

Phone Manager Application Support

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APPLICATION SUPPORT



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Goldmine

Overview

This describes the features that are available when integrating with Goldmine.

Supported Versions

The following Goldmine versions are supported.

Version	Supported
Goldmine v7.0 (SQL)	
Goldmine v8.0 (SQL)	
Goldmine v9.2 (SQL)	
Goldmine v2013.1 (SQL)	
Goldmine v2014.2 (SQL)	

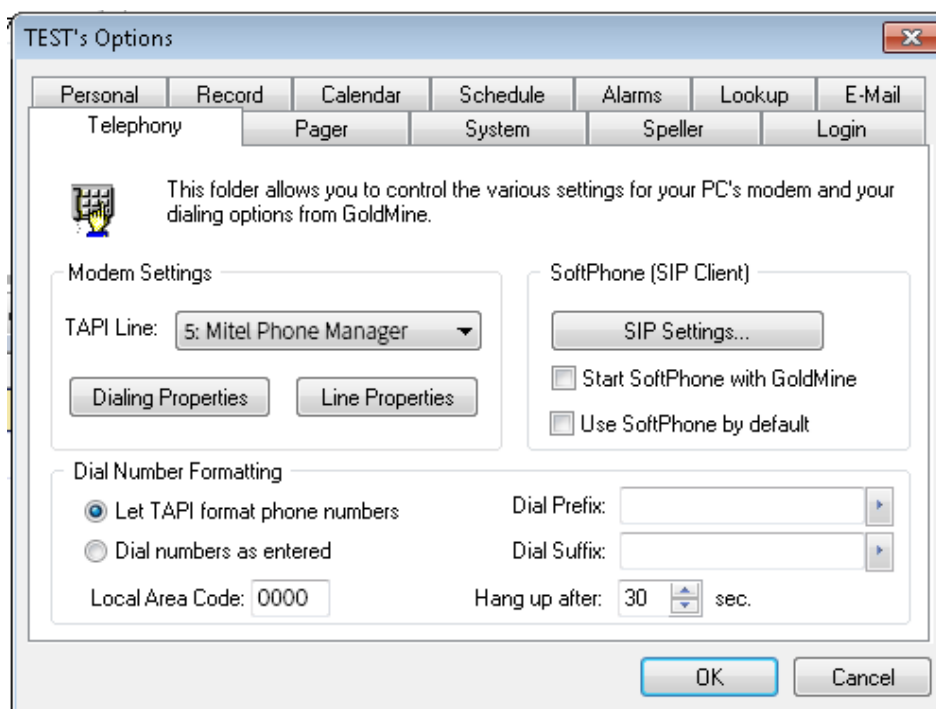
Features

Integration with Act! supports the features listed below:


- [Click to dial - TAPI](#)
- [Click to dial - GM+](#)
- [Screen pop for contacts](#)
- [Automatic call history entry](#)
- [Calendar & DND synchronisation](#)

Click to dial - TAPI

Goldmine supports dialling out directly from a Contact using the highlight and dial feature or using TAPI. To configure this within Goldmine from the *Tools -> Options* menu select the Telephony tab as shown.



Then select the Phone Manager TAPI option from the TAPI Line drop down box in the Modem Settings. Contacts can then be dialed by either right clicking on the Phone description field (i.e. Phone 1, Phone 2 or Phone 3) and selecting Dial or clicking on the button from the toolbar menu – this dials the Phone 1.

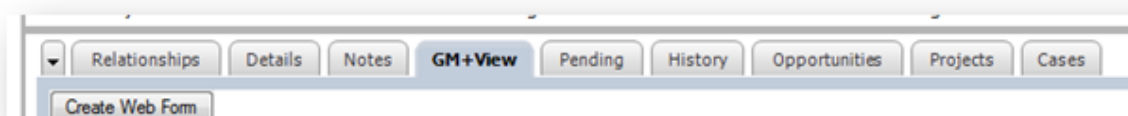
 See the Phone Manager User Guide for TAPI requirements

Click to dial - GM+

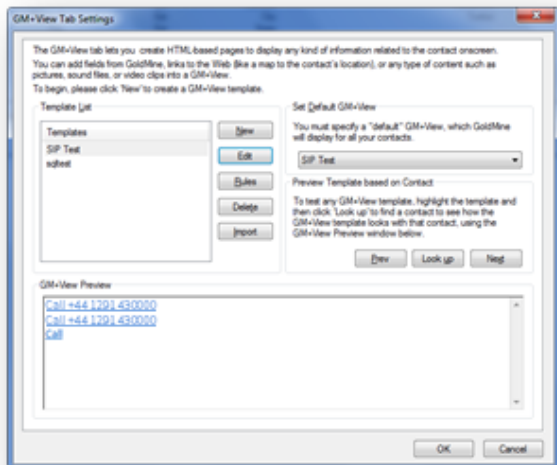
Goldmine supports dialling out directly using a GM+ View that converts the telephone numbers into clickable hyperlinks that call the number when selected.

When using Goldmine and TAPI for outbound dialling Goldmine displays additional dialogue boxes that "pop-up" within the Goldmine user interface, these additional dialogue boxes cannot be disabled within Goldmine. Using the GM+ View does not cause these boxes to be displayed or have any of the limitations of using TAPI, including unable to use in a multi-user environment.

GM+ Views once created change their content based upon the currently selected contact within Goldmine making it ideal for creating hyperlinks. GM+ View tab will need to be enabled by a Goldmine system administrator for clients, and can only be edited / created by a Goldmine Administrator.



The GM+ View tab can have multiple "Templates" associated with it, this allows the user to select which information they wish to see. These templates can be static or rules based. A full explanation of templates is NOT covered by this document.



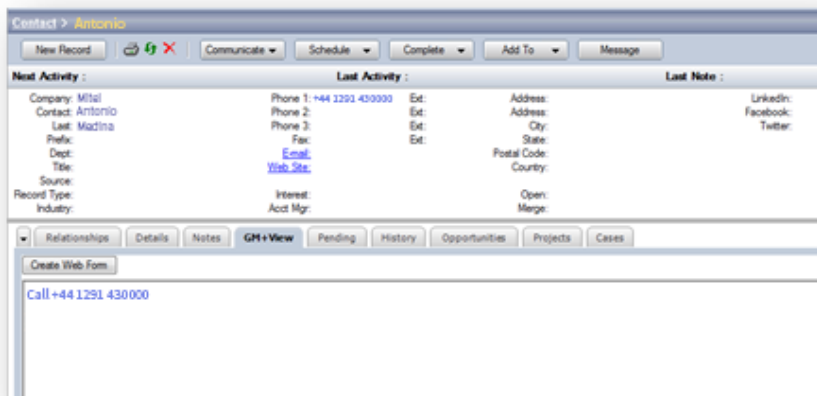
When creating a template you will be provided with the Goldmine template editor, the first step should be to click the HTML editor button to change it to its HTML editing view (Highlighted in red in the image below).



The following HTML snippet can be pasted into the editor:

```
<a href="sip://&lt;&lt;&amp;phone1&gt;&gt;">Call &lt;&lt;&amp;phone1&gt;&gt;</a>
```

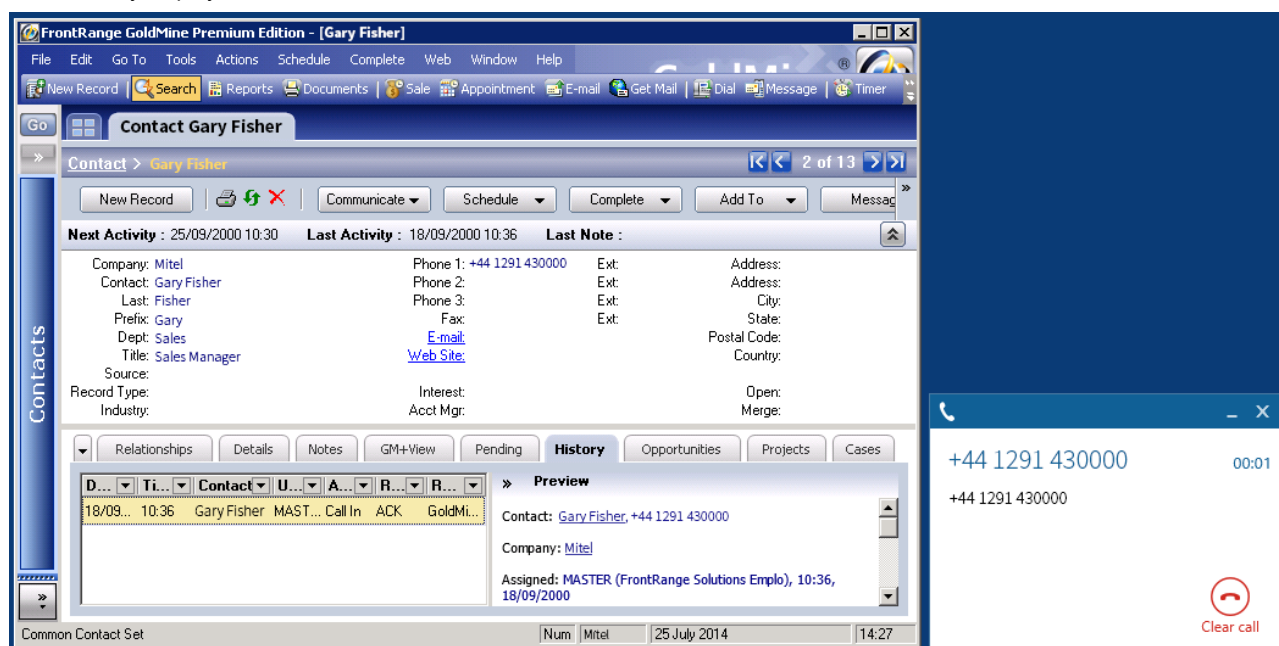
This snippet when viewed via the GM+ View in Goldmine will provide a SIP URI link containing the phone number contained in the Phone1 field of the current contact, and will dynamically change based on the selected contact. Addition entries can be added to the GM+ View template containing Phone2, Phone3 fields from Goldmine by editing the above examples substituting phone1 with either phone2 or phone3. If a phone field has no number then a blank call entry will be shown.



Screen pop for contacts

The Goldmine contacts can be screen popped directly within Goldmine when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching contacts that have this number. For example an inbound call is received from 02071975186 as shown on the toaster. The plugin performs a search on the contacts to find any records that have matching telephone numbers. A match was found and the contact record was

automatically displayed.



If multiple matches are found then the first Contact found with this telephone number will be displayed.

Contact fields

The range of telephone numbers that are to be searched for can be configured. By default the common telephone number fields are pre selected.

Field Name	Enabled?
Account Number	
Phone 1	
Phone 2	
Fax Number	
All Telephone Fields	

Telephone number formats

Goldmine does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

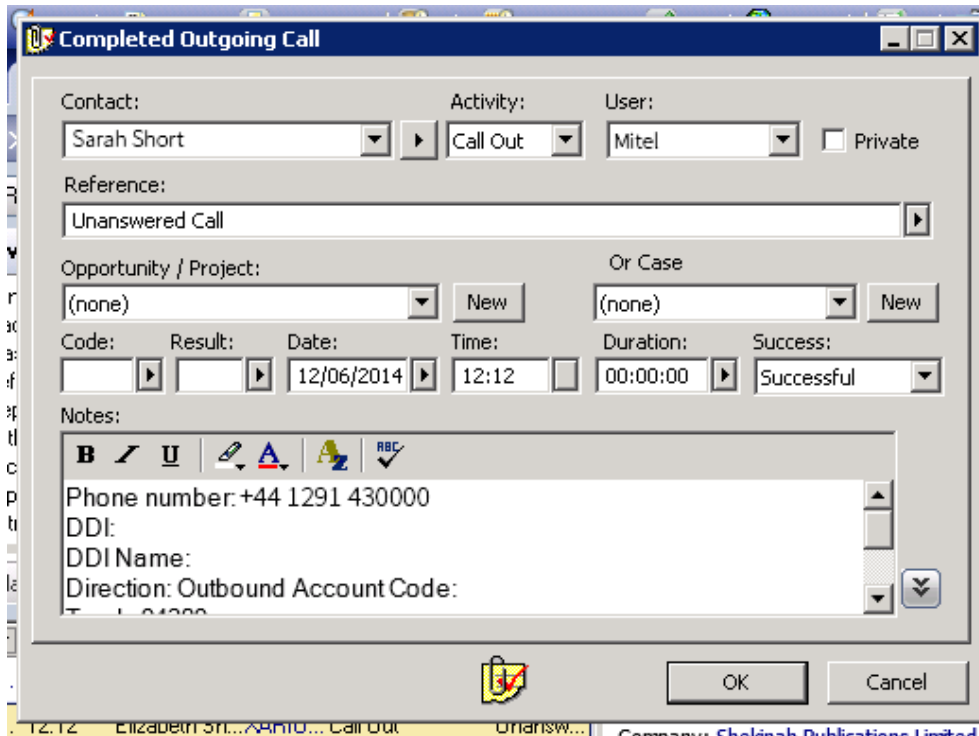
US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210

1(987) 654-3210	(987)654-3210		
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Automatic call history entry

Phone Manager can work with the History within Goldmine and can have *Call Completed* entries automatically created for calls made or received by the User when a match has been found to an entry in their contacts. The contact to associate with this is found using the caller id received or dialled number.

The notes section of the call entry is populated with the information shown.

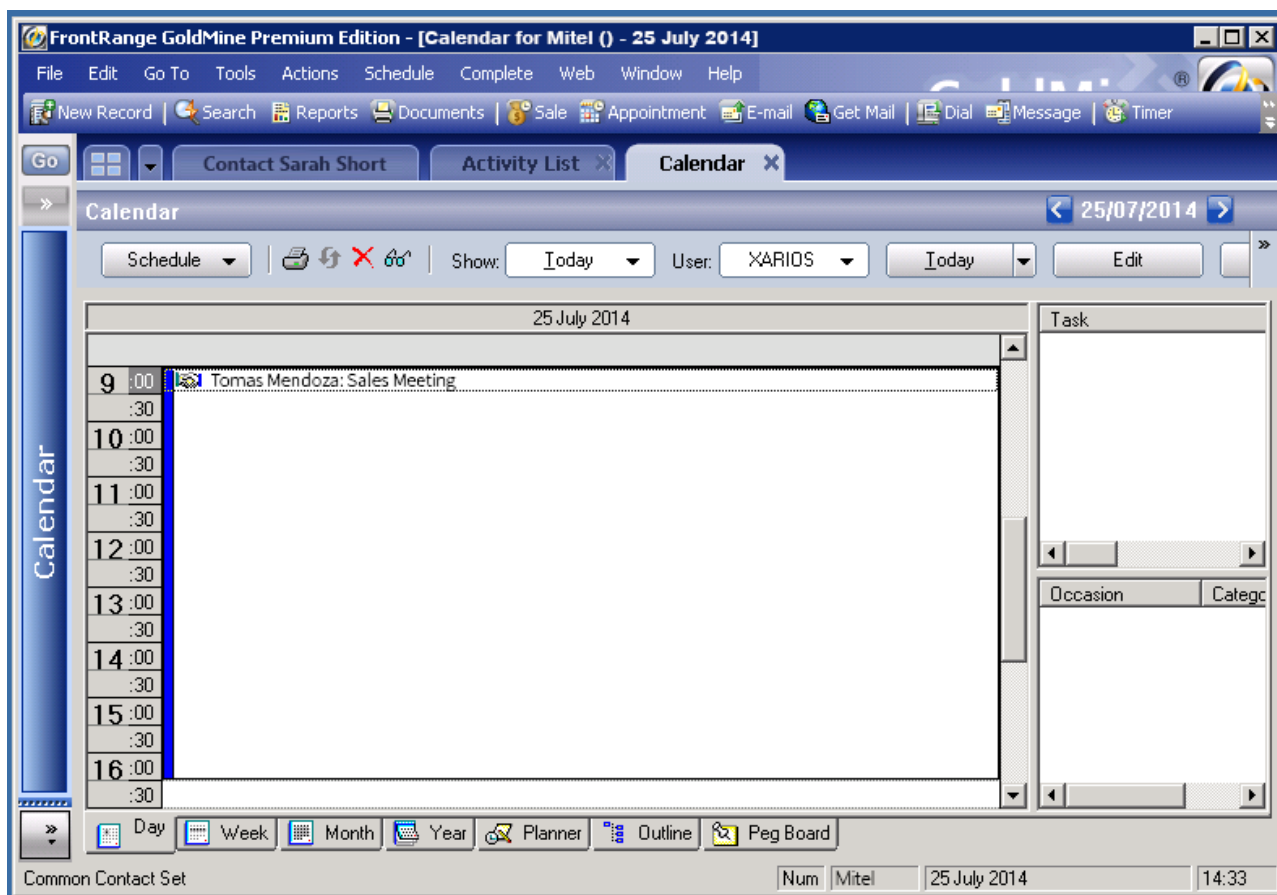


Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

Calendar & DND synchronisation

The calendar within Goldmine can be synchronised with the DND status of the extension of the User. For example when there is an appointment in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the *Reference* field of the appointment. When the appointment ends, the extension will be automatically removed from DND.

For example the *Appointment* entry below will place the Users extension into DND between 09:00 and 16.30 with the DND text set to "Sales Meeting".



Configuration

The integration needs to be configured for the correct version of Goldmine that is running. From the *Version* tab select the relevant entry from the drop down list.

