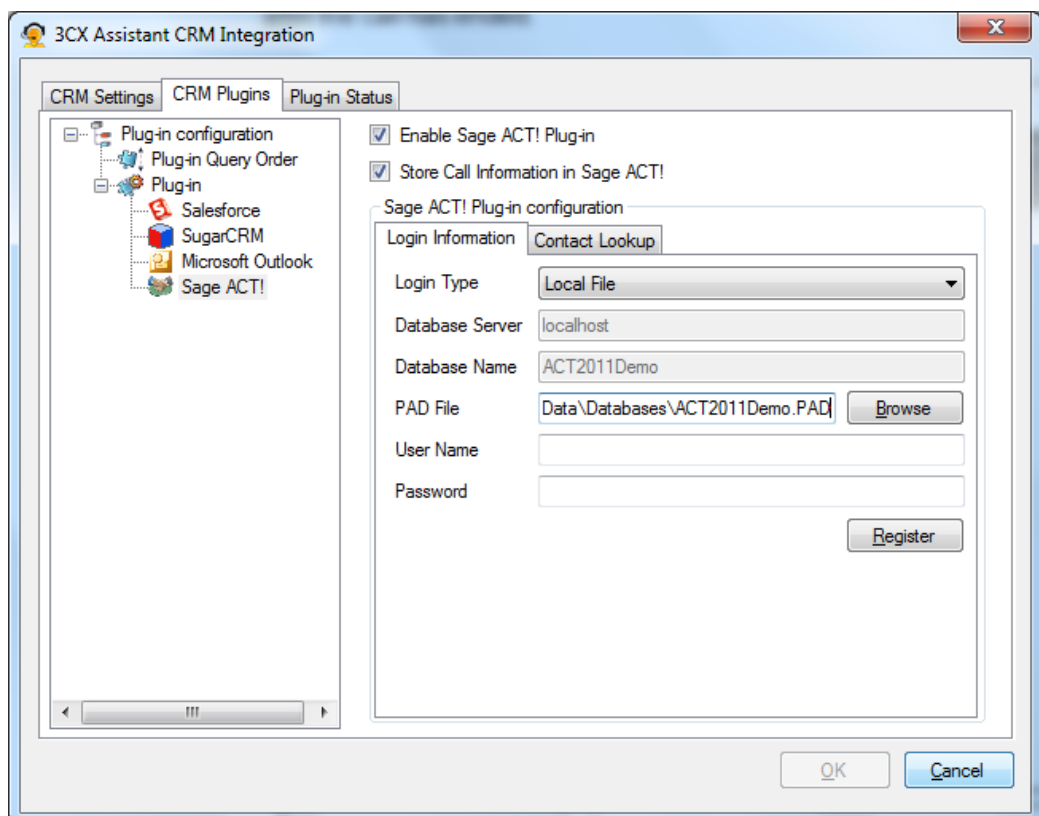


Figure 3: Sage ACT! plug-in for 3CX Phone System configuration (Login Information)

When using “Local File” login type, you have to browse for the PAD file in your file system. Otherwise, when using “Database” login type, you need to enter the name or IP address of the server where the Sage ACT! database is installed, and the database name. In both cases, you may need to enter your credentials to access the database.

2.3 Contact Lookup

You can change the maximum digit length to compare in the Contact Lookup section. When an inbound call arrives to your extension, the caller ID may have different formats depending on your PSTN or VoIP Provider. It could have international format (including the country code), national format (including the region or city code), or local format (including only the local number).

Also, you may have created your Contact's phones in Sage ACT! with prefixes that are not present in the caller ID, such as mobile phone prefixes. In order to match the caller ID with the contact's phone in these cases, you need to specify this parameter. The system will compare the last N digits of the caller ID with the last N digits of your contact's phone, where N is the specified maximum digit length to compare. Usually this parameter should be the length of your local number. With a higher number you get more accuracy, but you may possibly not match the caller ID with some contact. With a lower number you get less accuracy (with possible false positives), minimizing the possibility of a no match.

You can choose to look for contact information in the Contacts and / or Companies tables, and select the lookup order in these tables.

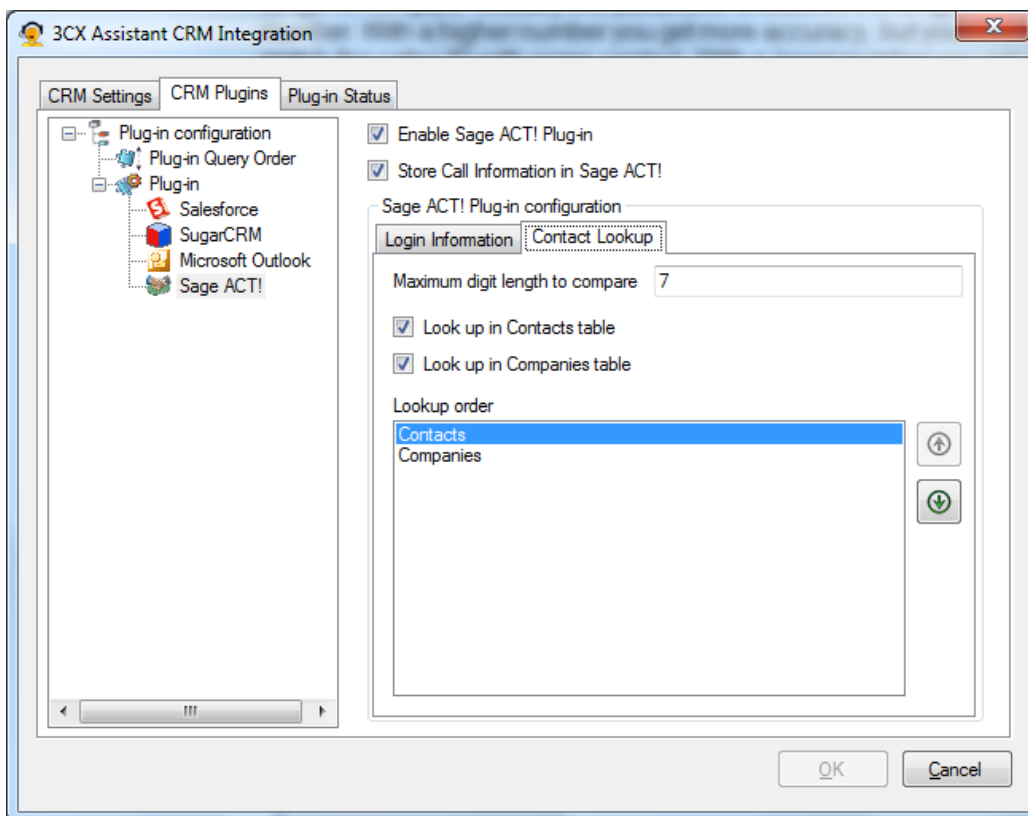


Figure 4: Sage ACT! plug-in for 3CX Phone System configuration (Contact Lookup)

3

Inbound call behavior

When an inbound call arrives to your extension and a contact is matched, depending on your 3CX Assistant CRM module configuration, the contact record will be automatically shown in Sage ACT!, or you will be able to click a link to open it.

When the call ends and having the option “Store Call Information in Sage ACT!” checked, a new call log containing the call details will be created and stored into Sage ACT! for the contact.

If a contact is not matched on an inbound call, clicking on the “Create contact” link in the screen pop-up will open the create contact dialog. You can fill that form and automatically create the contact in Sage ACT!.

4

Launching calls from Sage ACT!

4.1 Introduction

You can launch outbound calls directly from Sage ACT! using the dialer. This is an already existing feature available when installing the 3CX Assistant. The Sage ACT! plug-in for 3CX Phone System does not add any additional functionality for outbound calls, because it is not needed.

4.2 Configuring the dialer

In order to launch outbound calls from the Sage ACT! interface you need to configure the dialer to work with the 3CX TAPI service provider. To do this, go to "Tools" → "Preferences", select the "Communication" tab, press the "Dialer Preferences" button, check the "Use Dialer" option, and finally select "3CX TAPI Service Provider". Press "OK" to accept the changes.

4.3 Launching calls from the Sage ACT! interface

After configuring the dialer, you just need to press the "Phone Contact" button, select the desired phone number, and the call will be launched and automatically connected to your extension!

5

Troubleshooting Sage ACT! integration

5.1 Problems with the database connection

When the Sage ACT! plug-in for 3CX Phone System is configured to access a remote database through the network, you may experience problems due to firewall settings.

Sage ACT! uses a SQL Server database, so it listens by default on port TCP 1433. You will have to allow the access to that port from the client machines.

5.2 Problems opening a contact in Sage ACT!

The Sage ACT! plug-in for 3CX Phone System is able to look for contact information even when Sage ACT! is not running. But in that case, when you try to open a contact in Sage ACT! using the "Open contact" link in the screen pop-up dialog, you will see the following error message:

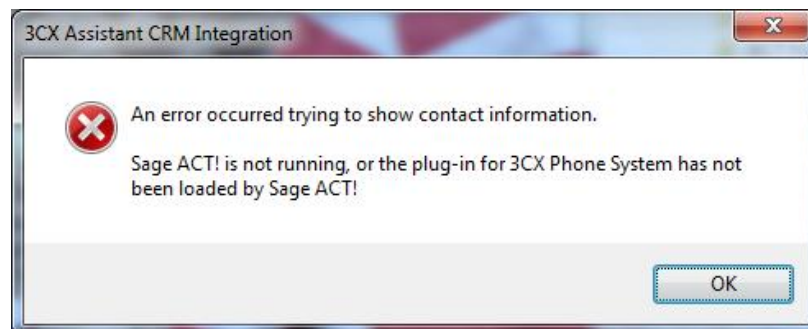


Figure 5: Error opening contact in Sage ACT!

When you open Sage ACT!, a plug-in is loaded, allowing to display a contact in Sage ACT! when you trigger that action from the screen pop-up. If Sage ACT! has a problem loading that plug-in, you will continue receiving this error, even when Sage ACT! is running.

In order to know if this is causing the problem, open the folder "%AppData%\ACT\ACT Data", and then open the file named "DependentDlls.xml" from that folder. If that file contains the text "3CX Plug-in for SageAct.dll", then the plug-in is having problems to be loaded.

If this is your case, contact us at support@bor-tech.com and we'll help you to fix the problem.