

Request a new Integration

## GoldMine Addin Guide

This Addin Guide contains proprietary information and shall not be used, disclosed, reproduced or shared, in whole or in part, without the prior written consent of the application developer. Should you need to do this or require further clarification, please contact the CRM Connect support desk quoting your serial number.

For information on setting up dialing with GoldMine, please click here.

This page will guide you through configuration and basic use of the CRM Connect GoldMine Add-in. It is expected that you are already familiar with the Address Book, Call History and Preview window, and the basic concepts of integration and screen popping using the Add-ins. See the 'User Guide' for these topics.

GoldMine and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

CRM Connect must also be installed already with the initial configuration completed. If this is not the case, please see the 'Technical Installation Guide' or consult your system administrator.

### Information You'll Need

- Windows account username and password
- GoldMine database name and filepath\*, username and password (if password protected)

\* Instructions on where to find this information are given below if required.

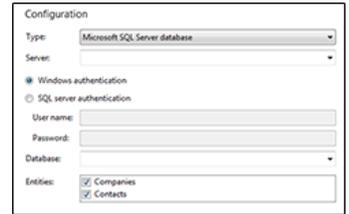
### Configuration

Right-click the CRM Connect tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'configuration' screen. In the 'Integration' area, click the 'Add new' button, select 'GoldMine' from the 'Type' dropdown box and then click the 'Set' button.



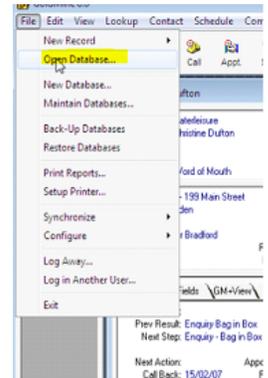
On the 'Configuration' group, you need to enter the details of your GoldMine database. There are three different kinds of database that apply to GoldMine:

- Microsoft SQL
- dBASE
- Firebird

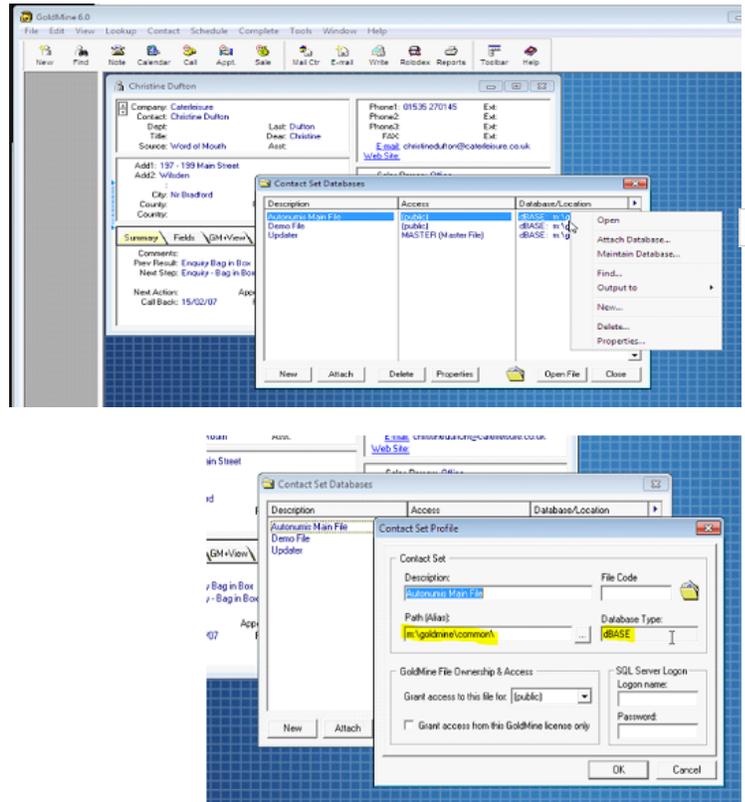


SQL is by far the most popular so the chances are you'll need to select 'Microsoft SQL Server database' in the 'Configuration' group's 'Type' dropdown box. Obviously, if you use one of the other formats then select the appropriate one - which is used largely depends on the size and age of your database.

To gather the required information about your database, go into GoldMine, open the 'File' menu, then 'Open Databases'.



Click on the database you wish to use in the integration.



Then select properties and under 'Path (alias)' you will find the file location required and next to it under Database Type you will see what 'Database Type' you are using, in this case it is dBASE.

Back on Go Connect's 'Configuration' group, type the 'Host' information into the 'Server' dropdown box or, if one of the existing options in there is exactly the same as the 'Host' information, you can just select it by clicking on it. Also, do the same with the 'Database' information from GoldMine but put it in the 'Database' dropdown box instead.

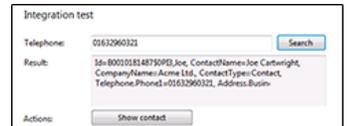
Under most circumstances, you'll be able to select the 'Windows authentication' option without the need for any further information. However, depending on your database's security policies, you may need to select the 'SQL server authentication' option and enter specific user name and password details which you should be able to get from your system administrator.

Select which of your GoldMine account contact types you want to be used by checking the corresponding boxes in the 'Entities' section.

Click the 'Save' button to store the information you've entered and apply the configuration.

**Testing**

To test if the configuration worked, enter a phone number from your GoldMine account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.



The test area results should look similar to the results showing in the image here. If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

**Functionality**

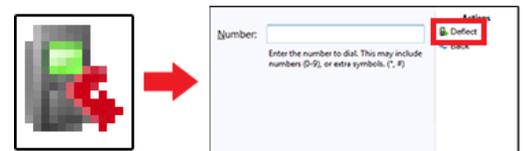
When a call comes in, the CRM Connect 'Preview Window' will pop up and display the phone number that is calling. If the caller is recognized as one of your contacts from GoldMine, their details will also be displayed and you can 'pop' their GoldMine contact record by clicking the 'GoldMine' button in the window.



You can also pop recognized callers' GoldMine contact records by clicking the 'GoldMine' button on the 'Phone Window'.



Calls can be deflected to another extension before answering them by clicking the 'Deflect' button, entering the extension number into the 'Number' box and then clicking the 'Deflect' button next to it or pressing 'Enter'.



To answer a call on either the 'Preview' or 'Phone' window, you just need to click the 'Answer' button.



To speak to a colleague during an active call, click the 'Consult' button, enter the extension number into the 'Number' box and then click the 'Consult' button next to it or press 'Enter'. The active call is automatically held. To end the call to your colleague and resume the held call, click 'Cancel'.

A dialog box with a "Number:" label and a text input field. Below the input field is the text "Enter the number to dial. This may include numbers 0-9, or extra symbols (\*, #)". To the right of the input field is a "Consult" button. Below the input field is a "Send digits" button.

To transfer a call to another extension, click the 'Transfer' button, enter the extension number into the 'Number' box and then click the 'Transfer' button next to it or press 'Enter'.

A dialog box with a "Number:" label and a text input field. Below the input field is the text "Enter the number to dial. This may include numbers 0-9, or extra symbols (\*, #)". To the right of the input field is a "Transfer" button. Below the input field is a "Send digits" button.