

# Help Contents for Call Routing

**Call Routing** for Windows is a software program that controls how incoming telephone calls are routed across a network. **Call Routing** works along with standard caller ID software to manage your phone system for both incoming and outgoing calls.

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## Displays

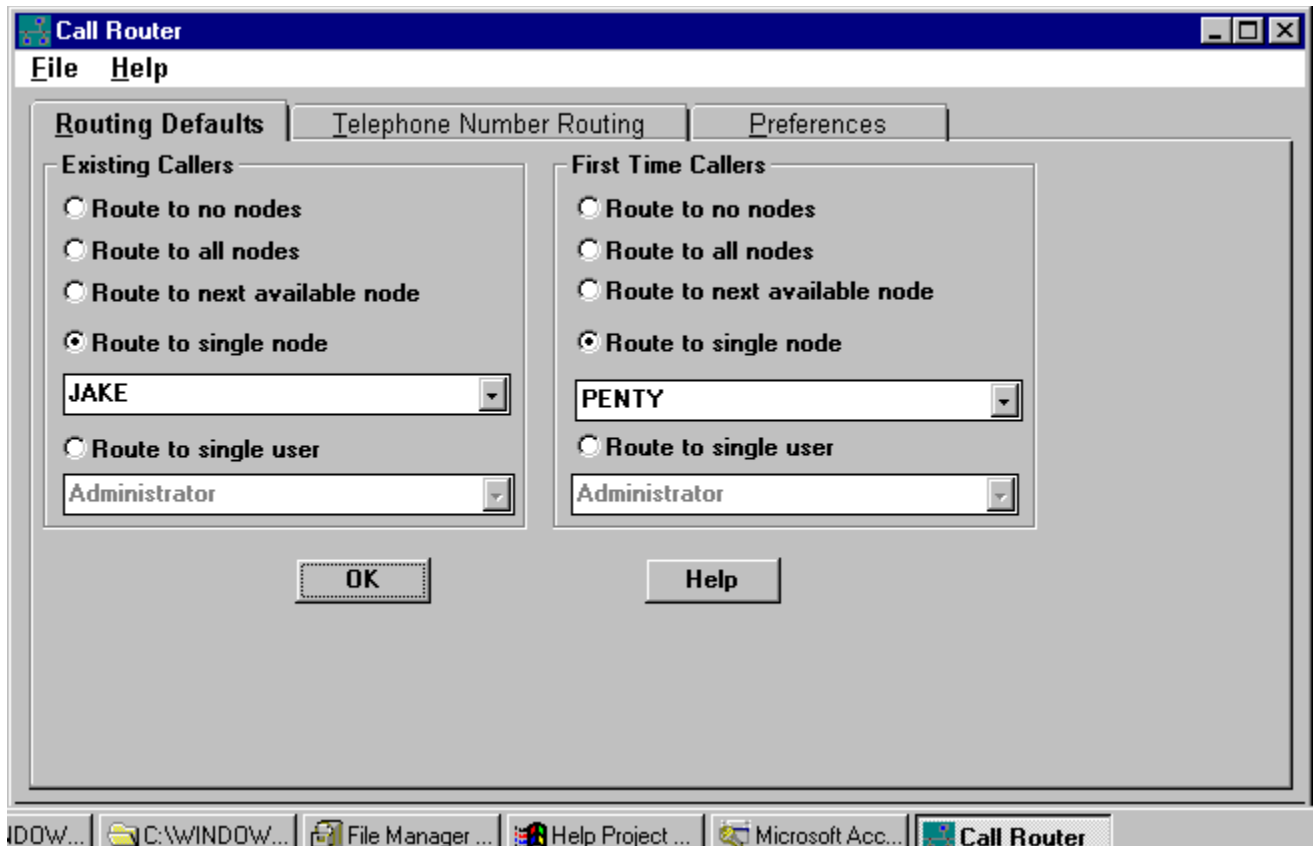
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**Call Routing** is a Mountain Systems, Inc. product.

## Routing Defaults



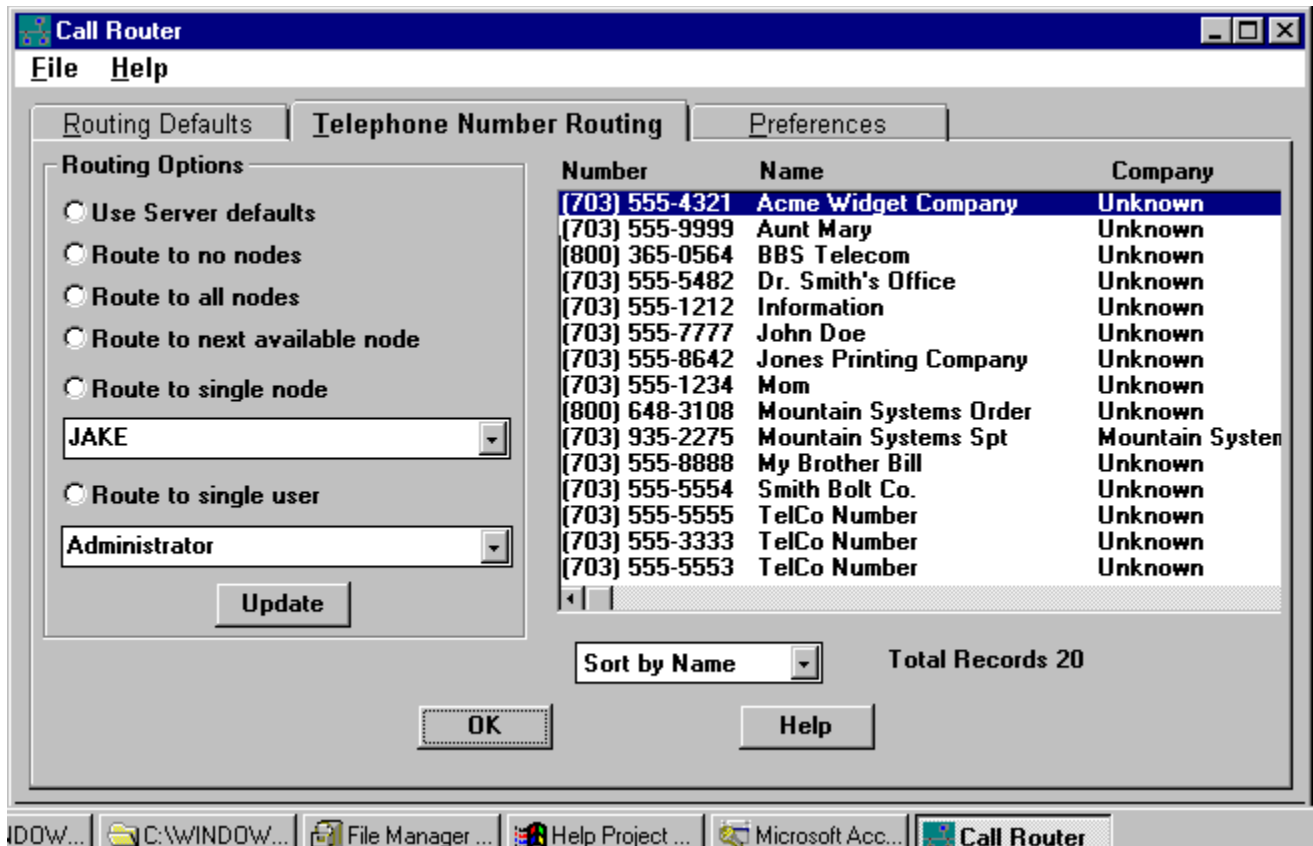
The routing defaults determine how calls are routed for incoming calls from telephone numbers that have no number specific routing information. The routing options include:

- Route to no nodes
- Route to all nodes
- Route to next available node
- Route to single node
- Route to single user

Separate criteria are provided for repeat callers and first time callers.

When calls are routed to a single user or node, the user or node information must also be provided.

## Telephone Number Routing



The routing defaults determine how calls are routed for incoming calls from specific telephone numbers. The routing options include:

- Use routing defaults
- Route to no nodes
- Route to all nodes
- Route to next available node
- Route to single node
- Route to single user

When calls are routed to a single user or node, the user or node information must also be provided. If no routing option is set, routing will be based on the routing defaults setting.

## Introduction

The Call Routing program works with your MultiLine Server software to route Caller ID information to Client locations. The Call Routing program allows the user to determine how incoming calls are routed to users on the network. In the simplest form, all call data, for both incoming and outgoing calls, is routed to all client locations. Each client will act as if it had its own hardware connection. Additional choices offer more detail routing possibilities.

Calls can be routed to individual workstation locations, to individual users, to the next available workstation/users, and to all users. Separate options are provided for incoming calls from first time callers versus incoming calls from repeat callers.

When incoming calls are routed, a message prompt is displayed on the server PC. The message shows the line number, caller information, and to whom the call is routed. A similar message is then displayed on the PC to which the call is routed.

If no response is provided by the user on the routed PC, then an additional message is displayed on the server PC to indicate the call was not answered.

If the user or node identified for the current caller is not currently connected or accepting calls, then a message prompt on the server will immediately be displayed to indicate the call cannot be routed.

Updates to the database to reflect routing changes can only be made when the server is NOT RUNNING to avoid ODBC database error messages.

Using the Routing software requires Network DDE support from your network software. See the [Network Configuration](#) section for more information about network requirements to use Routing Client/Server software.

## Database Control

In a typical network installation a single PC acts as the call server and one or more additional PCs act as call clients. The call server collects all Caller ID information for incoming and outgoing calls and distributes the information across the network to the client PCs. Each PC has a separate database for storing call information. This includes call history information as well as specific details about each telephone number.

Anytime a database update is made, the information is broadcast to all other PCs to keep the different databases in sync. The option exists for each client PC to limit both incoming and outgoing database updates. This allows for the situation where database differences on each client location are required.

The client PC user can set these options using the **Call Routing Preferences** available from the **Edit** menu.

## Holding Calls

A client PC has the option to hold all incoming routed calls. This option is selected by using the **Call Routing Preferences** available from the **Edit** menu.

When a client PC user is connected and holding all calls, then a message will immediately be displayed on the server for each call.

## Accepting Calls

**Incoming Call - Routed Directly to You**

Call Details

Line : 1 Tue May 23 09:28 AM

Number : (703) 935-2275

Name : John Doe

Company : Mountain Systems

Accept

Reject

Help

This call will be forwarded in 9 seconds

An incoming call routed to a client PC results in a simple message displayed on the client. The message offers two pushbutton options:

**Accept**

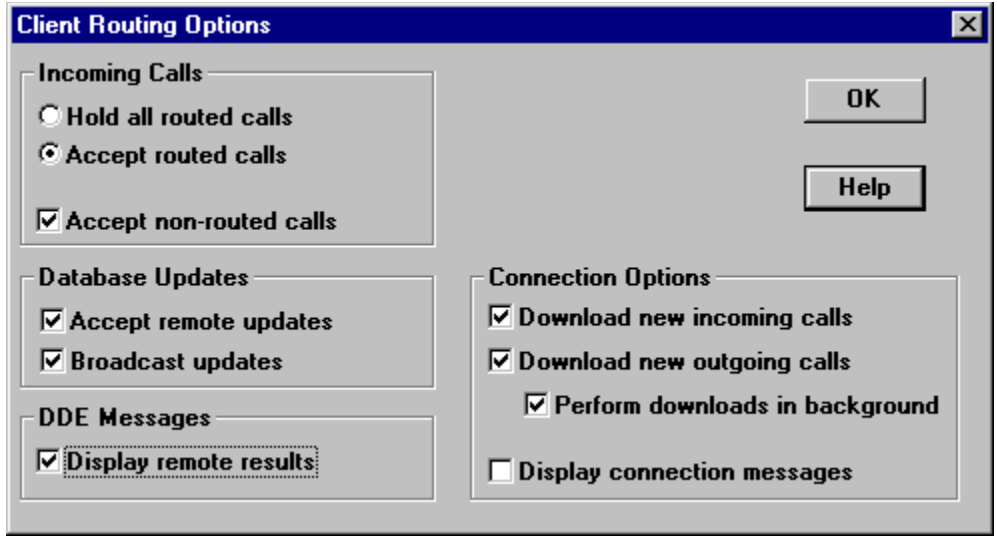
**Reject**

If the **Reject** button is pressed, a message will be displayed on the server PC to indicate this choice.

If the **Accept** button is pressed, the call is assumed to be answered and no further action is taken on the server PC.

If no option is selected after a time out period, the **Reject** option is assumed and an appropriate message displayed on the server PC.

# Call Routing Preferences



The client PC user has options for accepting calls, database updates, and DDE display. This dialog is used to specify the client call options.

A client PC receives a variety of incoming and outgoing call information from the server PC. As it is not possible to determine who is placing outgoing calls, all outgoing calls are displayed on each client PC. The options below determine the actions for incoming calls.

- Select the **Accept Routed Calls** option to accept all routed incoming calls.
- Select the **Hold all Routed Calls** option to hold all routed incoming calls.

Select the **Accept non-routed Calls** option to accept incoming calls that are not routed to this workstation or user.

This setting allows the client to see all incoming calls, whether routed to this client location or not. Disabling this option will result in displaying only the incoming calls that are routed directly to this workstation or user.

Select the **Track outgoing calls** option to track outgoing calls that are detected by the server.

This setting allows the client to see all outgoing calls that are detected by the server software.

Select the **Broadcast Updates** option to broadcast database updates made at the client PC to all other PCs on the network. This includes telephone number updates and call note updates.

Select the **Accept remote Updates** option to accept database updates to the client PC made at other PCs on the network. This includes telephone number updates and call note updates.

Select the **Display Remote Results** option to display DDE results based on incoming actions from remote nodes.



When this option is selected, incoming calls routed to other clients will also be displayed on this workstation. When this option is not selected, only DDE results from calls routed to this client will be displayed.

Select the **Download New Incoming Calls** option to have any new incoming calls downloaded to the client on connection.

This option allows the client to always stay in sync with all incoming calls received by the server. Any new incoming calls that have occurred while the client was disconnected will be downloaded to the client when the server connection is established.

Select the **Download New Outgoing Calls** option to have any new outgoing calls downloaded to the client on connection.

This option allows the client to always stay in sync with all outgoing calls processed by the server. Any new outgoing calls that have occurred while the client was disconnected will be downloaded to the client when the server connection is established.

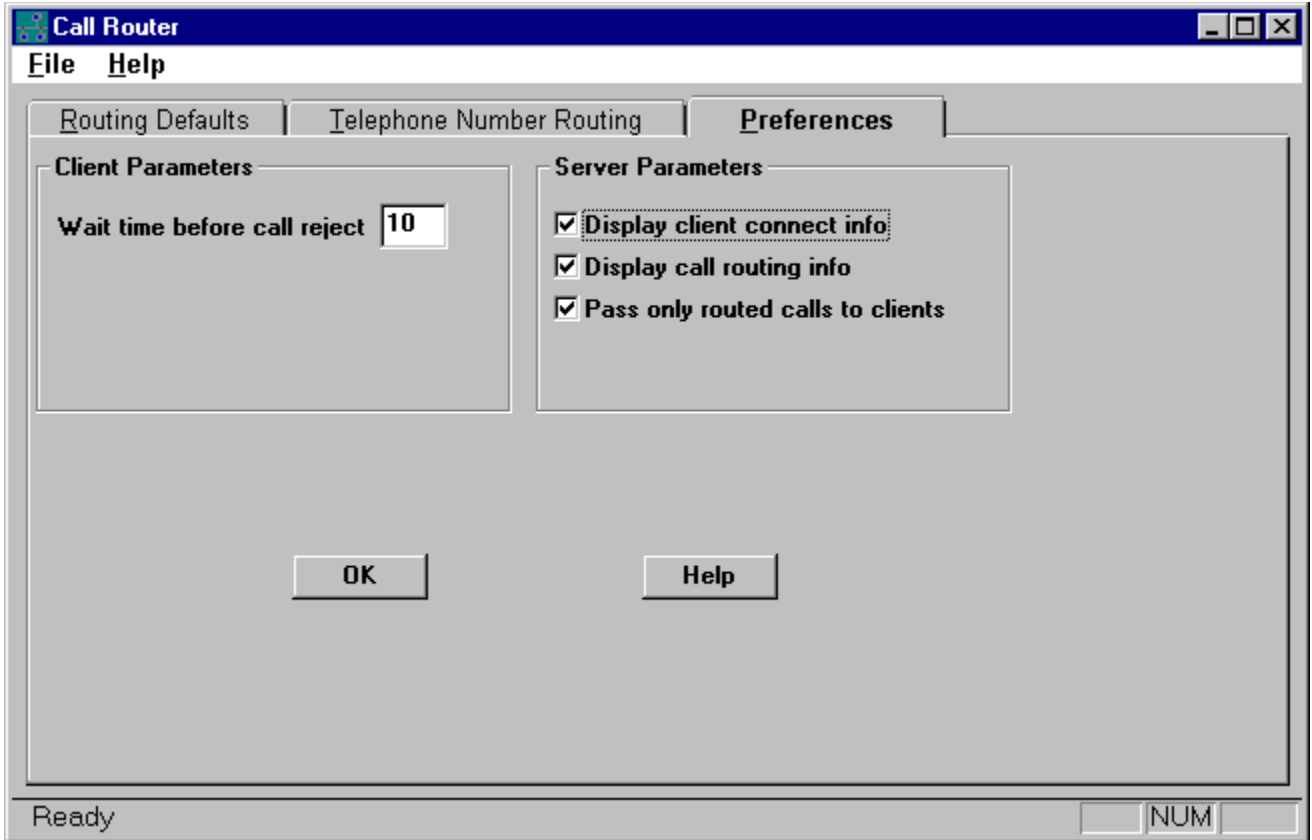
Select the **Perform downloads in background** option to have the download process execute in the background. This will allow you to use the client software and PC much faster. This will download all the server calls quickly, and process them one at a time about every four seconds.

Select the **Display connection messages** option to have automatic dialog messages appear whenever a connect or dis-connect from the server is occurring. These messages will also include a speaker beep to alert the user of the action.

The **Extension Options** area allows choices for CallerID hardware that supports extension telephones. This option will only be enabled if your hardware supports this option.

Enter your extension telephone number in the **Extension #** field. This value will be used in connections with the server, and for incoming and outgoing calls that are processed.

## General Preferences



### Client Preferences

The **Wait time before call reject** value determines how long the server waits before a routed call is assumed to be rejected by the client workstation. When this time value expires, and the client has not accepted the call, a message will be displayed on the server alerting the user to this situation.

### Server Preferences

Note: The server software must be restarted for changes in these options to take effect.

Select the **Display client connect info** toggle to display client connect and disconnect information. Selecting this option will display a dialog message each time a client workstation connects or disconnects from the server.

Select the **Display call routing info** toggle to display routing status dialogs for each incoming call that is routed to a client workstation. An initial dialog will show the incoming caller and the client workstation to which the call is routed. If the client workstation does not respond within the time set above, a dialog message will be displayed.

Select the **Pass only routed calls to clients** toggle to pass only routed calls to client

connections. This setting will have the effect of only showing the incoming calls on each client connection that are routed to that client. If all incoming calls are to be shown on each client, DO NOT select this option.

## Manual Call Routing

Incoming calls can be manually routed after the call is answered. Double clicking on an existing call line in the Incoming Calls display will bring up a set of related tabbed folders. Use the Manual Routing folder to manually route existing calls.

Existing calls can be routed with the following options:

- Route to all nodes
- Route to next available node
- Route to single node
- Route to single user

Select the desired routing option and press the **RouteNow** button to route the call. When routing calls to a single user or node, double clicking on the item (in the scrolling list) will both select the routing option and route the call.

