Phone Manager Application Support - Goldmine

DECEMBER 2016 DOCUMENT RELEASE 5.0 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)	\bigcirc
Goldmine v8.0 (SQL)	\bigcirc
Goldmine v9.2 (SQL)	\bigcirc
Goldmine v2013.1 (SQL)	I
Goldmine v2014.2 (SQL)	I

Features

Integration 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.

Personal	Record	Calendar	Schedule	A	Alarms	Look	kup	E-Mail
Telephor	ny 🚽	Pager	System		Spell	er		Login
IJ	This folder dialing optic	allows you to cor ons from GoldMin	ntrol the various e.	settin <u>c</u>	gs for you	r PC's m	odem	and your
-Modem Se	ttings			SoftPh	one (SIP	Client)		
TAPI Line:	5: Mitel P	hone Manager	•		SIP Se	ttings		
Dialing F	Properties	Line Prope	rties	📄 Sta	irt SoftPh e SoftPho	one with one by d	n Gold Iefault	Mine
- Dial Numb	er Formattir)g						
🔘 Let T.	API format p	phone numbers	Dial	Prefix:				•
🔘 Dial n	iumbers as (entered	Dial	Suffix:				×.
Local Ar	ea Code: 🛛	000	Hang up	o after:	30 ╞	sec.		

Then select the Phone Manager TAPI option from the TAPI Line drop down box in the Modem Settings. Contacts can then be dialled 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 addition 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.

	-	-
Relationships Details Notes	GM+View Pending History	Opportunities Projects Cases
Create Web Form		

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.

enplate Lat		Set Default GM-View
Templates	Sew	You must specify a "default" GM+View, which GoldMine will deplay for all your contacts.
SIP Test school	Edt	SP Test ·
	Bales	Preview Template based on Contact
	Delete	To test any GM+Vew template. highlight the template and then click 'Look up'to find a contact to see how the
	Import	GM-Wew template looks with that contact, using the GM-Wew Preview window below.
		Prev Look up Next
Mala Barra		
Call +44 1291 430000		
Call +44 1291 430000		
CAT .		

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).

Edit SIP Test GM+V	ew .	
] - 🏆 🕉 🗈	🛍 B 🖍 🗵 🗛 🖍 🏹 🖉 🗮 🗃	I 🖤 🖾 🎕 🖾 🛒 🛞 🔰
emplate Name:	SIP Test	

The following HTML snippet can be pasted into the editor:

<a href="sip://<<&phone1>>">Call <<&phone1>>

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.

were rearrang .	Last Ad	livity :		Last Note :
Company: Mital Contact: Antonio Lest: Maclina Prefix Dept: Tote: Source: lectorf type: Industry:	Phone 1: H44 3253-430 Phone 2: Phone 3: Exat <u>Visio Sta</u> <u>Visio Sta</u>	000 E4: E4: E4: E4: E4:	Address: Address: Oby: Sate: Postal Code: Country: Open: Merce:	Linkedin: Facebook: Twitter:
industry:	Acct Mgr.		Merge:	
Relationships Details	Notes GH+View Pending	History Opport	unities Projects Cases	
Create Web Form				
Call+441291430000				

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.

۲ آ	ontRange GoldMine Premium Edition - [Gary Fisher]	_ _ X	
File	Edit Go To Tools Actions Schedule Complete Web V	Vindow Help	
1	ew Record 🚭 Search 🔚 Reports 🔚 Documents 🍞 Sale 🎬 Ap	bointment 📑 E-mail 🖀 Get Mail 🖳 Dial 🛋 Message 👸 Timer 🍟	
Go	Contact Gary Fisher		
	Contact > Gary Fisher	🔀 🕻 2 of 13 🔁 刘	
	New Record 🚭 😚 🗙 Communicate 🗸 🛛 Sc	hedule 💌 Complete 💌 Add To 💌 Messag ≫	
	Next Activity : 25/09/2000 10:30 Last Activity : 18/09/2000	10:36 Last Note :	
ontacts	Company: Mitel Phone 1: + Contact: Gary Fisher Phone 2: Last: Fisher Phone 3: Prefix: Gary Fax: Dept: Sales E-mail: Title: Sales Manager Web Site: Source: Precord Type:	H 1291430000 Ext: Address: Ext: Address: Ext: City; Ext: State: Postal Code: Country: Open:	
ŭ	Industry: Acct Mgr.	Merge:	×
	Relationships Details Notes GM+View D ▼ Ti▼ Contact▼ U▼ A▼ R▼ R N▼ Contact▼ U▼ A▼ R▼ R▼	rending History Opportunities Projects Cases	+44 1291 430000 00:01 +44 1291 430000
	10/03 10.36 Gary risher MAST Call in ACK GoldML.	Contact: Gary Fisher, +44 1291 430000 Company: Mitel	
» •		Assigned: MASTER (FrontRange Solutions Emplo), 10:36, 18/09/2000	$\overline{\mathbf{O}}$
Com	on Contact Set	Num Mitel 25 July 2014 14:27	Clear call

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 & Internat	ional 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	Tele	nhone	Formats
00	1010	phone	i onnata

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		

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.

_	
	ontact: Activity: User:
15	Sarah Short 💽 💽 Call Out 💌 Mitel 💌 🔽 Private
R	eference:
F	Jnanswered Call
O	pportunity / Project: Or Case
0	none) 💌 New (none) 💌 New
Co	ode: Result: Date: Time: Duration: Success:
Г	▶ ▶ 12/06/2014 ▶ 12:12 00:00:00 ▶ Successful ▼
No	otes:
	B 🗶 <u>U</u> 🖉 🗛 🎭 💖
P	Phone number: +44 1291 430000
D)DI:
)DIName:
Ę	Direction: Outbound Account Code:

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.

GoldMine	
Settings	Fields
Versic	on Goldmine v2013.1 (SQL) 🗸