



Welcome

To:



For ACT! By Sage

Phone Parsing & Storage Guidelines

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Call On CRM Phone Parsing and Storage Guidelines

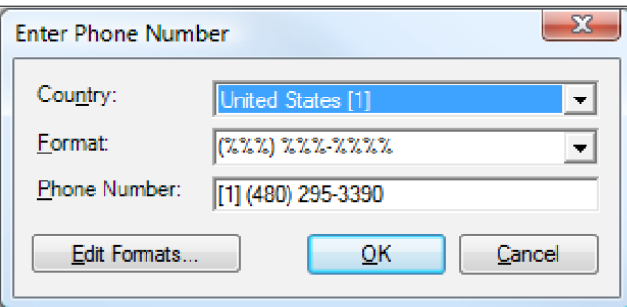
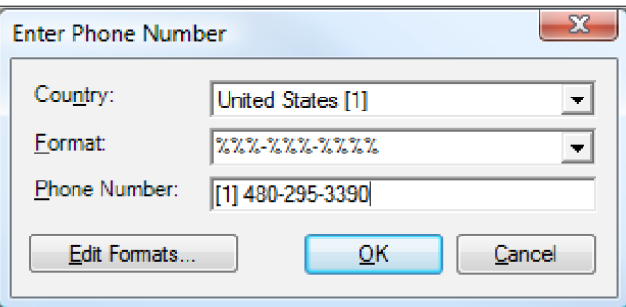
Call On CRM adds a call control toolbar to your ACT! contact database which allows you to call contacts directly from your contact database. It also handles incoming calls and matches these calls to a contact stored in your ACT! database, if one exists. In order to properly locate contacts in the ACT! database, your database needs to follow certain guidelines in data storage.

Phone Number Storage and Masks in ACT!

ACT! phone fields can be stored in a variety of ways in ACT! Call On CRM needs a consistent storage approach to be followed to be able to properly query your database contacts to find a matching contact.

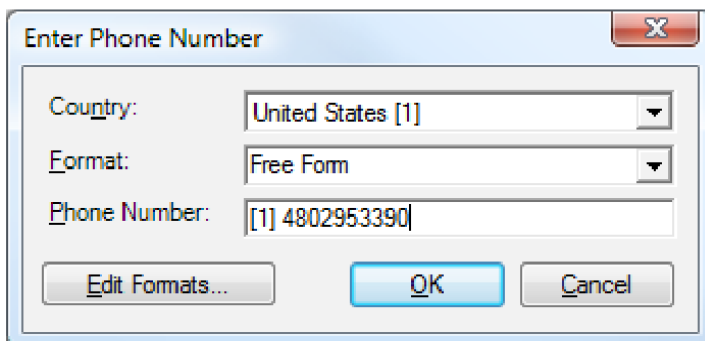
ACT! allows you to define a Phone Mask which controls the display format of your phone numbers. Each country in ACT! can have several phone masks defined to properly format phone numbers in a given country.

For example, several mask formats can be defined for a US based phone number, depending on how you like to see your phone numbers displayed.

Sample Mask 1.	Sample Mask 2.
	

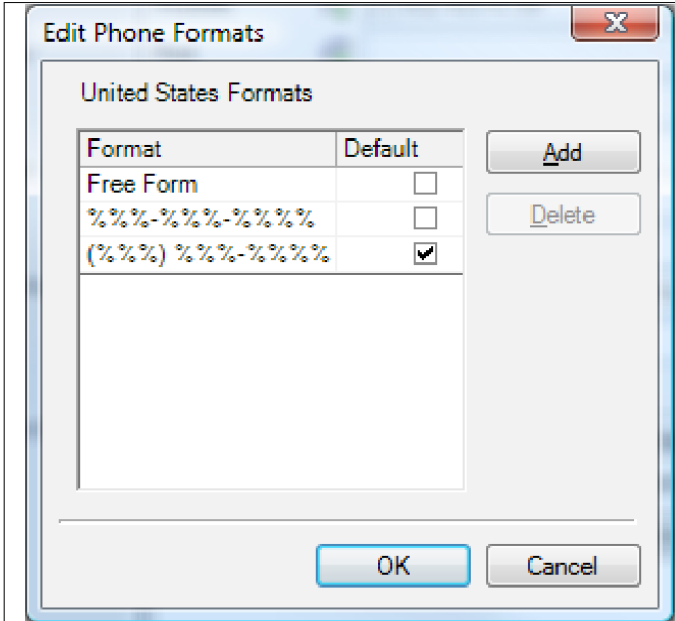
ACT! will also let you use a “Free Form” mask*, which doesn’t apply any formatting to the phone number, when using a free form mask data can be stored any way you want to enter it.

(*Do not use the Free Form Mask when formatting numbers for use by Call On CRM, details below)



Editing ACT! Phone Masks

To create or edit a phone mask for a country, navigate to a contact record in the country you would like to edit. Click on the ... button next to the phone field. Next, click on the "Edit Formats" button. The following dialog will be displayed:



Format	Default
Free Form	<input type="checkbox"/>
%%%-%%%-%%%	<input type="checkbox"/>
(%%%) %%%-%%%	<input checked="" type="checkbox"/>

Each country has its own set of Masks. One of the masks can be set as the "default" mask which will be used by default when you create a new ACT! contact in the specified country.

Valid Values for the Mask Format are:

- # - represents a numeric character
- % - represents an alpha-numeric character

Other characters represent a formatting placeholder.

You can define as many masks as you would like for each country. A best practice would be to have a default mask which you want to use for all of your phone numbers in a specific country.

Creating New ACT! Contacts

When creating a new contact in ACT! it is important to select the contact's country field before entering any of the contact's phone numbers. Once you have selected a country, you will be able to select from the existing set of phone masks for the contact's country when entering the phone number. By default ACT! will use the default phone mask to use in displaying the phone number on your contact layout.

If you don't select the contact's country, ACT! assumes the contact is in the same country as you're "My Record" contact and uses you're My Record's Country as the default.

Make sure when adding a contact in a country that doesn't have any masks defined yet that you define a new mask for the country and don't use the Free Form phone mask.

Updating Existing ACT! contacts to use Masks properly

Normally, ACT! contacts have been imported into your database from a variety of different sources. By default, ACT! will apply a "Free Form" mask to a phone number field when it is imported into the database.

To update an existing ACT! contact to properly use a phone mask, first make sure the contact's country field has been setup properly. Next you can click on the ellipsis button “...” next to each phone field and see what mask the phone field is using. If you change the mask from free form to a specific mask, make sure ACT! retains all of the numbers from the free form field. You may have to type the phone number back in correctly as to not lose any data when changing masks.

How Call On CRM matches your ACT! database records

When a new call comes into your Call On CRM application we use the available Caller ID information from the phone system to find a matching contact. If a Caller ID information is available, the phone number given by the caller id must first be parsed by our application to determine what country the call is from. Once the country of origin has been established, we take the phone number and format it with all of the masks defined in ACT! and then run a search against the ACT! database to find a matching contact.

Call On CRM is very efficient in locating a contact even in extremely large databases, with most searches taking less than a second to find a match. To make the search occur this quickly we rely on data being stored in ACT! in a specific way. If your phone numbers aren't stored in ACT! with any regularity, the reliability of the contact matching will degrade significantly.

Visual walkthrough of finding a contact with Call On CRM and ACT!

