activeTAPI-DyNav v2013

Getting Started Manual

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| Author: | Markus Schmidt  [msc@activeTAPI.NET](mailto:msc@activeTAPI.NET) Schmidt e-Services GmbH Wiesentalstrasse 10a D-65207 Wiesbaden |
| Last Major Update: | 16th of May 2013 |
| Revision: | 2013.02 |
| Relates to: | activeTAPI-DyNav v2013 |
| For NAV Version: | NAV 2013 R2 Rollup 4 |
| Last Print Date: | 12. Oct. 2011 11:45 |
| Pages: | 14 |

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# Introduction

activeTAPI-DyNav consists of three parts

* **activeTAPI.COM-Objects**The bridge between Windows TAPI and Microsoft Dynamics NAV. This part includes the activeTAPI-Dialer, the Troubleshooter and the Tracing functionality.  
  Once this part works as expected you can continue with the next part.
* **activeTAPI-DyNav NAV-Objects**The activeTAPI CTI functionality within NAV. This includes the complete implementation for RT-Client and the configuration of Telephony with NAV. Consider all these objects to be examples and feel free to modify these objects to suit your needs. However, some additional ‘goodies’ – e.g. an Add-In – have to be registered in NAV for the RT-Client.

Before we get started with activeTAPI-DyNav v2013 for the Role Tailored Client (RTC) some initialization is needed.

## Basic Installation

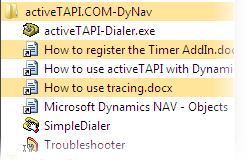
Start with the installation of activeTAPI-DyNav:

* Download the current **activeTAPI-DyNav v2013** version from here:  
  <http://www.activeTAPI.net>   
  and run the Setup!

The basic installation installs the activeTAPI.COM-Objects and it saves the NAV-Objects to the application folder. After the basic installation you are ready to test the TAPI connectivity. There is no need yet to do anything with NAV!

### Verify the installation

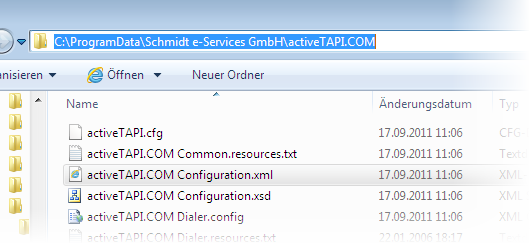
In Windows 7 open the Start-Menu as shown in *Picture 1[[1]](#footnote-1)*



1. activeTAPI-DyNav Start-Menu entries

After installing activeTAPI you will find the configuration files here:

*%ProgramData%\Schmidt e-Services GmbH\activeTAPI.COM*



1. activeTAPI configuration files are located in the machine data folder

**Important:** Do not change anything here until otherwise mentioned!

## Check Windows-TAPI connectivity

Before you start with Microsoft Dynamics NAV make sure your Windows TAPI is configured and that it works properly.

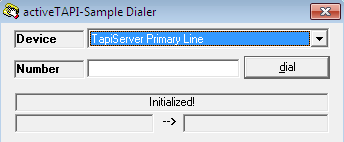
Before you start make sure you have:

**CLOSED ALL APPLICATIONS THAT USE WINDOWS TAPI!**

Then

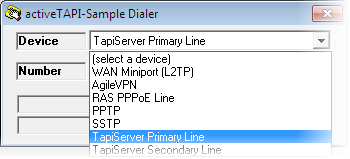
* Start the activeTAPI *SimpleDialer*

Check that you can dial and you receive inbound telephone numbers.

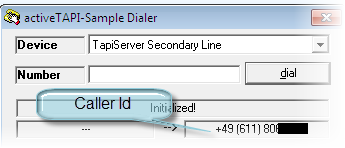


1. The activeTAPI-SimpleDialer can be used to verify Windows TAPI works properly

Select a device (see Picture 4), enter a telephone number and dial. If successful, call the telephone number that is “attached” to your machine. You should see the calling number (see Picture 5).



1. SimpleDialer select a device



1. SimpleDialer shows incoming caller Ids

If outbound dialing work and if you can see inbound telephone numbers your Windows-TAPI is fine so far and you can continue with the Microsoft Dynamics NAV integration.

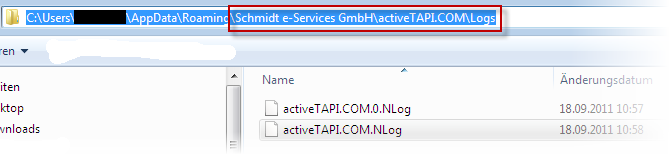
## Troubleshooting Windows-TAPI

### Check Windows Telephony

Check that you *Telephone & Modem Option* in the Windows *Control Panel* are set correctly. This includes the current location settings and the areacode of the current location.

### activeTAPI Trace Files

Using the Windows Explorer navigate to your *%AppData%* folder:



1. The %AppData% folder contains the activeTAPI logfiles.

Open the *NLog-file* with any text editor and check the logs.

### activeTAPI does not handle the leading dialing prefix correctly

Without going into details: the PBX, the TSP (Telephony Service Provider) or the TAPI routing software must not send a leading dialing prefix (like ‘0’) to the client. If it does anyway, this is a configuration error in the underlying software. This is not an activeTAPI issue!

**Important:** The leading dialing prefix has just one purpose: it is used to tell the local PBX that you want to get a line for outbound dialing. Such a prefix is never part of a telephone number and it should neither be stored in any database not should it be added to telephone number before you dial.

### You don’t see an inbound number

There are some situations where you don’t see inbound numbers. In any case, it is **not** a problem of activeTAPI if you don’t see it! Either you TSP does not route the numbers correctly, there is another application “catching” the numbers and/or you have a buggy TSP. The latter one is the most common error. Check your PBX Vendors Web-Site to get an up-to-date TSP for your device!

Also, some TSPs do not support more than one application listening to incoming calls. Thus, if you have one application open – for example a Dialer that was shipped with the TSP – in some cases this Dialer will then get the incoming call events and activeTAPI will not receive anything. Again, this is a problem of the TSP! As a workaround you should close all applications and check if you can then see incoming calls in the SampleDialer.

### Check if activeTAPI.exe is running

Whenever something does not work as expected check if there’s an active process called *activeTAPI.EXE.* This process must not exist when all activeTAPI applications have been closed: RT-Client, activeTAPI.COM-Dialer, SampleDialer, etc.

If *activeTAPI.exe* is running anyway you can safely shutdown this process using the Windows Task Manager.

# Getting started with Microsoft Dynamics NAV

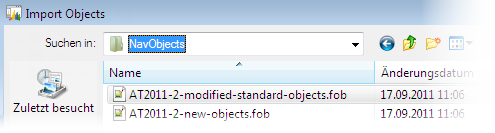
After you have made sure your telephony works as expected it is now time to integrate telephony with Microsoft Dynamics NAV.

**Important:** The NAV Objects can be used staring with **Microsoft Dynamics NAV 2013, only**! If you use **NAV 2009 (R2)**, please download **activeTAPI-DyNav v2011.3** from the activeTAPI website: [http://www.activeTAPI.net](http://www.activetapi.net/000000989608d8023/index.html)

If you use still older version of NAV, contact us.

## Installation

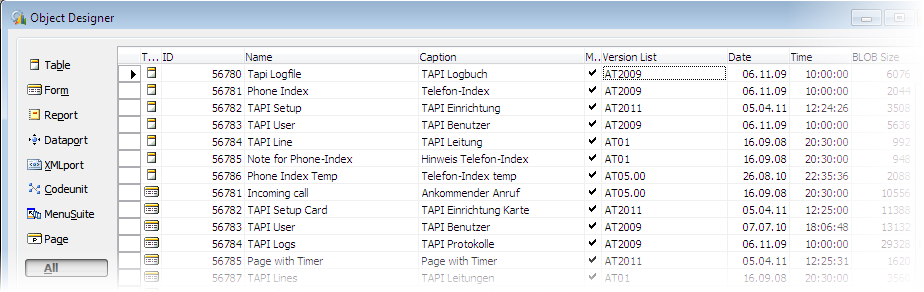
* Open Microsoft Dynamics NAV Development Environment
* Navigate to the Object Designer
* Import the activeTAPI FOBs from the %ProgramFiles%\activeTAPI.COM folder



1. Import activeTAPI FOBs

**Important:** The filename of the objects depend on the current version of activeTAPI-DyNav. For example: v2011.3 stand for v2011 release 3, v2013 stands for v2013 release 1.

All the activeTAPI objects contain version code *AT:*



1. Imported activeTAPI Objects for Classic and Role Tailored Client

**Important:** If you use NAV 2013 R2, download the activeTAPI-Objects for this version.

# RT Client Setup

activeTAPI-DyNav comes with an Add-In for the Role Tailored Client. This Add-In is used on Page 56785 *Page with Timer* to work around the RTC’s disability to receive local events.

The *Page with Timer* acts as the telephony event receiver (bridge to CTI) in the RTC. Without having this page opened the RTC won’t receive CTI notifications.

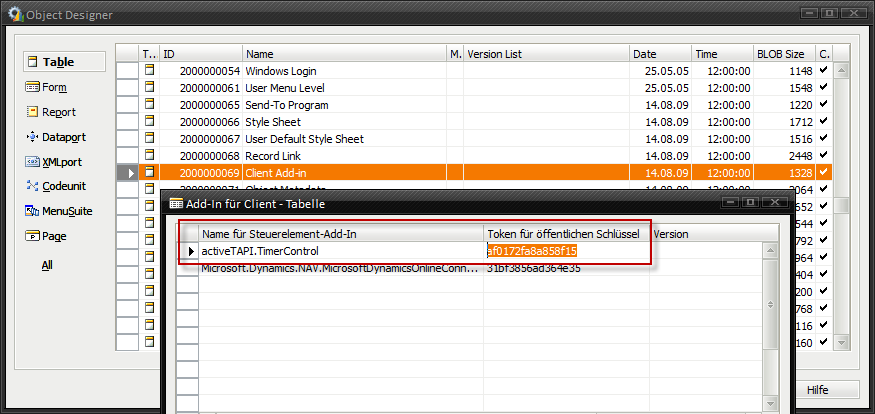
## Register RTC Add-In

During the setup the Timer Add-In was copied to the NAV standard Add-In directory:

*%Program Files(x86)%\Microsoft Dynamics NAV\70\RoleTailored Client\****Add-ins\activeTAPI***

Filename: *activeTAPI.RTC TimerControl.DLL*Control Add-In Name*: activeTAPI.TimerControl*Public Key Token: *af0172fa8a858f15*

To complete the installation the Add-In must be registered in NAV in Table 2000000069:



1. Register the activeTAPI-Timer Add-In in NAV Table 2000000069

The Page that uses the activeTAPI-Timer Add-In was already imported with your NAV Objects. After the registration of the Add-In, activeTAPI is available also in the RTC.

Start Page During the setup the Timer Add-In was copied to the NAV standard Add-In directory.

## Define Start Page

Prepare a desktop icon for the RT Client. In the properties add the start page to the destination. It should look like:

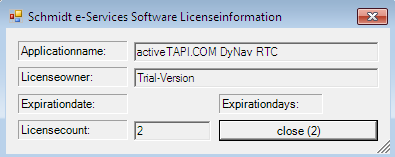
"C:\Program Files\Microsoft Dynamics NAV\70\RoleTailored Client\Microsoft.Dynamics.Nav.Client.exe" **"DynamicsNAV:////RunPage?Page=56785"**

You can do that for every user. If a user is not an activeTAPI-User, the page will be closed directly after start of the RT Client.

An activeTAPI-User will see the page *Page with Timer*. As the RT Client has no possibility, to minimize a page by command, the user should do this manually.

This page must always run (minimalized), because it is the heart of the event-handling for the RT Client. Therefore you get a warning, if you want to close this page.

Now, restart the NAV Client and check that activeTAPI is loaded and initialized properly (see Picture 10)

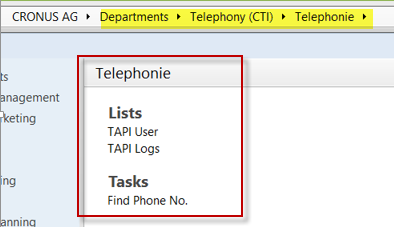


1. activeTAPI License Dialog

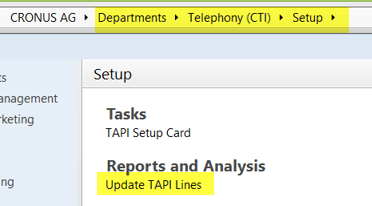
Please notice that the license dialog does not appear anymore when you have a purchased license!

# Configure NAV for activeTAPI

Navigate to the Telephony Configuration (you find it in Departments):



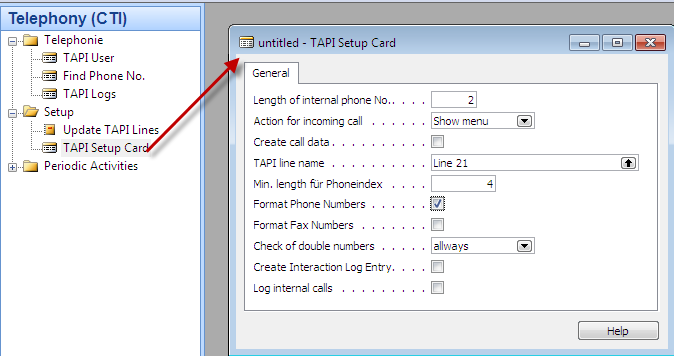
Update the TAPI Lines:



This is the first and simplest test to examine whether the automation objects were installed correctly or not.

### Menu "Telephony (CTI)", "Setup", "TAPI Setup"

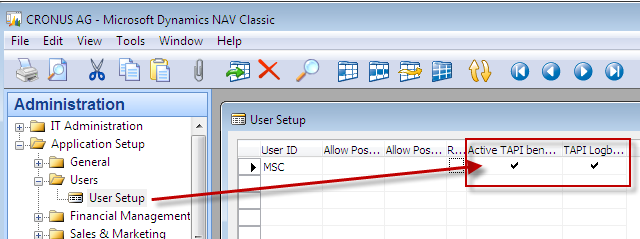
1. Length of internal phone no.: Enter a number, e.g. 2
2. Action for incoming call: e.g. "Show menu"
3. Create call data: No
4. TAPI Line Name; select it; if no line is available, step 7.A did not run correctly
5. Min. length for PhoneIndex: , e.g. 4
6. Format Phone Numbers: Yes
7. Format Fax Numbers: Yes
8. Check of double numbers: Possibility to avoid duplicates
9. Create Interaction Log Entry: Yes / No
10. Log internal calls: Yes / No



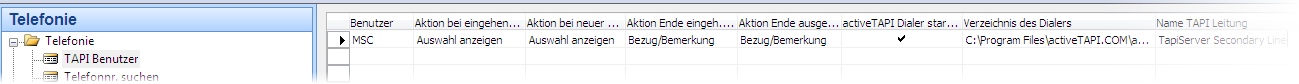
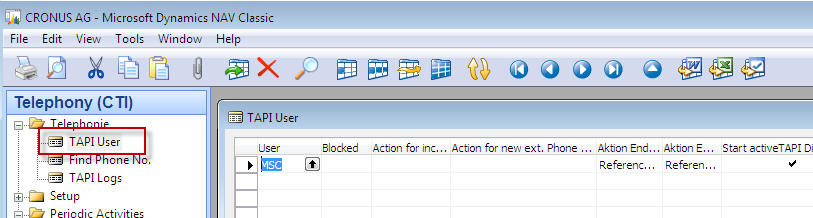
1. activeTAPI Telephony setup

### Menu "Administration", "Application Setup", "Users", "User Setup"

Activate field “Use activeTAPI” for the current user.



### Menu "Telephony (CTI)", "TAPI User"



* Action for incoming call: E.g. "Show menu"
* Action for new ext. Telephone number: E.g. "Show menu"
* Start activeTAPI-Dialer: Yes
* Path of the Dialer: Select; with standard installation:  
  %ProgramFiles(x86)%\activeTAPI\activeTAPI-Dialer.EXE
* TAPI Line Name: Select a TAPI for the current user (see “Check Windows-TAPI”)

### Close and restart Navision

After this start the activeTAPI-Dialer should appear with the license information.

## Test the installation and the setup

### First outgoing call

Choose any customer, vendor or contact. Remove the Phone No. (if existing) and input a “real” telephone number (this is necessary to register it in the Phone Index). Press the telephone Bitmap button.  
After finishing the call, look into the TAPI Log (Menu “Telephony (CTI)”, "TAPI Journal").

### First incoming call

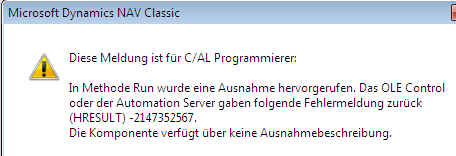
Choose any customer, vendor or contact. Delete the Phone No. (if existing) and input your Mobile Phone No. Call yourself with the Mobile Phone.  
After finishing the call, look into the TAPI Log (Menu “Telephony (CTI)”, "TAPI Journal").

### Create and check the Phone Index

NOTE: In a Standard-Navision-Demo-Database (Cronus) there are no telephone numbers. BEFORE the following activities enter some “real” telephone numbers, which can be actually called (Mobile, private, company, etc..) or from which a call can come.  
Select "Fill Phone Index" in the menu " Telephony (CTI)", "Periodic activities" and let the report run.  
Examine the error messages in the menu " Telephony (CTI)", "Periodic activities", "Notes for Phone Index".  
Check the Phone Index: Menu " Telephony (CTI)", "Periodic activities", "Modify Phone Index".

## Troubleshooting activeTAPI.COM-DyNav

Whenever you get messages like show in Picture 12 activeTAPI was not installed properly:



1. activeTAPI is not installed properly, Windows-COM has some invalid references in the Registry

In that case we suggest to run an Registry Cleaner to clean up the Windows Registry. This is a known issue with Windows-COM.

1. In Windows 8 search for activeTAPI.COM-Dialer.exe [↑](#footnote-ref-1)