

CallingNow[®]

Caller ID to Database Integration

User's Guide
Version 3.0



Spring 2010



beagle software

www.beaglesoft.com

Table of Contents

1.0 Introduction	2
2.0 Software Installation	3
3.0 CallingNow	4
4.0 Options.....	5
5.0 Caller Database.....	17
6.0 How it Works.....	23
7.0 Troubleshooting	24
8.0 Obtaining Technical Support.....	30
9.0 Beagle Software Contact Information	31

1.0 Introduction

CallingNow brings a new level of call visibility to your desktop. CallingNow lets you see who's calling and gives you options on how to display the information and how to act on it. CallingNow couples the standard caller ID information such as name and number with enhanced location information. When calls come in the caller's information pops up in a balloon. The database integration option lets you automatically 'pop' up a screen that matches the phone number to the caller. This lets you see detailed information about the caller before you even answer the phone. CallingNow lets you return the call.

CallingNow can work with external databases or Microsoft Outlook. CallingNow includes a SQL based contact manager database. . Outlook integration can tie caller ID information to your contacts in your Outlook database.

CallingNow:

- Marries caller ID to contact management on your computer.
- Gives you Real-Time Call Information presented to you on your desktop
- Tells you who's calling and lets you decide what to do before you answer the call.

Features:

- Caller ID Shows incoming enhanced caller ID information in system tray, on desktop
- Screen Pop Can coordinate to popup a screen in Outlook or a database.
- Call Back Permits you on-click call back.
- Call logs stores caller information.

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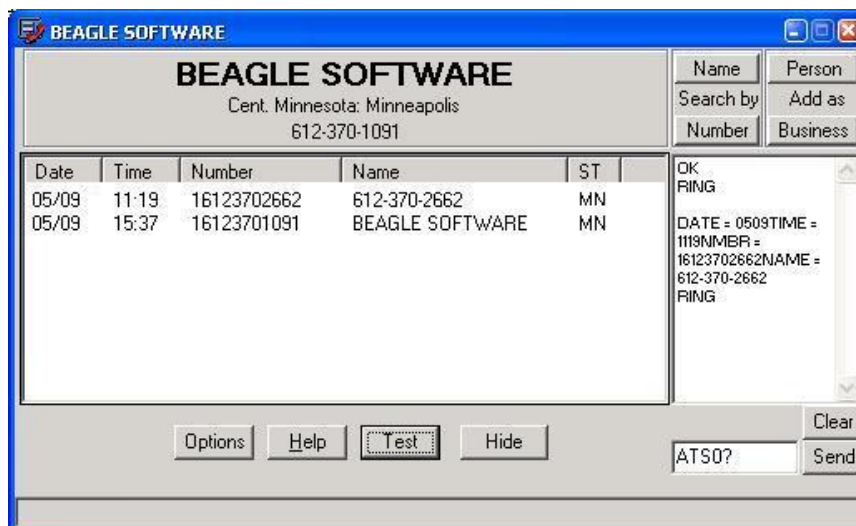
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2.0 Software Installation

From CD:

1. Place the CD in the drive and allow it to run automatically. If autorun fails, choose the **Start** menu, select the **Run** command and enter **x:\Setup** in the Run box (replace 'x' with CD-ROM drive letter, usually 'D' or 'E').
2. Follow the instructions from the CallingNow installation wizard.
3. If asked for a key code, enter the code *exactly* as printed **on the sticker on the CD envelope** (or from your confirmation email). Enter this code on the registration page of the install wizard, or if you are already running CallingNow choose the **Register** option under the **Help** menu.
4. You will be guided through a series of screens. You can customize your installation, but Beagle Software recommends choosing the default selections.
5. When installation is complete, start CallingNow from the **Start/Programs/Beagle Software/CallingNow** menu.
6. CallingNow will display a message to inform you that it is initializing options for the first time.

Note: You can install CallingNow directly over a previously installed version. Some CallingNow options have changed, so you may need to reset some time setting or display options.



3.0 The CallingNow Main Screen

The main display shows a list of incoming calls with the caller ID information provided with the call. This includes the date and time of the call, the phone number and name associated with the number. CallingNow adds the location based on the area code. The top of the screen shows the most recent call.

Main screen buttons:

- Test** - Simulate a call coming in.
- Hide** - Hide CallingNow in the system tray.
- Options** - Open options screen.
- Help** - Open online help.

Database options buttons:

- Search by** -
 - Number** - Search database by phone number.
 - Name** - Search database by name.
- Call** - Return call using modem or TAPI.
- Delete** - Delete call from the list.
- Options** - Open the options screen.

Modem Output Area:

Send to Modem - Send a command or a string to the modem. Useful in checking or setting options in modem.

Tip: The default send value "ATS0?" queries the modem on how many rings to wait before answering the call. A response of "000" indicates that the modem will never answer the call.

Clear - clears the modem trace screen.

3.1 Guide to the Menus

Menu options for Call List (right click)

Add to Database

Person - Add the call to the database as a person. The name is treated as a persons name and the phone number is assumed to be home phone number.

Business - Add the call to the database as a business. The name is treated as a business name and the phone number is assumed to be a business phone

number.

Edit Call Record - Edit the call record before adding it to the database or performing a search.

Search by-

Number - Do a search by the full phone number.

Name - Do a search by the first word of the name.

Note: for more search by name or number options press the **Search by** label.

Call Back - Call the number using the selected call service

Delete Call record - Delete the call from the list.

Options - Open the options screen.

System tray menu options (right click):

When minimized (or if you press the hide button), CallingNow resides in the system tray (in the lower right corner of the display). Left clicking the icon once will return CallingNow to the desktop. Right clicking on the icon will give the following menu options:

Show Calls - Shows the call list.

Place Call - Calls the number shown using the selected phone service.

Options - Opens options screen.

4.0 Options

Customizing CallingNow to meet your needs

Set the options for CallingNow.

Choose from:

Setup

Database

Calling

Logging

About

Buttons:

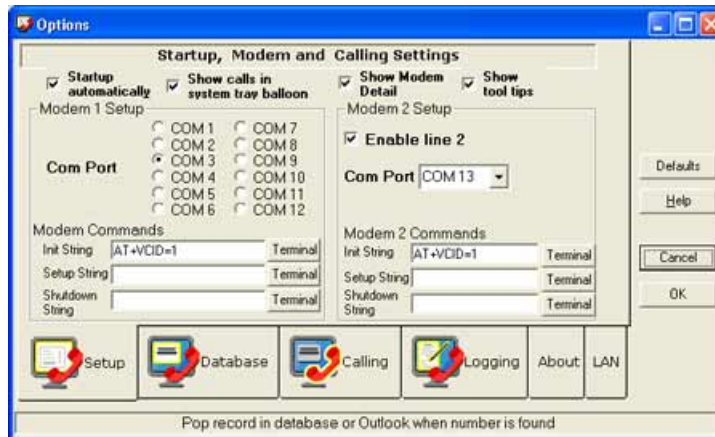
OK - Close form and save changes.

Cancel - Don't save changes.

Help - Open on-line help.

Defaults - Set to program default values.

4.1 Setup Tab



Show calls in system tray balloon - Show information in system tray balloon when calls come in .

Startup automatically - Start CallingNow automatically when you log into Windows.

Modem Setup (Modems 1 + 2)

Modem Init String - Initialization string for modem. The default value sets modem to give caller ID information.

Setup String - optional commands to send to the phone line when starting CallingNow. Commands can be sent by the modem to change call forwarding, etc.

Shutdown String - optional commands to send to the phone line when stopping CallingNow. Commands can be sent by the modem to reset call forwarding, etc.

Com Port (COM 1 ... COM 12) - Communication (serial) port used by caller ID modem. If you are unsure which COM your modem is using, check the "Phone and Modem" applet in the Windows Control Panel. Select the number of the com port in use by the modem.

Terminal - Opens modem test screen.

Show Modem Detail - Display the modem trace on the main screen as calls come in.

4.2 Database Tab

External Database - Tie calls to External Database.

Outlook -Tie calls to Outlook Contact Records.

None – Do not tie in with external database.

Screen pop record when found - Pop up contact record if found in the Database or Outlook. Searches database for a matching phone number.

Web Browser search string – Search string to use with web browser search. This string is combined with the phone number to format a query to send to a search engine.

External Database Options:

DB application directory - Directory where DB application is located. Ends in '\'

DB Program - Program name of the DB application. The application typically end in .exe and is a front end to the database.

DB Arguments - Command line arguments to start database application (if any).

Test - Open the DB using the path, name and arguments specified.

4.2.1 Starting a DB Application from CallingNow

CallingNow has the capability of starting a remote database application to pop screens or access call records. CallingNow can pass information to a DB application via the Windows command line. This is similar to starting the application via the “Run” command under the main Windows Start menu. Command line arguments tell the receiving application what kind of data is being sent and what to do with it.

The following fields in the database option screen are used to pass search arguments to a DB application via the Windows command line. After starting the DB application, it would be expected to parse the command line argument and the search string. The demoDB is preconfigured to accept the default values of the search and add arguments.

4.2.2 Search and Add Options

Default Action—Select what kind of DB action you want

CallingNow to perform when a call comes in. You can either search for an existing record or add a new record on each call. Normally a search is done by phone number (this is the default value). This assumes that your database is searchable by phone number. Alternatively you have the ability to search by name or location (state). Alternatively, you can choose to add every call to the database either as a person or as a business.

Search by Number - Command line arguments sent to DB app to search by phone number. The number is passed following the option.

Search by Name - Command line arguments sent to DB app to search by name. The name is passed following the option.

Search by Location - Command line arguments sent to DB app to search by location. The location is passed following the option.

Add as Person - Name or location arguments. Character to replace spaces in number, name or location arguments. The name is passed to the DB.

Add as Business - Command line argument sent to DB app to add call as a business. The name is also passed to the DB.

Replace blank spaces with ... - Character to replace spaces in phone number, name, or location. This is used to give the argument a single continuous string. It would be converted back to spaces in the database handling application. For example, "Beagle Software" becomes "Beagle~Software" when the default replacement character is used.

4.3 Calling Tab

CallingNow can launch return calls with a simple right click by the phone number on the call list. CallingNow will dial the number using either the built in modem or TAPI services running on the computer.

The Telephony Application Programming Interface (TAPI) is an API, which enables PCs running Microsoft Windows to use telephone services. This is a standard that allows applications to easily use serial devices (such as modems) that have already been configured in Windows. TAPI can use either the CallingNow modem or another phone capable device.

Note: TAPI setup is done from the "Dialing Rules" tab of the "Phone and Modem Setup" applet in the Windows Control Panel.

Calling Service:

TAPI - Use the TAPI services installed on the computer to make calls.

Modem - Use the caller ID modem for dialing the number.

TAPI Info - Shows TAPI location information and provides a quick check to see if TAPI is installed on the computer.

Test - Tests the calling service selected by placing a call. For more information see TAPI troubleshooting.

4.4 Logging Tab

CallingNow can log all incoming call activity to the file selected. This gives you a record of call date and time, caller number, name and caller state. The information is logged whenever caller ID information is delivered, regardless if the phone was answered.

Log - Saves calls to file when checked.

Log File - Specifies the file name of the call log.

View - Opens the call list in notepad.

Run Diagnostic Trace - Enables diagnostic tracing which gives a detailed trace useful in troubleshooting by Beagle Software support.

Test String - Set a sample string used to simulate an incoming call from the Test button on main screen. Useful in demonstrating screen pop and verifying connection with external database.

Database Lookup Screen

The database search form lets you find records in your database searching by phone number, name or location. From this form you can also search the web.

Controls:

Number search by number

You can search by full number, area code only or area code and exchange.

Tip: larger entities, such as businesses, often use blocks of numbers using the same area code, exchange and first number

(ie 612-370 -9300...-9399), Searching by area code and exchange can often find records already in the database within the same number block

Name search DB by name

You can search by full name or first, second or third part of the name.

Tip: Caller ID often has truncates or abbreviates the names of individuals or entities.

- Location search DB by location
- DB opens database
- Do search on web.

Outlook Lookup Screen

This form is the main screen for watching the call information.

Lookup Contact in Outlook

The Outlook lookup form lets you find contacts in Outlook searching by phone number or name. This form you also allows you to search the web for information matching the calling information.

Controls:

Search Name look for the name in Outlook.
Search Number look for the phone number in Outlook
Search Sub String lookup a portion of name in contacts
Search Web search the web for phone number

Edit Call Screen

Edit call specific information including number or name. Useful when modifying a call record prior to calling back a number or adding to a database.

Controls:

- **Number** – edit the call number
- **Name** – edit the call name
- **OK** save the changes
- **Cancel** cancel the changes

Modem Test

Modem Test lets you test the modem by sending and receiving characters.

The Modem Test is a simple terminal applet that opens the communications port allowing direct communication with the modem. This screen allows you to test the commands and handshaking that will be used for the CallingNow. This screen will attempt to open a connection to the modem, with the settings taken from the Setup options screen. Once the port is opened, the user can send commands directly to the modem and wait for a response. This screen is available from 'Test' button in the setup options screen.

Steps to use the Modem Test:

Select the port and handshaking settings in Setup Options form.

Press the **Test** button on that form.

The Modem Test Screen will open and the connection between the modem and the communications port will be opened. If an error message appears when the form is opened, then the port number or handshaking settings may be wrong.

Type a command in the Input box (i.e. **AT**).

Press the **Send** button – the command will be sent to the modem.

The response from the modem will be shown in the large box. Typically, the modem will respond by echoing the command you sent, and an 'OK' acknowledging the command.

If nothing is returned (no 'OK') then the connection settings are likely wrong.

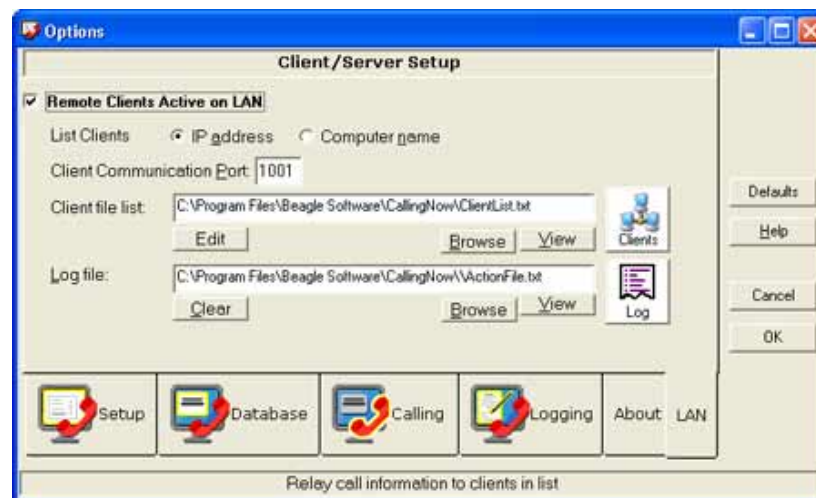
If there is no response from the modem:

The communications port (com port) number may be wrong in the Setup Options form. Verify the connection to the modem in the **Modem->Diagnostics** tab in the Windows control panel.

A modem has not been installed or is not turned on.

LAN Tab (Client/Server Version)

Client/Server settings for enabling remote relay clients in CallingNow.



Remote Clients Active on LAN Check this to enable communication with clients on your network. Clients are administered from the client list.

List Clients by -

P Address – If clients will be listed in CallingNow Server by IP address

Computer name - If clients will be listed in CallingNow Server by computer or network name

Client Communication Port Number - Specify the port number used to communicate with CallingNow Clients. The default value is 1001. CallingNow Clients normally listen for instructions from CallingNow Server. This port connects with the client.

Client file list

Shows the path and file name of the current client list. (i.e.

C:\Program Files\Beagle Software\CallingNow\clientlist.txt) This is the file used by CallingNow to keep track of clients accessed by the Server.

Edit - opens up the client list.

Log file: Records every non-time function or event that occurs for each client.

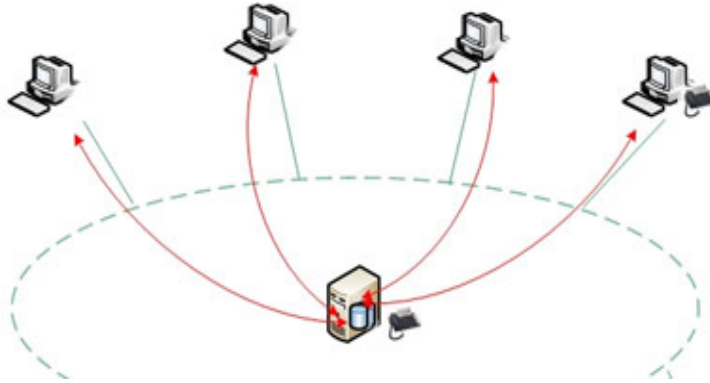
File name of action log: Contains the full file name and path of the action log file. (i.e. C:\Program Files\Beagle Software\CallingNow\eventlog.txt)

View: Runs the report and opens up the log using Windows Notepad.

Browse: find the file to use for logging

Client/Server version

With Client/Server functionality allows you to have call ID information on multiple computers on your network. With Client/Server you can have CallingNow pop screens on remote computers, no physical phone connection is required. Remote computers act as a slave, so when a call comes in the main CallingNow computer (the server) relays the call information to the remote (Client/Computer).



How it works

The call rings a modem installed in the computer running CallingNow Server. CallingNow Server shows the call information on the host computer and relays the call information to other computers on the network. Caller ID information can be shown simultaneously on multiple CallingNow Client desktops. CallingNow can also open a customer/order database to further aid in identifying the caller.

Benefits of CallingNow Client/Server

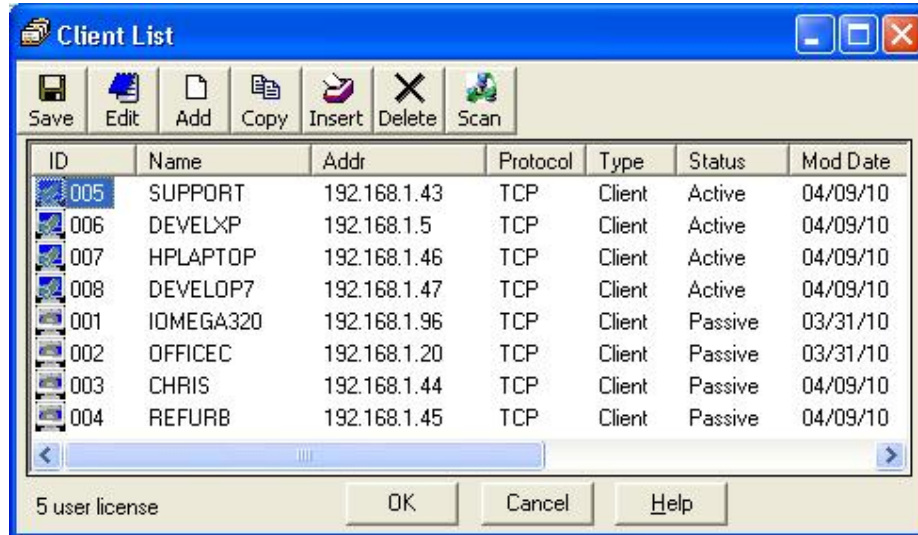
- Pop screens on a remote computer without installing telephones, phone lines or modems
- Gives call visibility over an entire office
- Works with any type of phone system
- Software only solution, no extra cabling or hardware required
- Presents calls without a ringing phone
- Caller ID at the desktop

Installation Steps

- Install CallingNow Server a computer equipment with a Caller ID modem
- Install the CallingNow Client software on the intended computers on the network
- Register the Clients on Calling now server by adding them to the client list.

Client List (Client/Server)

Shows the list of clients registered with the CallingNow Server. Clients are active after they are added. To select a client in the list, double click any column in the row.



Note: Each client requires a separate license. Client licenses can be purchased individually or in a bundle.

Toolbar

The Client List toolbar contains the options for adding, editing and removing the clients accessed from the CallingNow Server.:

Save Save the changes to the current client list.

Edit Edit the name, location or protocol of the client.

Add Add a new client at the end of the list.

Copy Create a copy of the highlighted client below the existing client.

Insert Insert a new client immediately below the current client.

Delete Delete the client from the list.

Client List Columns

ID – Sequential index number in current directory. This number is assigned when the directory editor is started. If you change the order of the clients, then the next time the client editor is opened the numbering of the servers will reflect the new order.

Name – Network name of the client

Address – IP address of the client.

Protocol – Protocol used to communicate with client.

Type – Client.

Status – Active, Passive or Inactive.

Status Date – Date of last status change.

Notes – optional annotation.

Last Call – Date last call occurred

Hints

- Expand the client list and form by dragging the left edge of the screen to the right.
- Selected clients can be deleted, copied, viewed or played from the toolbar, or by right-clicking with the mouse.
- Listing can be alphabetically sorted by any of the column headings by clicking on the column title.
- Double click the client to select the client to edit.
- A single right click of the mouse will give the client edit options in a pop-up context menu.

OK Update the current list with the changes.

Cancel Press to cancel any changes made to the list and return.

Help Press for on-line help.

Client Edit Screen (Client/Server)

The Edit server screen permits users to add new or edit clients in the list. Pressing the Add or Edit button on the Directory toolbar accesses this screen.

Edit Client

Client name: SUPPORT Find IP

IP Address: 192.168.1.43

MAC addr:

Client Protocol: TCP

Active Client
 Passive
 Inactive

Notes: support call center

Test OK Cancel Help

Notes or comments

Client name—Enter the Name of the client (i.e. SALES) .

IP Address

Enter the full IP address of the client (i.e. 192.123.22.34)

Find It – look up the IP address using the client's name.

Client Protocol

Select the time-sync protocol used to communicate with CallingNow Client. The choices are:

- **TCP** TCP internet protocol. Default setting.
- **UDP**

Notes:

- Protocol must be the same on both CallingNow Server and Client.
- Use UDP protocol if TCP is unavailable or has problems
- Port number is an application wide setting and is set in the [Options-> LAN screen](#)

Active/Passive/Inactive

shows if client is currently active and in use by CallingNow. A client is considered either *Active* (running Client), *Passive* (visible on the network but not running Client), or *Inactive* – disabled or not visible on the network.

Notes: Optional field to identify location of the client, i.e.:
Receptionist desk

5.0 Caller Database

The demoDB is a fully functional contact manger with a form based front end and SQL based database backend.



The contact manager contains the common contact fields (name, address, phone etc) and includes a clipboard field parser for inserting information from other sources. Search options include a simple text based search form as well as SQL query form generator. The demoDB can be easily integrated with the CallingNow caller ID middleware to allow screen pops based on matched phone numbers. This allows for a pop up of a contact record when a phone call comes in.

5.1 Main Database Form

Main name and contact information screen for database.

Buttons:

Add - Add a new name.

Delete - Delete the current name.

Update - Update the current name.

Close - Exit the program.

Search - Search for names or strings.

ID - ID number for this name. This number is unique for each record.

Field Detail:

First Name - Person's first name.

Last Name - Person's last name.

Street - Complete street address.

City - City name.

ST - State, County, or Province

Zip code - Zip or Postal code.

Business Name - Name of Business or Organization.

Country - Country name.

Past Calls - To look at past calls for this person.

Cell - Cell phone number.

Home Phone - Home phone number.

Work Phone - Work phone number w/ extension. Format for extension or auto attendant: x-123

Fax Phone fax number (for auto attendant: x-123)

E-mail complete E-mail address.

URL Web address.

Notes Notes and comments.

Tip: clicking on the field label will copy the contents of that field into the clipboard.

Contact Type:

Friend

Business Relationship

Customer

Prospect

Menus:

File:

Add - Add a new blank record to the database.

Update - Update current record.

Exit - Exit the Database Program.

Edit:

Delete

Search

Copy:

Mailing Label - Copies the person's name and address into the clipboard.

E Mail - Copies the email address into the clipboard.

Phone Numbers - Copies the phone numbers into the clipboard.

Scratch Pad - Allows you to individually select fields to copy

Clone Address - Make a copy of all fields in record (typically used with Paste->Clone)

Paste:

Paste from clipboard - Opens up the paste from clipboard screen.

Paste from clone - Paste cloned record into current record (fields will be replaced) See Clone Address above.

Calls:

Dial

Past Calls

Options:

Opens option screen

Tools:

Outlook - Allows you to add contacts or tasks from the current record.

Add Outlook Task - Add contact information to Outlook as a task. Opens a new Outlook task and inserts contact information. You can further edit the task before saving.

Add to Outlook Contacts - Creates a new contact in Outlook and inserts contact information.

Help:**Help Topics****About** - Details about the Database Application

5.2 Search Form

Search the demo DB for matching pieces of information

Search button - Start search

Search Tip: Use *, ? for wildcards. For example, if searching for 10 Main Street you could enter *Main* which would return all fields with 'main' in them. The search is case insensitive. If the query returns more than one match then all of the matches will be shown (1 by 1).

Check boxes: - Qualifies search**prospects** - Search prospects only.**customers** - Search customers only.**all fields** - Search all fields, including numeric and date fields.**Menus:****File:****Options** - Opens options form.**New:****Name** - Creates a new blank name in database and opens the insert fields from clipboard form.**Search:****SQL** - Opens the SQL query form.**MS Access** - Opens Microsoft Access (if installed).

5.3 SQL Query Form

The SQL Query form lets you compose and edit a custom SQL query for finding records in the demoDB. With it you can generate a complex search to select a specific subset of records. You can use it to find a sequence, or range matching several criteria at once. For example you can find all callers in a certain range of zip codes, or callers created over a certain range of dates.

Use this tool to generate a valid SQL query and then search the database and return fields in the name form.

Address - Select from the name table

Query Edit Area – compose the query here.

Query generator:

Where - Specify a selection clause.

Field pull down - Choose the table field you want to select by.

Operator pull down - Select the relational operator for the field and value.

Value pull down - Enter a value to use for the selection.

Order by - Specify a sorting clause.

Field pull down - Choose the table field you want to add to the query.

Add - Press to add field to query in editor.

Clear - Press to clear the query window.

Save - Save the current query.

Open - Open a saved query.

Search - Press to start search with the current query.

Cancel - Press to close this form.

Parse fields from Clipboard

You can import records into the demo DB quickly using by copying the information and then pasting it into the clipboard parse utility. Use this form to copy information from somewhere else and paste it into the proper fields of the demo contact manager.

From the 'Edit' menu select 'Paste' and then paste information into the form from clipboard. The utility will then attempt to parse the information into the correct fields to be inserted into the form.

To use the parser:

1. Paste data into clipboard
2. Choose the format of the data
3. Press the 'Fill' button to parse the fields and guess the field type
4. Correct or edit the parsed fields
5. Press 'OK' to copy fields into form

Controls:

Format pull down - Choose the format (name, title, company etc) of the data in the clipboard.

Data fields - Data to insert into fields on form.

Field type pull down - Select which field the data (on the right) goes in.

Colon delimited - Check if each field is preceded by a field identifier and a colon.

Fill - Parse the data, fill the data fields and guess the field type.

Guess - Guess the type of field based on format, order and data contents.

OK - Insert the fields into the form.

Cancel - Cancel field parse and insertion.

5.4 Call Log / Dialer

Use the attached modem to dial a number and record information about the call.

Command Buttons:

Dial - Dial number now.

Talk - Switch from modem to phone.

Hang Up - Hang up modem dialer.

Add - Add a new call record.

Delete - Delete the current call record.

Close - Close this form and return to main screen.

Update - Update the current call record.

Task - Create a task in Microsoft Outlook.

Past Calls - Review past calls for this Name ID.

Fields:

Name ID - Contact ID number from main screen.

Call ID - The ID assigned to this call.

Call Number - Number you are calling.

Call Contact - Name of person you are calling.

Call Comments - Notes for this call.

Time Start - Time the call was begun.

Time Stop - Time call stopped (system generated.)

Business Call - Is this a business call?.

Dial Code - Long distance access code, if used.

Area Code - Local area code.

Modem Options:

COM 1..COM6 - To select the modem COM Port

5.5 Past Calls

View a list of past calls made from within the contact DB

Past Calls:

Close - Close this screen and return to previous.

Update - Update the current record in grid.

Delete - Delete the current record in grid.

Business Name - Company name.

First Name - First name.

Last Name - Last Name

ID - Contact ID from main screen.

5.6 DB Options Screen

Options for the demo DB:

Standard Database - Database you normally use. Include the full path and file name (i.e. c:\Files\mydb.mdb)

Actual Database in user - Database you are currently using. Include the full path and file name.

Note: If the standard and actual databases are not the same then demoDB will warn you that they are different whenever you start the application.

Time Zone - Select the local time zone. Used for displaying the database modification time, which is normally kept in terms of UTC (GMT).

Show tool tips - Show tool tips when the mouse is places over the field or button on the form.

6.0 How CallingNow Works

CallingNow gathers caller ID information that is delivered between the first and second ring of the phone. Caller ID information occurs part of the signaling and is not dependent on the phone being answered for delivery. CallingNow takes the name and number information and finds the location they are calling from. It also does a lookup in the contact database looking for a match to display on the screen, if desired.

Caller ID

Caller ID uses Frequency Shift Keying to transmit bits over a phone line. FSK is

extremely simple: One tone (or frequency, like 1,200 Hertz) represents a binary 1, while another tone (like 2,200 Hertz) represents a binary zero. A modem



changes frequencies depending on whether it wants to send a 1 or a 0. How quickly it changes frequencies determines the speed, or baud rate, of the modem.

To send caller ID information to your desktop, the phone company uses an FSK technique identical to a 1,200 baud modem and it sends ASCII character data to the caller ID modem. The caller ID message is sent between the first and second ring.

If you listened to the phone line just after the first ring, you would hear a "bleeep" sound about half a second long. If you decoded the bleep, you would find that it contains (in the simpler of the caller ID systems):

- A series of alternating 1s and 0s to help the caller ID box get the timing down
- A series of 180 1s
- A byte representing the type of message
- A byte representing the length of the message
- Month, day, hour and minute, each represented with a pair of bytes
- The 10 digit phone number in 10 bytes
- The name of the caller
- A checksum byte

CallingNow and Screen 'Pops'

The information is then passed to the CallingNow program. CallingNow parses the information and checks it for validity. It then passes it to a database program such as the demo database or Outlook. If the phone number is found the contact record is displayed (or 'popped') automatically. CallingNow logs the caller ID information.

If the caller record is not found, CallingNow has the ability to add the information to the external database.

7.0 Troubleshooting

Problem	Description	Next Steps
Screen blank with all calls	No Information Shown with Call	No caller ID information available for call Call answered before 2 nd ring Caller ID is not enabled for the phone line. Phone line is not plugged into modem. Wrong COM port is selected in options. Modem has not been properly initialized.
Call information is blocked on certain call	Call doesn't contain data	If the words "private," "anonymous," or a variation displays, your caller has chosen to prevent the display of their calling information. "Out of area" indicates the caller is phoning from an area not equipped for Caller ID, such as cellular, some businesses, and some long distance areas.
Screen will not pop Database	Incoming call comes, data is shown but no screen is popped	Record not in database Phone number different than one in database No database selected Outlook Express will not work with
Screen will not pop Outlook	Incoming call comes, data is shown but no contact screen is popped in Outlook	Record not in Outlook Contact Phone number different than one in outlook Outlook not selected in CallingNow Outlook Express in use – CallingNow will not work with Outlook Express.
Phone won't dial with TAPI	TAPI not configured	Open the TAPI dialer. By default, Phone Dialer is not added to the Windows Communication menu. To open Phone Dialer: 1/ click the Start button 2/ from the Start menu click Run 3/ in the Run dialog box type: dialer.exe and press Enter 4/ the dialer application will now open. This should also start the Telephony service in Windows, if not currently running. 5/ check the Edit->Options->Lines options for verifying dialing and device types 6/ Try dialing a call from Phone Dialer. If the call fails then check to see that the Telephony service is running in the Windows service manager (Administrative Tasks->Services). The Telephony service provides TAPI support for programs that control telephony devices and IP based voice connections on the local computer and, through the LAN, on servers that are also running the service. It must be running for TAPI to function.

How to run the diagnostic routine

You can run CallingNow in the diagnostic mode by checking the “Run Diagnostic Trace” in the Options->Logging screen. This provides a trace log to pinpoint problems.

How to remove the software

Removing CallingNow from a system will remove all executables, help files, log files, registry settings and DLLs that are registered exclusively to CallingNow. To remove CallingNow you need to use the uninstall utility provided with the software:

1. Exit CallingNow, stop all background instances of CallingNow, including services.
2. Select the **Uninstall** program (uninstall.exe) from the **Programs→Beagle Software>CallingNow** directory.
3. Follow the uninstall wizard. Accept the defaults.

If asked if you want to remove shared DLLs, it is safest not to remove them in case they are in use by another program.

7.1 Modem Troubleshooting

If purchasing CallingNow with a Caller ID modem, the software is preconfigured to work with this modem. CallingNow will also work with a variety of other Caller ID enabled modems. This includes several modems with the Intel chipset as well as 3COM and US Robotics modems. Not all modems support Caller ID. If in doubt, check your modem’s documentation or contact the manufacturer.

To test your modems Caller ID capability you send it a command to enable caller ID detection. To do this you need a terminal program such as HyperTerminal which is included in Windows.

Note: you can also use the built in modem terminal, accessible from **Terminal** button on the **Options->Setup** screen

1. Open HyperTerminal (Start Menu->Accessories>Communications>HyperTerminal)
2. Click the HyperTerminal. icon
3. For a profile name, enter **CALLER ID**
4. Choose **OK**
5. From the **Connect Using** drop down box, pick your modem or "COMX" if you are using an external modem connected to a serial (COM) port X. Click **OK**

6. Choose **OK** on the Com Port Settings Screen

7. On the main HyperTerminal screen enter **ATZ** followed by the ENTER key You should get an *OK* immediately back from the modem (If you do not receive an *OK*, check to see that your modem is not in use by another program and verify that you selected the correct modem/COM port for your modem.)

8. Then enter **AT+VCID=1** followed by ENTER key. You should receive an *OK* from the modem. If you do not receive an *OK*, try the additional command codes in step 9.

9. You may substitute one of the following command codes in place of AT+VCID=1 in step 8.

```
AT#CID=1  
AT%CCID=1  
AT+VCID=1  
AT#CC1  
AT*IC1
```

If one of these commands works with your modem then you must enter this command (used as a initialization string) in the CallingNow **Options->Setup** screen under **Modem Init String**.

If all these command codes fail check your modem documentation for commands that may work. Your modem may not support caller id.

10. Place a call to your modem and your modem should show caller id data something like this:

```
RING  
RING  
DATE = 0815  
TIME = 1530  
NMBR = 16123702662  
NAME = BEAGLESOFT  
RING
```

If you get something different than DATE, TIME, NMBR and NAME ID labels please let us know. CallingNow software will currently only work with these standard caller ID labels.

11. It's a good idea to verify that the modem will never actually answer the phone. To check the answer modem setting enter **ATSO?** The modem will return the number of rings it is set to answer to - it should be 0 (never answer). To set the modem to never answer the phone, enter **ATSO= 0**

7.2 Client Test (Client/Server)

This form is the base test screen for conducting client communication tests.

Test	Protocol	T/U	Port	Gd/Bd	Remarks
<input checked="" type="checkbox"/>	Resolve name			<input checked="" type="checkbox"/> 192.168.1.5	OK
<input checked="" type="checkbox"/>	ping			<input checked="" type="checkbox"/> Trip time: 0 msec	
<input checked="" type="checkbox"/>	TCP	TCP	1001	<input checked="" type="checkbox"/> OK	
<input type="checkbox"/>	UDP	UDP	1001	<input type="checkbox"/>	

Test Features

- Checks client access and connection with 4 different tests.
- Includes name lookup test and ping test to check for basic accessibility of the client.

The client test lets you check both the connection and the capability of local or remote clients. Compatibility and connection problems can be diagnosed using the built in 4-point connection test.

Client Section

Current settings in CallingNow.

Address

Name of the client. This is the name that will be used for testing.

Port

Number of TCP or UDP port used to communicate with client.

Test Request Section

Choose tests to run on client.

Test Check to select the individual test

Tests Available:

Resolve name

Check that network name can be resolved to an IP address.

Ping

Common connection test to verify connection to a remote client. The ping utility uses the ICMP echo request and echo reply packets to determine whether a particular IP system on a network is functional.

UDP

UDP protocol used to communicate with client using given port number. See the TCP test above for interpreting test results.

Protocol

Name of the test to run.

T/U

Whether the test uses a TCP or UDP type connection.

Port

Port number used to communicate with client in test. Unless configuring behind a proxy server, accept the default.

X

Toggle all tests on or off.

Test button

Start to run the tests selected from top to bottom.

Cancel button

Cancel any remaining tests (will finish current test).

Timeout Interval

Interval in seconds to wait for the client to respond for each test. If the client does not respond within the interval, then the test fails.

Test Results Section

Shows the results of the communications tests.

Pass (Gd) Test Checkmark

The client has responded to the test with the appropriate response.

Fail (Bd) Test Checkmark

The client has failed to respond to the test on the port specified, or the response was in an unexpected format.

Remarks/Data

The string returned by the client or the results of the test.

7.3 Troubleshooting Client/Server

The LAN Options specify if CallingNow Server will listen for Clients and, if so, will specify the port and protocol it uses.

Server Fails to Contact Client

- Check the licensing of the Server (see the “Exceeds License” message below).
- Check the address specified on the timeserver tab of the Client (run **ipconfig** from the DOS command line on the *Server* to determine the Server’s IP address). Try the IP address instead of the server name.
- Check that the port and the protocol are the same on both the Server’s LAN option tab and the Client’s LAN option tab.
- Check the communication (**ping** from the Client to the Server using the address).
- Check that the port is available for use by CallingNow (run **netstat -a** from the DOS command line on both client and server for a listing of TCP and UDP ports currently in use).
- Use the Client Test to check if the server can communicate with the client and that the client software is running.

Clients get “Exceeds license” message

CallingNow Server must be licensed for each CallingNow Client in use. Contact Beagle Software to purchase additional licenses or to obtain an evaluation license for multiple clients.

Clients fail to Screen Pop when I press the “Test” button

The socket connection used to communicate with the Server and a specific client remains open for approximately 2 minutes after the client makes a time request. This is a Windows operational setting and individual clients must wait at least 2 minutes between successive time setting requests.

CallingNow won't relay call to client

- Check that the connection to the LAN is working by “pinging” the client.
- Client isn’t running
- Client/Server doesn't have the same settings for communication
- There is no LAN connection to the client selected

Log doesn't show anything”

- No call with a match has been made since startup.
- The log file has not been specified or is turned off
- Logging is off or no file has been specified to write the log to.
- File system is full.

‘Address in Use’ or ‘Can’t Reset Server’ Error Messages

- Is usually due to the TCP port that the Client-Server communication normally uses is being used by another application or otherwise unavailable. . If another application is using this port then CallingNow is unable to open it and complains.
- The port number can be changed on both Server and Client.

8.0 Obtaining Technical Support

Web site: www.callingnow.info

Consult our web site for the latest updates, technical information and documentation.

E-mail: support@callingnow.info
support@beaglesoftcom

Please be as specific as possible, including the program version and, if able, the steps to recreate the problem.

Phone: 612-370-1091

Refund Policy

In order to receive a refund on a product for the purchase price, the product must not have been damaged by the customer or by the courier chosen by the customer to return the goods. The product must be returned in complete condition, meaning that all cables, manuals, software, etc., are included. The product must be in as-new or re-saleable condition to qualify for refund. Refunds are not issued for shipping charges.

Restocking Charges

Product items returned within 30 days qualify for a full purchase price refund, assuming all qualifications listed above in Refund Policy are met. Items returned after 30 days and before 60 days of purchase will be subject to a minimum 20% restocking charge. Additional charges may apply for damaged or missing parts. Products returned after 60 from the date of purchase, or products that are not returned in as-new or re-saleable condition, do not qualify for refund or credit and will be returned to the customer.

Registered Version

One registered copy of CallingNow can be installed on a single workstation and used by one or more people.

Limited Warranty

Beagle Software warrants that this product will perform in accordance with the included documentation for a period of 180 days from the date of receipt and that Beagle Software will, at its own discretion, make commercially reasonable efforts to solve any problem issues. This Limited Warranty is void if failure of the software product has resulted from accident, abuse or misapplication.

Governing Law

This agreement shall be governed by the laws of the State of Minnesota, USA.

Limitation of Liability

THIS SOFTWARE AND THE ACCOMPANYING FILES ARE SOLD "AS IS" AND WITHOUT WARRANTIES AS TO PERFORMANCE OF MERCHANTABILITY OR ANY OTHER WARRANTIES WHETHER EXPRESSED OR IMPLIED. NO WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE IS OFFERED.

Good data processing procedure dictates that any program is thoroughly tested before relying on it. The user must assume the entire risk of using the program.

ANY LIABILITY OF THE SELLER WILL BE LIMITED EXCLUSIVELY TO PRODUCT REPLACEMENT OR REFUND OF PURCHASE PRICE.

Please refer to the complete Software License Agreement in the on-line help of CallingNow.

9.0 Beagle Software Information

Beagle Software, founded in May 1997, supplies innovative and useful Internet enabled Windows programs that bring the power of the Internet to the desktop of the user.

Beagle Software is located in Minneapolis, Minnesota, just slightly West of the Mississippi River.

Ordering Information

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sales@beaglesoftware.com

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Fax: 612-605-7138

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877-845-2549

beagle software

Time Synchronization Solutions

Beagle Software offers a complete line of premier time synchronization products.

Consult our Web Site for more information and updates.



www.beaglesoft.com

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