Tapi Link for GoldMine® - Configuration Guide

Version No: 2.2.1.670 (for GoldMine® 5.x and 6.x)
Version No: 3.5.1.670 (for GoldMine® 7.x)
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Version No: 5.5.1.670 (for GoldMine® 9.x)

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(For details concerning the preliminary installation procedures, system requirements and pre-requisites refer to the associated documentation entitled 'Tapi Link For GoldMine® - Installation Guide')

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Important Preliminary Information

This guide assumes that you have already installed the product and followed the Quick Start Wizard.
(The Quick Start Wizard runs automatically the very first time you start the application and asks a sequence of questions such as the product serial numbers, the date format, and your user password etc. in order to configure the basic configuration parameters.)

For details concerning the preliminary installation procedures, and system requirements etc. refer to the associated documentation entitled 'Tapi Link for GoldMine® - Installation Guide'.

(Throughout this guide you will find mention of the term TAPI – This is an acronym for Telephony Application Programming Interface. TAPI defines standards for call control and for manipulating call content. The standard supports connections by individual computers as well as LAN connections.)

Bear in mind when using this guide that the fully comprehensive product to which it relates can combine 3 distinct yet complimentary applications, namely:

- Tapi Link for GoldMine®
- Call Recorder for GoldMine®
- Power Dialer for GoldMine®

For completeness, this guide depicts the visual features and options that are available if you have activated all 3 of the above applications. So whilst certain context menus and setup dialog boxes herein may appear to be slightly different visually when compared to your own copy of the software, the functionality, configuration, and usage of each individual application remains the same, and is fully functional in all respects whether you have 1, 2, or all 3 elements of the product activated.

Should you wish to acquire the extra functionality provided by these additional elements, please contact your GoldMine® Reseller or Papillon Technology by telephone on 01992 560487 (+44 1992 560487)
from the US on +1 (614) 559-2270 by fax: 01992 560489 (+44 1992 560489) or by email to sales@papillontechnology.com The process is quick and easy, since the functionality of the additional elements is already built into the product and simply requires activation. (*Call Recorder for GoldMine® also requires a small hardware item which we supply.*)

Minor Software Variations

There are some minor differences in the visual interface of this software depending upon which particular version of GoldMine® you are using - i.e. GoldMine® 5, 6, 7, 8, or 9.
For example, (since there is no Borland Database Engine in later GoldMine® versions) the Searching tab and Licensing tab have been simplified and will appear differently to the software versions of this product running with GoldMine® 6.x or earlier, and which are depicted in this guide. These changes do not affect the functionality of the product.

The Tapi Link interface

The Tapi Link icon is depicted as a telephone in the system tray of the taskbar:

Dependent upon a properly configured system, and the compatibility and extent of the functionality of the driver supplied by your Telephone Service Provider, the Tapi Link icon will alter its appearance automatically, according to the prevailing line status, as follows:

When there is **NO LINE ACTIVITY** and the handset is at rest – the icon remains static and yellow in color:

When a **CALL IS IN PROGRESS** or when the handset is lifted - the icon will reflect and mimic this activity:

When an **INCOMING CALL** is sensed on the line - the icon will oscillate and also become red in color:

When an outgoing call receives a **BUSY** signal – the icon will indicate the 'engaged line' status:

When a call is placed **ON HOLD** – the icon will reflect this condition:

Outbound Dialing - via GoldMine®

Most users tend to favour making outbound calls *directly from within the GoldMine® interface*. There are a number of different methods you can adopt in order to do so, for example, via:

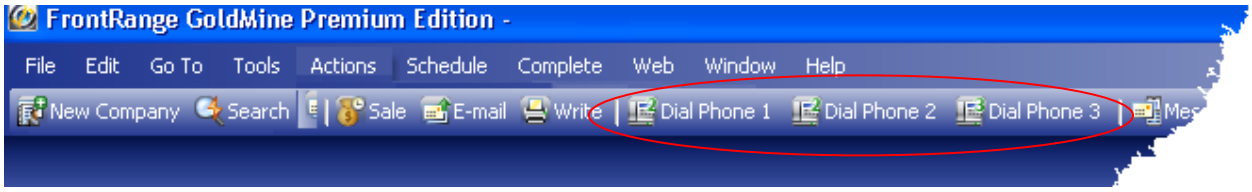
1. **GoldMine® icons**
2. **Telephone fields**
3. **GoldMine® menus**
4. **Computer keyboard**
5. **Additional Contacts tab**
6. **Personal Contacts/ Personal Rolodex**

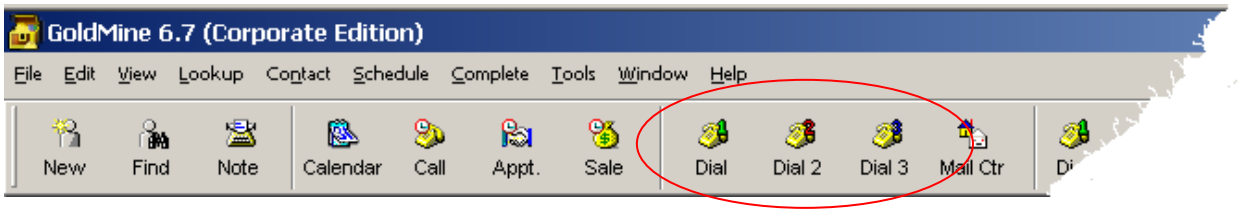
Each of these methods is detailed in the following sections.
(**Speed Dial**, **Paste Dial**, and **Keypad** dialing are three additional methods available directly from within the Tapi Link interface itself, and are dealt with later in this guide.)

Firstly, ensure that you have summoned the record of the appropriate contact you wish to call in GoldMine®.

1 – Dialing from the GoldMine® icons

To dial a primary contact on **Phone1, Phone2**, **Phone3**, click on the appropriate toolbar icon according to your particular version of GoldMine®:



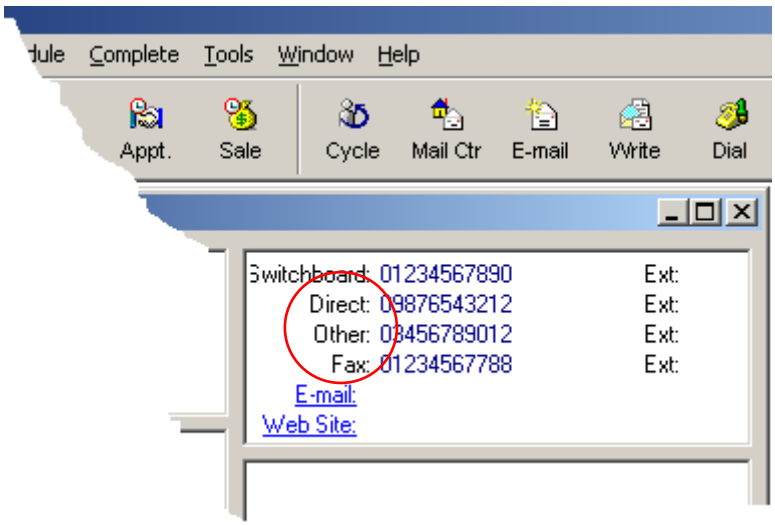


The **Dial** icons may not be visible on your particular GoldMine® system unless you have certain Toolbars/Taskbars and options selected.
If they are absent from your particular toolbar, the icons **Dial**, **Dial 2**, and **Dial 3** may be added via the **Insert Item** option in earlier versions of GoldMine®, or via the '**Customize'** menu option in later versions of GoldMine®
For further details refer to the section entitled 'Adding Dial icons to the GoldMine® interface' in the last chapters of this guide.

2 - Dialing from the Telephone Fields

Earlier versions of GoldMine®

You may dial any of the telephone numbers contained within the upper right quadrant of the contact record (with the exception of Phone 1 which is an indexed GoldMine® field specifically reserved for searching) by *double-clicking* on the label to the left of the telephone number. (e.g. double-click on '**Phone 3:**' - not on the telephone number.)



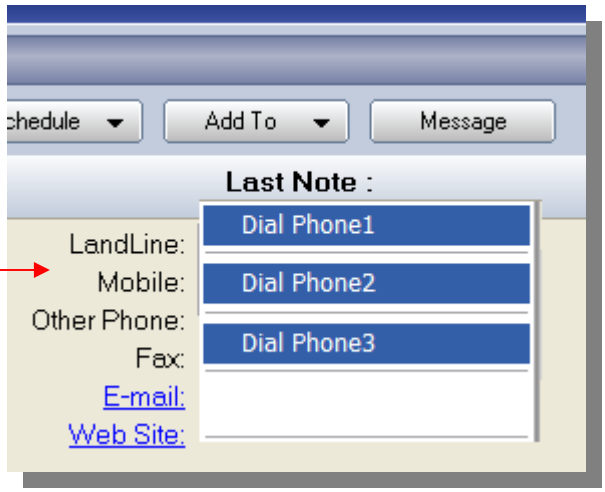
(Phone **1**, **2**, and **3** fields are customised in this example to read **Switchboard**, **Direct**, and **Other** respectively. The corresponding field labels in your own version of GoldMine® will probably bear quite different text.)

Later versions of GoldMine®

Note:

The above dialing method is not available with GoldMine® P.E. This is because all Phone fields have since become searchable indexed fields and now behave in the same manner as Phone1 if double-clicked.

Instead, **right-click** on your chosen telephone field and select **Dial** from the context menu.

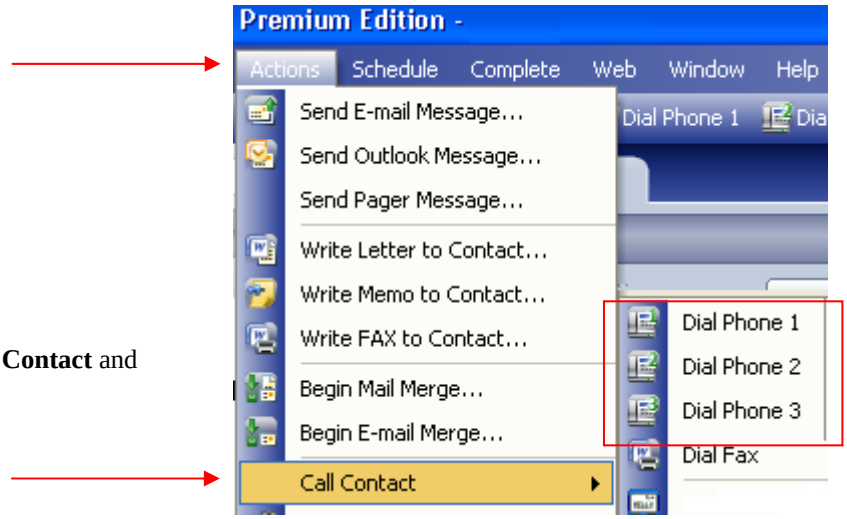


(The telephone field names shown above are simply examples. Your own system is likely to display different labels which are tailored to your own preferences – such as 'Switchboard' or 'Direct Line' etc.)

3 – Dialing from the GoldMine® menus

Depending upon your particular version of GoldMine -
To dial a *Primary Contact* select **Actions** from the GoldMine® menu bar –

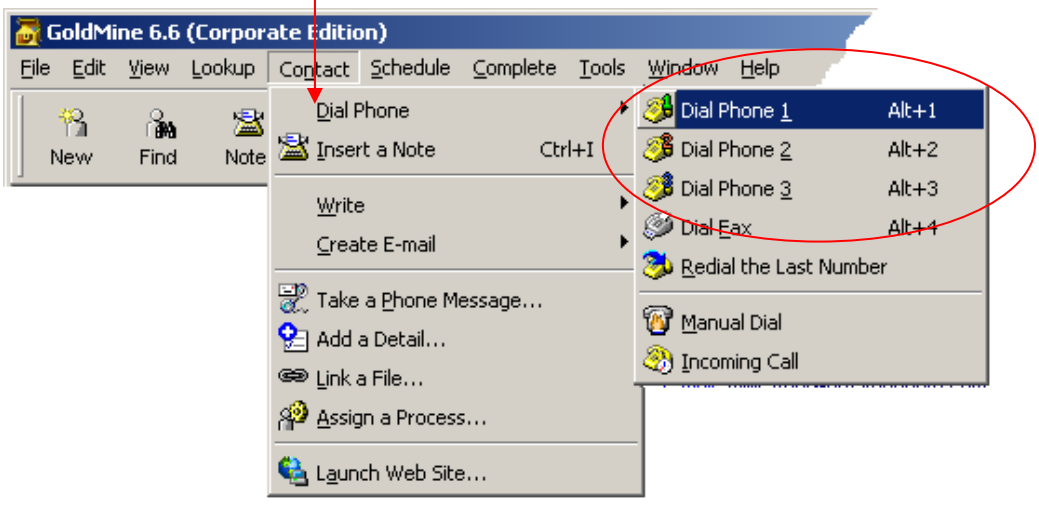
From the drop-down menu select **Call Contact** and make your selection.



If you only need to call the number recorded in the first telephone field select **Communicate** > **Dial Phone**

Earlier versions of GoldMine®

In order to dial a primary contact from earlier versions of GoldMine® select **Contact** from the menu bar.
From the drop-down menu select **Dial Phone**, and then one of the telephone fields to call.



4 - Dialing from the computer keyboard

Using the computer keyboard -
Press and *hold down* the **ALT** key (located at the bottom left side of your keyboard).

With the **ALT** key depressed -

To dial **Phone1** – press the digit **1** on the keyboard.
To dial **Phone2** – press the digit **2** on the keyboard.
To dial **Phone3** – press the digit **3** on the keyboard.
To dial the **Fax** – press the digit **4** on the keyboard. (Assuming you'd ever want to telephone a fax machine.)

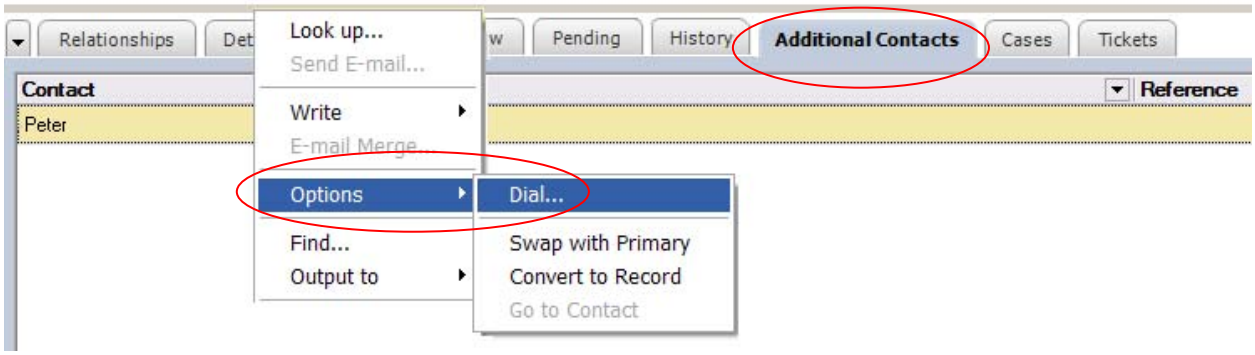
(Note that if you are using the numeric keypad on the right hand side of your keyboard – you will need to ensure that the keyboard NumLock status is ON.)

Just as with any other window with which you wish to use keyboard commands, you need to work with an 'active window'. So to use this method, ensure that the GoldMine® contact record itself has the focus. (i.e. ensure that the title bar is not 'greyed-out'. This indicates that it is the currently active window.)

5 - Dialing from the Additional Contacts tab

In order to dial an additional contact select the GoldMine® **Additional Contacts** tab:

Right-click on the contact you wish to call:



Select **Options**, then **Dial** from the sub-menu.
The visual appearance above will vary slightly according to your specific GoldMine version, but the dialing method is identical.

continued . . . .

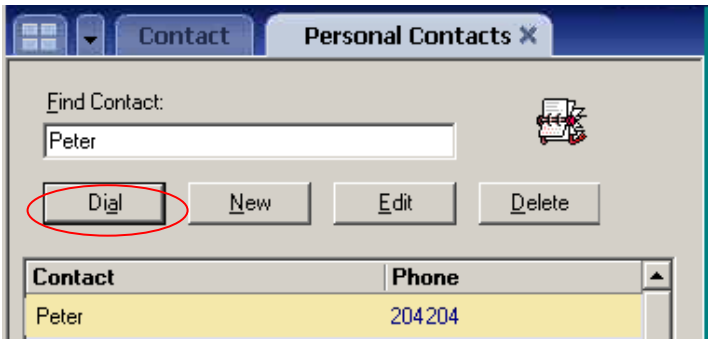
6 - Dialing from the Personal Contacts/ Personal Rolodex

Outbound dialing can also be achieved via the **Personal Contacts** tab or **Rolodex**.

In earlier versions of GoldMine® this feature can be summoned by clicking on the **Rolodex** icon on the GoldMine® toolbar. Alternatively, you may launch the **Personal Rolodex** or via **View | Personal Rolodex** on the GoldMine® menu, or by pressing the F11 key on the computer keyboard.

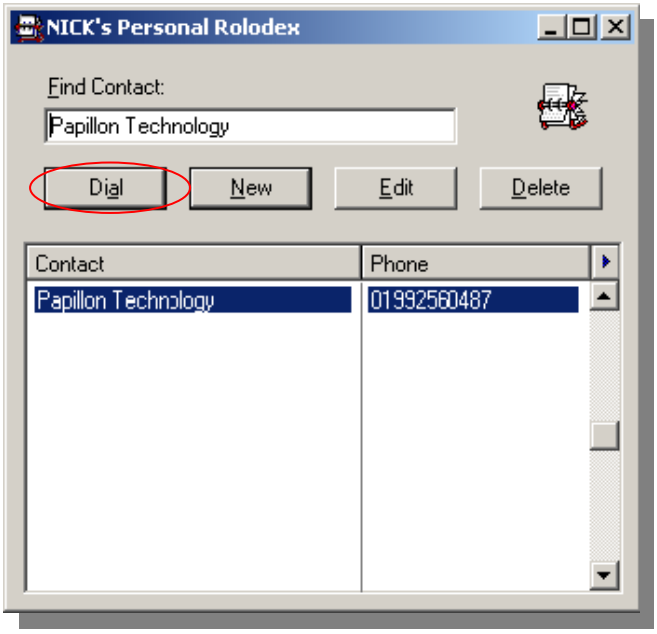
Later versions of GoldMine®

In order to dial from the **Personal Contacts/Rolodex** select the party to be called from the list.



Then click on the **Dial** button.

Earlier versions of GoldMine®



Outbound Dialing – via the Speed Dial facility

Tapi Link also incorporates a useful Speed Dial feature for quick access to frequently called numbers.
You may configure up to 10 pre-determined telephone numbers - each with a corresponding user-defined name or identification label.

There are two methods of using the **Speed Dial** feature.

1. via the Tapi Link context-menu
2. via the computer keyboard **0R** via the Tapi Link Keypad.

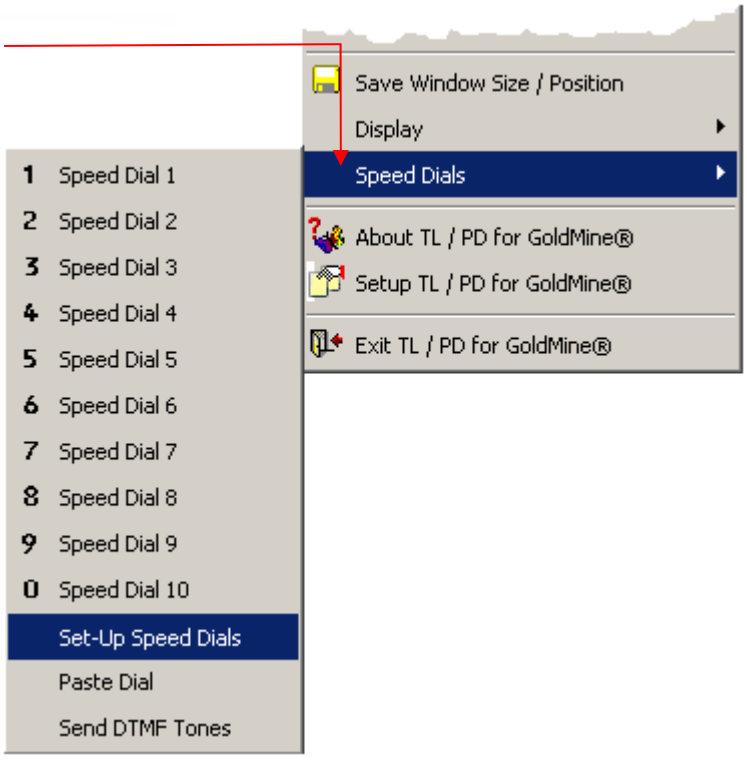
You may mix and combine each of these methods as you wish.

Method 1 – via the Tapi Link context-menu

To configure this facility proceed as follows:

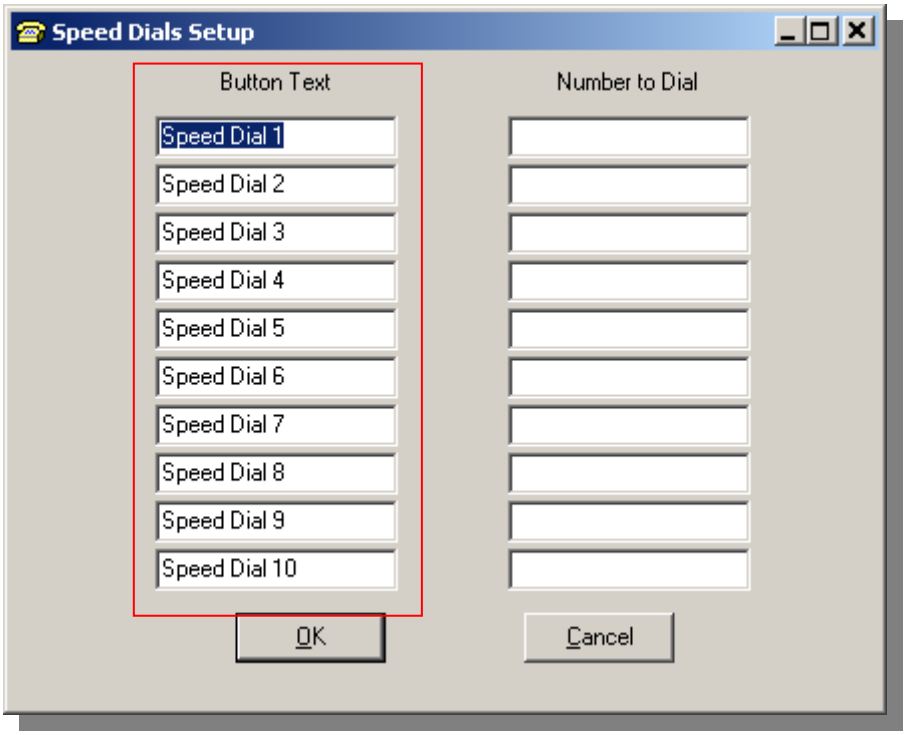
Right-click on the Tapi Link icon in the system tray:

From the context menu click on the **Speed Dials** option.



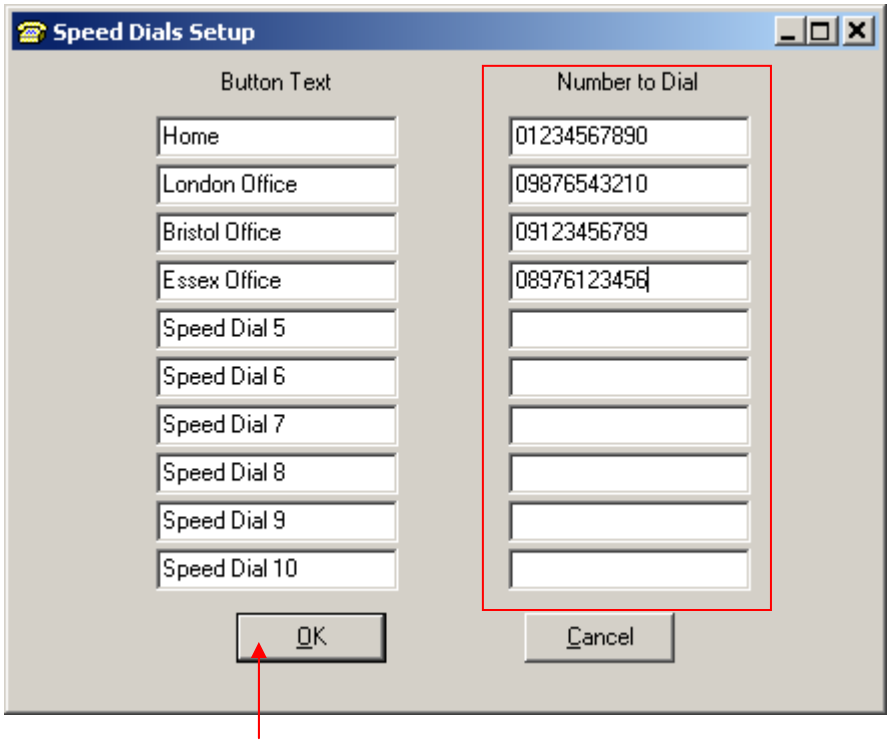
Select **Set-Up Speed Dials**.

The **Speed Dials Setup** window will appear:



Overtype the existing entries in the **Button Text** column with your own choice of name or label.

Enter the corresponding telephone numbers to the right under the **Number to Dial** column

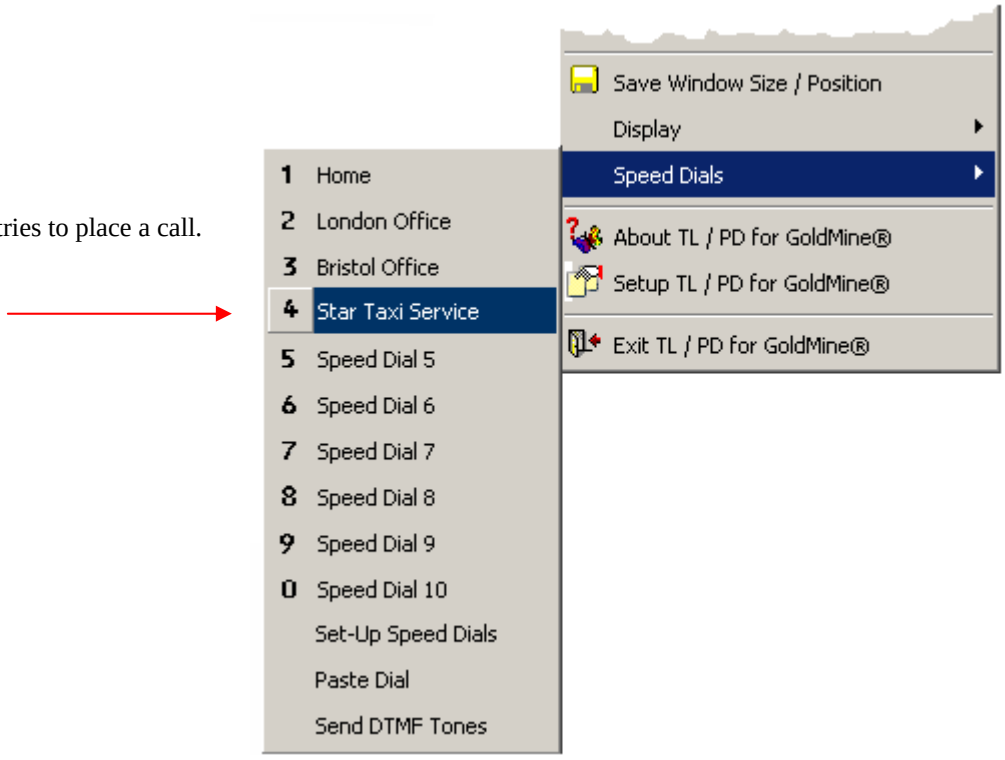


Click on **OK** when you have completed your **Speed Dial** settings.

continued . . .

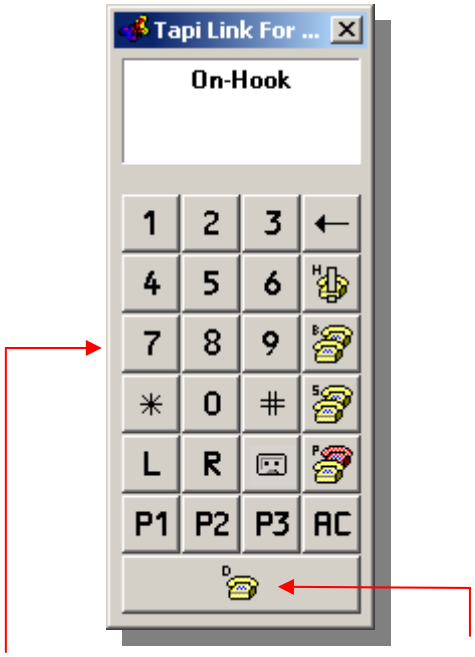
The context-menu will now display the labels you have specified - as shown in the following example:

Click on any of the entries to place a call.



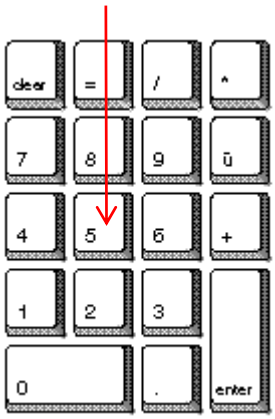
Method 2 – via the computer keyboard or the Tapi Link Keypad

If you have chosen to have one of the Tapi Link Keypads on screen, such as the large **Keypad** ….

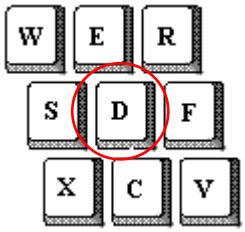


…. you may click on any **Speed Dial** number (1 to 0) and then click on the **D** button to place the call.

A quick alternative to this method, if you have the **Keypad** in focus on screen, is to key in the **Speed Dial** setting (1 to 0) by using the numeric keypad on the computer keyboard (or the number keys on a laptop machine) ……



…….and then clicking on the **D** button on the computer keyboard to place a call.



(Although you may use any Tapi Link Keypad for **Speed Dial** purposes you must have a **Keypad** in focus on-screen in order to use the numeric keys on your computer keyboard for Speed Dialing.)

The **Button Text** labels and the corresponding telephone numbers stored in your **Speed Dial** settings may be revised or re-configured as many times as you wish.

Outbound Dialing – via the Paste Dial facility

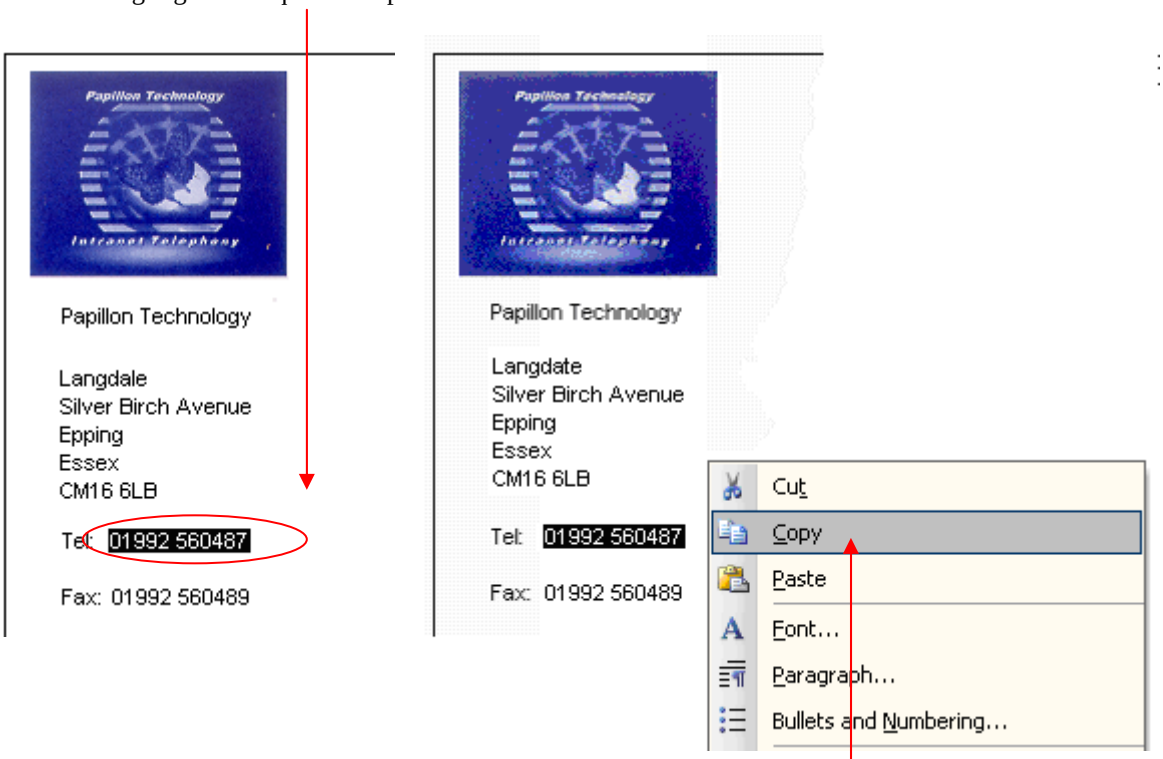
The **Paste Dial** feature enables users to dial telephone numbers copied from virtually any on-screen document.

In effect, the chosen telephone numbers are captured and pasted directly into the Tapi Link dialing mechanism and the call is then placed automatically.

Examples of documents from which telephone numbers can be captured in this way include:

- Emails
- Web Pages
- GoldMine® Notes tab (or the Notes field from any area of GoldMine®)
- Text files (e.g. Notepad® files)
- Spreadsheets (e.g. MS Excel®)
- Word processing documents (e.g. MS Word®)
- PDF files (Portable Document Format)

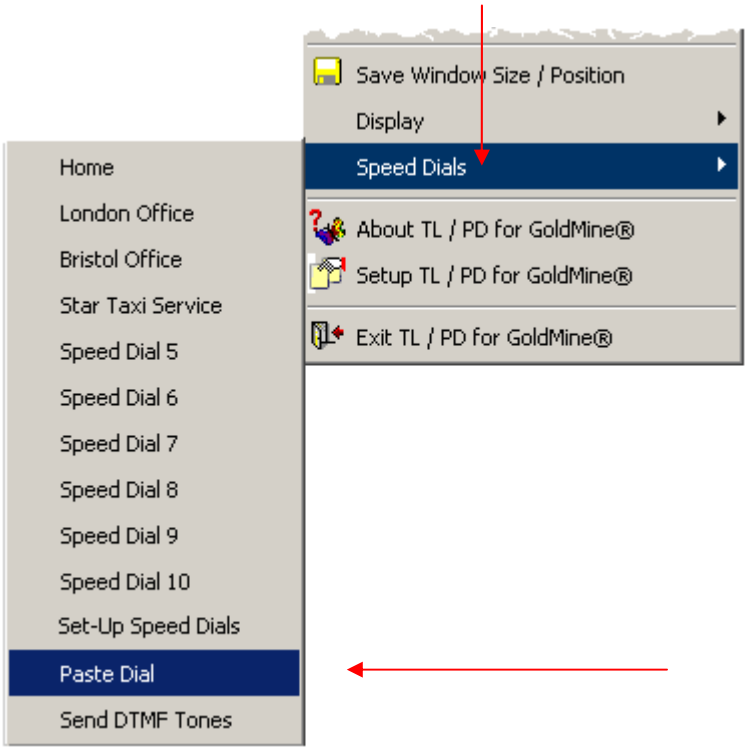
Select and highlight the required telephone number in the on-screen document:



Right-click on the highlighted number and select **Copy** from the context-menu.
(Alternatively, simultaneously select the **Ctr**l and **C** keys on the computer keyboard.)

Right-click on the Tapi Link icon in the system tray:

From the context-menu select **Speed Dials** . . . .

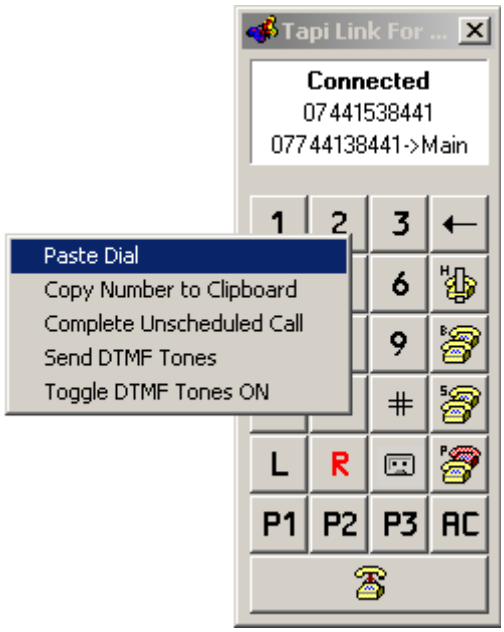


. . . . and then select **Paste Dial**.

The call is then placed to the required number.

If the original number on screen is formatted in one complete string (e.g. 01992560487) you should be able to double-click upon it to highlight it. Otherwise, if the number contains spaces (e.g. 01992 560487) you will need to select the whole number with the mouse cursor or via keystrokes.

Alternatively, you may right-click on any of the Keypads and select **Paste Dial** as follows:

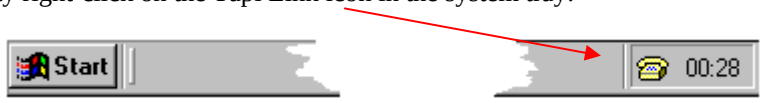


Outbound Dialing - via the Call Back facility

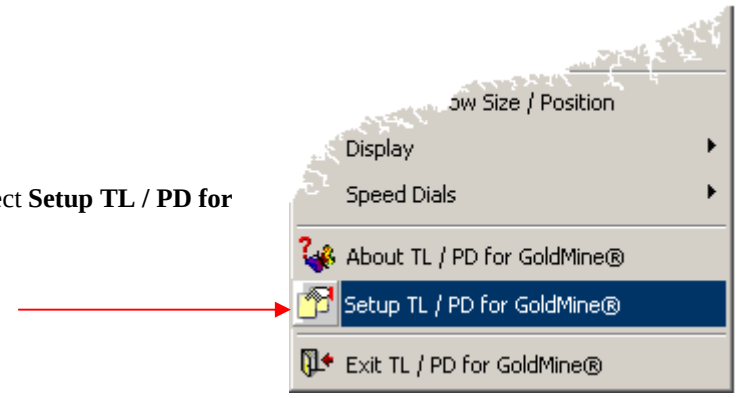
The **Call Back** feature enables you to –

- Return calls to remote parties
- Return calls to internal extensions
- Redial previous calls originating from your location

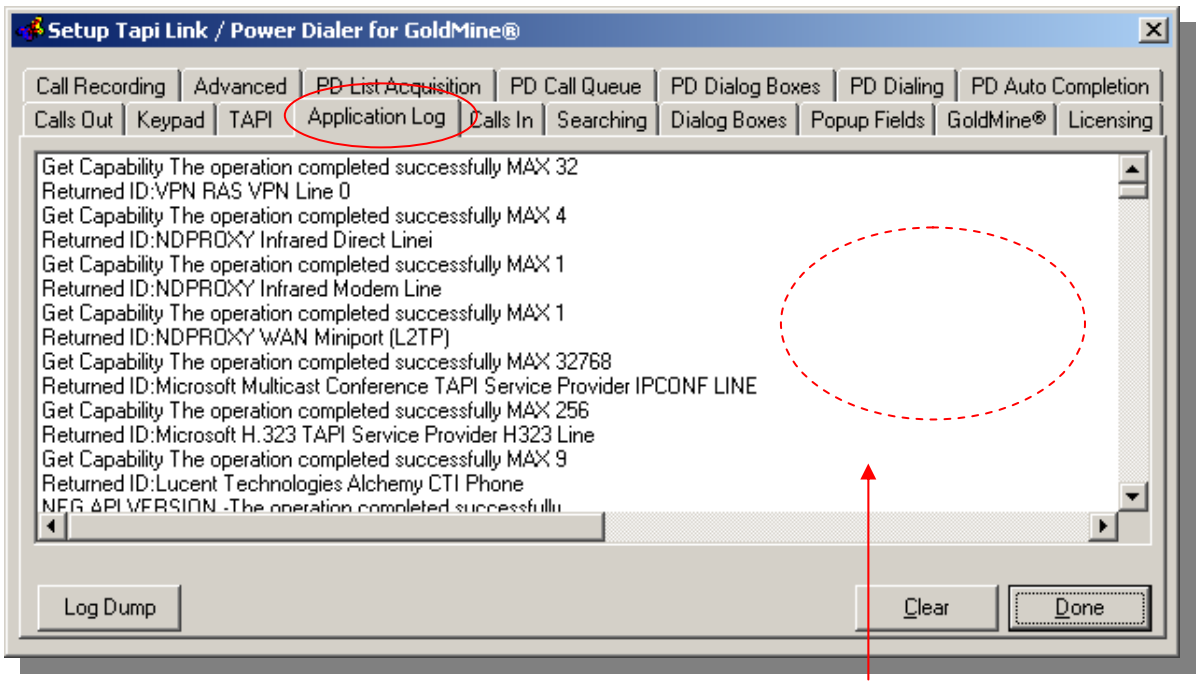
To summon this facility right-click on the Tapi Link icon in the system tray:



From the context menu select **Setup TL / PD for GoldMine®**.

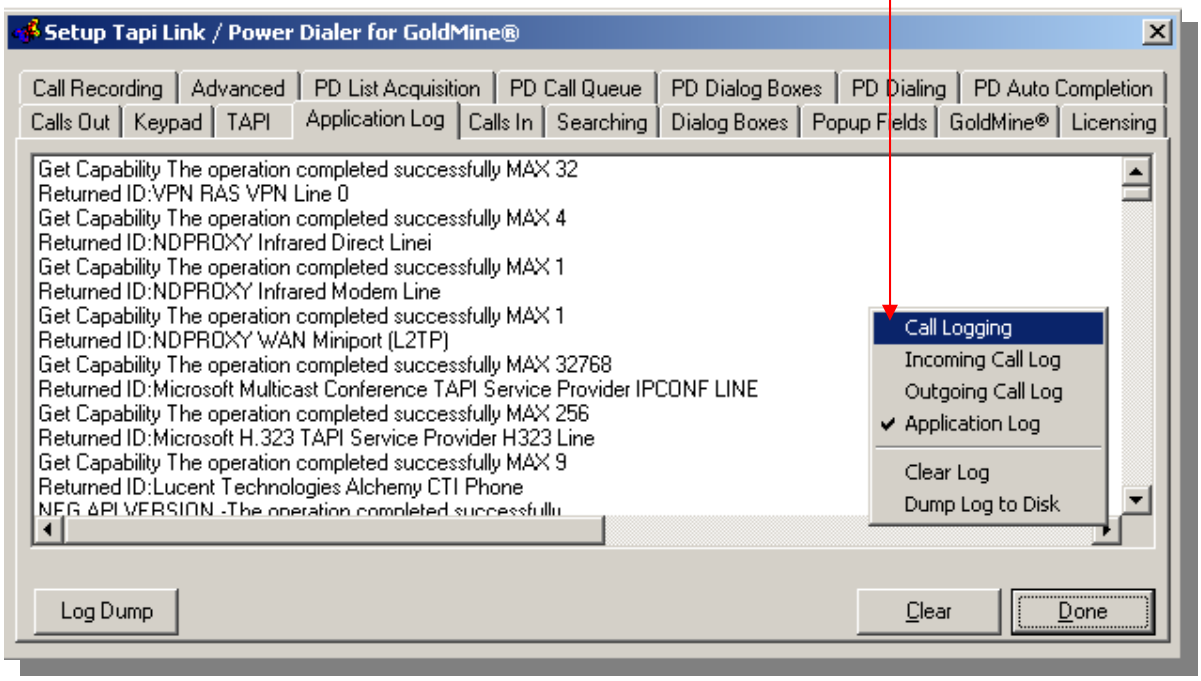


This will summon the **Setup** window from which you should select the FOURTH tab which will be headed either **Call Logging** or **Application Log** depending on your prevailing configuration:

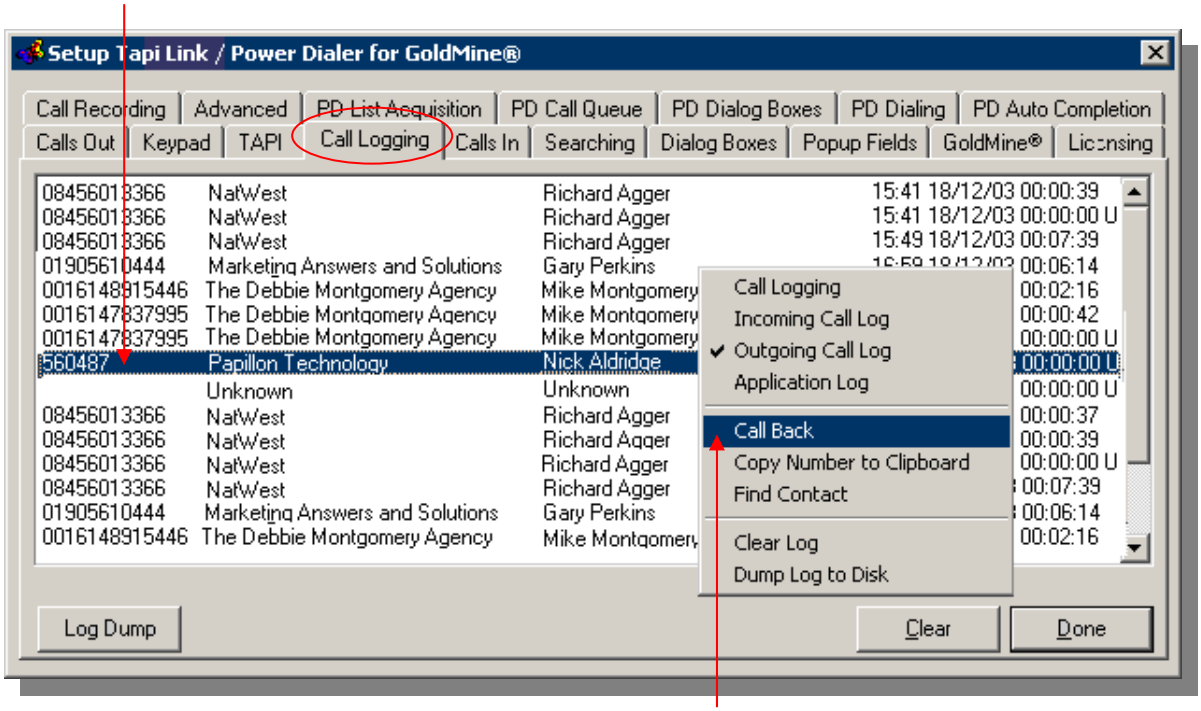


If the title of the fourth tab does NOT read '**Call Logging'** right-click within the text area of the dialog box.

This action will summon a context-menu from which you should select **Call Logging**.



The title and contents of this tab will switch to reflect an alternative **Call Logging** view.
Scroll through the entries and then highlight your chosen incoming or outgoing call.



Right-click upon the selected call and select **Call Back** from the context menu to return a call to, or to redial the relevant party.

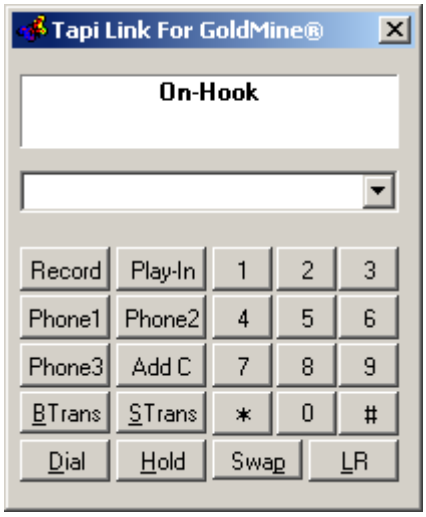
(Note that in addition to the 'combined' calls log, from the context menu you may also choose to display either **Incoming Calls** only or **Outgoing Calls** only.)

Outbound Dialing - via the Keypad

Although it is likely that the major proportion of your outbound dialing will be conducted directly from within GoldMine® interface itself, you may on occasion wish to use Tapi Link independently of the contact records in the database. If necessary the Keypad can be used for this purpose.
However, the Keypad is not required for most dialing purposes - and may simply occupy valuable screen space. Users that do not have a physical telephone on their desk may find the presence of the on-screen Keypad reassuring.

(Also see the section entitled 'Outbound Dialing – via the Call Back facility' for further outbound dialing features directly from Tapi Link.)

Large Keypad



Text Keypad

Toolbar Keypad

Once any of the above Keypads have the on-screen focus***** you may dial manually by clicking with the mouse on the appropriate buttons. However, it is considerably more effective to use the numerical keypad on the computer keyboard for dialing purposes. (If you wish to use the numerical keypad on the computer keyboard - ensure that the NumLock key status is 'ON'.)

*****
(i.e. the Keypad is the active window – this is indicated by the fact that the Tapi Link title bar is not 'greyed-out' or 'dimmed', but the title bars of any other open applications are.)

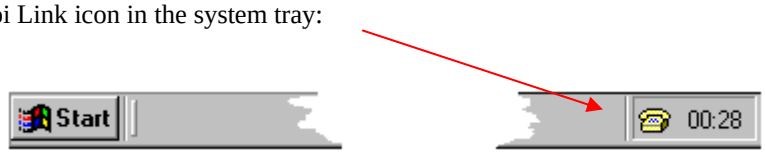
Configuring the on-screen Keypad display

The Keypad is only one of a variety of ways in which you can use Tapi Link. Most users tend to favour one or more of the many other dialing methods detailed in previous sections, because for most purposes the Keypad is not really necessary, and it also occupies what may be considered to be valuable space on-screen. In the main it is users who do not have a physical telephone present on their desk for whom the on-screen Keypad is a comfort factor.
It is NOT necessary to have the Keypad displayed on screen at all if you are using any of the other dialing methods.

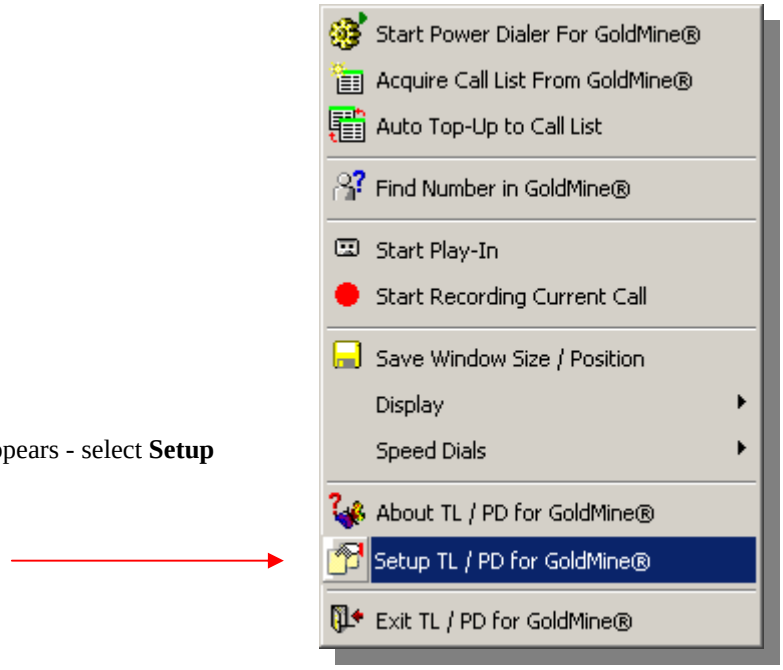
However, the Keypad can prove useful if at any time you wish to see a visual display of outbound telephone numbers etc. (The most common example of this would be during testing - for diagnostic purposes.)

If you need to have an on-screen keypad displayed for dialing purposes – proceed as follows:

Right-click on the Tapi Link icon in the system tray:



From the context menu which appears - select **Setup TL / PD for GoldMine®**.

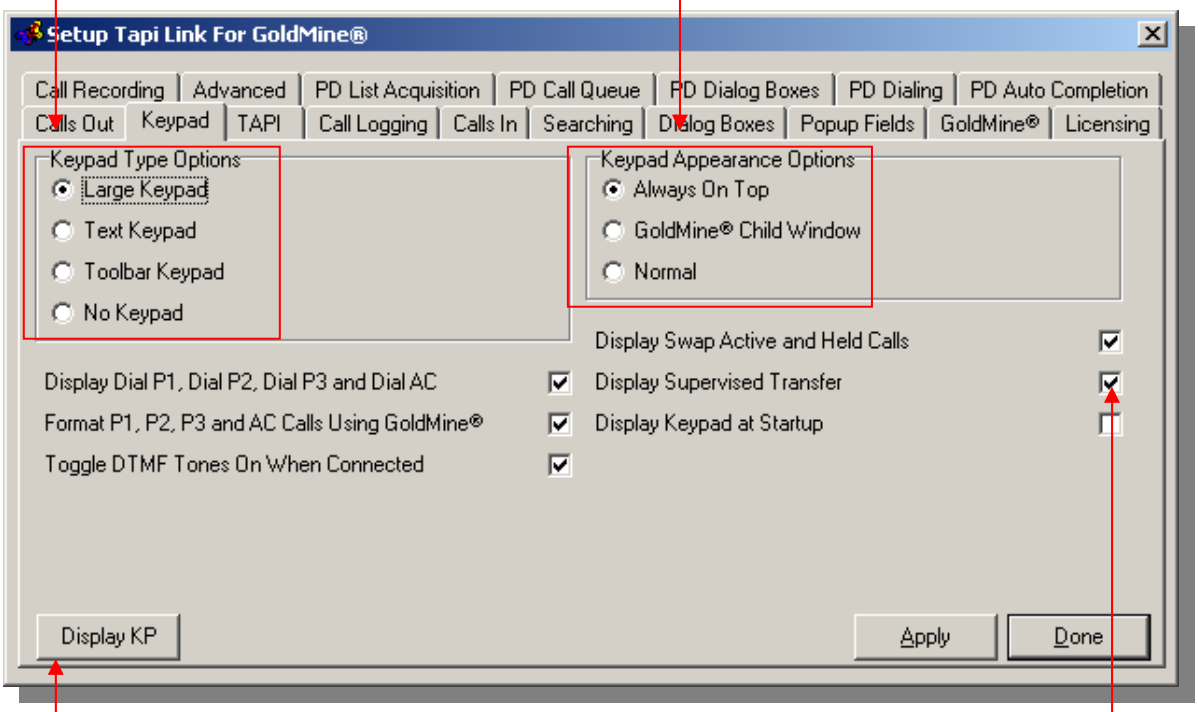


continued . . .

Select the **Keypad** tab and choose your requirements:

Keypad Type:
Select from amongst the three different Keypad styles by clicking one of the radio buttons. (Each of the three types available are illustrated in the section entitled 'Various Keypad styles'.)

Keypad Appearance:
Choose the on-screen behaviour of the Keypad i.e. Always remaining above all other windows / Only visible within a Goldmine® parent window / or the Normal windows behaviour.



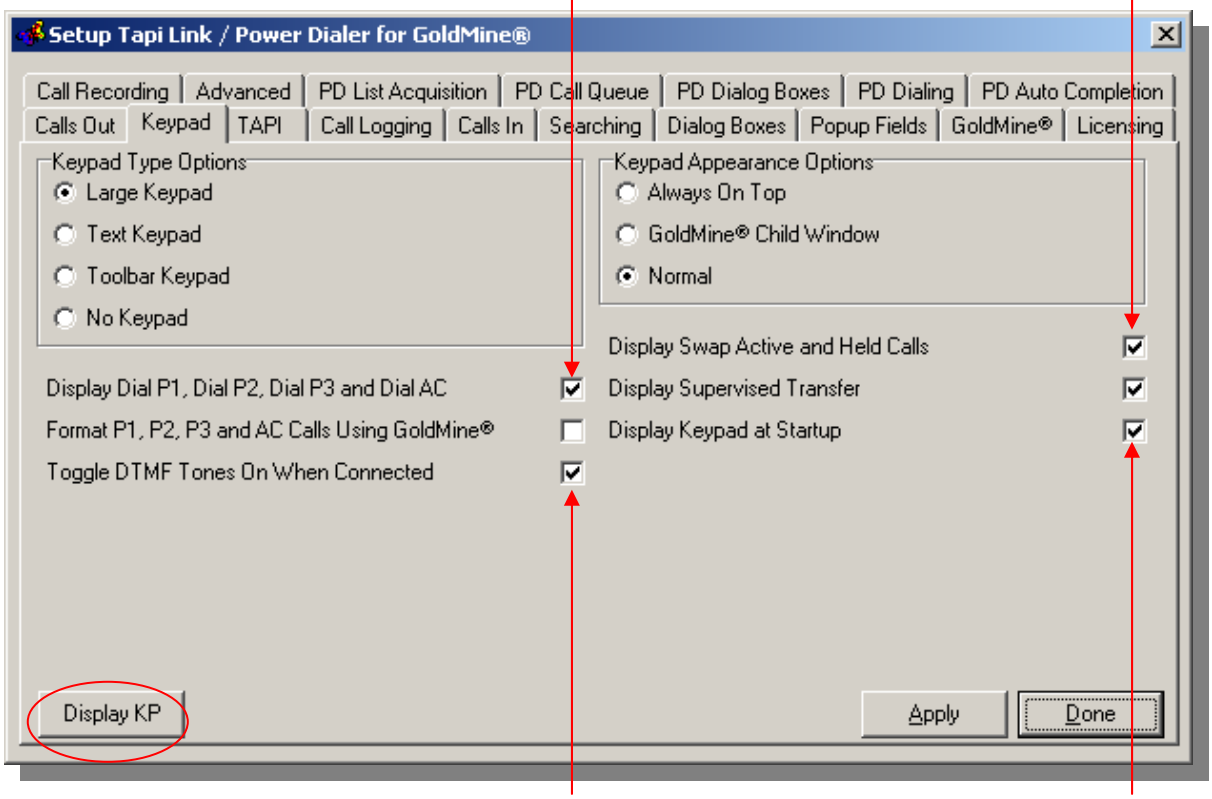
Choose to introduce an additional button to the Keypad that will enable the transfer of calls with the benefit of a courtesy 'handover' facility, rather than a 'blind', unmonitored transfer.

The **Display KP** button will raise the Keypad of your choice for quick reference while it is being configured.

continued . . .

Add extra Keypad buttons to enable 'one-button dialing' of the Phone 1, 2, & 3, and **Additional Contact's** numbers. * see following notes …

Choose to introduce an extra button to the Keypad display which facilitates switching between 'active calls' and 'calls on hold'.



Enable the option to send **DTMF** tones down the line via the Keypad during a connected call. (see the section entitled 'Speed Buttons – Auto Attendant')

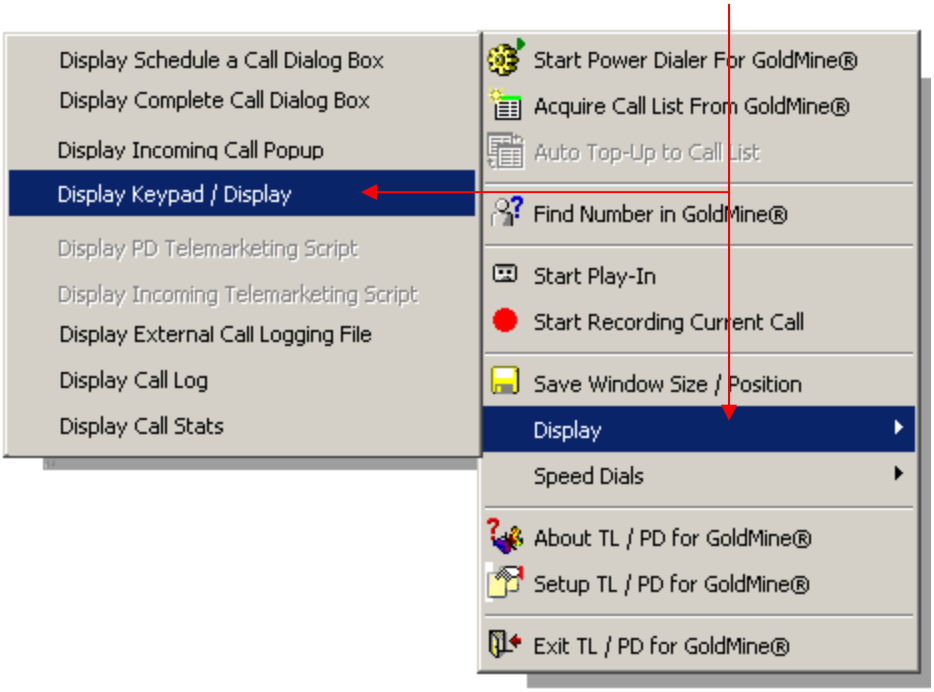
Choose to have the Keypad displayed on screen automatically whenever Tapi Link is started. (This would occur at logon, assuming Tapi Link remains by default in your startup folder.)

- If you choose to introduce additional buttons to the Keypad you may need to revise the overall size and/or proportions of the Keypad to accommodate those changes. This can be achieved by using standard Windows® frame-resizing procedures explained in the section entitled 'Setting up the Keypad'.

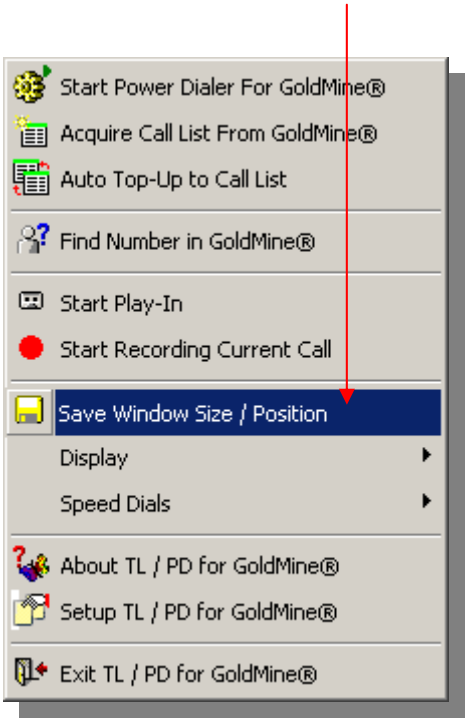
The **Display KP** button (shown above on the bottom left of the dialog box) is useful to summon the Keypad in order to review its appearance during configuration, however . . . . . .

continued . . .

. . . in operational conditions the same result is achieved by selecting **Display > Display Keypad/Display** from the nested context menu (accessed by right-clicking the Tapi Link telephone icon):



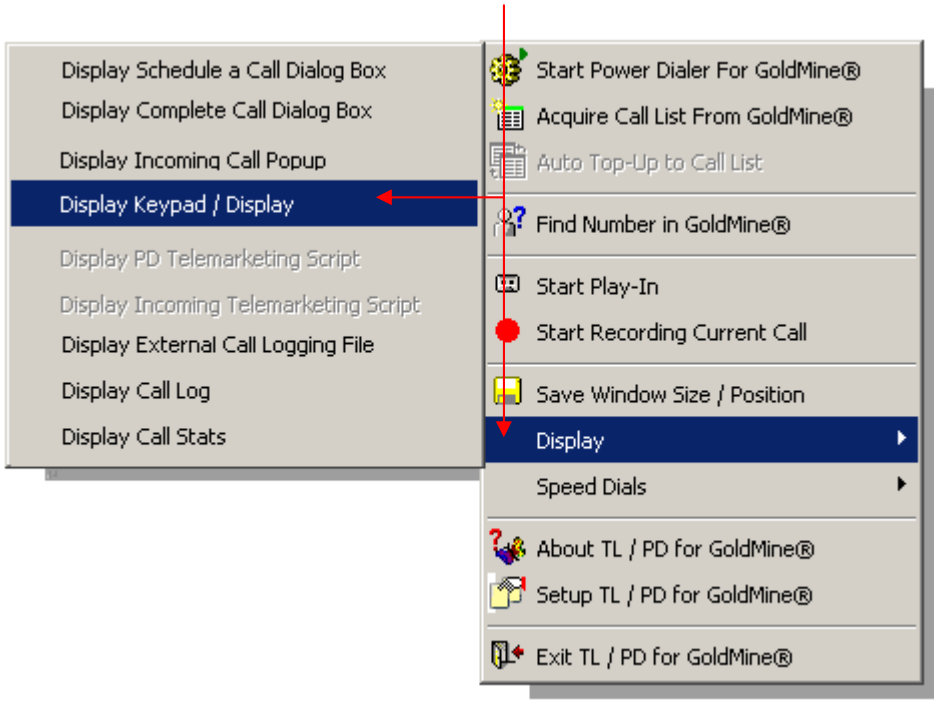
Having made any revisions to the Keypad configuration which will affect its overall size or location, you will need to select **Save Window Size / Position** from the Tapi Link context menu – accessed by right-clicking the icon in the system tray:



Finally, click on the **Apply** button after all changes have been made in order to save the new configuration.
Click on the **Done** button to dismiss the setup dialog box.

Setting up the Keypad

If you have enabled a specific Keypad, you can summon it by left-clicking on the telephone icon,
(Note: Left-clicking on the icon *during a call* will disconnect that call.) or alternatively right-clicking the icon and selecting **Display > Display Keypad/Display** from the context menu).



The default dialing display will be presented (in this instance the Large Keypad is used as an example):

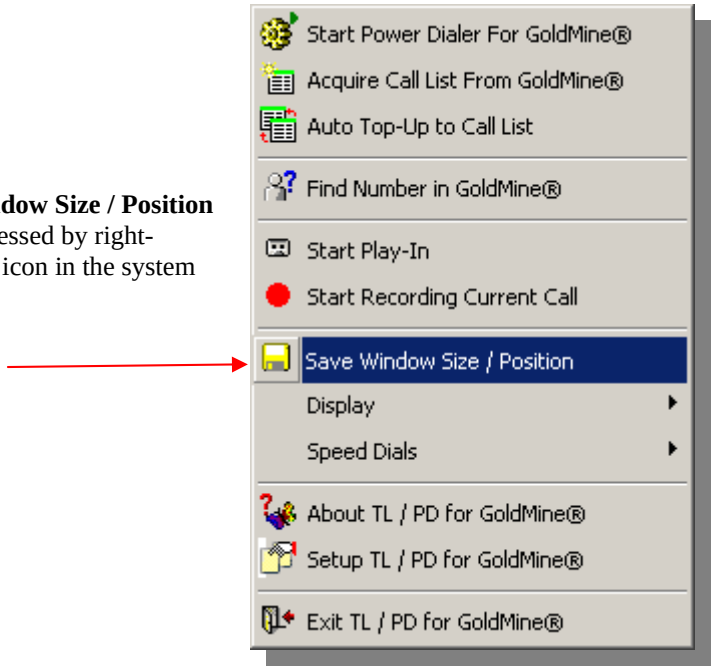
At this point you may need to adjust the dimensions of the dialog box to suit the display resolution settings of your particular screen so that none of the elements of the dialog box are obscured. If necessary, this can be achieved by employing the standard window frame-resizing methods as follows:

Position your mouse cursor carefully to point at any edge or corner of the window. Then gradually move the pointer back and forth by just a few millimetres until the pointer changes to a 'double arrowhead' -

Whilst the cursor remains as a 'double arrowhead' - click and hold down the mouse button and then drag the edge or corner of the window back or forth until the optimum window size is achieved and none of the required elements of the dialog box are obscured:

Once you have adjusted the final dialog box dimensions to suit, this setting *must be saved permanently.*

To do so, click on the .**Save Window Size / Position** in the context menu which is accessed by right-clicking the Tapi Link telephone icon in the system tray:



The Keypad window may be dragged to any area of the screen and/or resized by clicking & dragging any edge or corner of the window. Any changes to either the proportions or on-screen placement of any of the Tapi Link elements will not be made permanent unless you select **Save Window Size / Position**.

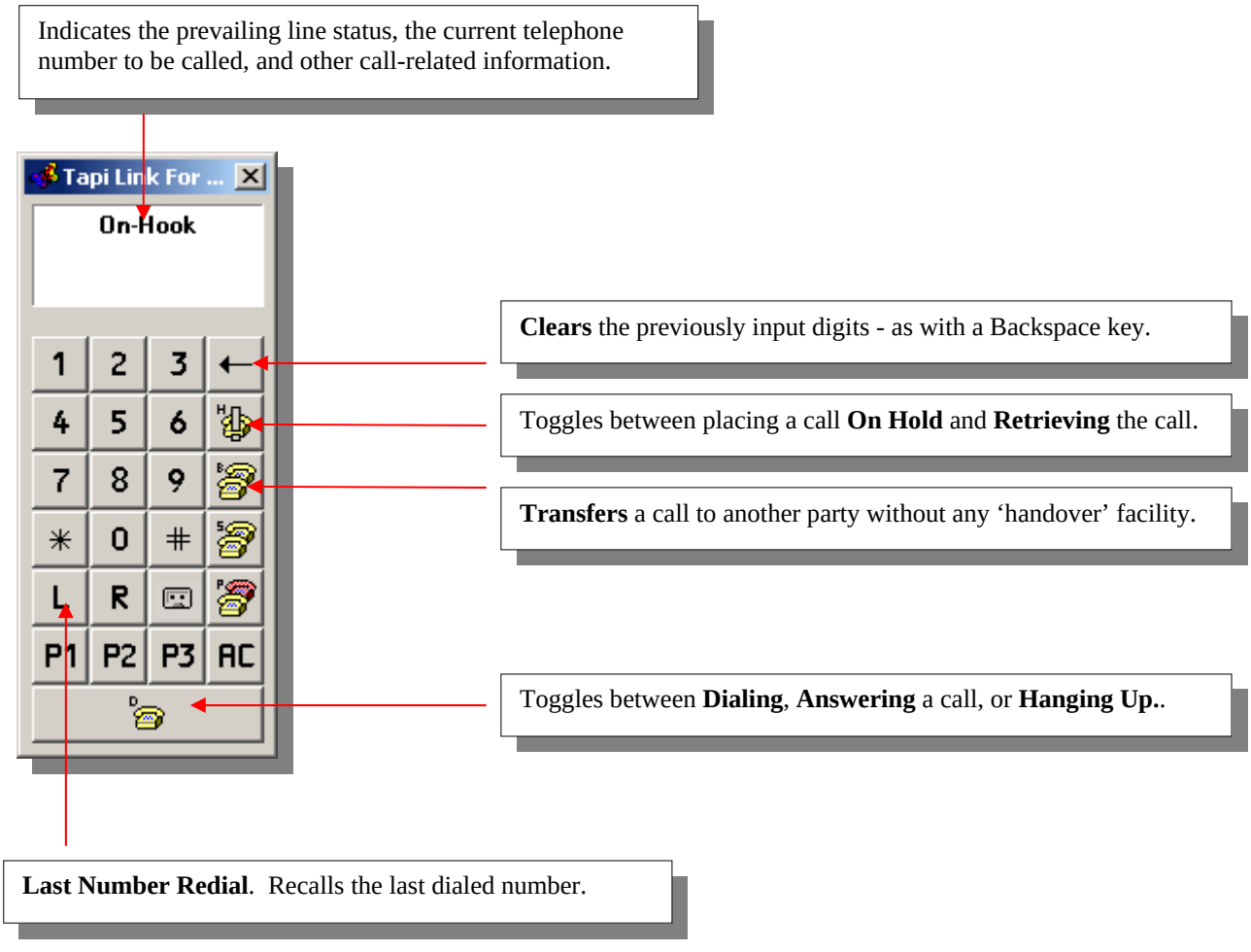
Various Keypad styles

You may select from three different Keypad styles – alternatively, select **No Keypad** from the **Keypad Type Options** in the **Keypad** tab if you prefer not to have a Keypad visible on-screen. If you do choose *not* to have a Keypad visible on screen, a mouse click on the Tapi Link icon in the system tray serves to answer a ringing call or to disconnect any current call.

Choose a Keypad style from those listed in the **Keypad Type Options** section on the **Keypad** tab.

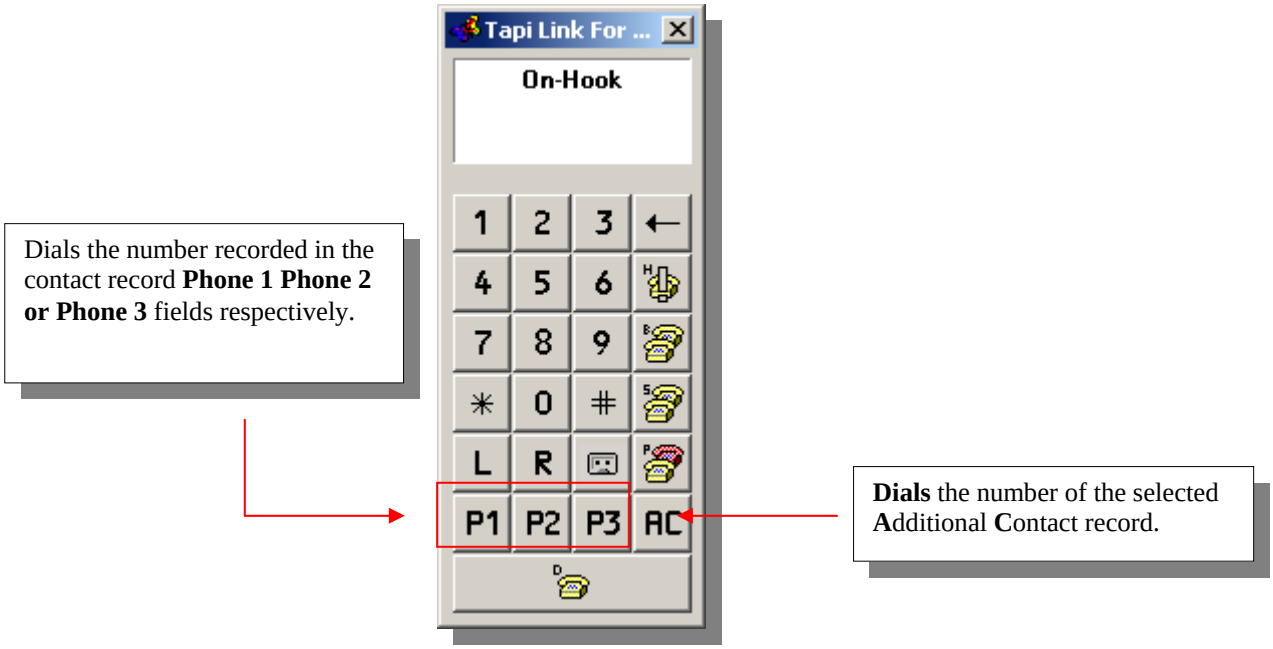
1
Note that it is not necessary to click upon the buttons displayed on the on-screen Keypad in order to dial – instead you may use the numerical keypad on the computer keyboard to manually dial individual numbers.
(In this event, ensure that the computer keyboard Numlock key is set to 'ON'.)

LARGE KEYPAD



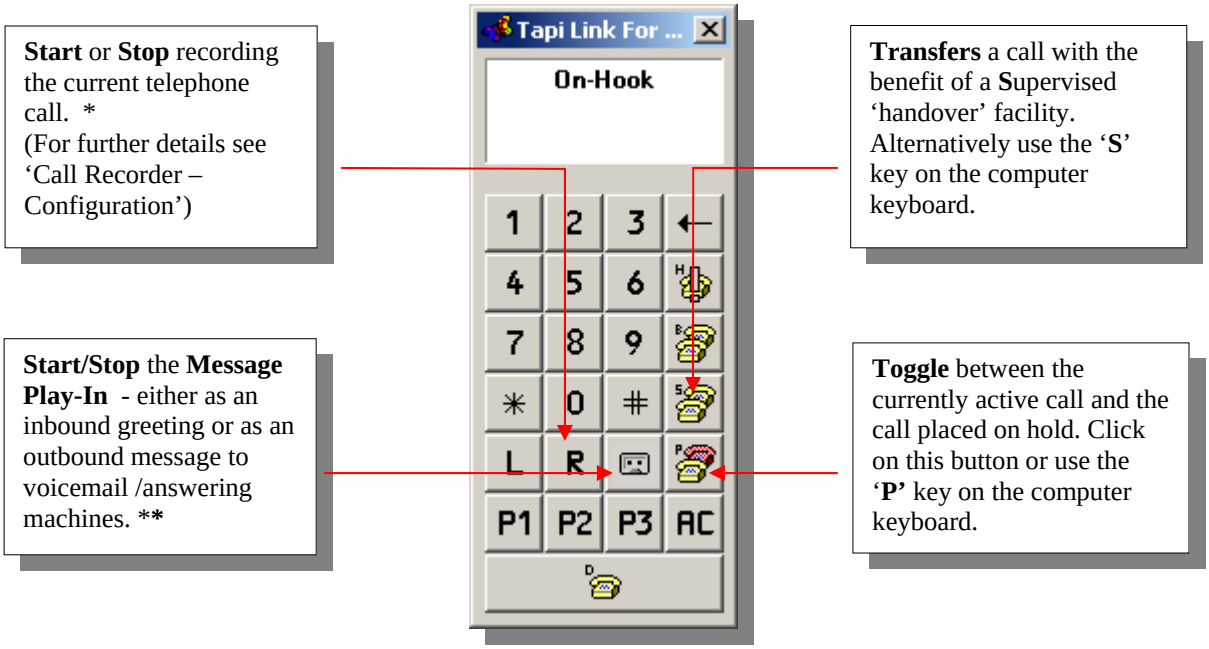
continued ….

If you have checked the boxes **Display Dial P1, Dial P2, Dial P3 and Dial AC** and/or the **Supervised Transfer** and **Swap Active and Held Calls** checkboxes as indicated previously, the **Keypad** will display additional elements as indicated in the following illustrations:



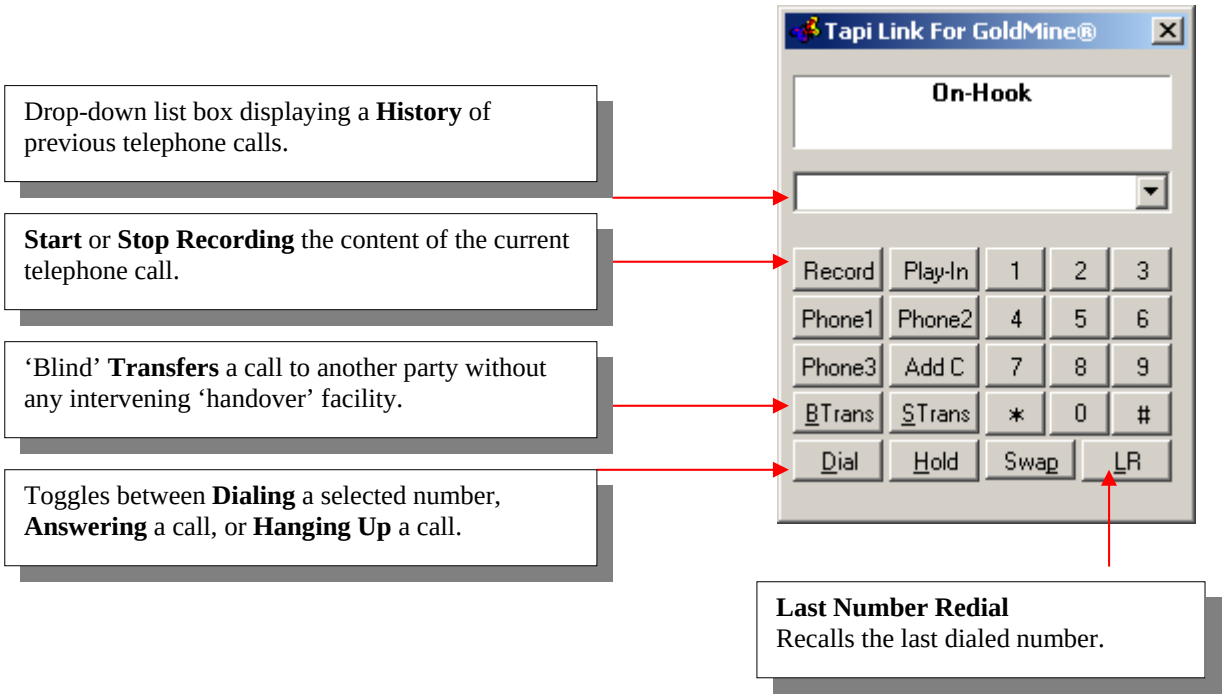
NOTE:

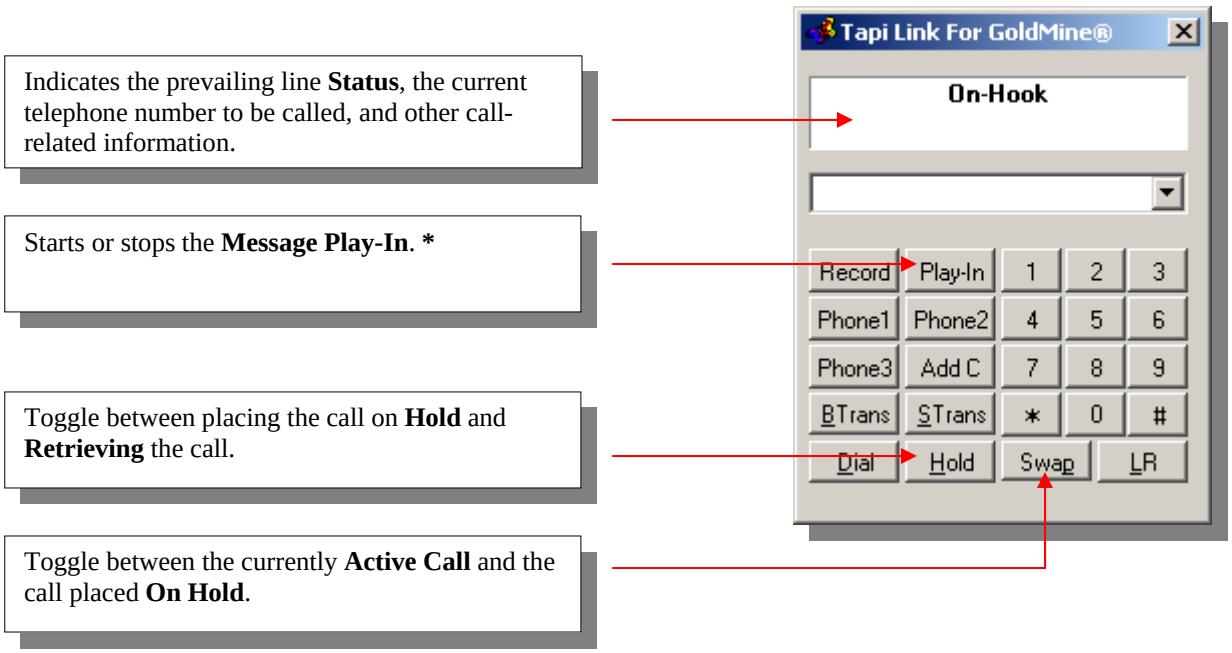
If you choose to introduce additional buttons you may need to revise the size and/or proportions of the Keypad to accommodate those changes. (This can be achieved by using standard window frame resizing procedures detailed in the section 'Setting up the Keypad'.) Having made any such revisions to your Keypad proportions, to make the changes permanent you will need to select **Save Window Size / Position** from the Tapi Link context menu – accessed by right-clicking the Tapi Link icon in the system tray.



* *Requires a Call Recorder for GoldMine. ** May require an additional hardware device.*

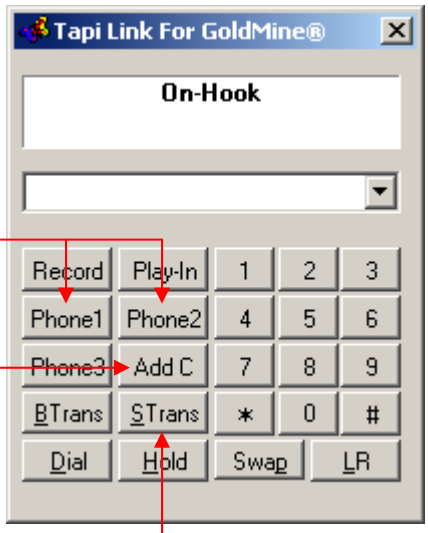
TEXT KEYPAD





* *May require an additional hardware unit, or alternatively, the Hi-Phone Desktop device.*

continued . . .



Dials the number indicated in the contact record **Phone 1** field and **Phone 2** field respectively.

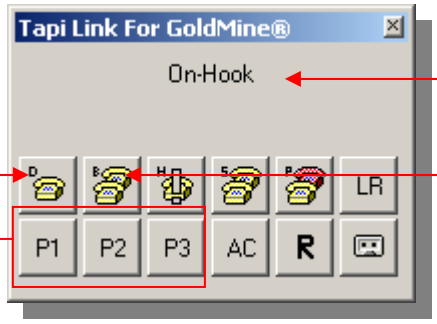
Dials the number of the selected **A**dditional **C**ontact.

Transfers a call with the benefit of a **S**upervised 'handover' facility. Alternatively use the '**S'** key on the computer keyboard.

TOOLBAR KEYPAD

Toggles between **Dialing** the selected number or **Hanging Up** the call.

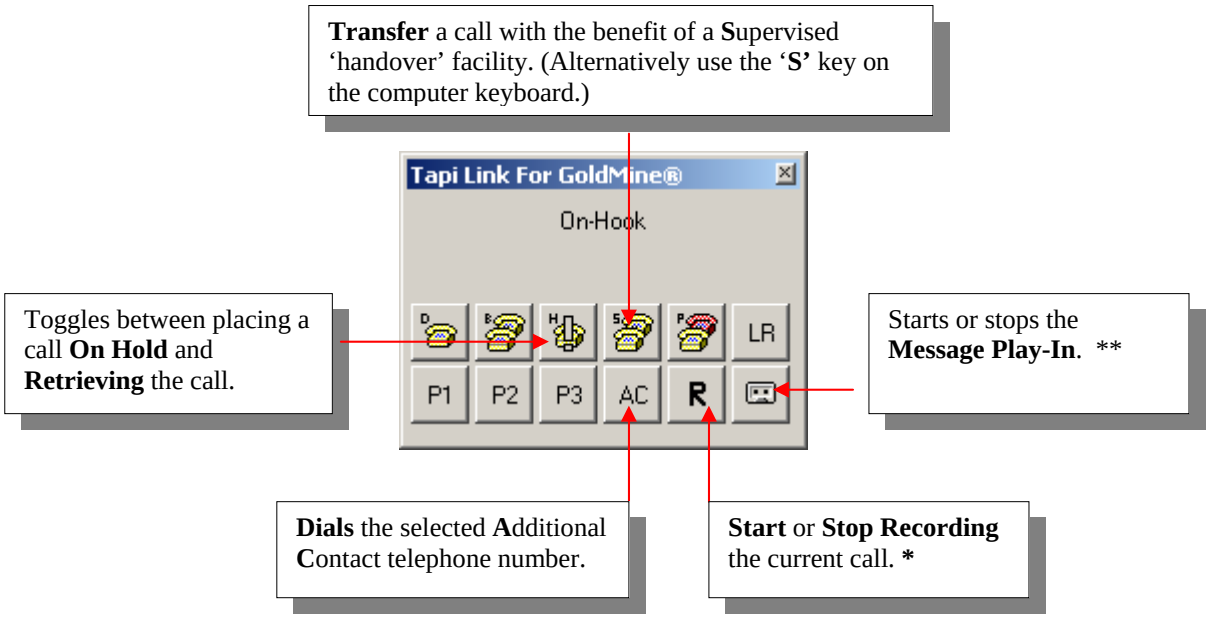
Indicates the prevailing line **Status**, the current telephone number to be called, and other call-related information.



Dials the number indicated in the contact record **Phone 1** field, **Phone 2** field, or **Phone 3** field

'Blind' **Transfers** a call to another party – i.e. unsupervised, without any intervening 'handover' facility.

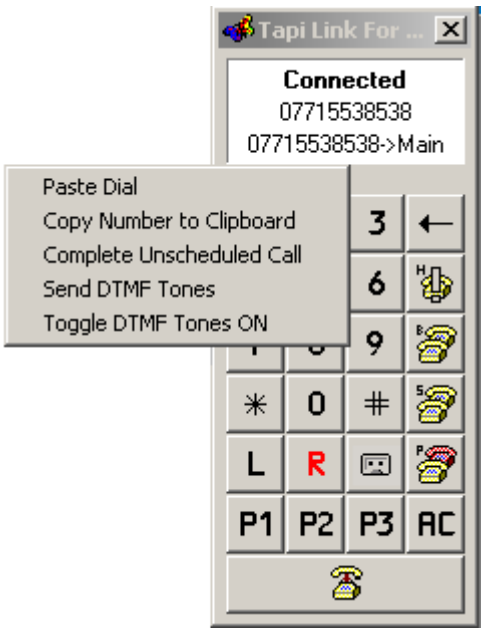
continued . . .



* *Requires Call Recorder for GoldMine®*

** *May require an additional Call Recorder hardware unit, or alternatively the Hi-Phone Desktop device.*

Note:
Depending upon the Keypad chosen and the current call status of the line, there are additional context-sensitive menu options available when right-clicking upon the Keypad, for example:



Further details of these particular options can be found in the respective sections of this guide, namely 'Outbound Dialing – via the Paste Dial facility' and 'Speed Buttons – Auto Attendant'.

Telephone Number formatting

In certain circumstances Tapi Link may require special configuration to suit the characteristics of the telephone system in use, and the manner in which it makes outgoing calls. This section considers the various options available when configuring the exact format of the outbound numbers to be dialed.

Your telephony settings (in windows® Control Panel > Phone & Modem Options > Dialing Rules > Edit) should have already been configured with an entry declaring your local **Area Code**, which will (in most countries) be disregarded when you dial a *local* number. Similarly, the *international prefix code* and *country code* for the UK, for example, are not required when dialing from within the U.K to another U.K destination.
However, if you store your GoldMine® telephone numbers in canonical format (e.g. 4401992560487) you may need to take advantage of the options on **Calls Out** tab in order to avoid improperly formatting the *dialed* numbers.

For example, a GoldMine® contact record showing a canonical telephone number of
4401992560487
(i.e. the telephone number of Papillon Technology including the UK country code 44)

with **Manual Prefix to Add** 00
(which would add the necessary international prefix to enable calls abroad)

and **Manual Prefix to Remove** 0044

will be dialed as 01992560487
(unless of course your local area code is 01992, in which case only 560487 will be dialed.)

Therefore, with the above settings configured, a call to France for example, to a GoldMine® contact record bearing the telephone number 3311111111111 (which includes the country code 33) would be dialed as 003311111111111.

Entries made in the **Manual Prefix to Add** and **Manual Prefix to Remove** sections are mutually *inclusive* - i.e. Tapi Link will search for an *exact* match for the numerical sequence entered in **Manual Prefix to Remove**. Accordingly, in the above instance of the call made to France, the **Manual Prefix to Add of** 00 is *not* removed by the **Manual prefix to Remove** of 0044 since the international code and country code is 0033.

The Match Prefix and Replace Prefix options

These options should be used in circumstances where, for example, Least Cost Routing is employed and consequently further adjustment is required to numbers dialed to certain locations.
In order to compensate for any possible shortfall within the Microsoft TAPI translation mechanism where it may not itself, in these instances, be capable of making the necessary adjustments to the number sequence - you may configure Tapi Link using the following example as a guideline:

For example, having pre-configured the system to prefix calls with a 9 to access an outside line:

e.g. 9901 373 1234 but requiring the addition of the digit **8** for Least Cost Routing to certain numbers

if 9901 is entered in the **Match Prefix** field

and 8901 is entered in the **Replace Prefix** field

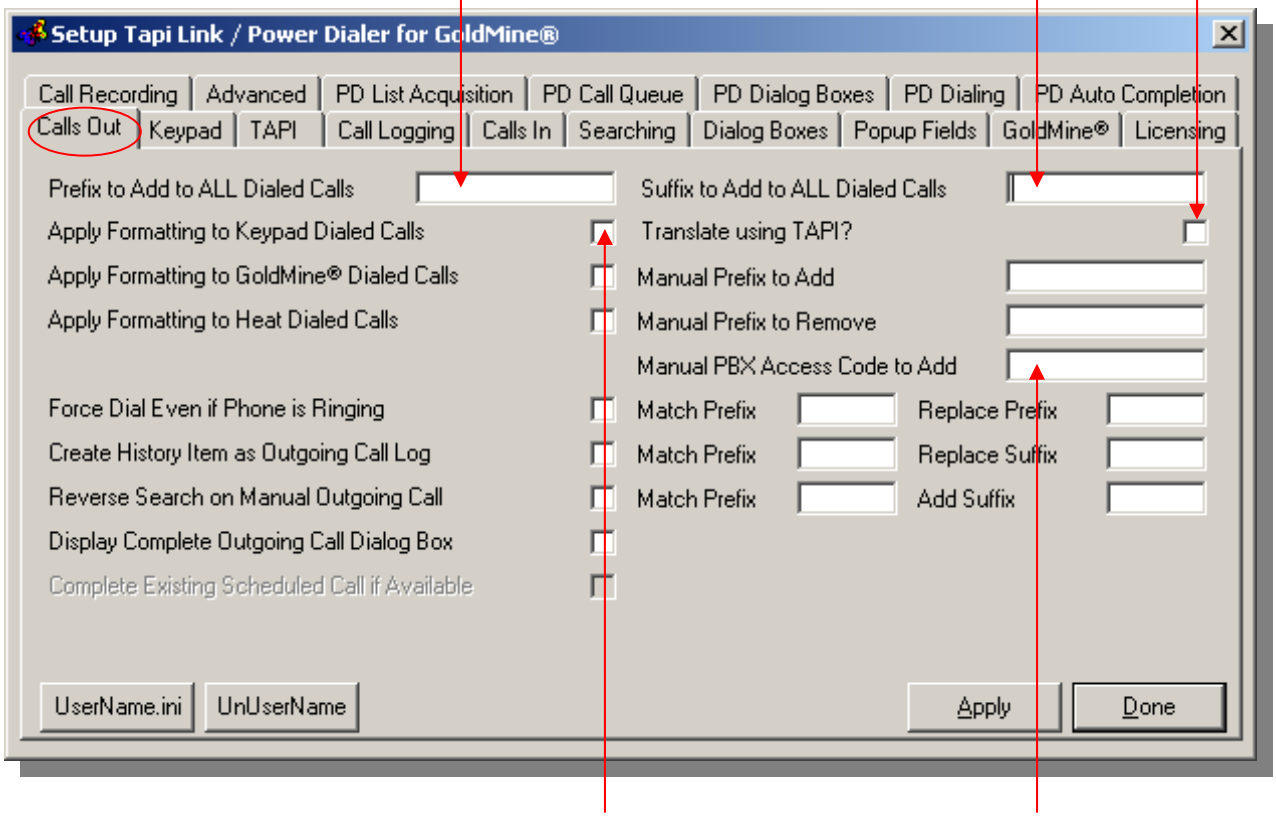
all calls made to area code 901 will be sent via Least Cost Routing. (Naturally, calls to other numbers which do not correspond to the **Match Prefix** (e.g. 9 555) will remain unaffected.)

continued . . .

Additional options are available on the **Calls Out** tab:

Numerical prefix or suffix to be added to the dial string – this will apply to ALL dialing methods.

Choose to allow your Control Panel | Telephony settings to translate the number dialed ***see below**



Apply the **Manual Prefixes to Add** and **Manual Prefixes to Remove** settings to the Tapi Link Keypad buttons - P1, P2, P3, and AC.

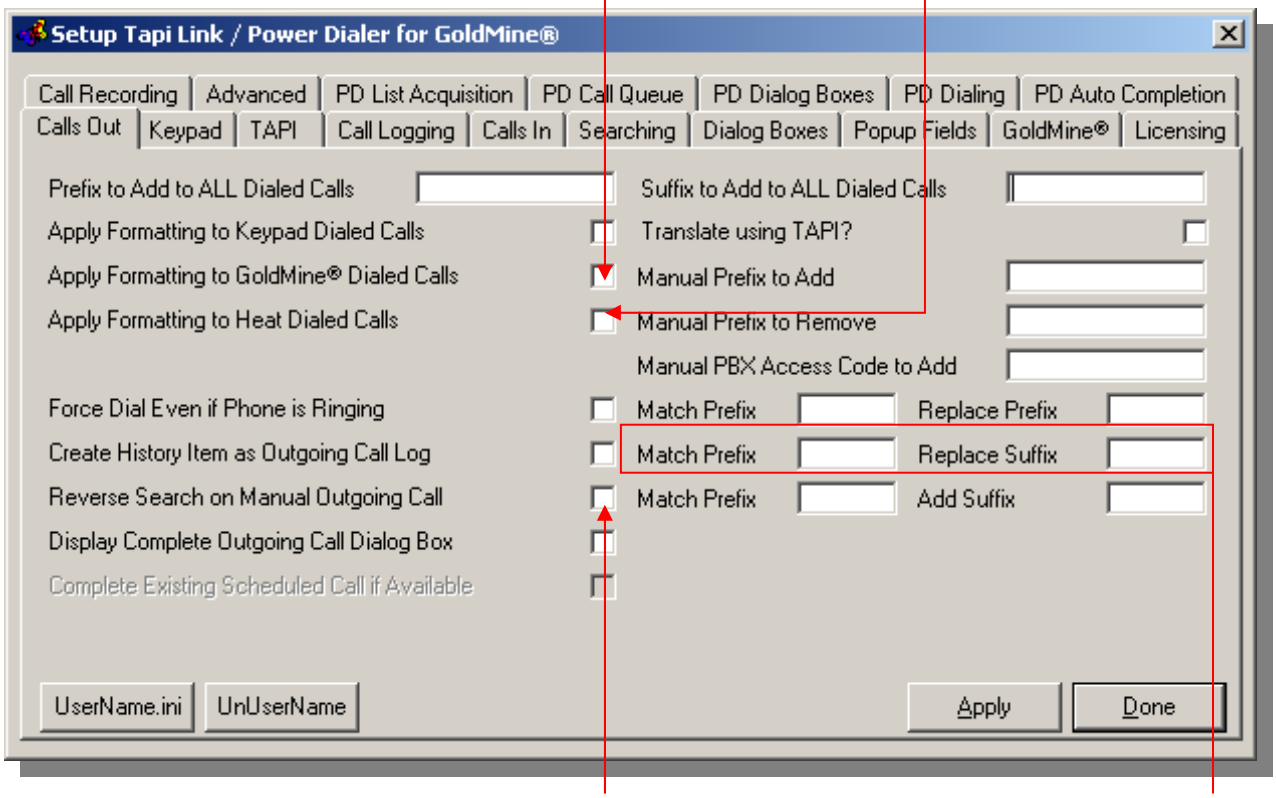
Enter any numerical prefix which may be required to your outgoing calls via a switchboard e.g. '9' for an outside line. ***see below**

- **N.B.** This option may already have been selected via **GoldMine• | Edit | Preferences | Modem** (or Telephony) tab – and also within **Control Panel | Phone & Modem Options**.
  Do NOT duplicate this setting. You only require the setting in one of these locations.

continued . . . .

Apply the **Manual Prefixes to Add** and **Manual Prefixes to Remove** settings to calls dialed from within **GoldMine®**.

Apply the **Manual Prefixes to Add** and **Manual Prefixes to Remove** settings to calls dialed from within **HEAT®**.



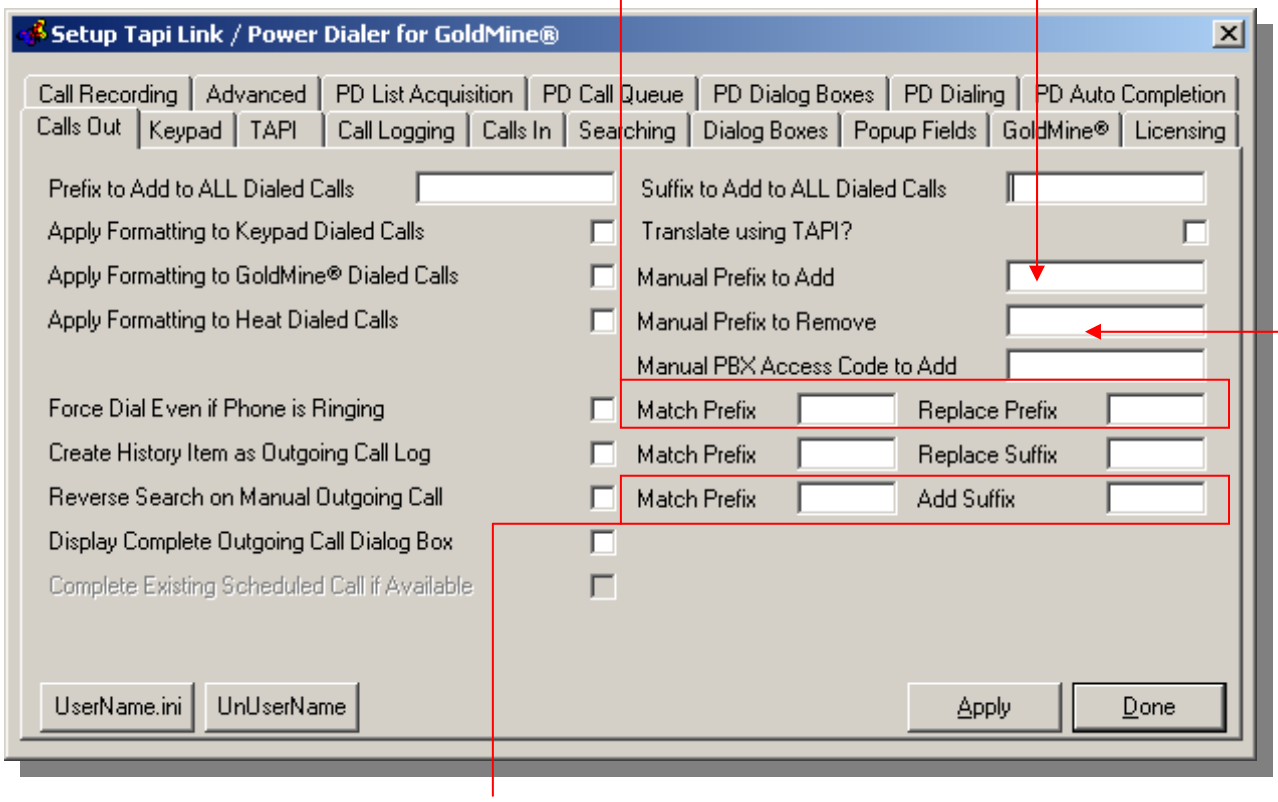
Searches for the relevant contact record relating to any *manually* dialed calls (that are connected). This facilitates detailed Call Logging and the appropriate linking of Call Recordings.

Choose to remove a specific prefix whenever encountered and also to add a particular suffix to the number dialed.

continued . . . .

The prefix you wish to remove from the dialed number and, whenever encountered, the corresponding prefix you wish to substitute. (see the beginning of this section)

Choose to add a prefix to the dialed number. (Usually your International Access Code.)



The suffix that you require to be added whenever a specific prefix is present in the dialed number. (see the beginning of this section)

Remove the prefix predetermined in Control Panel | Telephony from the number dialed. (This is usually your International Access Code + your Country Code.)

Once you have completed your specific requirements - click on the **Apply** button.

Then click on the **Done** button to dismiss the dialog box.

Screen-Popping introduction

One of the main advantages of screen-popping is that you can have the relevant caller's details immediately to hand before you answer the call.
So it is often assumed by new users that the ideal scenario is to see the immediate appearance of the caller's entire GoldMine® contact record on screen while the telephone is still ringing. However, this is most often **not** the case.
This is because most users will be dealing with a specific contact record which they do not necessarily want abruptly supplanted by another contact record.
Similarly, it is usually only *the user who actually accepts the call* who would require access to the appropriate contact record.

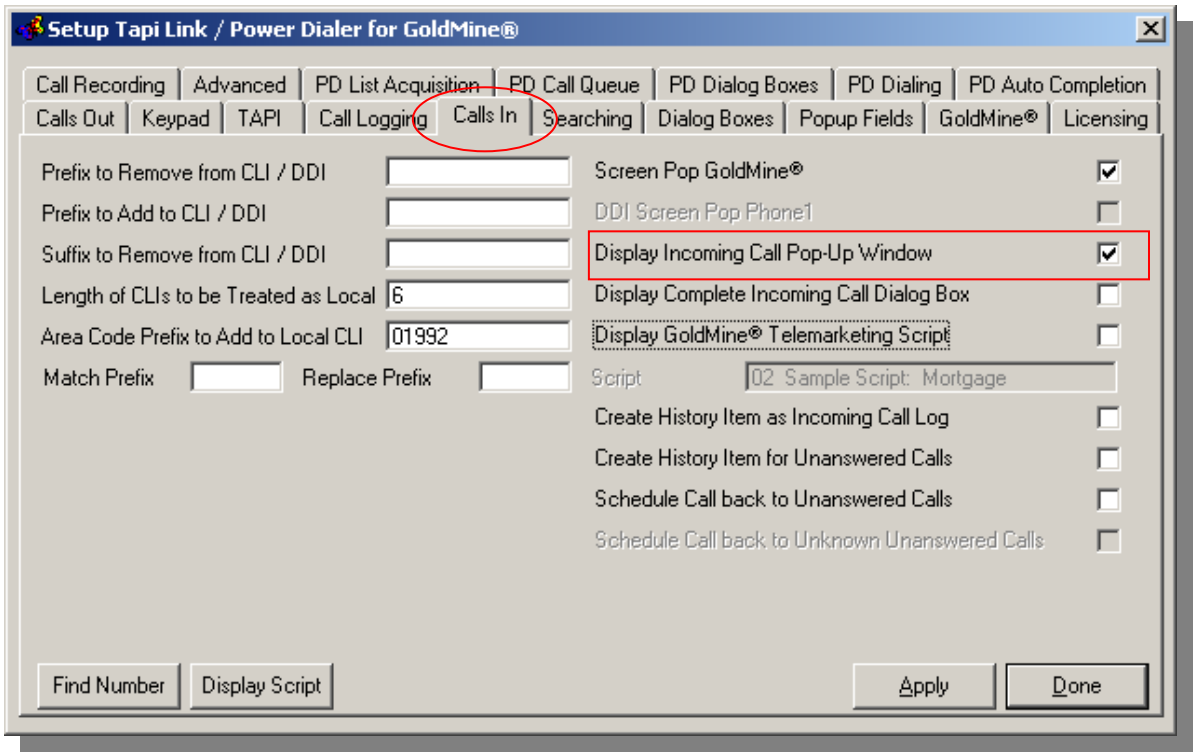
So instead, the majority of users opt for the regular 'screen-pop'. This is a Popup dialog box that presents a brief summary of important data about the specific caller – and this information allows the users to assess whether they, or perhaps someone else, are best suited to take the call.

If any user wishes to ignore the call then the screen-pop can simply be ignored or dismissed, or it can set to disappear automatically after a chosen interval.
If the user wishes to take the call, the 'Popup' provides the relevant options to immediately summon the callers contact record, or alternatively to raise a *supplemental* contact record - so that the record with which they are currently dealing is not discarded. There are also options within the popup to create a new record or to add an additional contact to an existing record.

Since the nature of each users needs and working methods can be very different, Tapi Link provides a variety of different screen-popping options to accommodate those individual requirements.

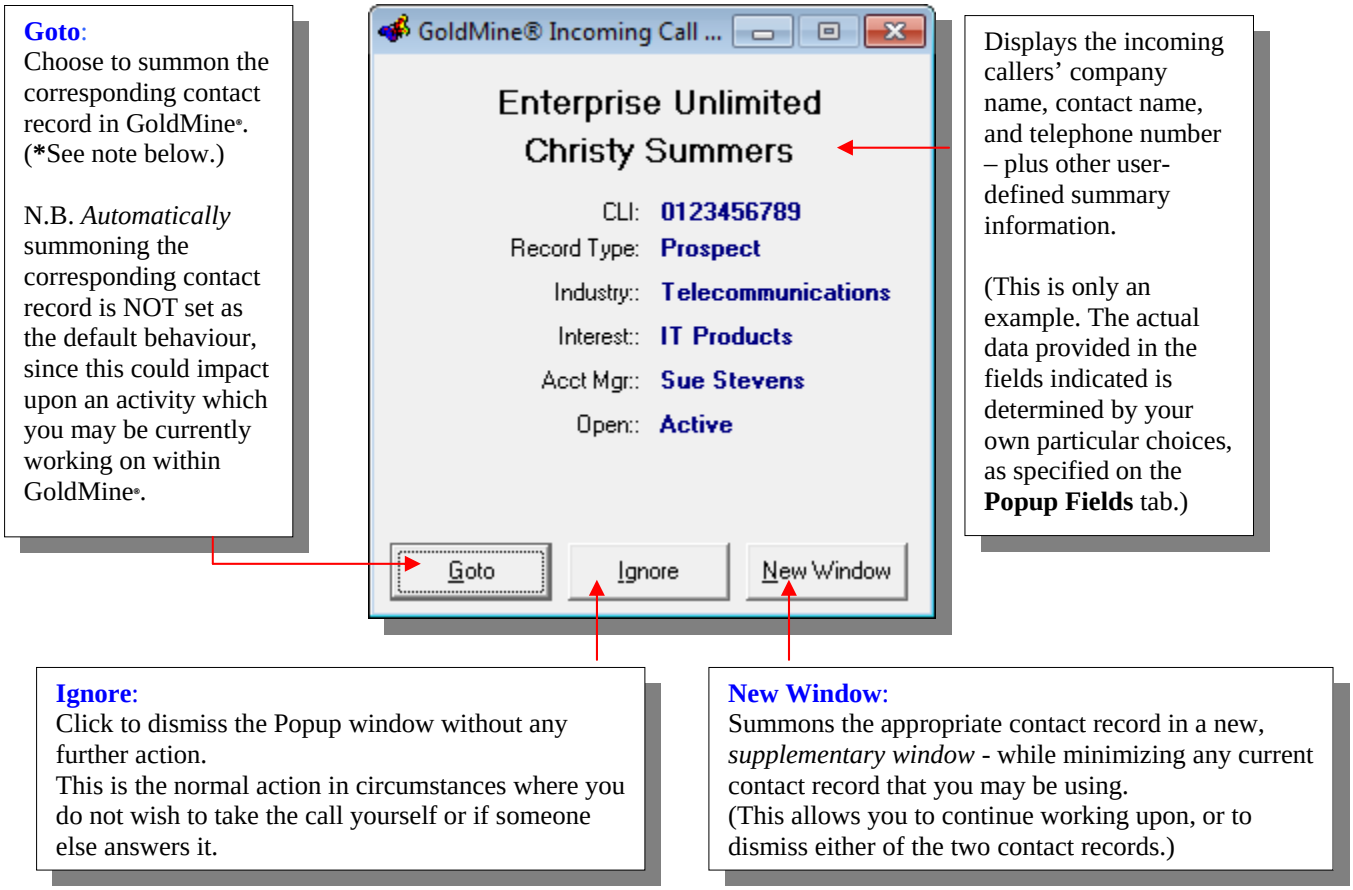
If users need to disregard incoming calls and concentrate solely on outbound calls at any time, screen-popping can be permanently or temporarily disabled simply by un-checking the **Screen Pop GoldMine®** option shown below.

The following setting on the **Calls In** tab determines whether a 'screen-pop' dialog box appears, or alternatively if the contact record itself appears –



Un-checking this option determines that the relevant GoldMine® contact record will appear instead of the popup.

An example of an **Popup** screen is shown below:



Note
***** The **Goto** button can also be configured to accept the incoming call by enabling the **Goto/New Answers Call** option on the **Dialog Boxes** tab.
***** The **Ignore button** can also be set to operate automatically - in order to dismiss the Popup screen after a specific time has elapsed - via the **Auto-Hide** option on the **Dialog Boxes** tab.

The above illustrates a typical example of a screen-pop dialog box in circumstances where the calling party is known, and there is a corresponding record in GoldMine®.
The individual buttons in the screen-pop dialog box are 'context-sensitive'. Their appearance and functionality will alter to match the changing nature of the incoming calls. For example, in the event of a call from an *unrecognised* number, the **Goto** button is supplanted by a **New Record** button which will create and populate a new contact record for the caller. (For more detailed information see the later sections entitled 'Capturing new records from Screen Popups' and 'Capturing new Additional Contacts'.)

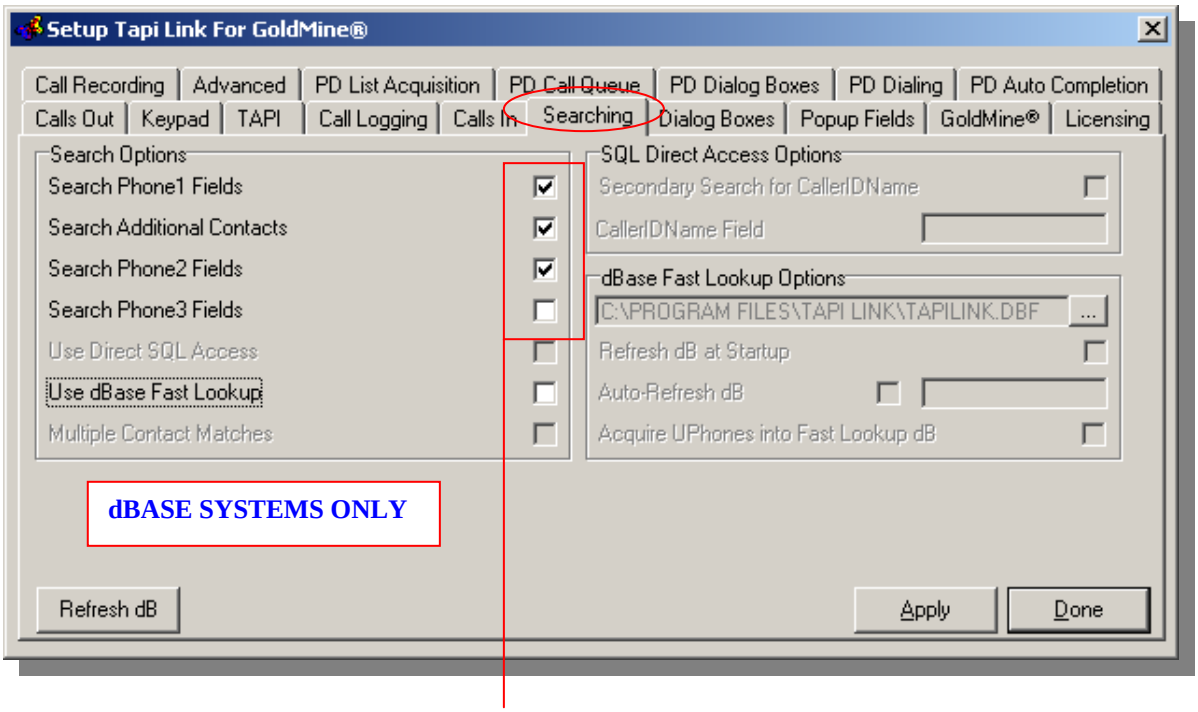
Bear in mind that if you opt to have the contact record appear rather than a screen-pop, in the event of receiving a call with a withheld or unrecognised number then there will be no on-screen activity at all – because there will be no associated contact record to be summoned.

Configuring specific Screen-Popping features

To define the extent of the search process for matching telephone numbers within GoldMine®, and the behaviour of the resulting screen-pop dialog boxes - proceed as follows:

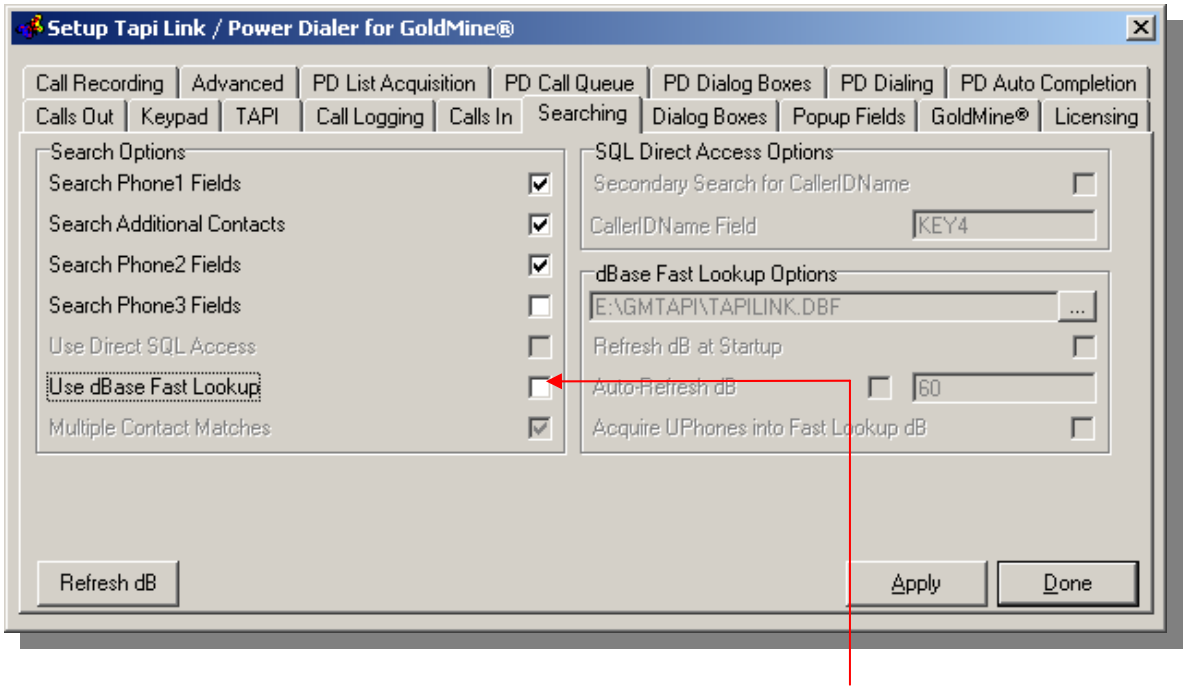
*The appearance of the **Searching** tab will vary according to the specific version of GoldMine® you are using. The examples shown correspond with a GoldMine® 6.x interface only. GoldMine® 7, 8, and 9 users will observe a much simplified **Searching** tab.*

Select the **Searching** tab:

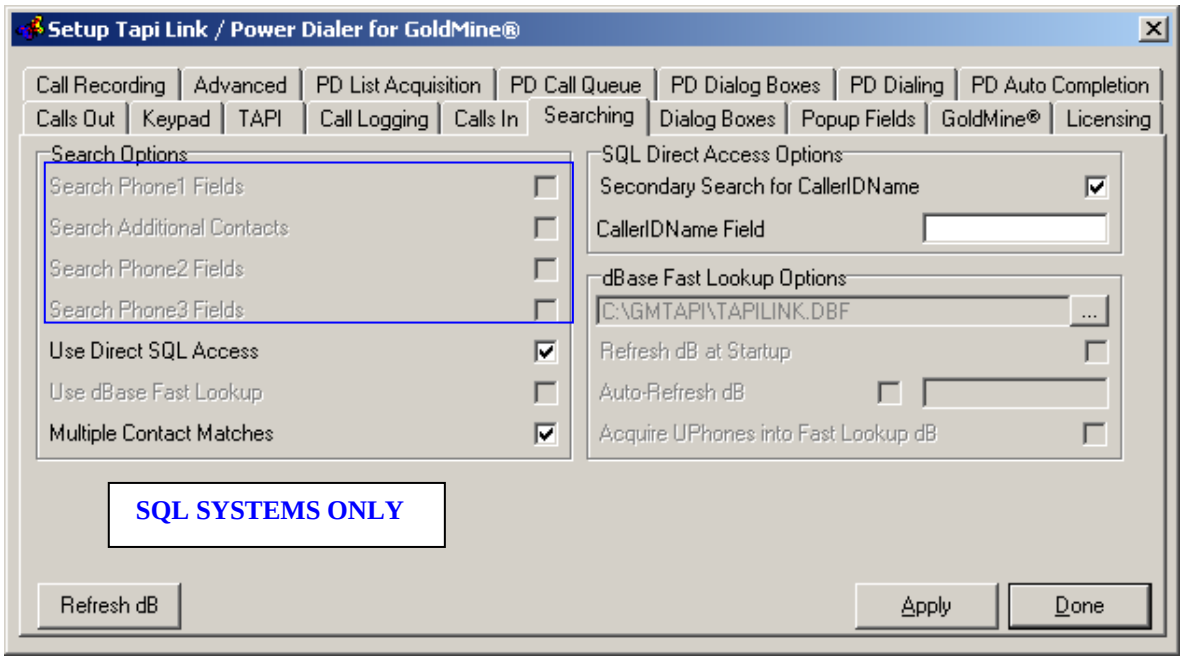


Choose which of the fields you wish to be searched for the incoming callers' number. This option is only available upon and relevant to dBase GoldMine® systems. Refer to the contents page main section entitled 'Optimisation for dBase systems' for comprehensive information on screen-popping for non SQL systems.

(In the event that all of the options within the **Searching** tab are 'greyed-out' and unavailable – refer to the contents page main section Troubleshooting & Reconfiguration and the sub-section entitled '8. Activating the Screen-Popping functionality'.)



(Bear in mind that when using dBase on low-end systems, if you are not using the **dBase Fast Lookup** facility, the fewer the fields searched, the faster the results may appear. However, on SQL server based systems this is of no consequence since all fields are searched simultaneously, and consequently the option of limiting your choices to individual search fields is irrelevant and will be 'greyed-out' as shown in the following example.)

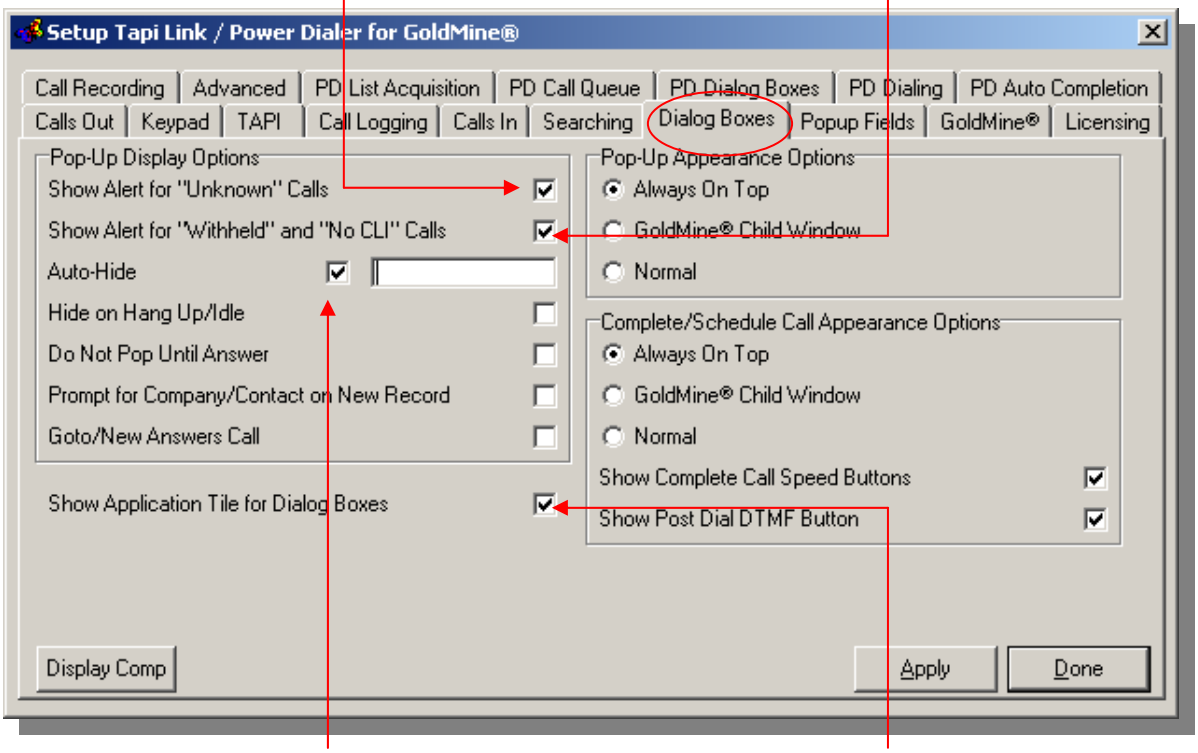


GoldMine® 6.x users with SQL systems should ensure that the **Use Direct SQL Access** option is checked.
The **Multiple Contact Matche**s option shown above is detailed in a subsequent section entitled 'Screen-Popping with multiple contact matches'.

Further refinement of your screen-pop configuration can be specified via the **Dialog Boxes** tab:

Choose whether to display a screen-pop declaring 'Unknown' for any incoming calls that present an unrecognised telephone number.

Choose whether to display a screen-pop for incoming calls where a blank or 'withheld' telephone number is presented * see below



Choose to hide the Popup display after a predetermined period of time.
Enter the desired period (in seconds) alongside the check box. **** s**ee below

Choose to display an 'Application Tile' on the Windows Task Bar as an alert when a dialog box remains currently active and requires the users prompt attention.

*****

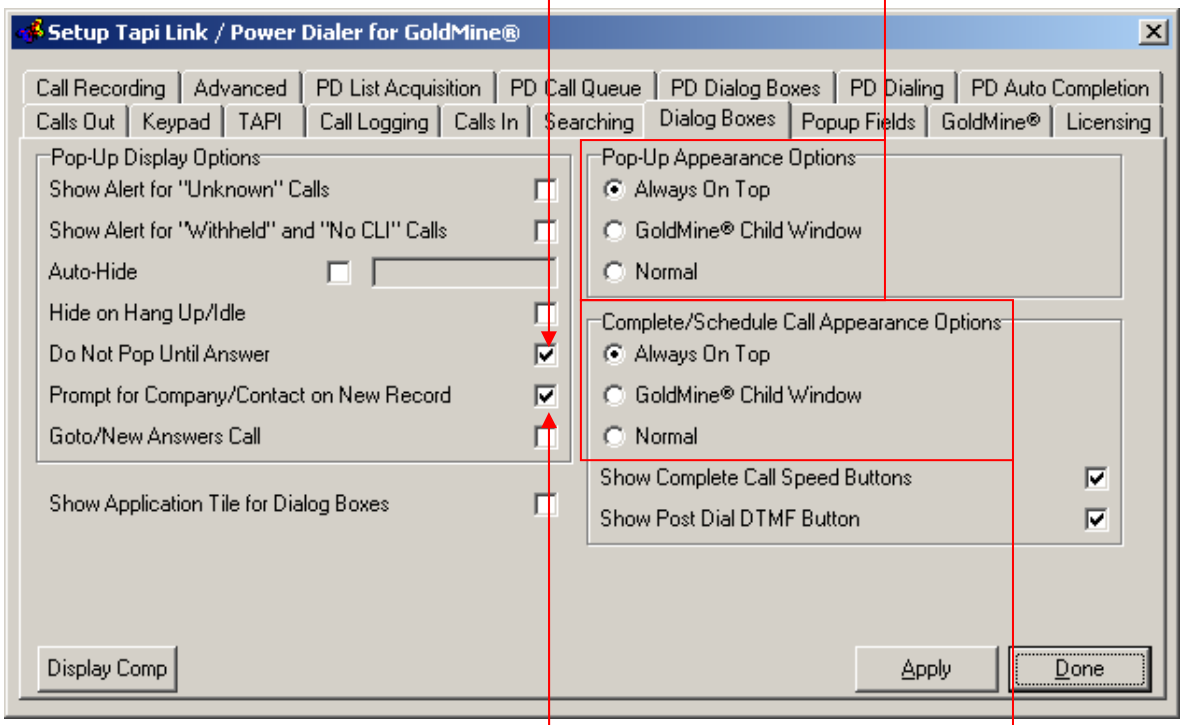
The proportion of calls which present themselves without a source telephone number may be such that you would prefer no Popup notifications in those cases. These may be calls where the telephone number has been purposely withheld by the caller, or perhaps where the callers number has simply not been passed on by one of the carriers in a chain of several telephone service providers.

******

If left unattended, the default behaviour for a screen-pop is to remain on screen until such a time as it is replaced by a screen-pop for a subsequent call – but it is also subject to any **Hide on Hang Up/Idle** setting.

Choose not to activate screen-popping until incoming calls are actually answered. (Not a commonly-used option.) *

Choose to display the incoming call **Popup** either *on top* of all other desktop applications, as a GoldMine® child window, or as normal. **



Check this option to prompt you for a Company Name and Contact Name for a new contact record entry – otherwise a new record bearing only the telephone number will be created.

Choose to display the **Call Completion dialog box** either on top of all other applications, as a GoldMine® child window, or as normal..

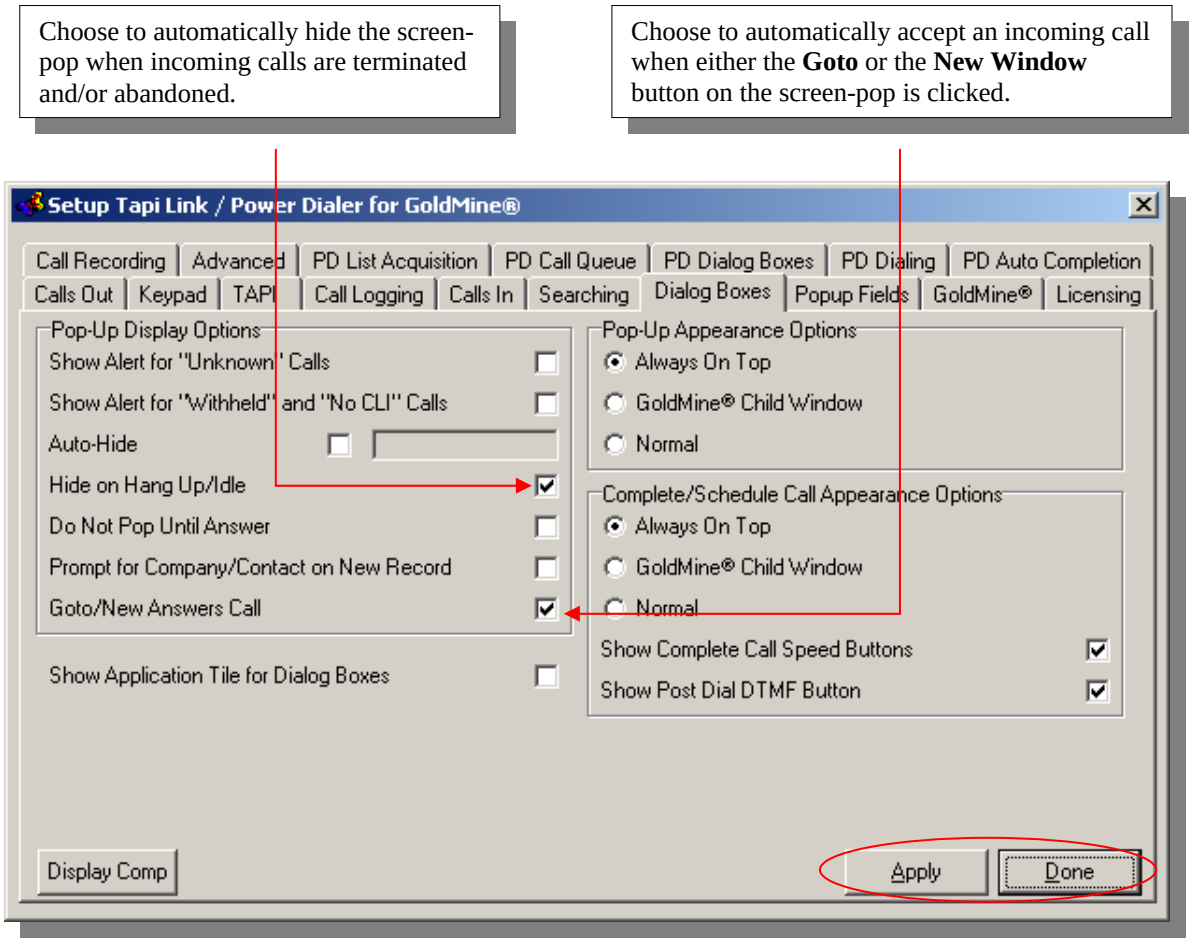
*

Can be employed for example in circumstances where users may have the unfortunate tendency to 'cherry-pick' the calls they accept, rather than treating all incoming calls equally. i.e. having seen the information presented while the telephone is still ringing, they perhaps choose to avoid calls emanating from 'difficult' callers. Checking this option would mean that the screen-pop (or contact record) does not appear until they have already answered the call.

**

Bear in mind that if you choose to have the screen-pop as a GoldMine® child window - when GoldMine® is minimised the screen-pop will not be visible.

continued . . . .



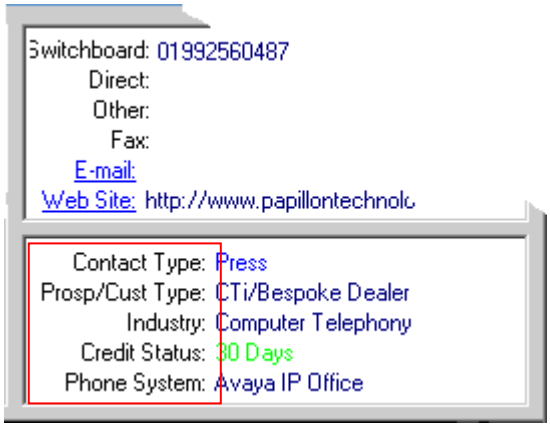
Once you have finalized your selections, click on the **Apply** button to save the changes to your configuration.

To complete the process and to dismiss the dialog box click on the **Done** button.

Choosing the contact record information displayed on screen-pops

You can choose from a variety of contact information that is to be displayed on a Popup dialog box – however, during the original installation phase Tapi Link acquires its default settings from the existing information in the GoldMine® 'Key Fields' 1 to 5 as shown in the illustrations below.

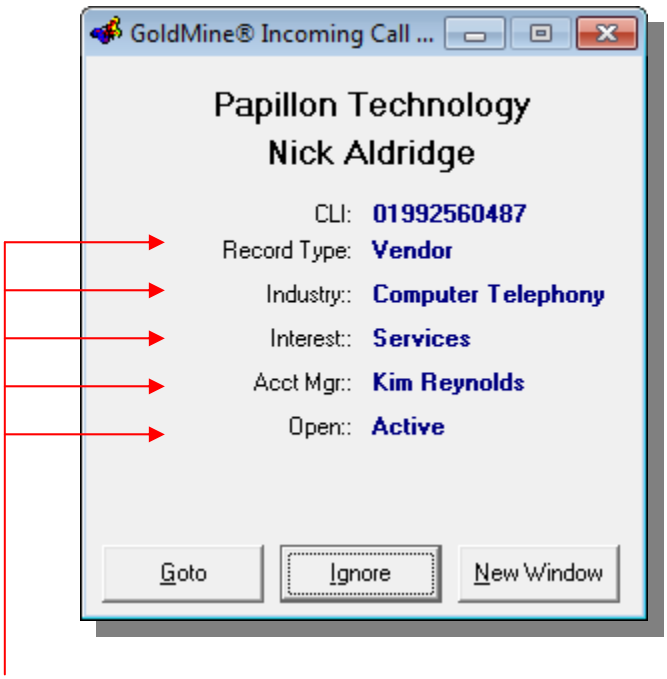
Earlier versions of GoldMine®



Later versions of GoldMine®

These particular fields are a popular choice because they are commonly used to store brief defining facts that summarise key information about your customer / prospect / supplier etc.
(The actual labels on your own version of GoldMine® will doubtless be very different from the example above because the field labels are usually customised to suit the specific requirements of the individual business.)

Using the above right example, in its default configuration the incoming call Popup screen would appear as follows:

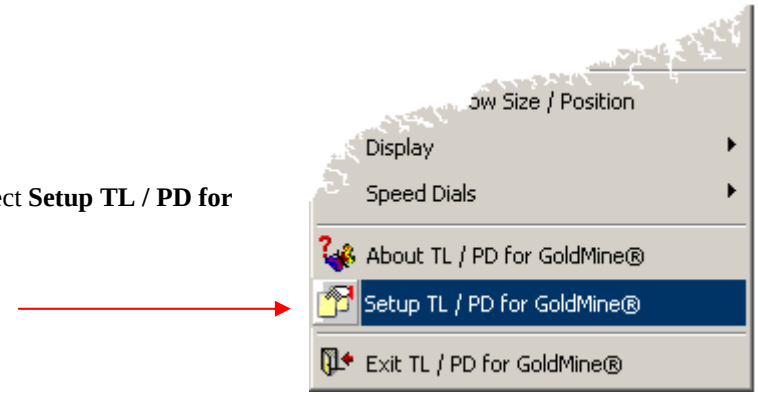


Although these particular GoldMine® fields [Key Fields 1-5] are frequently used to store significant attributes of each contact, you may have relevant data located elsewhere in GoldMine® which you would prefer to appear on the Popup dialog boxes instead. If you have administrative access to, and sufficient knowledge of GoldMine® you can choose other GoldMine® fields from which to extract and present data. In fact, each user can have different data displayed according to their specific needs.

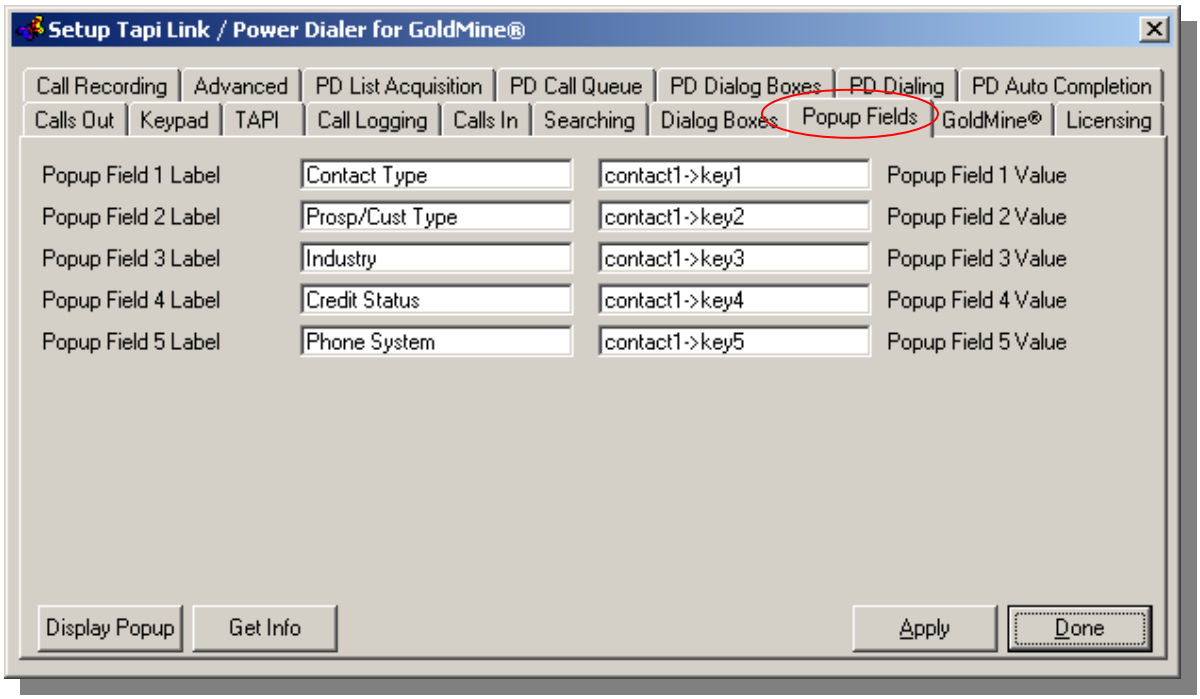
In order to configure Tapi Link to present specific Popup information tailored to your individual requirements proceed as follows:

Right-click on the Tapi Link icon in the system tray:

From the context menu select **Setup TL / PD for GoldMine®**.



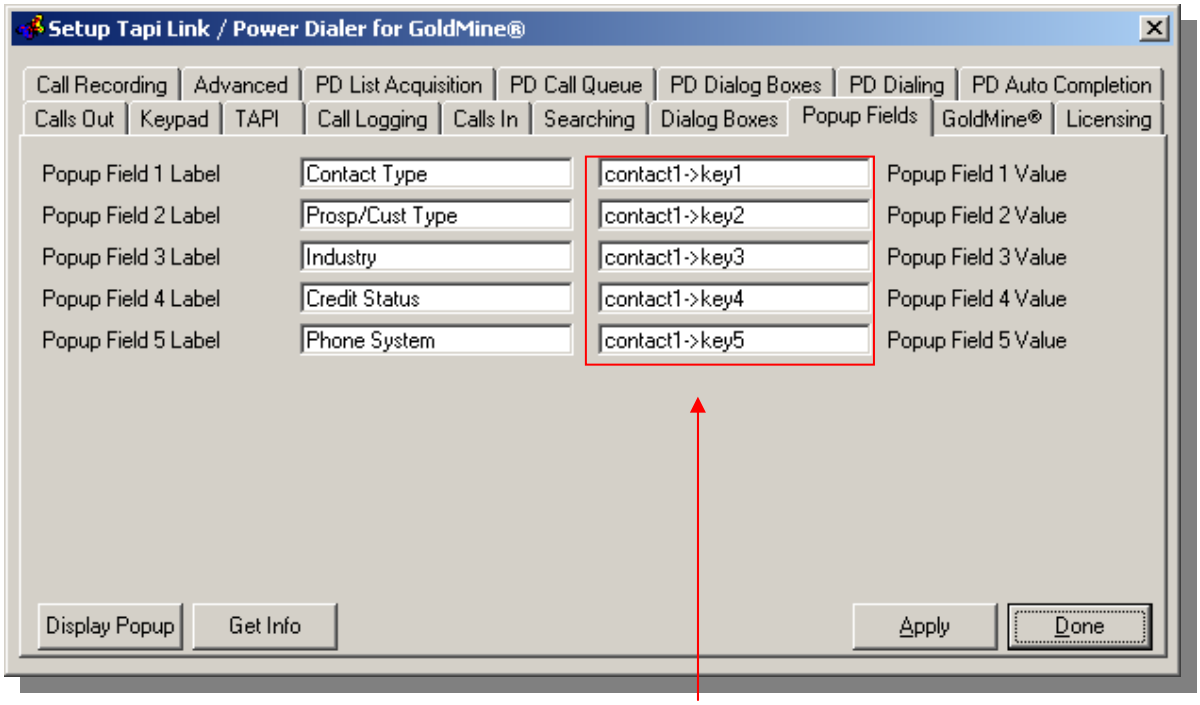
From the **Setup** window which appears select the **Popup Fields** tab:



The various fields on this tab enable you to configure the Popup dialog box to display up to five items of selected data of your choice from your own individual data fields within GoldMine®. This will usually be the type of information you would consider to be of the greatest significance at the time of an incoming call.

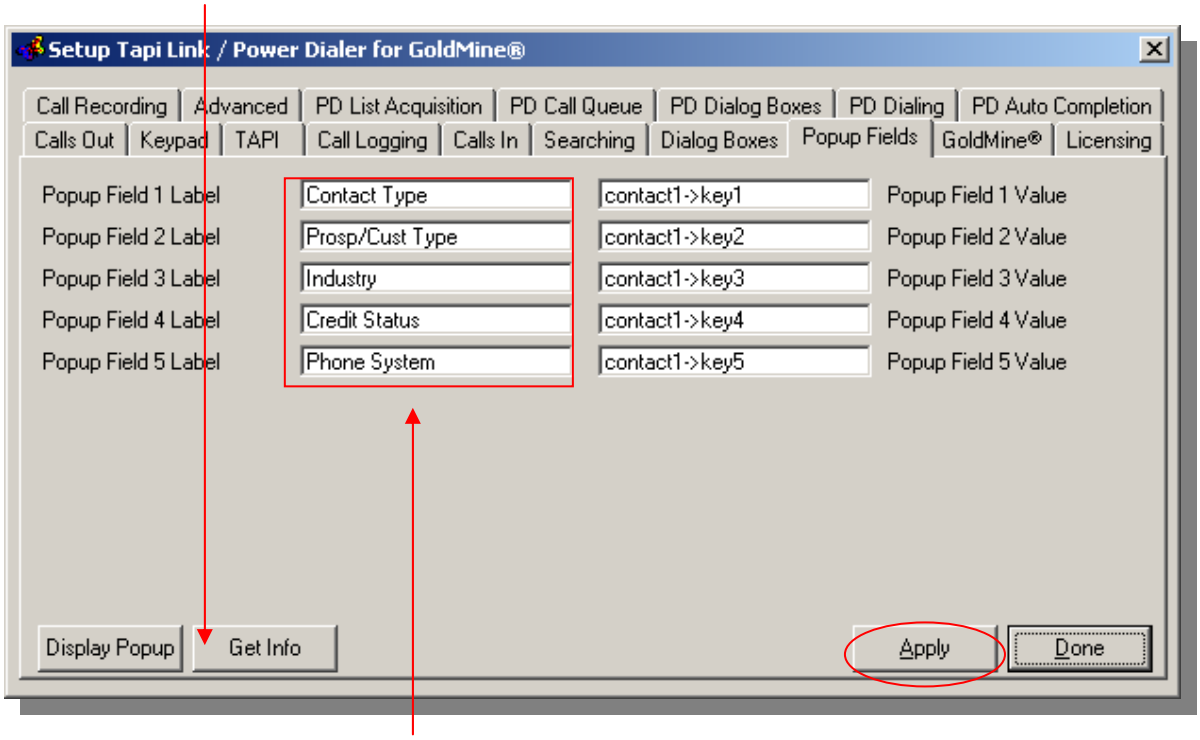
(You may choose any field from the GoldMine® tables Contact1 or Contact2.)

continued . . .

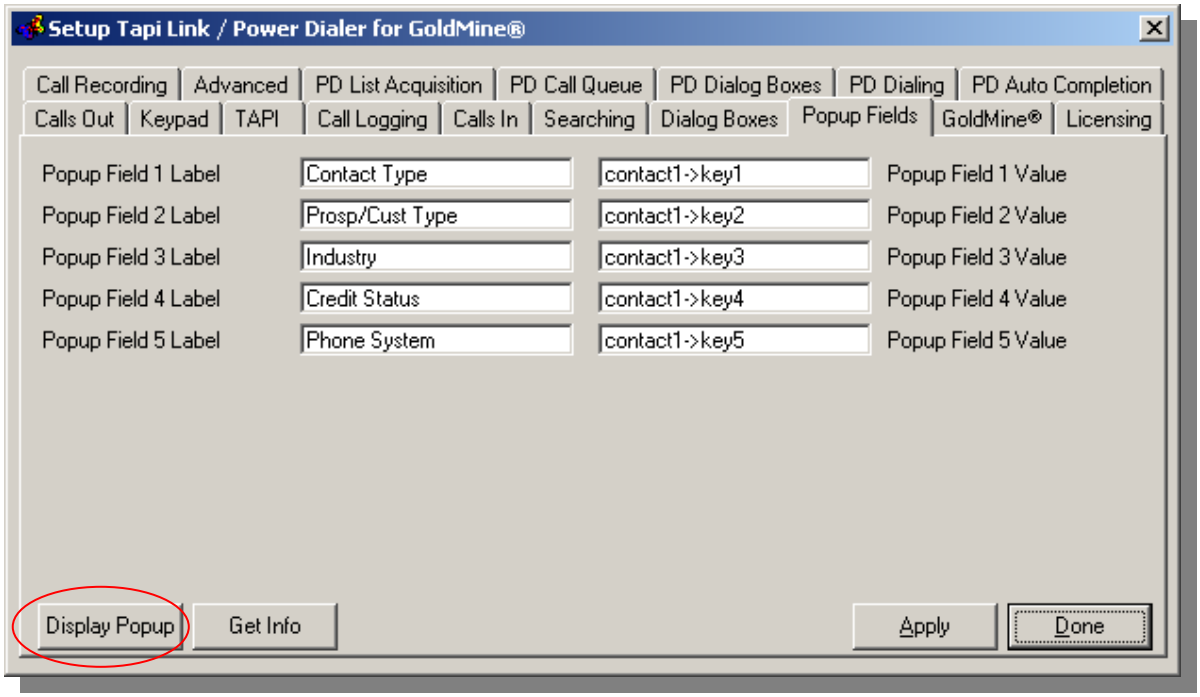


Popup Field Values: Enter the *values* of the appropriate GoldMine® Contact1 or Contact2 fields corresponding to the data that you wish to have displayed on the incoming call PopUp.

Having made any changes to the **Popup Field Values** –
Click on the **Get Info** button.



This will update the **Popup Field Labels** with the corresponding label names from GoldMine®.
Then click on the **Apply** button to save your settings. (If the **Get Info** button fails to register any changes, adjust the respective Field Properties within GoldMine® by copying the Global Label name into the Local Label name field. Alternatively, you might prefer to simply enter the Popup Field Labels manually.)



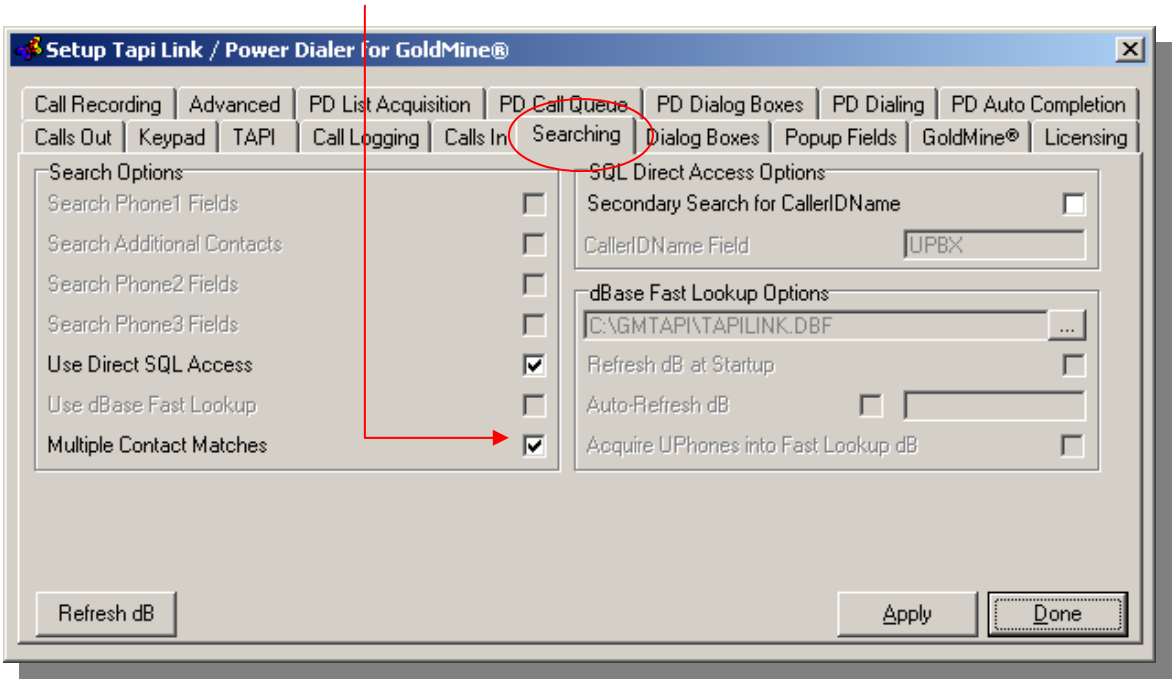
Click on the **Display Popup** button to see the initial results of your configuration …….

This displays a *dummy example* of a screen-pop to enable you to visualize the results of your field LABEL configuration only. (Not the corresponding data, because no contact record is actually being sought in this test.) . Subsequently, you can assess the results more convincingly - and with the specific field *data* displayed, by arranging an incoming call, or simply by checking with the **Find Number** option – detailed later in this guide in the section entitled 'The Find Number Feature'.
When you are satisfied with the results click on the **Apply** button in order to save any changes
If required, each user could have completely different screen-popping criteria setup, and choose to have data which is appropriate to their particular role or departmental responsibilities displayed to them. For example the Accounts department might prefer to have entirely different data presented on their own screen-pops from that which the users in the Sales department might choose to see.
(Note that the settings and data shown above are for illustration purposes only. The corresponding details displayed on your particular machine will probably vary significantly to those shown above.)

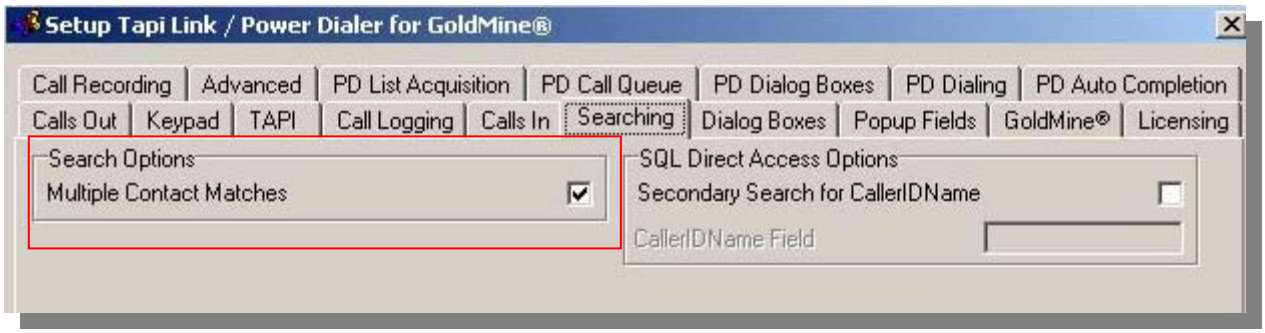
Screen-Popping with multiple contact matches

One or more of the individual contact records, or additional contacts in your GoldMine® database may bear the same telephone number. For example, you may have unique and separate contact records for several different employees – but they may all call from same company telephone number. Telephone numbers may also be replicated over a number of contact records for a variety of other reasons, depending on how you store and structure your data. When an inbound call is received, the following feature facilitates choosing and switching between all of the records found with a matching telephone number, and will function with both SQL and dBase versions of GoldMine®.

To enable this feature, select **Multiple Contact Matches** on the **Searching** tab:

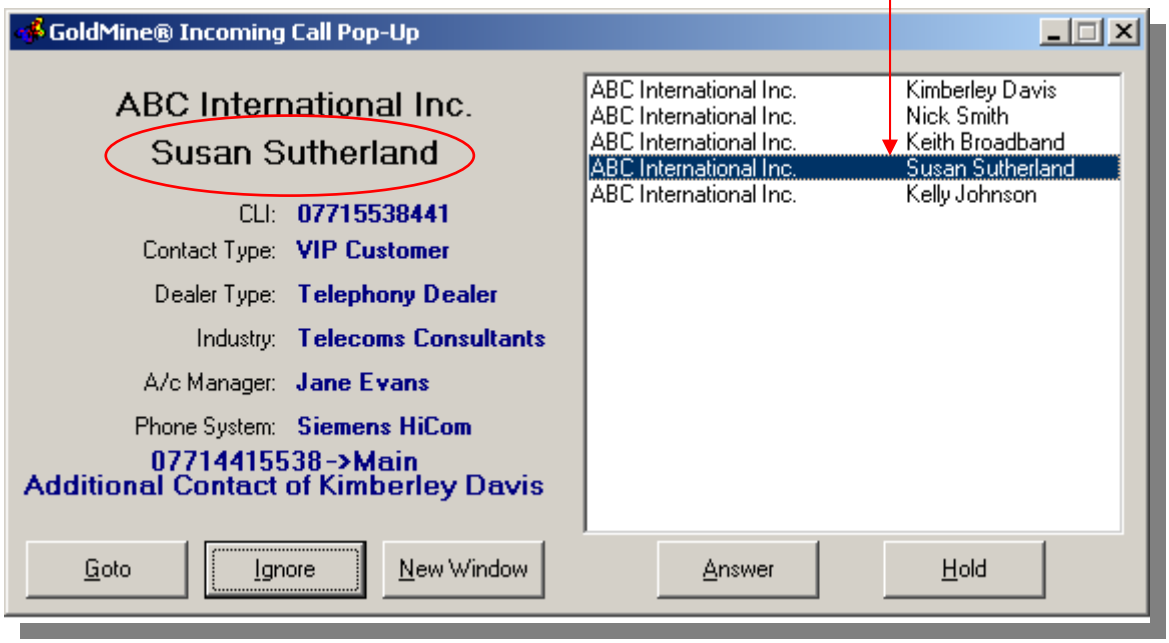


(The above illustrates the GoldMine® 6.x version of the software settings. The **Searching** tab will appear differently in GoldMine® versions 7, 8, and 9 as follows) -

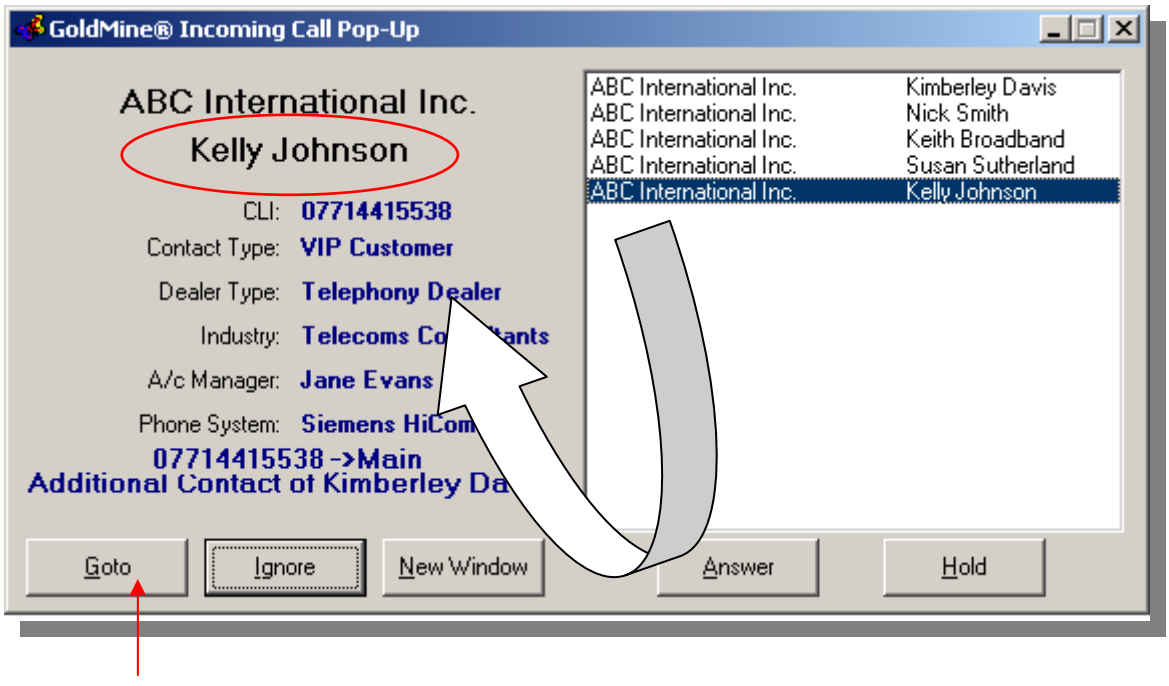


- the resulting screen-pops will now be extended to display several matches corresponding to any contact records and additional contacts within GoldMine® that bear the same telephone number, as in the following illustration -:

From this screen, select the specific contact you wish to deal with:



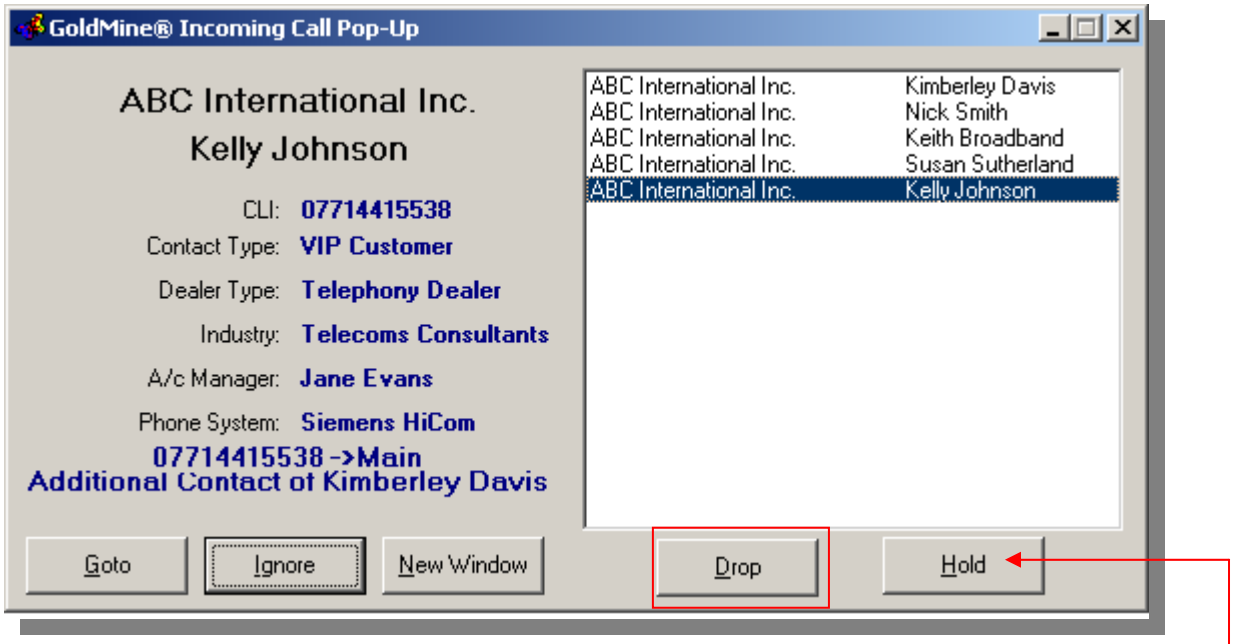
Changing your selection in the right-hand pane will alter the corresponding details on the left-hand pane to reflect your new choice, along with the appropriate changes in all of the Popup Fields information.



Click on the **Goto** button to summon the relevant contact record.

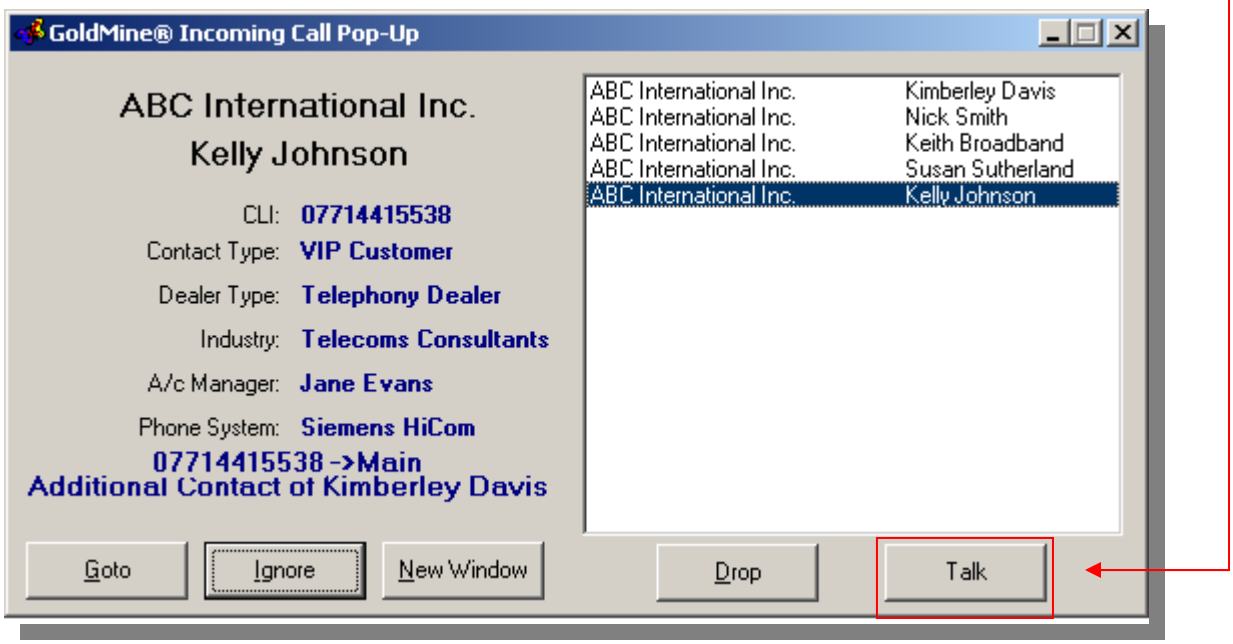
(This button can also be configured to accept the call by enabling the **Goto/New Answers Call** option on the **Dialog Boxes** tab.)

Clicking on the **Answer** button will accept the call, and the button will toggle to **Drop** as shown below.



Clicking upon **Drop** will terminate the call.

Clicking on the **Hold** button will place the call on hold, and the button will toggle to **Talk**.

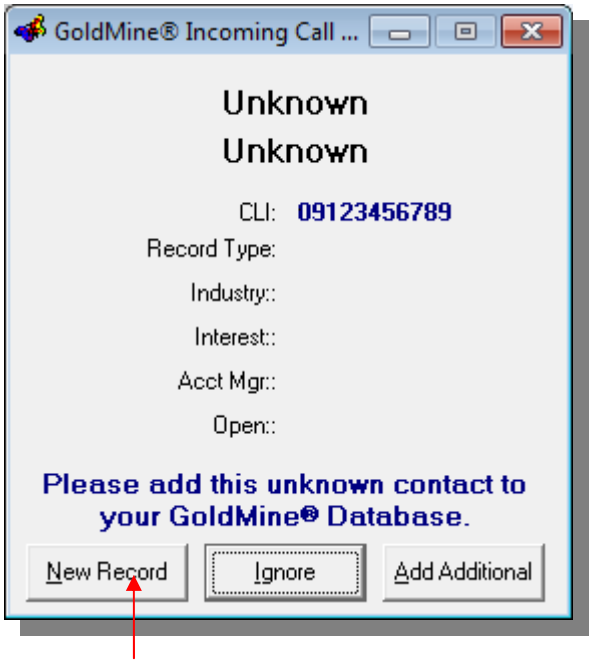


Clicking on the **Talk** button will take the call OFF **Hold**.

Capturing new contacts from Screen Popups

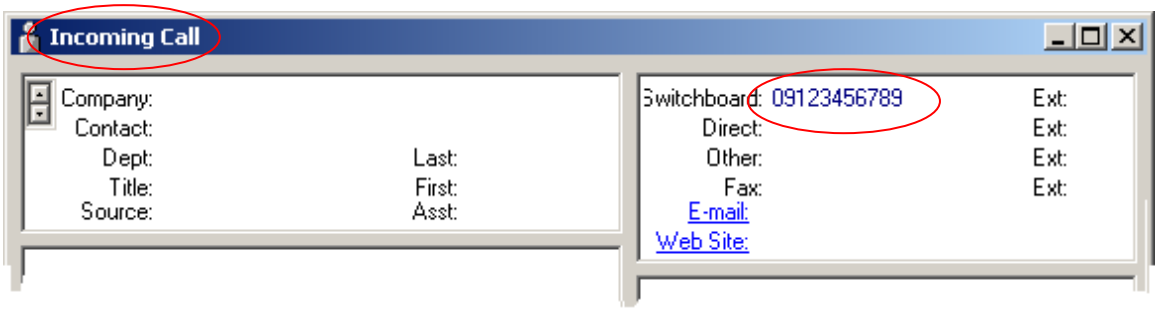
When screen-popping is activated and a call is received from a CLI/Caller ID which is *not* recorded in the GoldMine® database, a screen-pop indicating an 'Unknown' caller will be displayed. (Assuming that the **Show Alert for Unknown Calls** checkbox is selected on the **Dialog Boxes** tab.)

A typical example which provides the opportunity to create a *new* contact record is shown below:



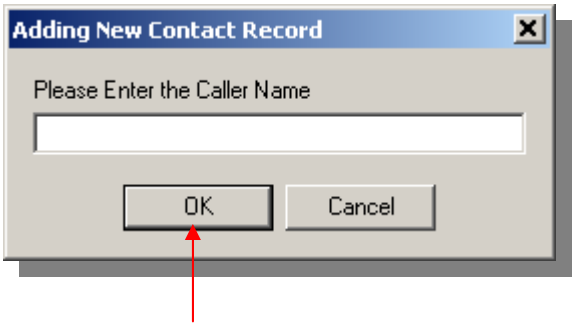
To create a **new** contact record for this caller - click on the **New Record** button.
(This button can also be configured to accept the call by enabling the **Goto/New Answers Call** option on the **Dialog Boxes** tab.)

This will create a new contact record pre-populated with the relevant telephone number only, ready for the user to enter further details as the conversation proceeds -



continued . . .

However, if you have selected **Prompt for Company/Contact on New Record** on the **Dialog Boxes** tab, this will also summon the following **Adding New Contact Record** dialog box:

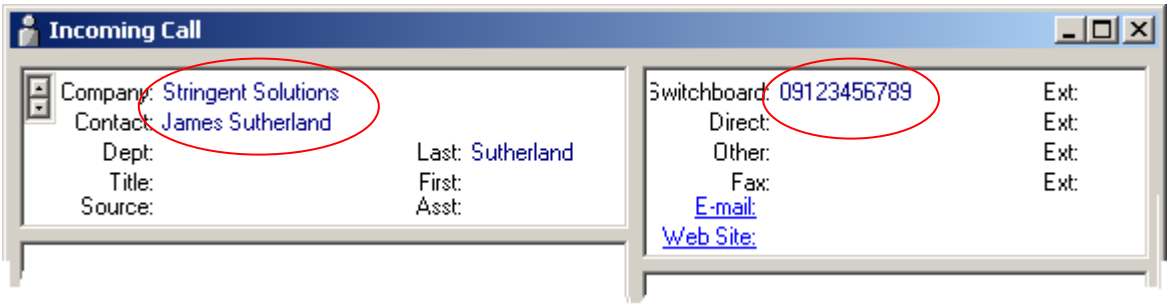


Enter the name of the new *Primary* contact and click on **OK**

The following dialog box will appear:

Enter the company name and click on **OK**.

This will create a new contact record, populated with the acquired information. (i.e. telephone number, contact name, and company name.)



Clicking on the **Cancel** buttons of the prompts at any stage (for example if you have entered incorrect information) will return you to the original Popup dialog box from which you may click on **New Record** in order to start afresh, or to select another option

Capturing new Additional Contacts

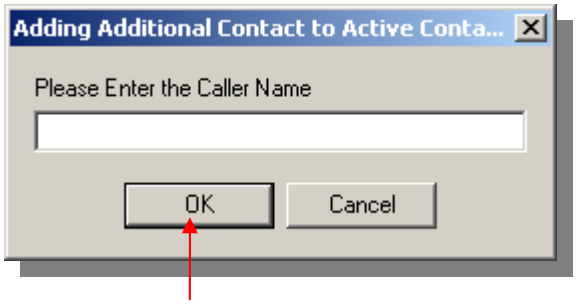
Screen-pops from unidentified numbers will also appear as 'Unknown' in the following circumstances –

Where an incoming number is new and not recorded in GoldMine© -
- but emanates from a known individual with an existing contact record in GoldMine©,
or
- the specific individual is not recorded in GoldMine© but there is an existing and relevant contact record to which the new callers details should be appended.

In these circumstances the screen-pop will appear similar to the following example, with no information other than the telephone number of the caller.
Remember that since a contact cannot be located from an 'unknown' telephone number, you will need to search for the appropriate contact record manually, using details provided by the caller, (e.g. their name or company name etc.) so that it is on-screen and ready to be populated.

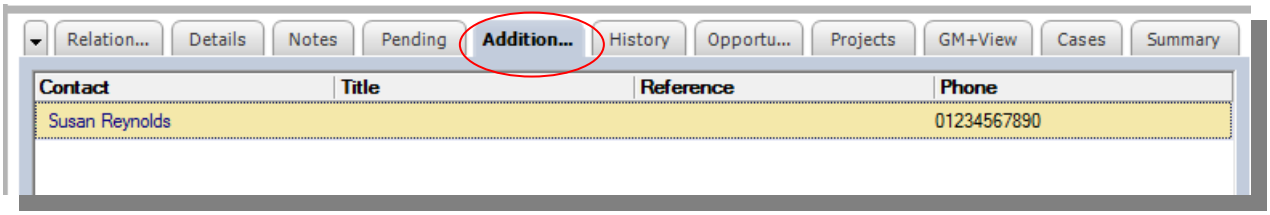
To add an additional contact to the active contact record - click on the **Add Additional** button.

The **Adding Additional Contact** dialog box will appear:



Enter the name of the new additional contact and click on **OK**.

continued . . .

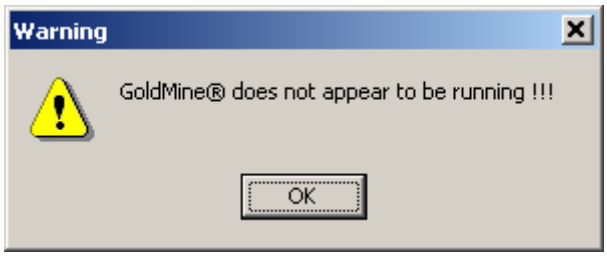


The GoldMine® **Additional Contacts** tab is populated with the relevant information.

(Alternatively, clicking on the **Ignore** button will dismiss the Popup window without further consequence.)

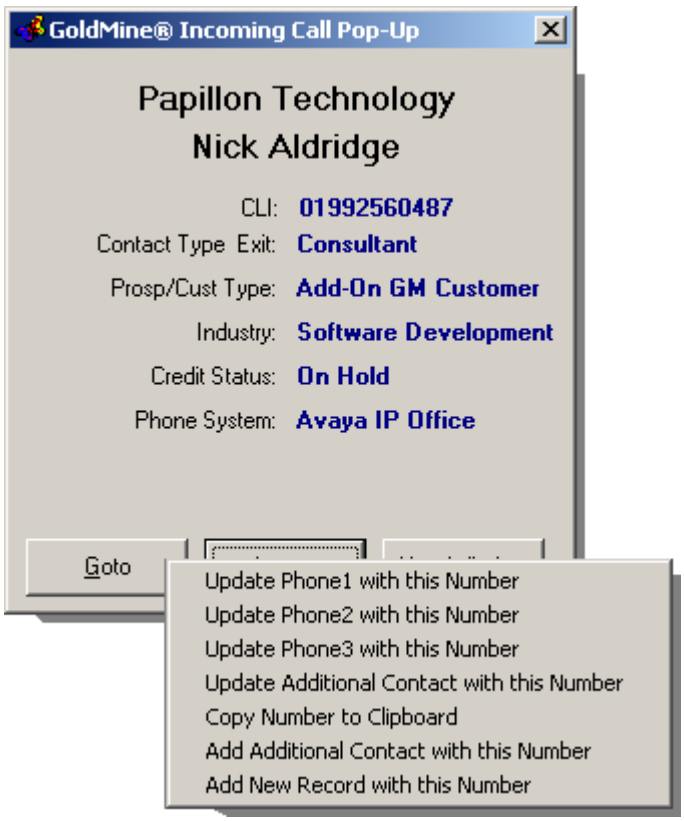
Refer to the next section entitled 'Further screen-popping options' if you wish to populate areas other than the additional **Contacts** tab.

Screen-popping can function whether or not GoldMine® is running, however, if you attempt to summon, or create a contact record (or additional contact) from the Popup dialog box whilst GoldMine® is NOT running, the following error message will appear:



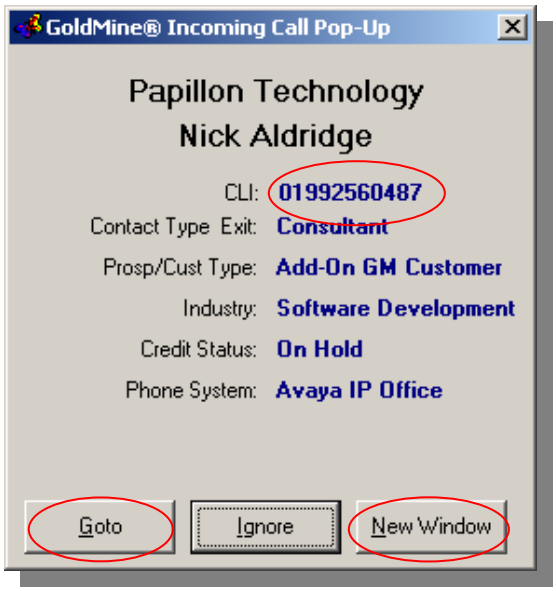
Further Screen-Popping options

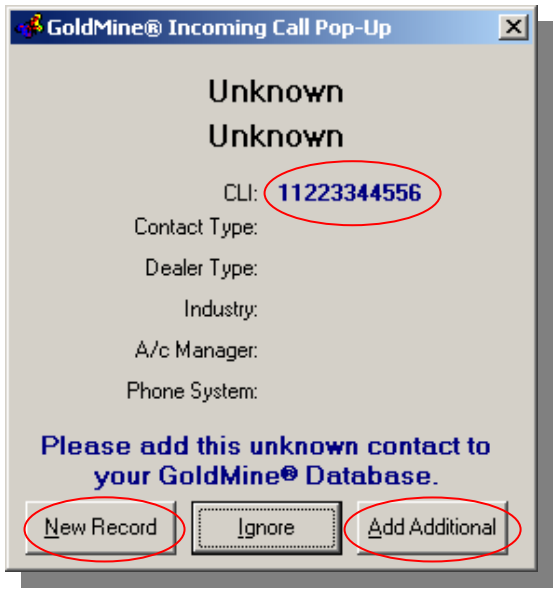
Right-clicking on various areas of the screen-pop dialog box will summon a context menu from which further helpful options are available:



These additional options allow rapid record creation, the updating of various GoldMine® telephone number fields, and easy copying of telephone numbers to a variety of other locations or applications.

Right-clicking on the items indicated below – the telephone number, the **Goto** button, the **New Window** button, or the **New Record** or **Add Additional** buttons will also provide similar context menus:



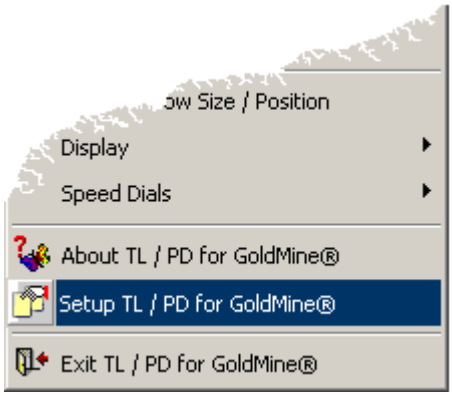


Correcting the format of incoming telephone numbers

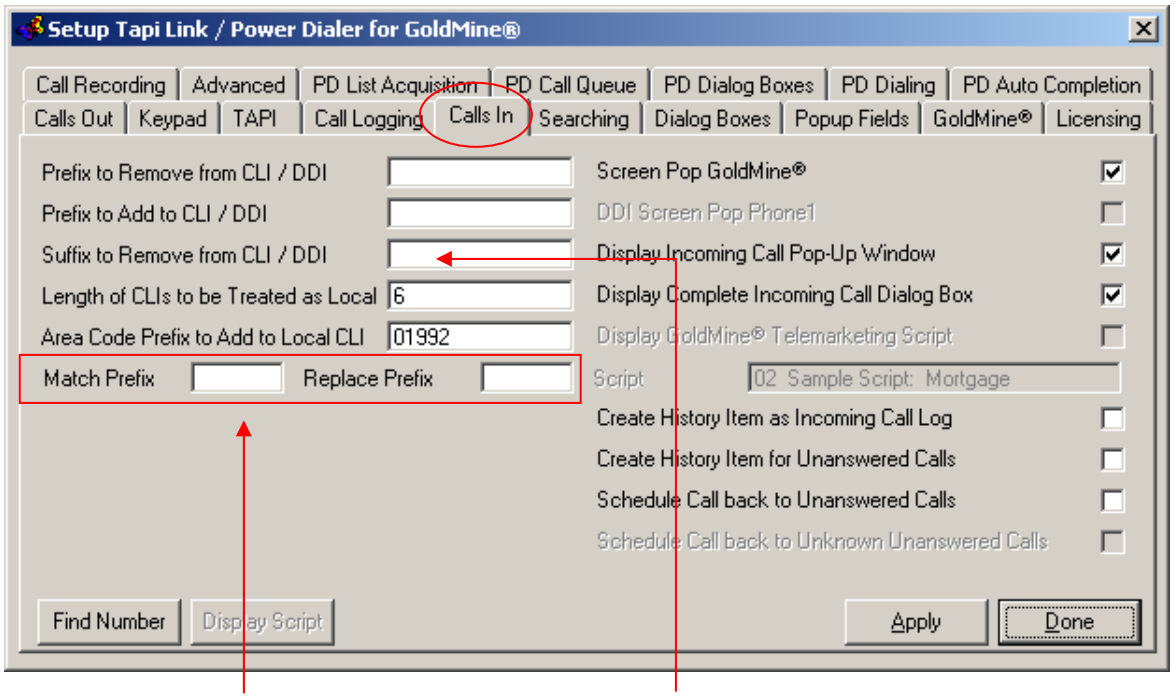
In certain circumstances Tapi Link may require special configuration to overcome anomalies in the format of the telephone number as presented by the specific telephone system in use. Some telephone systems may add spurious prefixes or suffixes or even truncate the incoming number - and therefore there will be no corresponding match to be found in GoldMine® for screen-popping purposes.

If you need to revise the format of the incoming number (CLI/Caller ID) as it is presented by the telephone system in order to match the actual telephone number format used in GoldMine®, proceed as follows:

From the context menu select **Setup TL / PD for GoldMine®**.



From the **Setup** window which appears, select the **Calls In** tab:



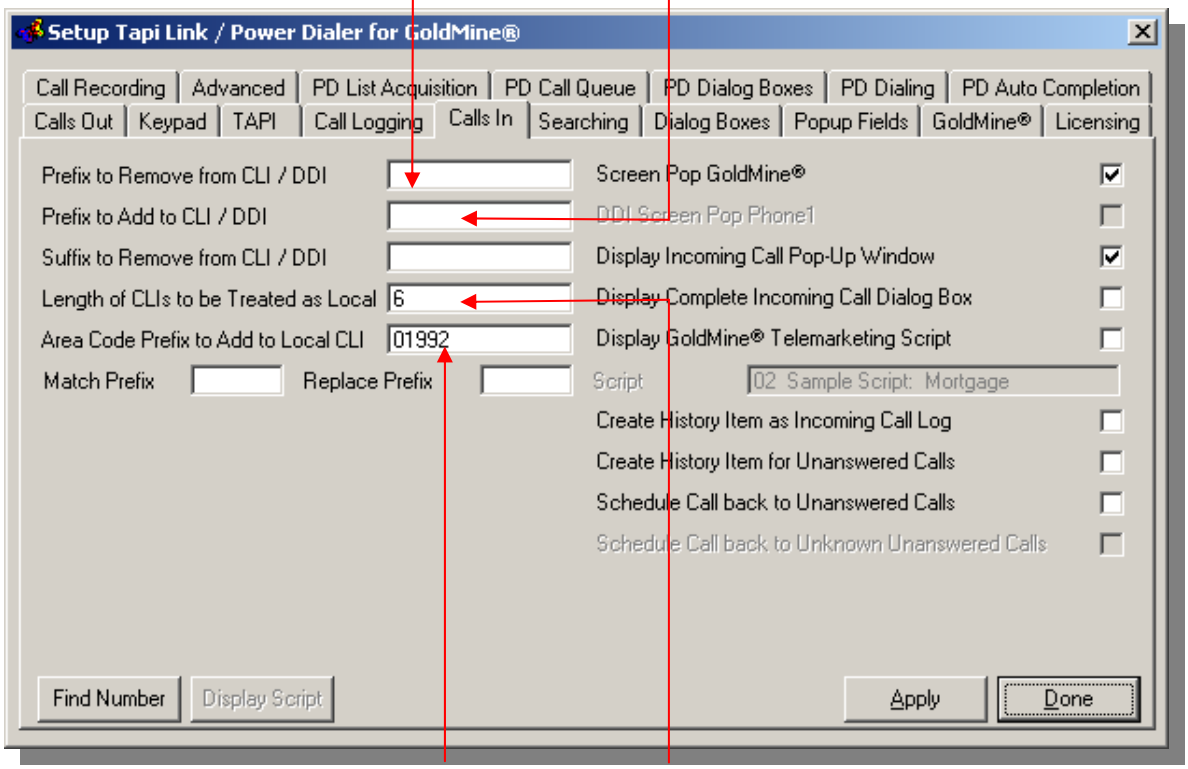
The **Prefix** you wish to **remove** from the CLI / Caller ID and, whenever encountered, the corresponding prefix you wish to **substitute**.

Enter here any specific **Suffix** that you wish to **remove** from the incoming calls CLI/Caller ID or DDI information.

continued . . .

Enter here any specific **Prefix** that you need to **remove** from the incoming calls CLI/Caller ID or DDI information.

Enter here any specific **Prefix** that you may need to **add** to the incoming calls CLI /Caller ID or DDI information.



Use this option if the CLI/Caller ID from local numbers does not contain your area code. (This is only an example code.)

Enter the number of digits that constitute a local number, (to which the corresponding Area Code will be appended.)

These options facilitate the conversion of the incoming number back to its original format once again, and to correspond with the telephone number format in GoldMine® – and thus enable successful screen-popping.

Once you have defined a suitable configuration to suit your specific system, save the settings by clicking on the **Apply** button. To complete the process and to dismiss the dialog box click on the **Done** button.

(The preceding settings and configurations are simply examples – you own individual requirements may vary considerably.)

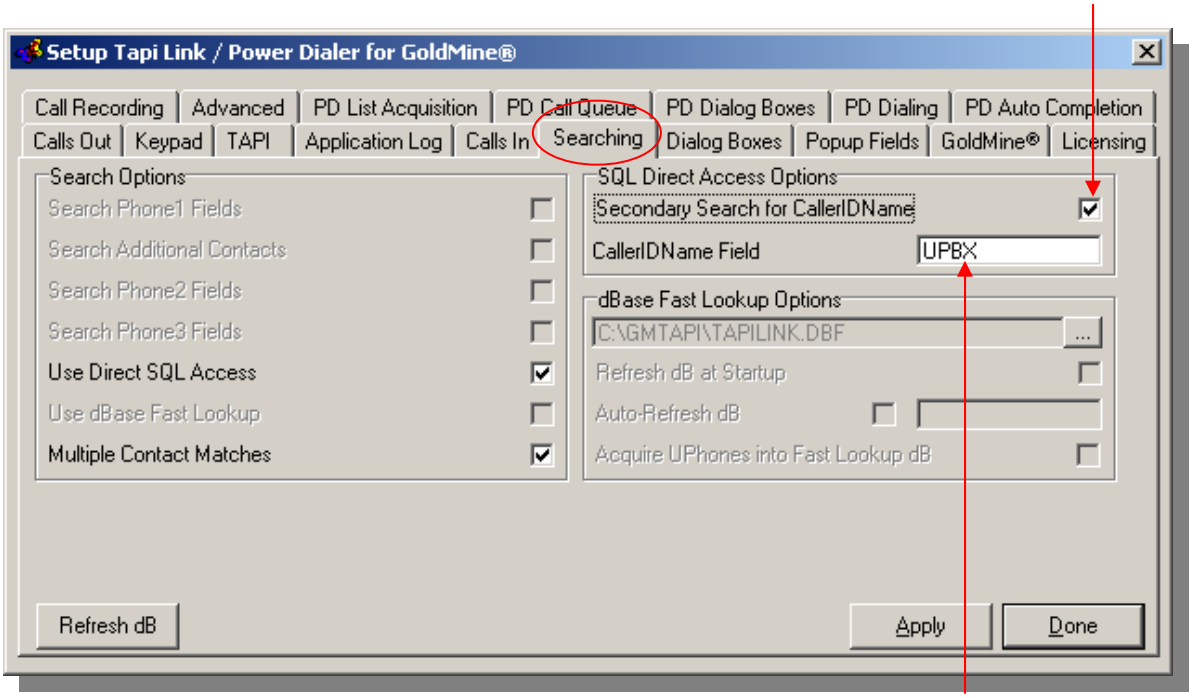
For further Popup options – see the section entitled ‘Configuring specific Screen-Popping features’.

Screen-Popping via Caller ID Name

This is a *secondary* search function and, if activated, will operate if no matching telephone number is found in GoldMine® based upon the CLI. (This functionality is only available on SQL server-based GoldMine® systems, and at the time of writing, not all telephone systems or networks provide this service.)

To enable this feature proceed as follows:

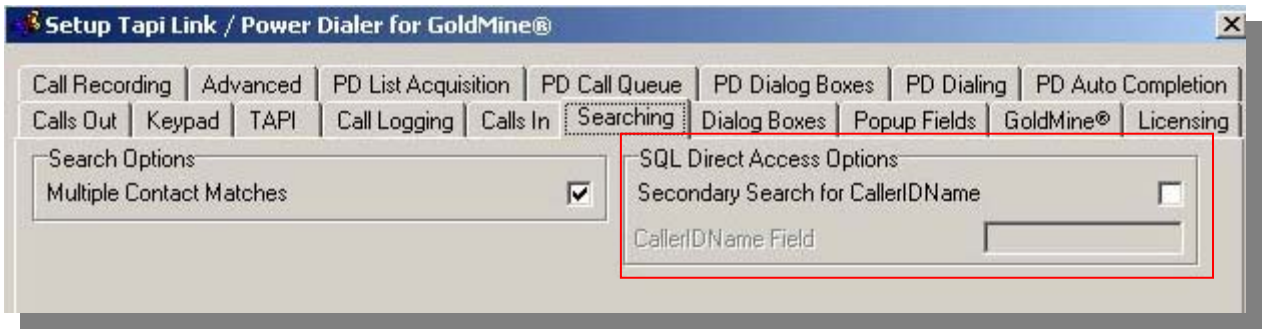
On the **Searching** tab select **Secondary Search for CallerIDName**



Then specify the **CallerIDName Field** – i.e. the corresponding field label within GoldMine® against which you are storing the relevant contacts Caller ID Name.

(Note that this must be the true name of the field, which is not necessarily the name on the visible label. The above is merely an example – you must enter the actual field name from your own GoldMine® installation.)

The **Searching** tab will appear differently with installations of GoldMine® versions 7, 8, and 9 as follows. However, the method of configuration and the functionality remain the same -.



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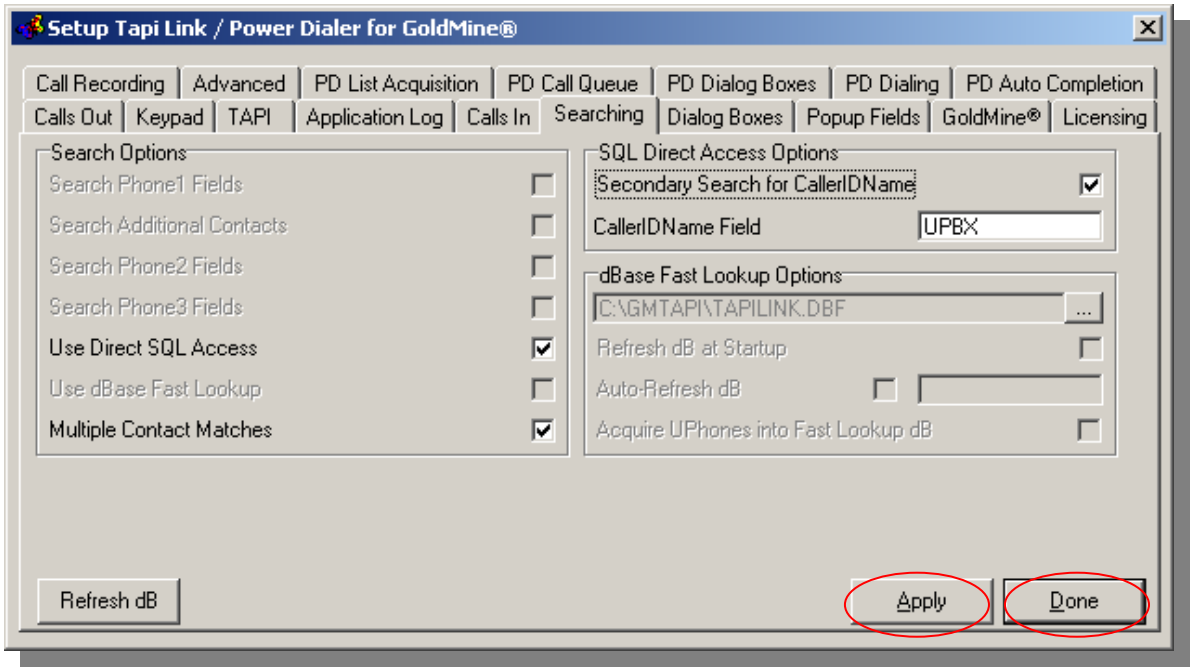


Click on the **Apply** button to save your changes.

Then click on the **Done** button if you wish to dismiss the dialog box.

An example of a screen-pop from *a known caller* generated from **CallerIDName** would appear as follows:

continued . . . .

Generating new records from Caller ID Name

When the screen-pop signifies an *unknown* caller as in the following example -

Click on **New Record**.

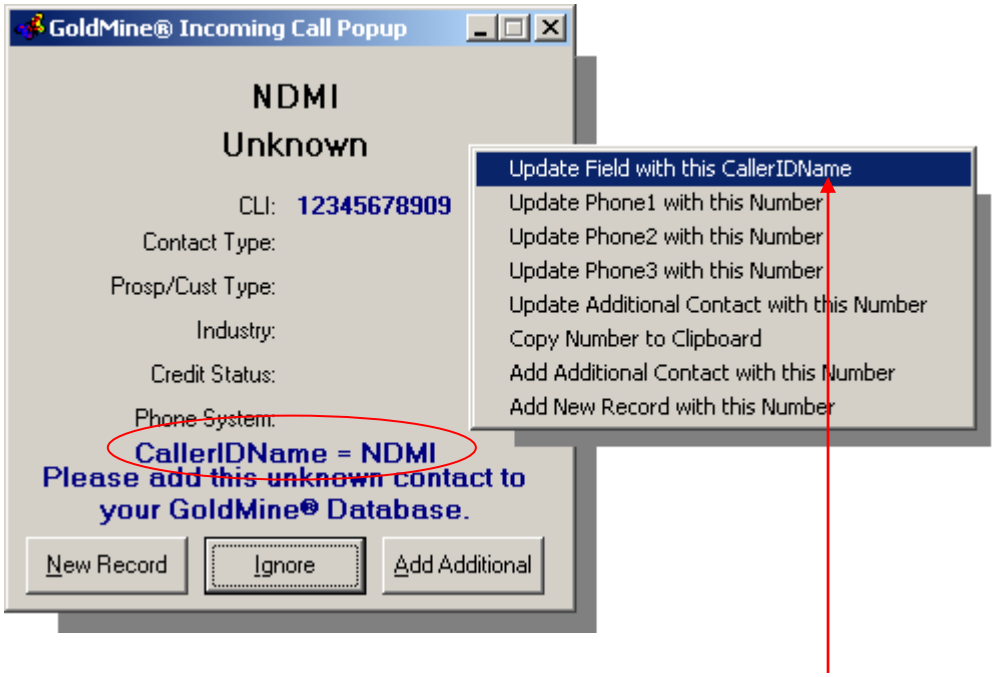
Enter the name of the caller:

The prompt to **Add New Contact Record** (company name) will appear. This is *already populated* but ready for any amendments that you may require:

Clicking on **OK** presents the newly populated contact record ready for further completion, as in the following example -

Continue to complete the remaining details on the new contact record as you see fit.

Further useful options are available by right-clicking on any of the buttons (or upon the telephone number)



For example **Update Field with this CallerIDName** will update the relevant Contact2 field (i.e. the predetermined CallerIDName field within GoldMine®) to reflect the new CallerIDName. The other options in the context menu are self-explanatory.

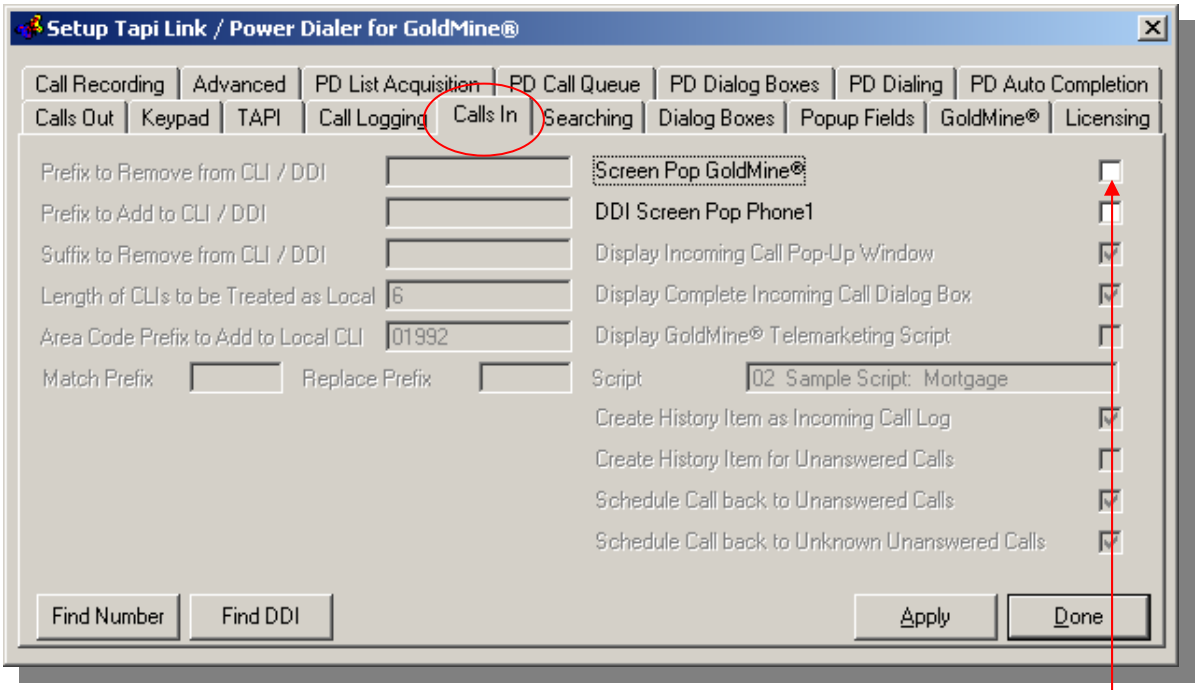
(If choosing the **Update Additional Contact with this Number** option you will first need to highlight whichever it is of the Additional Contacts on the **Contacts** tab that you wish to be updated.)

You may occasionally need to switch between the current contact record and another one in order that GoldMine® can visibly refresh the relevant data - particularly if using a GoldMine® Contact2 field.

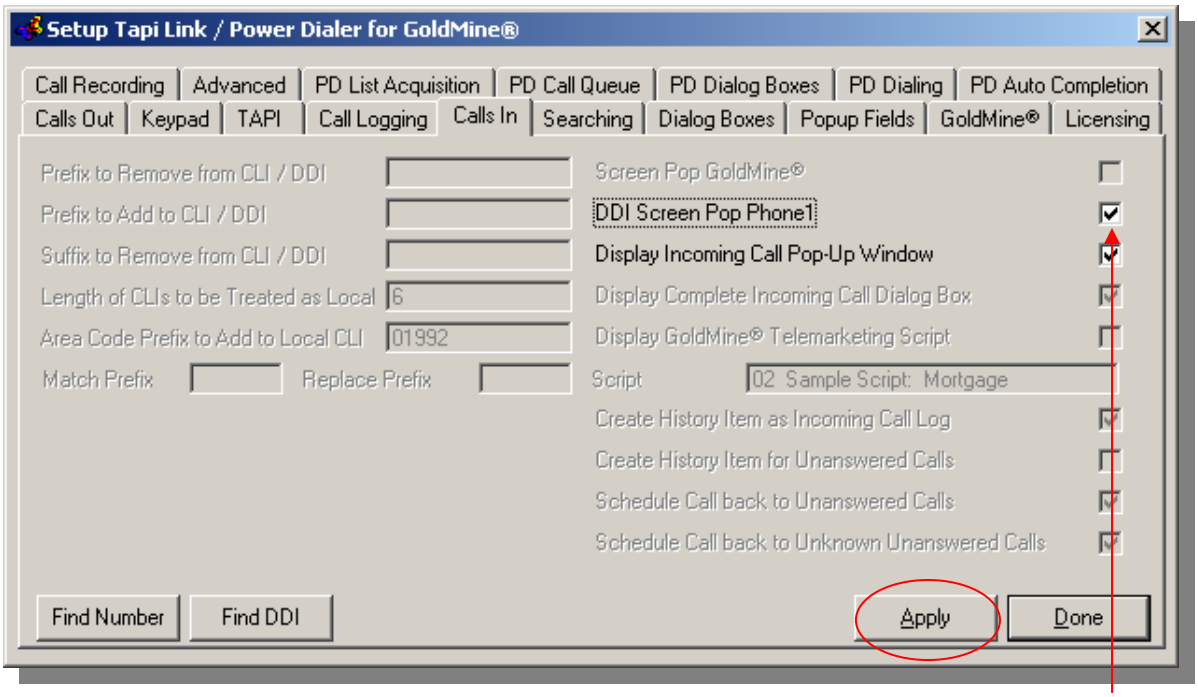
DDI Screen-Popping

This feature provides a number of useful options when answering calls on behalf of others, taking messages for them, and also transferring the calls to other parties if necessary.

To enable DDI screen-popping, select the **Calls In** tab:



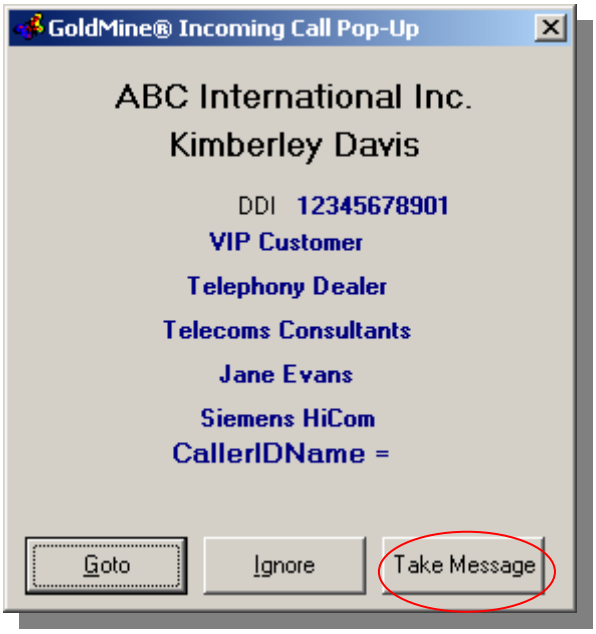
If it is not already unchecked, un-check **Screen-Pop GoldMine®**



Check **DDI Screen-Pop Phone1**.
Then click on the **Apply** button.

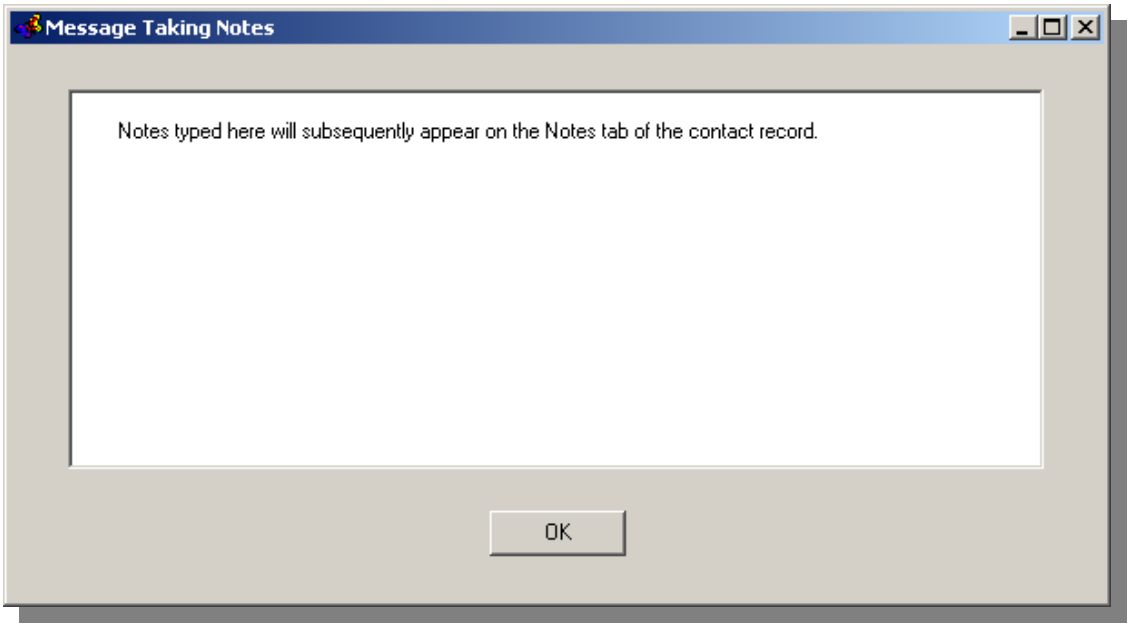
If you have not checked **Display Incoming Call Popup Window** the relevant contact record pertaining to the number dialed will appear.

If you have checked **Display Incoming Call Popup Window** a screen-pop will appear as in the following example:



Taking messages

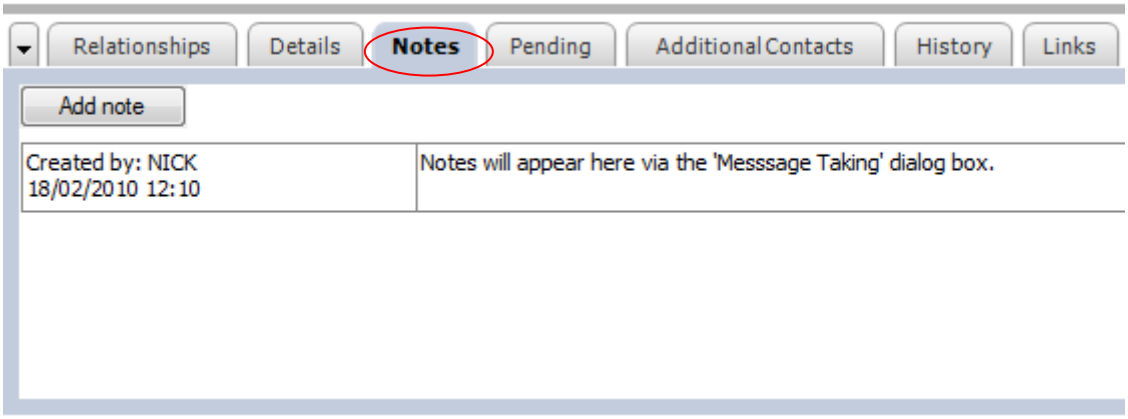
Clicking on the **Take Message** button will raise the following **Message Taking Notes** dialog box:



Enter any notes as required and click on **OK**.

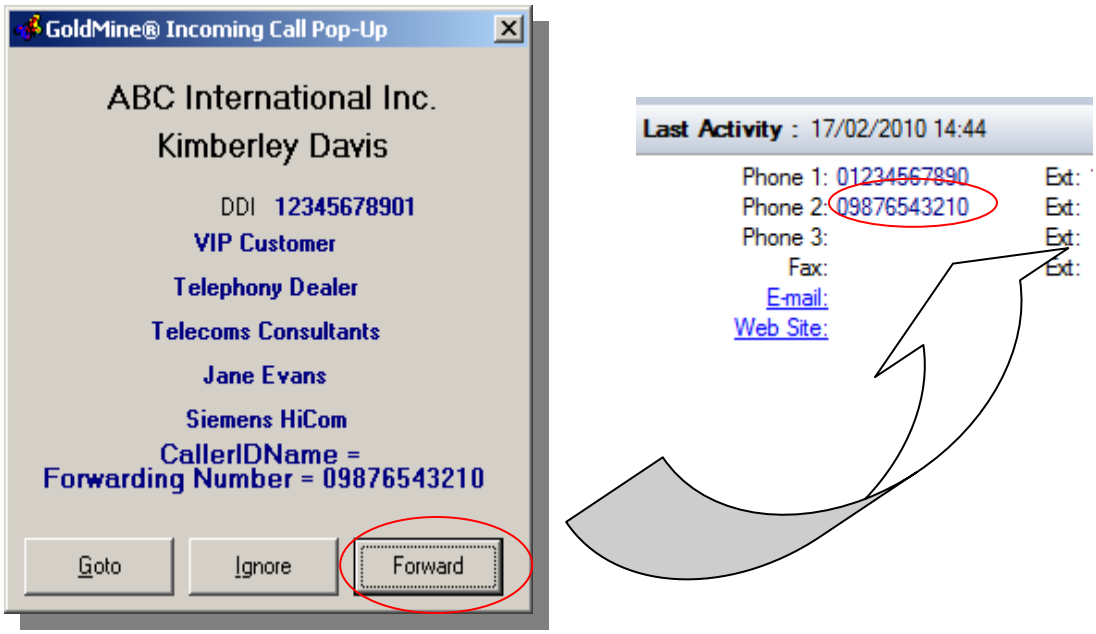
continued . . . .

The typed message will subsequently appear on the **Notes** tab of the corresponding contact record:



Forwarding and Transferring Calls

If the **Phone 2** field of the relevant contact record is populated, the **Take Message** button alters its function to a **Forward** button:



Clicking on the **Forward** button will transfer the call to the telephone number in the **Phone 2** field.

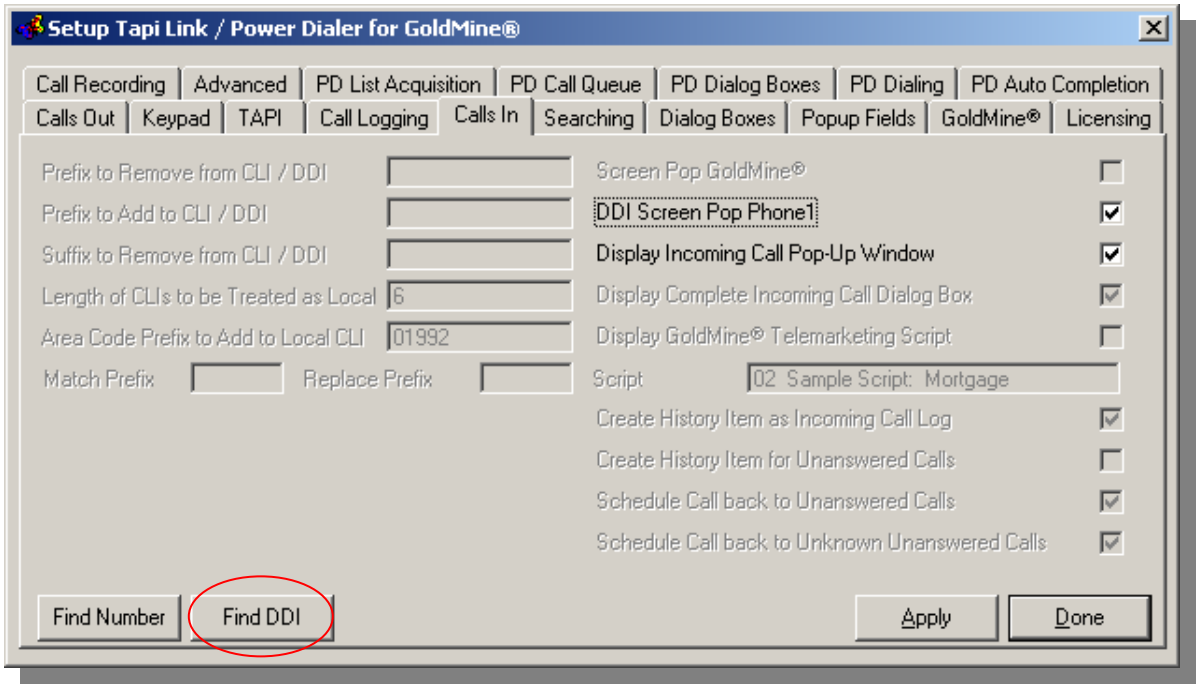
This is a supervised transfer, as opposed to a blind transfer, which permits the user to provide the courtesy of introducing the original caller to the final call recipient. Also see the following alternative options.

continued . . .

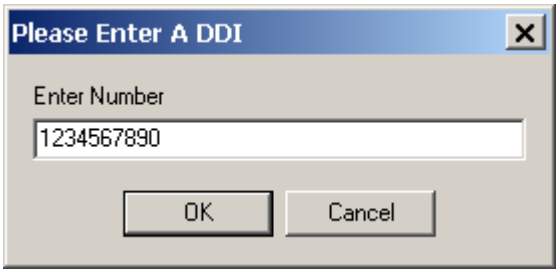
Right-clicking on the **Forward** button reveals additional options to either:
Blind Transfer the call (i.e. without any supervised 'hand-over') OR switch to the **Take Message** option as detailed previously.
If you have not checked **Display Incoming Call Popup Window** on the **Calls In** tab, the contact record itself will be raised at the time of the incoming call, instead of the preceding screen-pop dialog boxes. In this case, the popup dialog box will not be present for message taking and call forwarding options.

Setting up contact records for DDI purposes

For call centre agents and users who are representing multiple clients and taking calls on their behalf –
A simple method to create the relevant contact records corresponding to the companies you are representing, and to preview and assess the effects of DDI screen-popping is to use the **Find DDI** button -

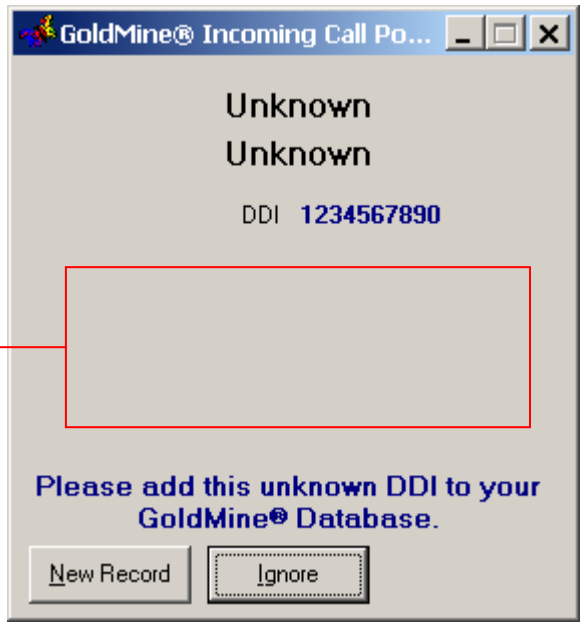


Enter a telephone number for the company whose DDI you wish to record.
Click on **OK**.



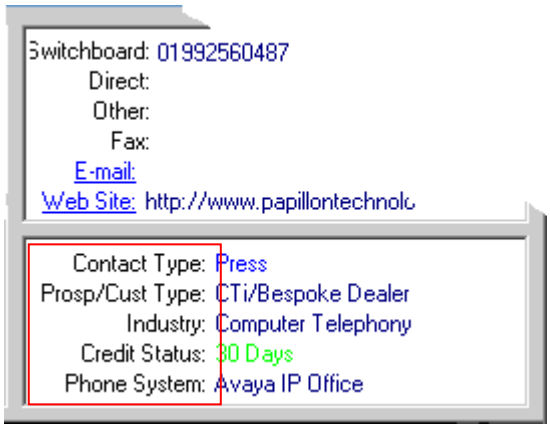
Since this is a new telephone number which is previously unrecorded on GoldMine® you will be presented with a screen-pop from which you can create a new contact record -

There are no contact details to present on this initial screen-pop. Data will be presented in this area once the appropriate data fields have been populated on the relevant contact record in GoldMine®



Click on **New Record** and a new contact record will be created in GoldMine® with the relevant telephone number ready populated –

Earlier versions of GoldMine®



Later versions of GoldMine®

Complete any remaining contact details as you see fit and then use the **Find DDI** button again to simulate the effect of an incoming caller having dialed that number, and then review and assess the associated screen-pop.

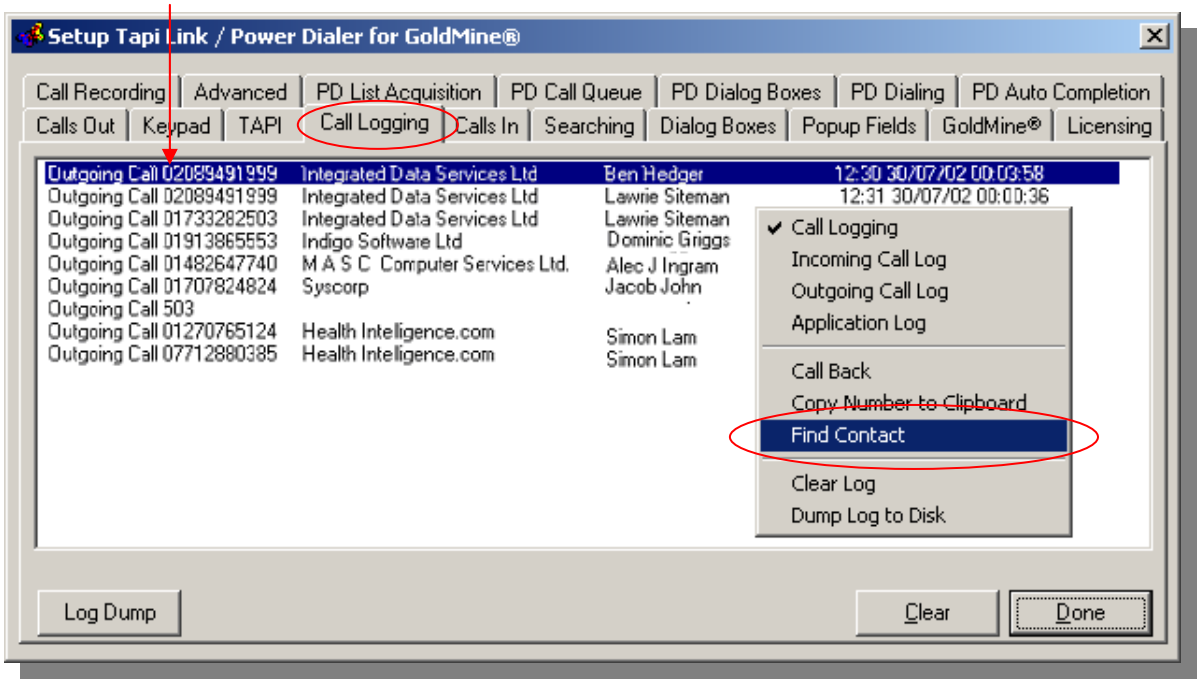
By default, the five GoldMine® Key Fields shown above are used as data sources.
To revise any of the GoldMine® fields interrogated for presentation of the data, refer to the section entitled 'Choosing the contact record information displayed on screen-pops'

The Find Contact feature

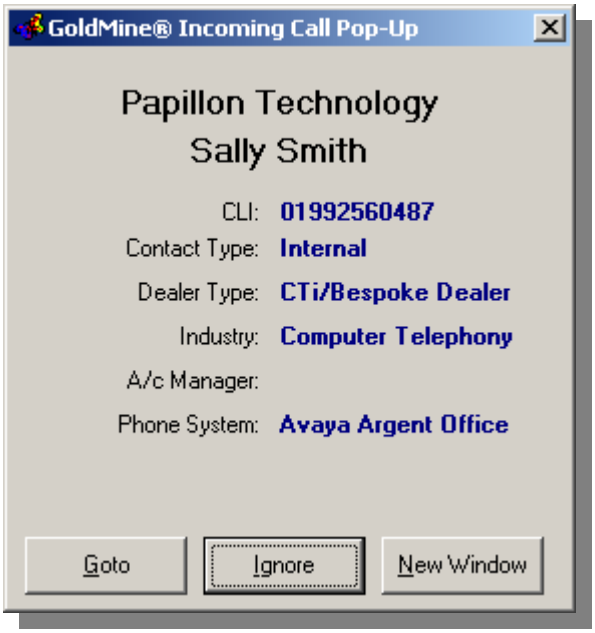
An additional facility incorporated within the **Call Logging** tab is the ability to browse through the listed calls and summon the corresponding contact records directly from the call log itself. To do so, proceed as follows:

Scroll through the log to locate a particular outgoing or incoming call:

Right-click on a chosen call entry and select **Find Contact** from the context-menu.



This will summon a **Popup** window displaying a summary of the contact information of the caller -

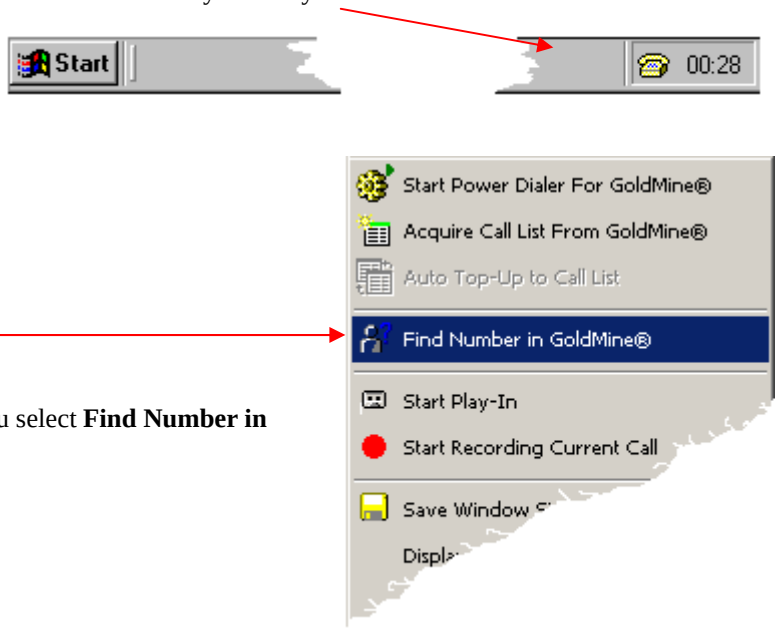


You may proceed directly to the appropriate contact record by clicking on the **Goto** button..
(Note that the **Screen Pop GoldMine**® option on the **Calls In** tab must be checked in order for the **Find Contact** facility to function.)

The Find Number feature

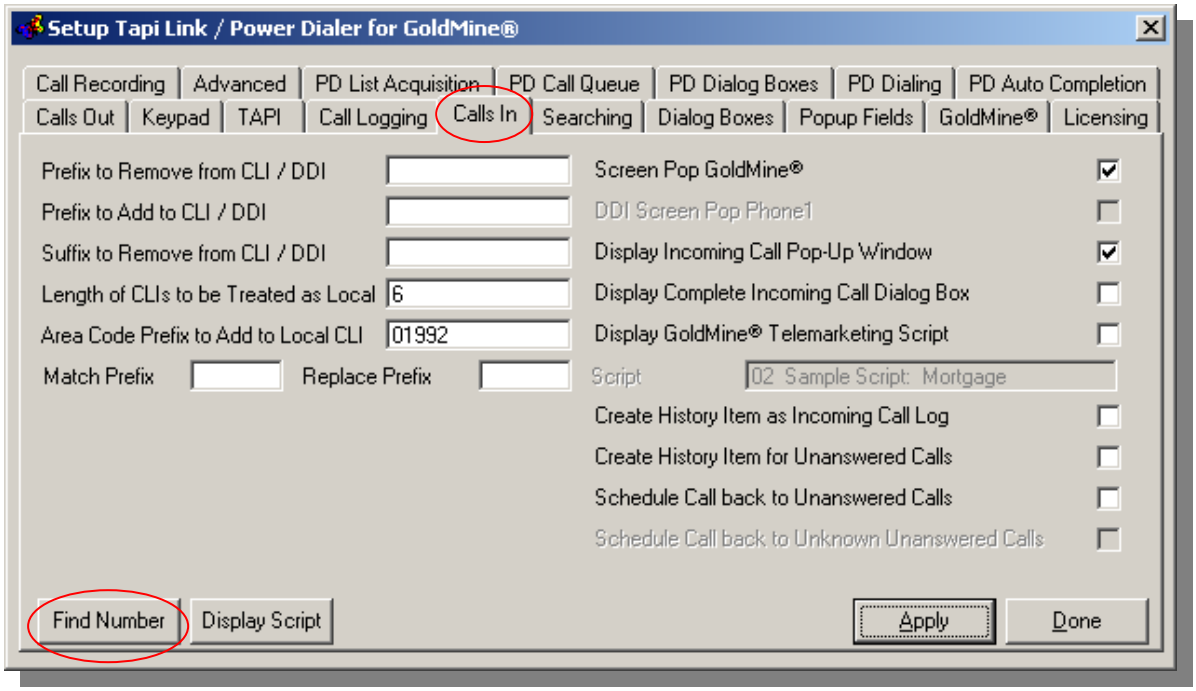
For testing, diagnostic and demonstration purposes (or simply to locate a telephone number anywhere in GoldMine®) Tapi Link provides the ability to manually simulate an incoming CLIP (Caller Line Identity Presentation) and emulate screen-popping of the details from a contact record in your GoldMine® database.

In order to run the facility -
Right-click on the Tapi Link icon in the system tray:



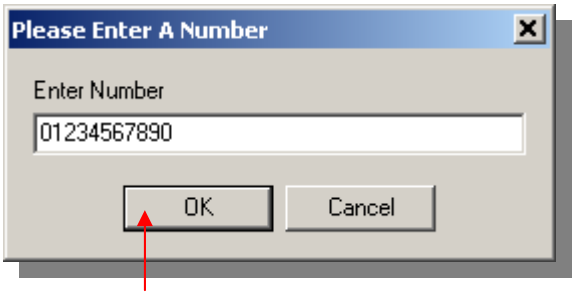
From the context menu select **Find Number in GoldMine®**.

Alternatively select the **Calls In** tab and click on the **Find Number** button.



continued . . .

Whichever method you choose, the following dialog box will appear:



Enter a telephone number and click on the **OK** button.

Tapi Link will search your GoldMine® database for the telephone number specified and present an **Incoming Call Popup** screen.

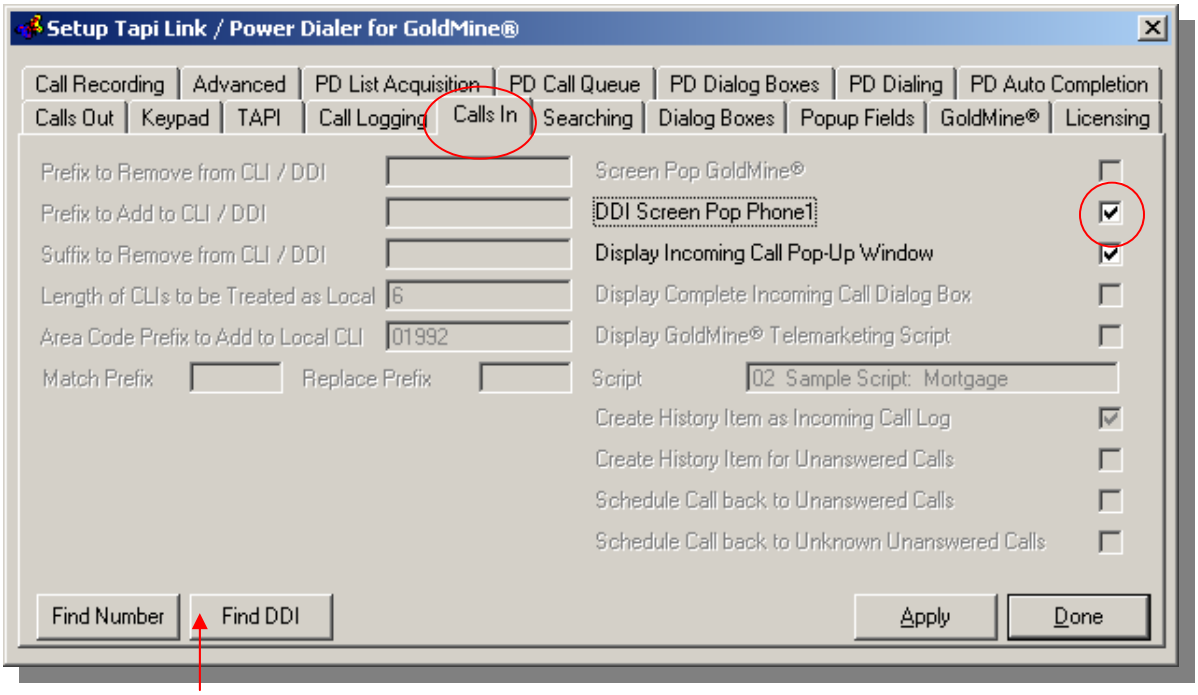
(The specific GoldMine® fields interrogated and the data presented in the above example are for illustration only. Refer to the section entitled 'Choosing the contact record information displayed on screen-pops' for further details.)

continued . . .

The same searching principle can be applied to DDI numbers.

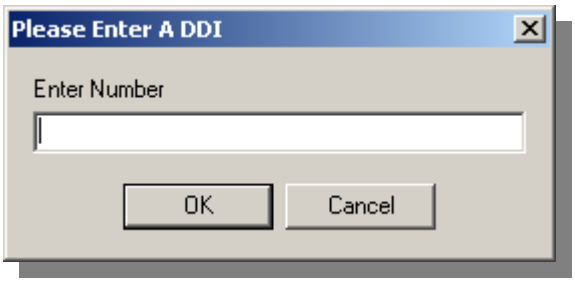
(The **DDI Screen Pop Phone1** option must be selected in order to use this function.)

Select the **Calls In** tab
:



Click on the **Find DDI** button.

The following **Enter a DDI** dialog box will appear:

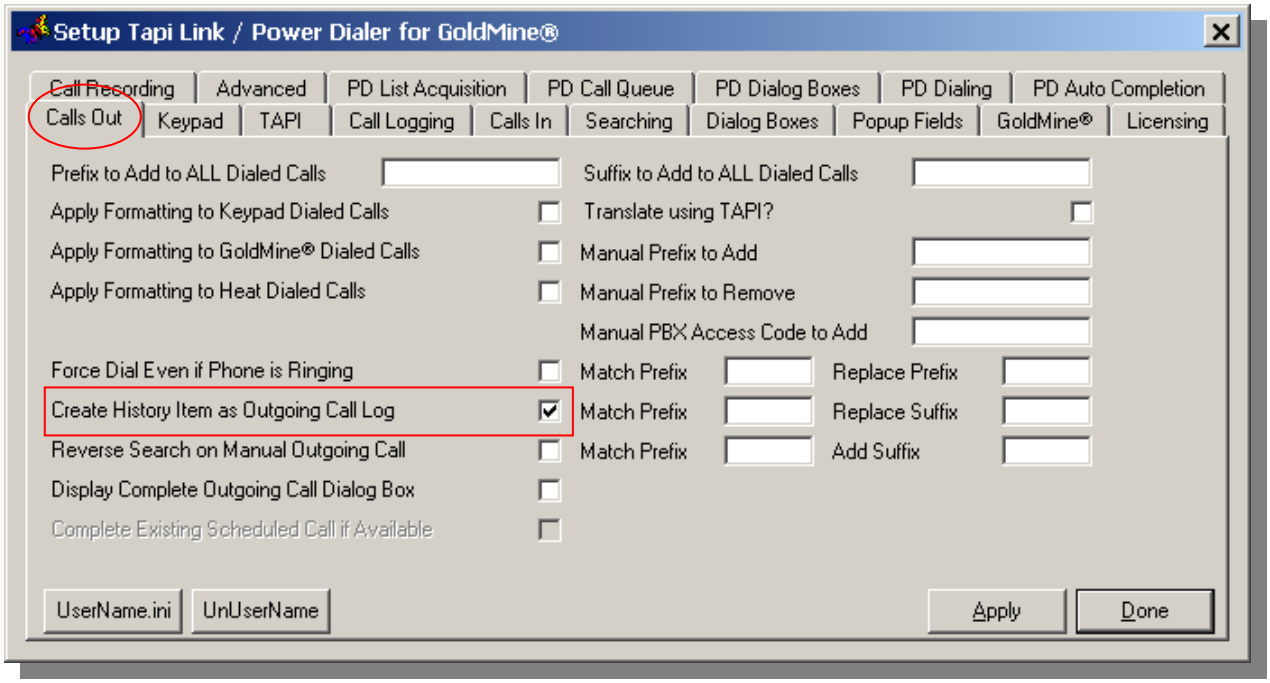


Follow the same procedure as for standard telephone numbers - as explained above.

(For further information in respect of screen-popping refer to the section entitled ‘Choosing the contact record information displayed on screen-pops’)

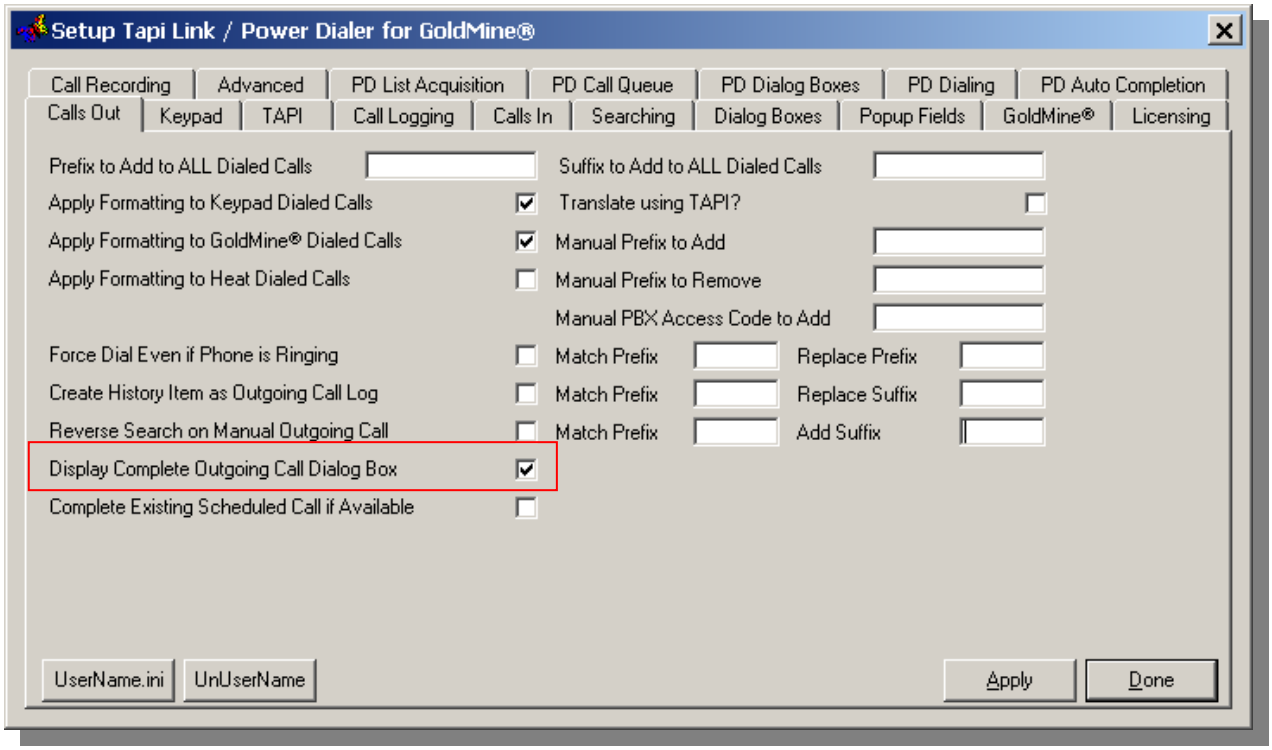
Outbound Call completion options

If you do not wish to deal with outbound **Call Completion dialog boxes** you might choose the following option on the **Calls Out** tab instead –

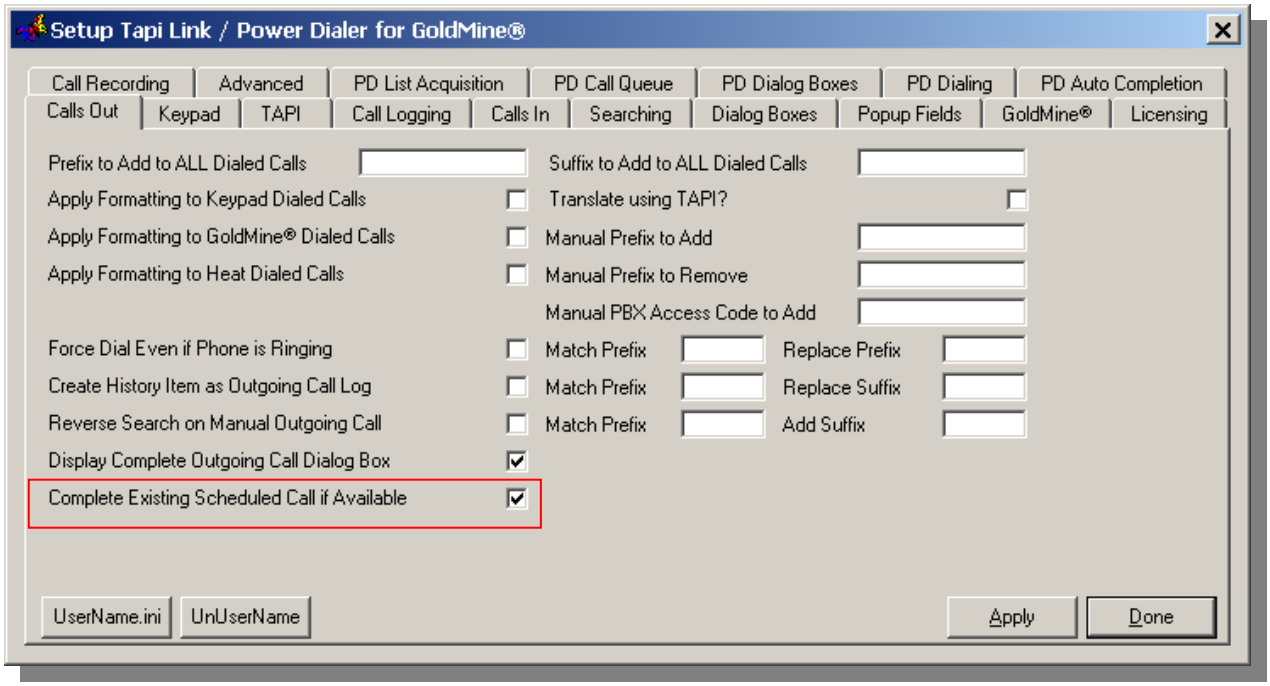


- in which case an automatic entry will be created in the History of the relevant GoldMine® record, detailing the call event complete with the exact duration of the call

Alternatively, if you have chosen to **Display Complete Outgoing Call Dialog Box** on the **Calls Out** tab

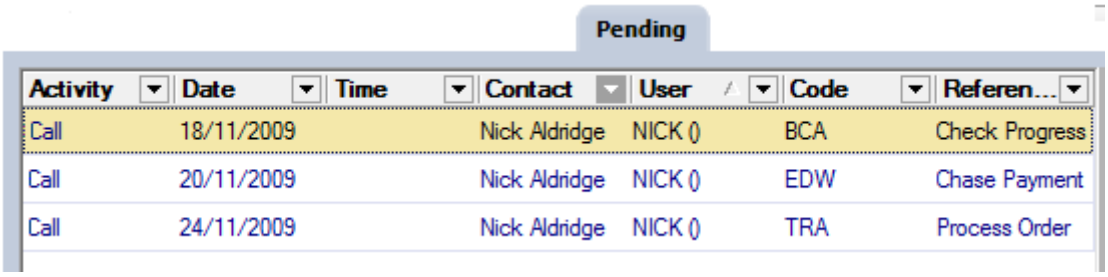


The option to **Complete Existing Scheduled Call if Available** becomes accessible as follows:



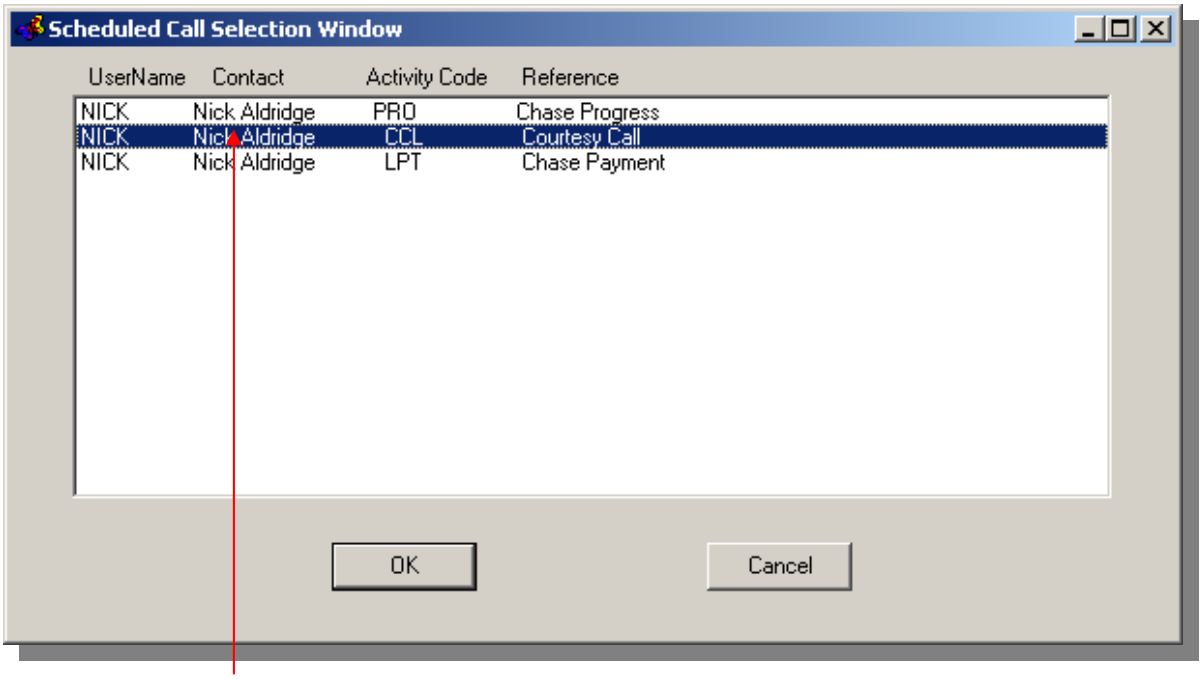
So if the contact is simply being called – but not necessarily in relation to any pending scheduled call – the user will automatically be presented with the opportunity of associating the call in progress with a pre-existing scheduled call..

In certain situations there may be *more than one* scheduled call pending, as in the following example -



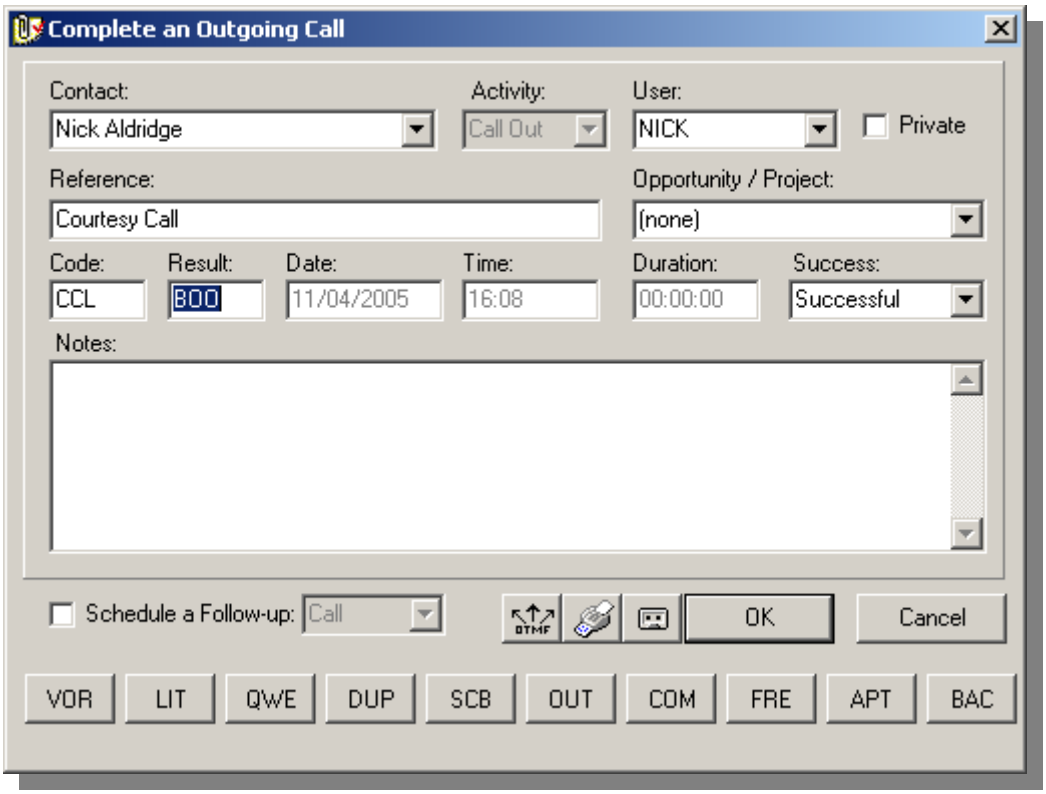
In these cases - immediately prior to the automatic appearance of the **Call Completion** box - a **Scheduled Call Selection Window** will be displayed showing all of the possible choices, as in the following example:

continued . . .



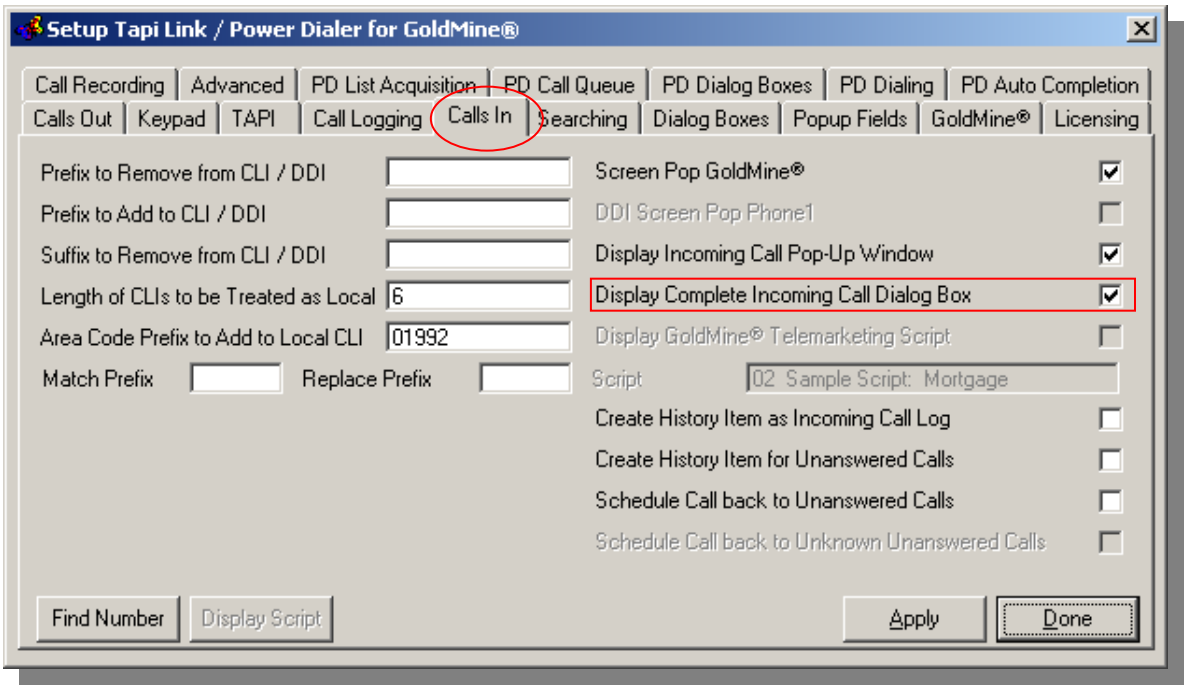
Select the specific scheduled call you wish to complete, and click on **OK**.
(However, clicking on **Cancel** would abandon the call completion process.)

The Call Completion box for that particular scheduled call will then appear as usual:

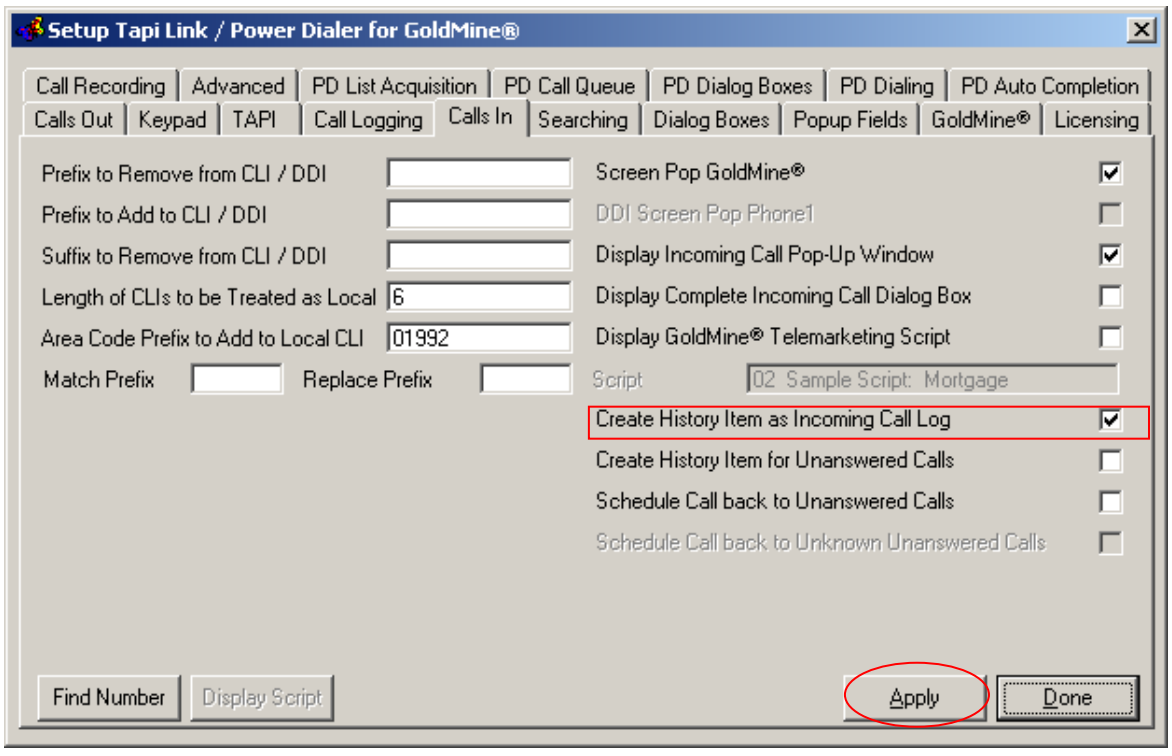


Inbound Call completion options

If you wish to have Tapi Link automatically present a **Call Completion Dialog Box** ready to capture details when an incoming call is answered, select the **Calls In** tab and check **Display Complete Incoming Call Dialog Box**.



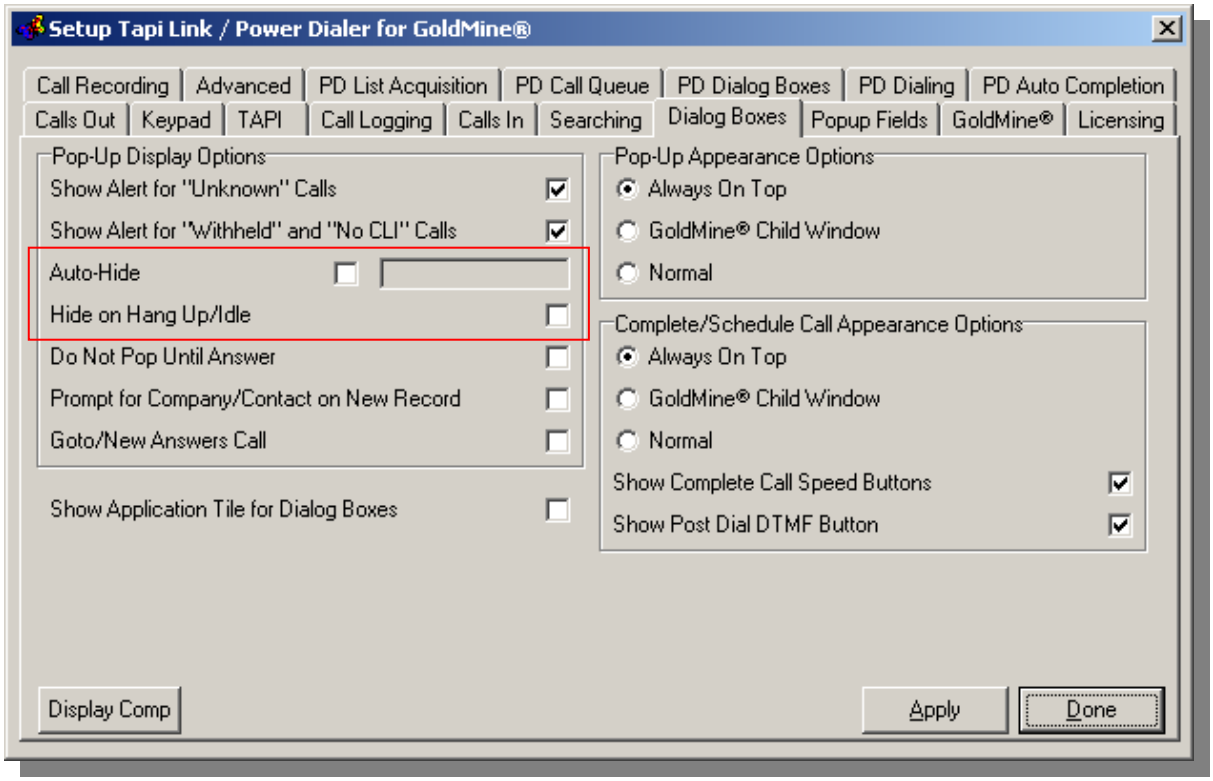
Alternatively, an automatic History entry can be generated in the relevant GoldMine® record for each answered call, detailing the call event complete with the exact duration of the call.
To enable this feature, select **Create History Item as Incoming Call Log** as follows:



Once you have finalised your selections, click on the **Apply** button to save the changes to your configuration.

Dealing with missed calls

Screen-pop dialog boxes will show the details of the *very last inbound call*, and remain on screen, unless of course contrary 'Hide' features have been configured on the **Dialog Boxes** tab **Popup Display Options** -



However, there may have been more than just one single call that has been missed.

Missed or unanswered calls will emanate for a variety of sources – some will relate to existing contact records, while others may initially be unidentified.

The following sections detail the options available for both 'known' and 'unknown' callers i.e.

Logging missed calls in GoldMine®

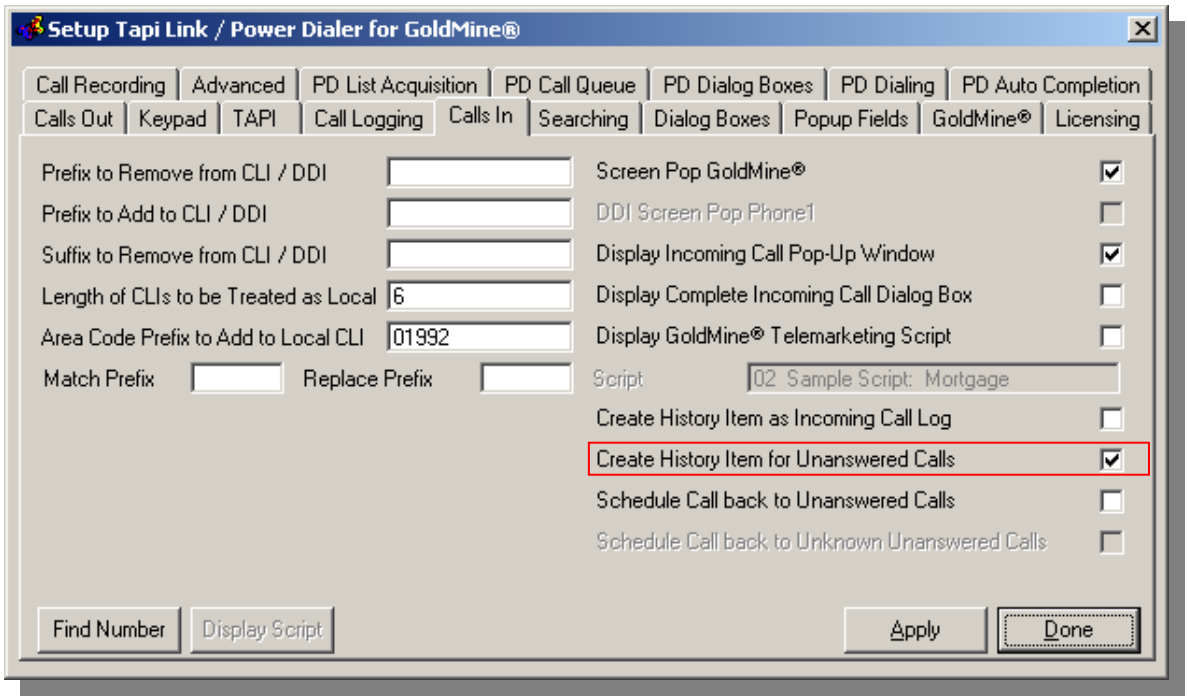
Returning calls to missed callers

Automatically scheduling return calls

continued . . .

Logging missed calls in GoldMine®

If you wish to record an automatic entry in GoldMine® History for missed calls -

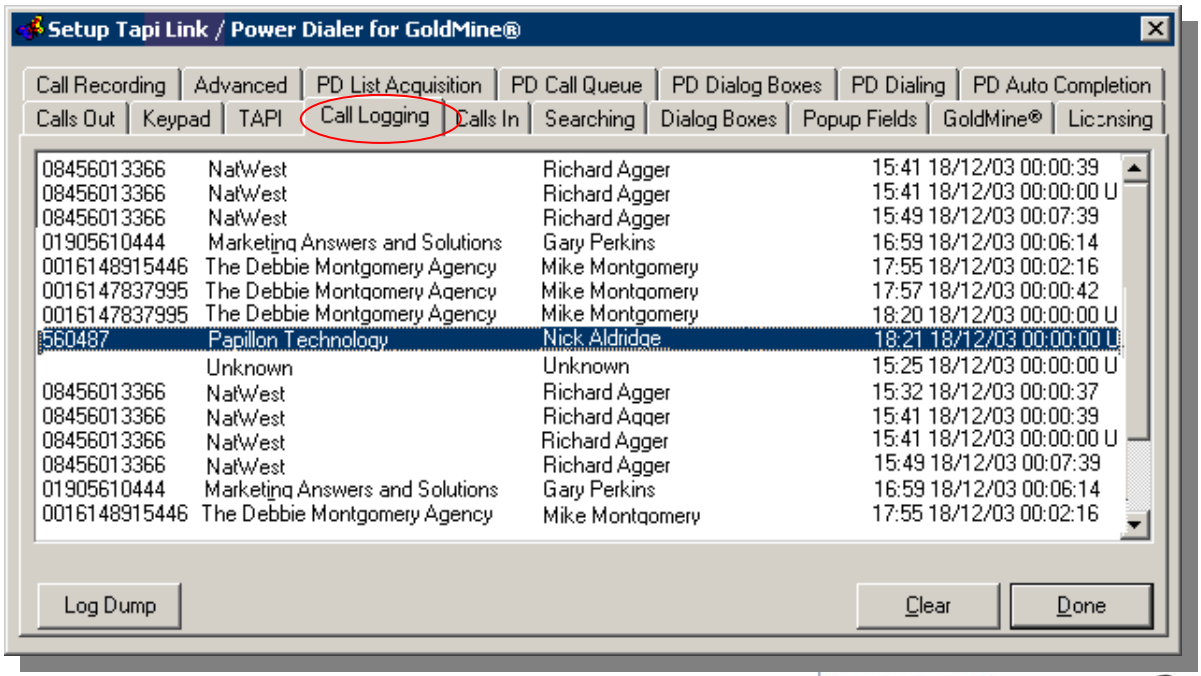


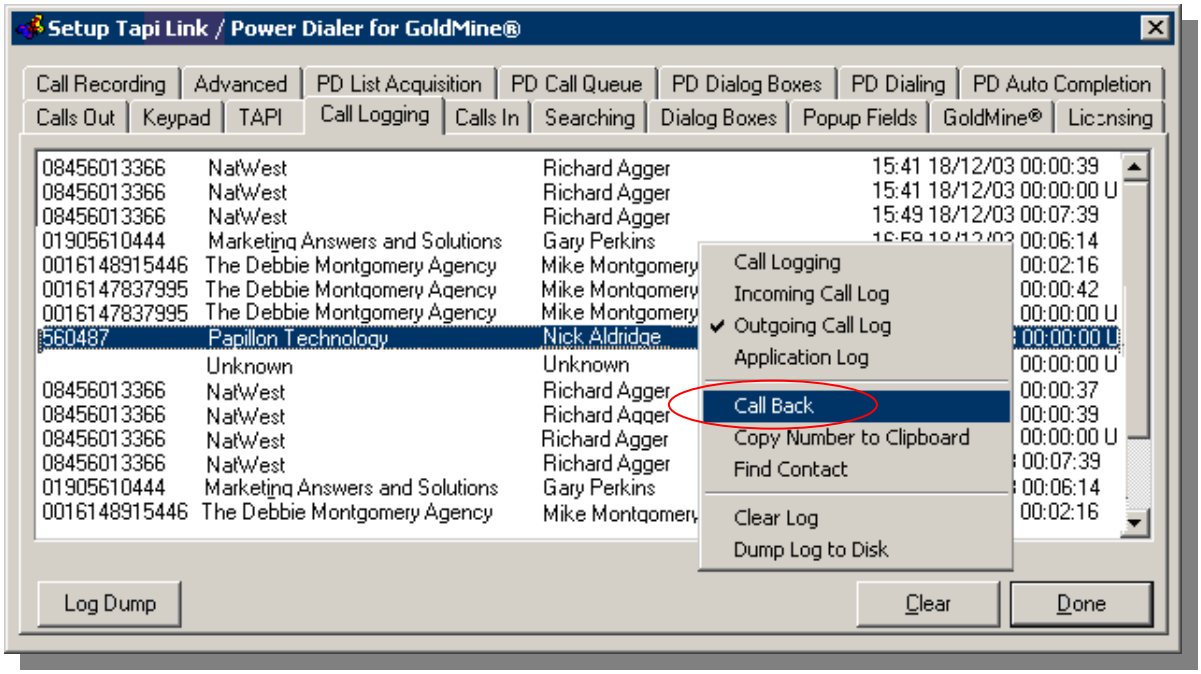
Check the option **Create History Item for Unanswered Calls**. (This of course can only create a linked History item for an identified call with a corresponding contact record.)

Returning calls to missed callers

If you wish to return a call to an earlier *missed* call (or indeed, recall *any* earlier logged call) –

Select the **Call Logging** tab:





Right-click upon the selected call and select **Call Back** from the context menu to return a call to the relevant party.

Using this **Call Back** technique you can –

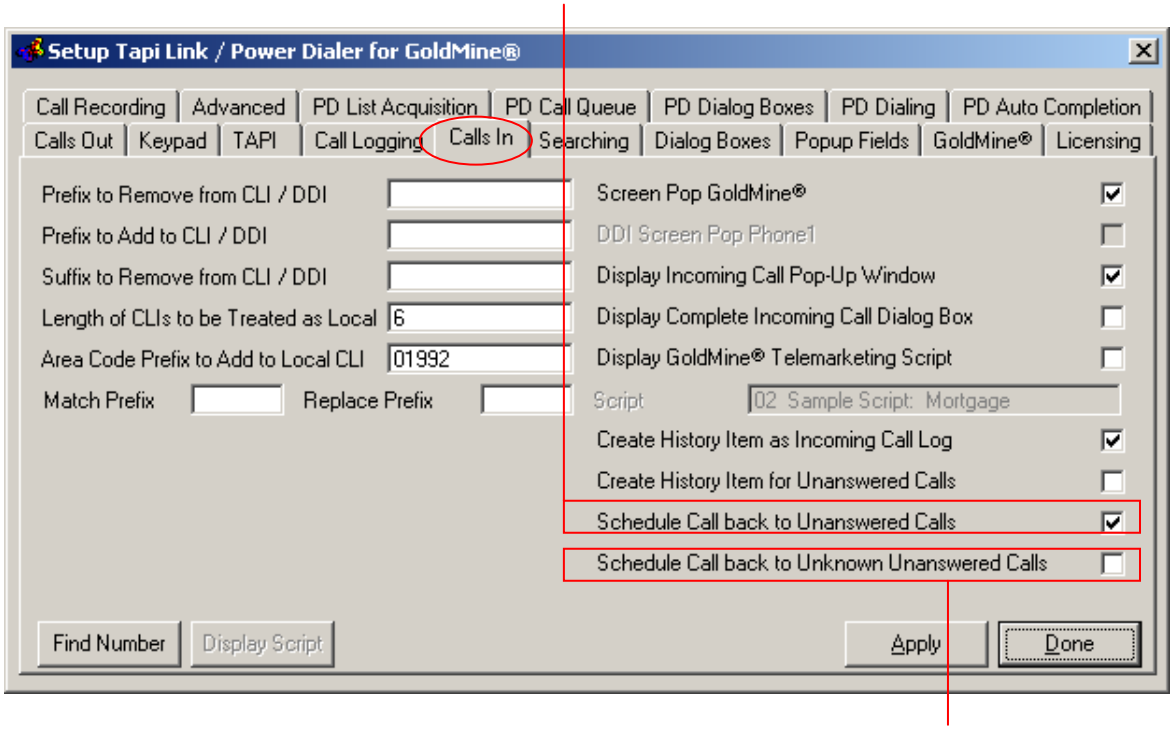
- Return calls to remote parties
- Return calls to internal extensions
- Redial outgoing calls originating from your own location

continued . . .

Automatically scheduling return calls

To arrange for return calls to be *automatically scheduled* for all missed calls –

Select the **Calls In** tab and check the option to **Schedule Call Back to Unanswered Calls**:



To arrange the same procedure for missed calls from unknown sources – also check **Schedule Call Back to Unknown Unanswered Calls.**

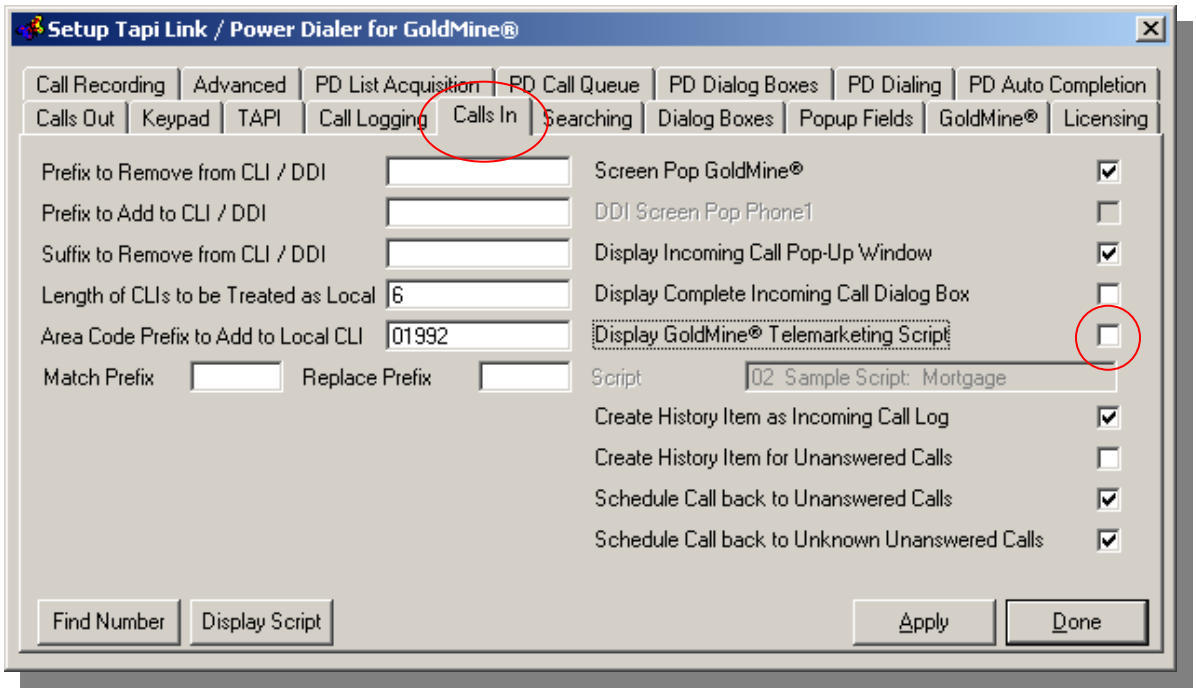
However, since this relates to an 'unknown' caller (i.e. an unrecognised number) there will be no known contact record upon which to link a return call. Therefore the scheduled return call will simply appear in the GoldMine® Activity List and Calendar as an unlinked entry.
The following example shows unlinked entries relating to a missed call from a presented number, and a missed call from a 'withheld' number.

Scripting for Inbound Calls

Using GoldMines• branching scripts, you can gather information quickly and effectively by working through a series of interactive questions in response to an incoming call. Branching scripts organize questions in a 'flowchart-type' format. Tapi Link can harness GoldMines• scripting facility and automatically present the chosen script during the call and post the captured data, notes, and the history of the ongoing script for each completed call into GoldMine•.

To implement this feature, proceed as follows:

Select the **Calls In** tab:

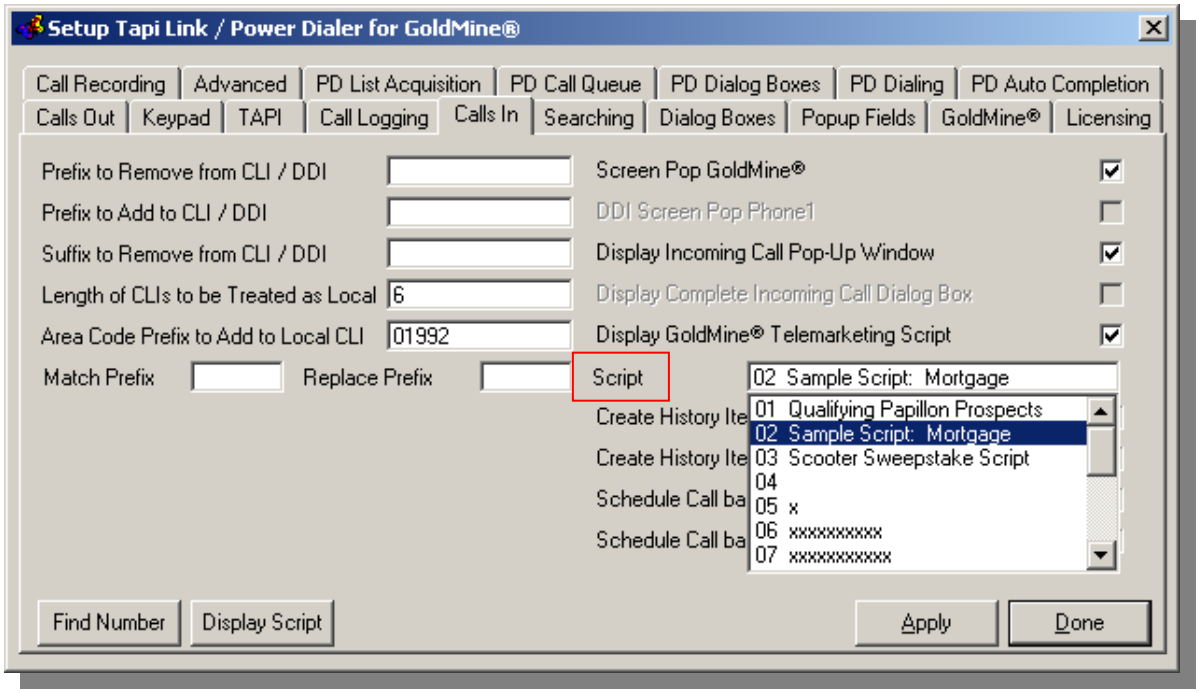


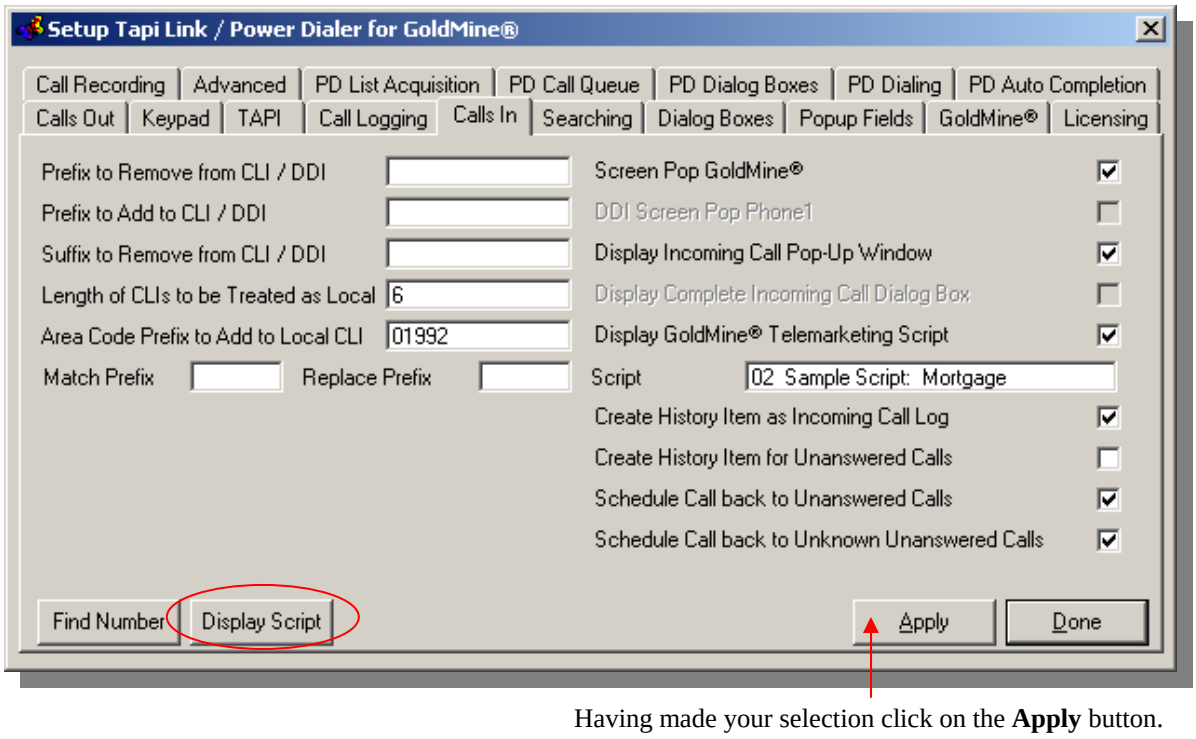
Check the **Display GoldMine• Telemarketing Script** option.

If the **Display GoldMine• Telemarketing Script** option is 'greyed-out' and unavailable, un-check the **Display Complete Incoming Call Dialog Box** field above it.

continued . . .

This will activate the drop-down list of scripts which you have prepared, from which you make your choice. (Each user can choose to work with a different selection of scripts if they wish.)



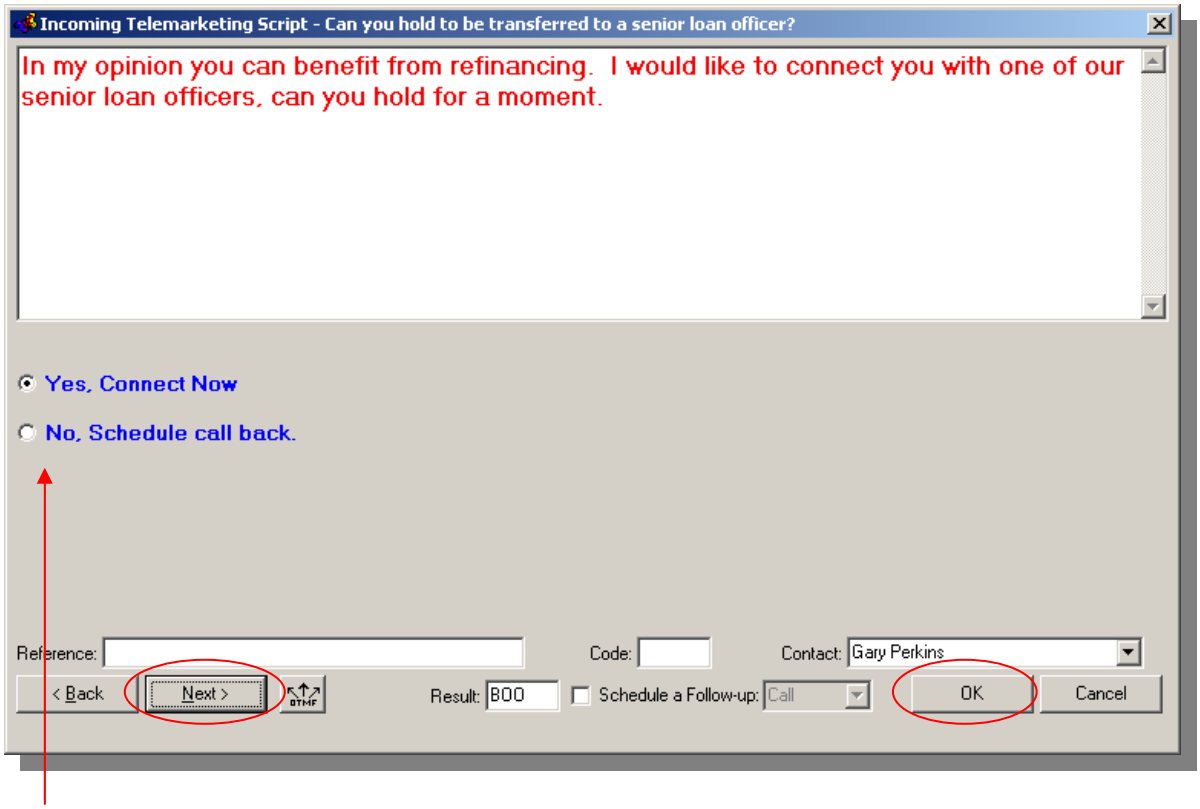


Having made your selection click on the **Apply** button.

To display the sample script click on the **Display Script** button.

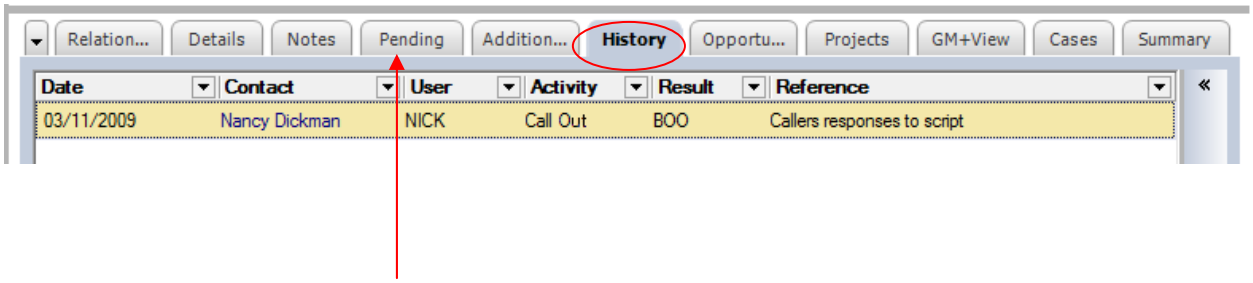
continued . . .

When an incoming call is answered the relevant script will be displayed automatically. The following is simply an example. (The script may or may not be preceded by a screen-pop, depending upon whether this particular option has been enabled.)



Select the appropriate responses from the calling party and click on the **Next** button to move on to the next scripted question in the sequence. Continue through the script, completing the relevant **Result Code**, **Reference**, and **Schedule Follow Up** as required.

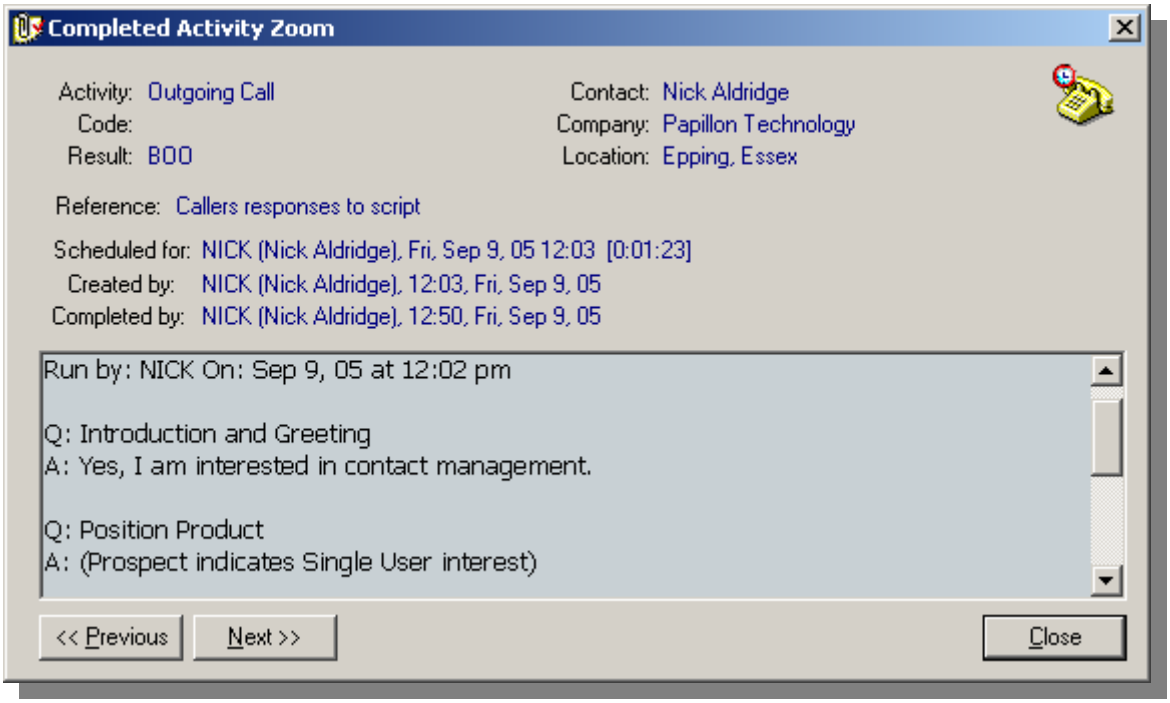
Click on the **OK** button to complete and close the **Telemarketing Script** dialog box.
This will create appropriate entries in the GoldMine® **History** showing the recorded responses from the call recipient as in the following examples -



along with any follow up activities scheduled on the **Pending** tab:

continued . . .

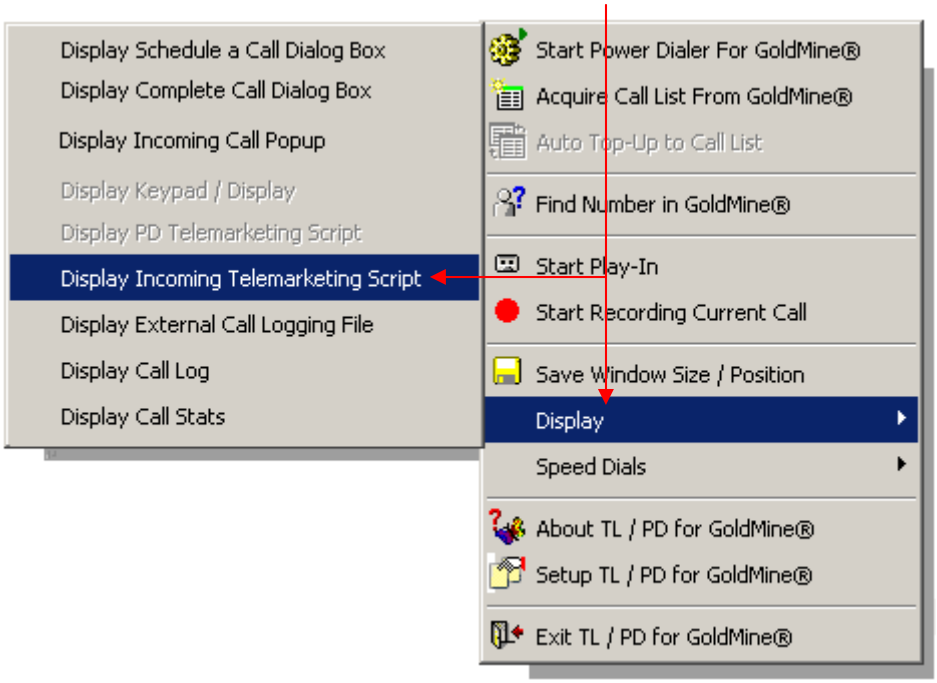
An example of the zoomed details of the **History** item including all of the responses to the script questions:



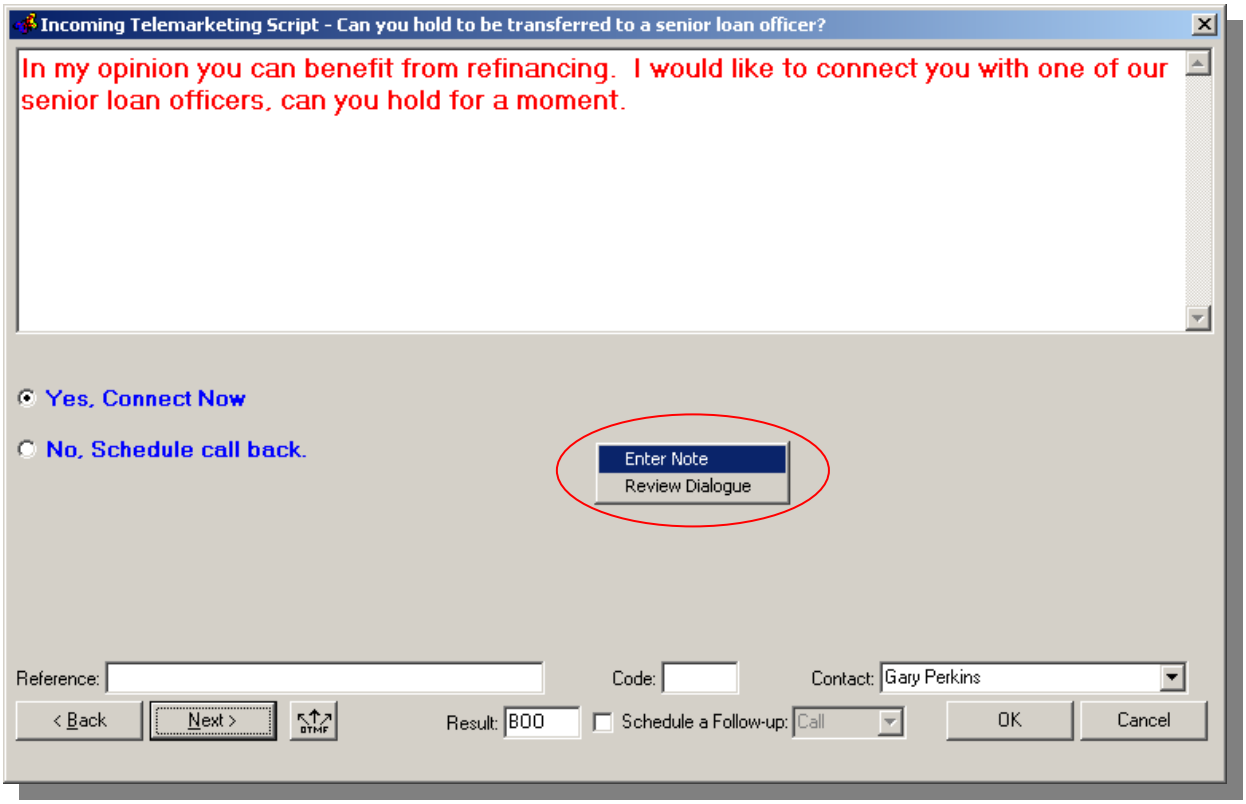
Once configured, it is more convenient to access the sample script from the context menu as follows:

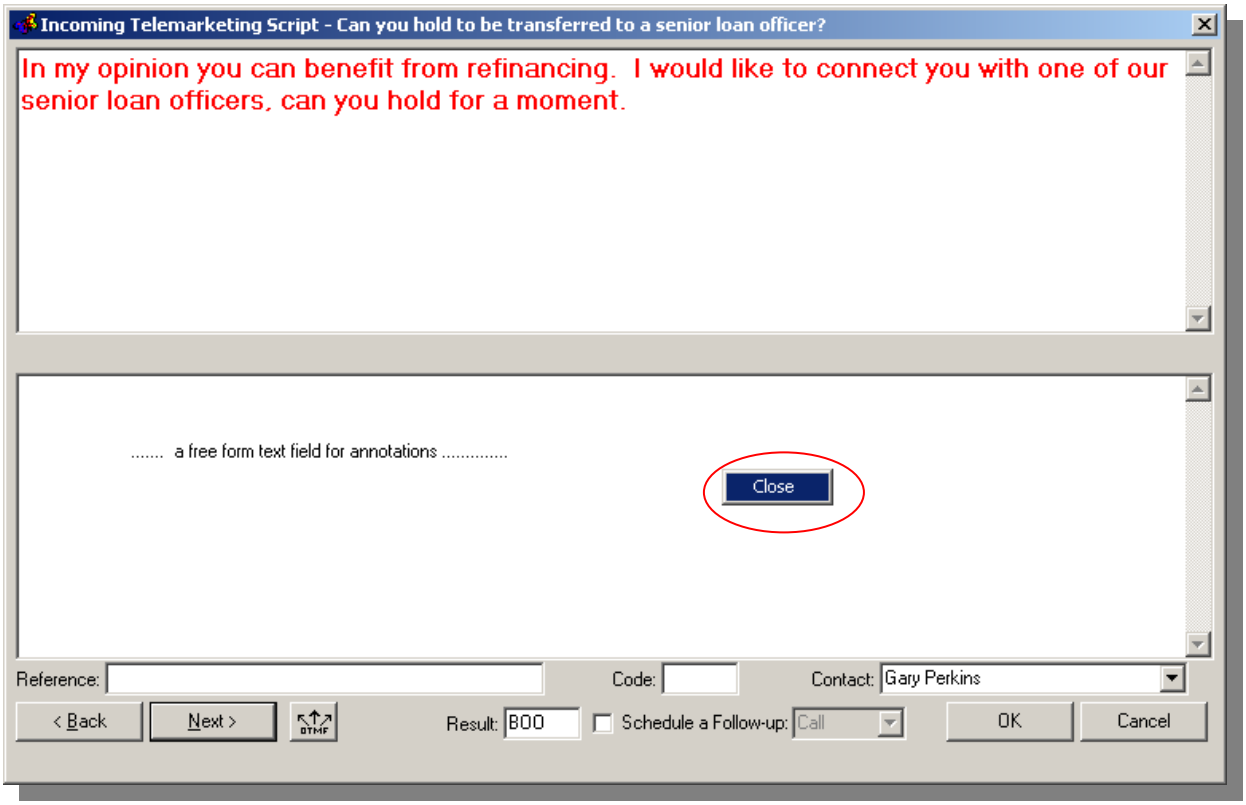
Right-click on the Tapi Link icon in the system tray:

From the context menu select **Display** - then select **Display Incoming Telemarketing Script**



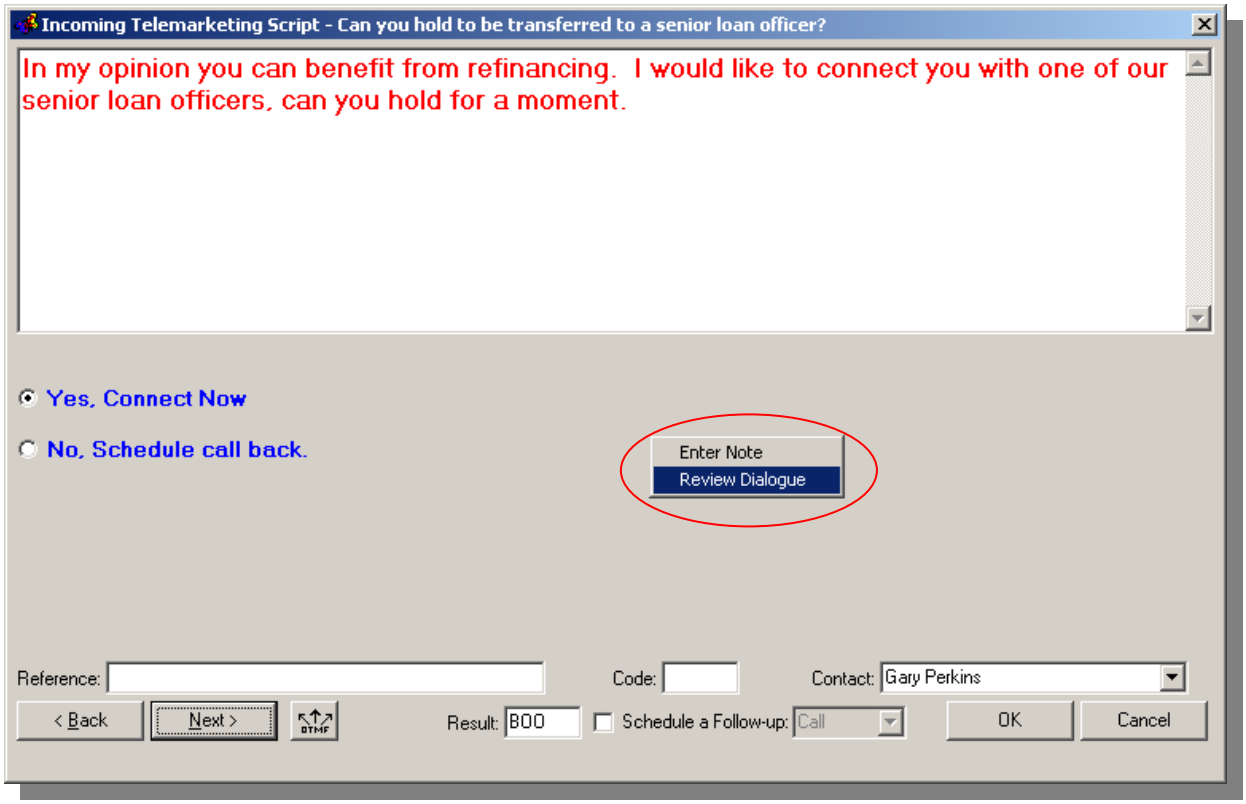
Further scripting options are available via the right-click context menu:

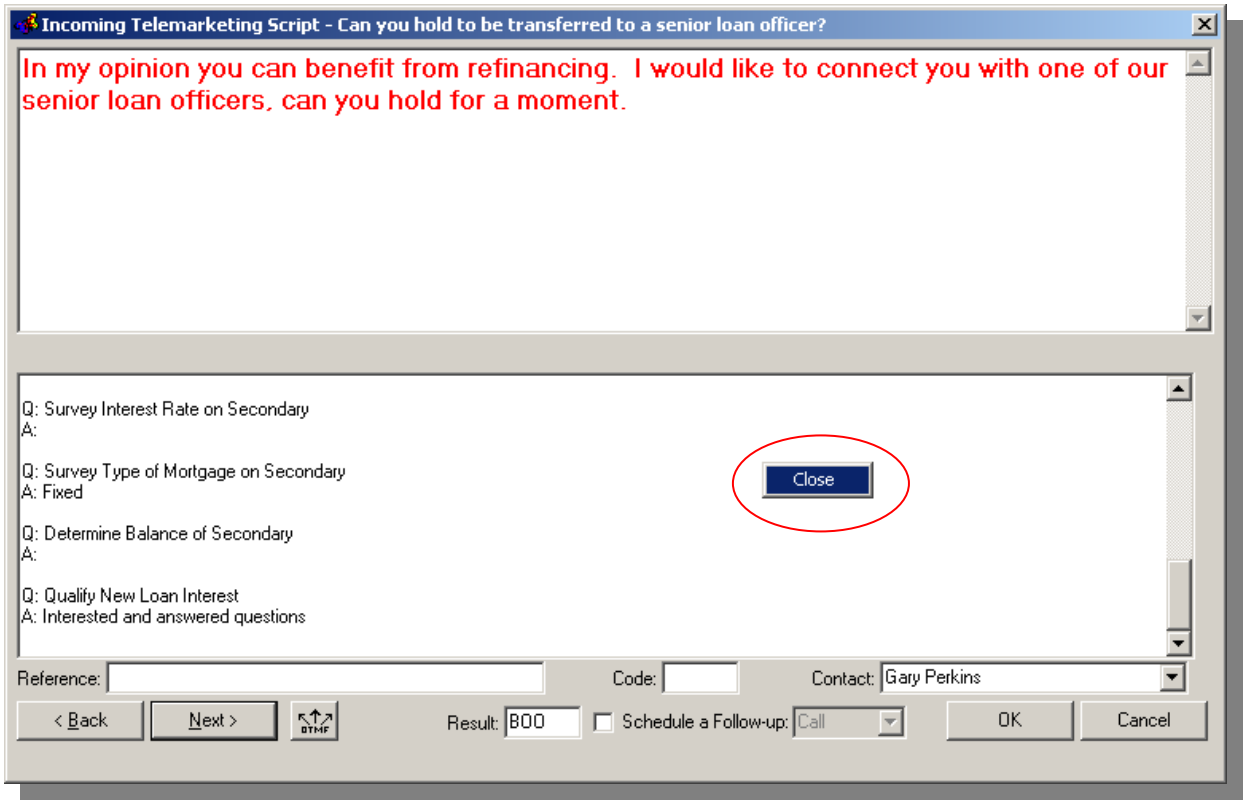




Enter any notes as required.
Click outside of the text field or alternatively right-click and select **Close** to exit the notes.

You may also review and edit any previous dialogue as follows:





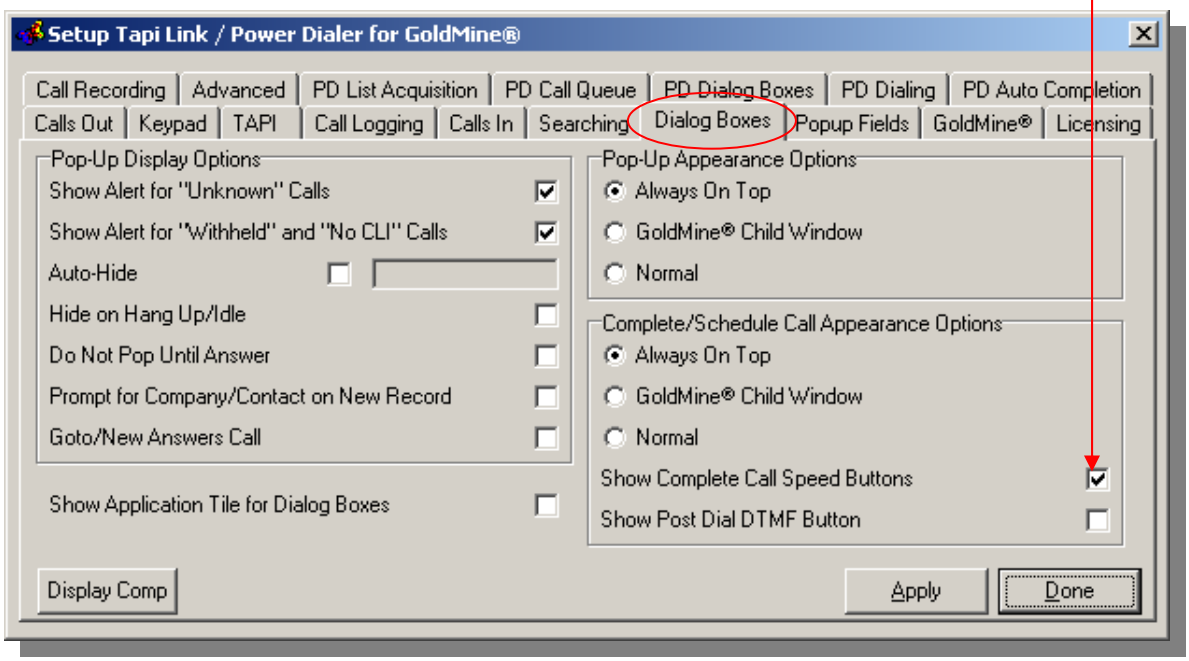
Edit and amend any previous entries as desired.
Click outside of the text field or alternatively right-click and select **Close** to exit the dialog review.

Speed Buttons – Introduction

The programmable Speed Button feature saves time, minimizes keystrokes, and reduces user-errors by automatically populating **Result Codes**, **Activity Codes** & **References** and rapidly completing and closing the Call Completion dialog box. In addition, the buttons can be programmed to schedule follow up calls or other activities for a specific point in the future, to any specified user, and with pre-determined References, and Activity Codes.

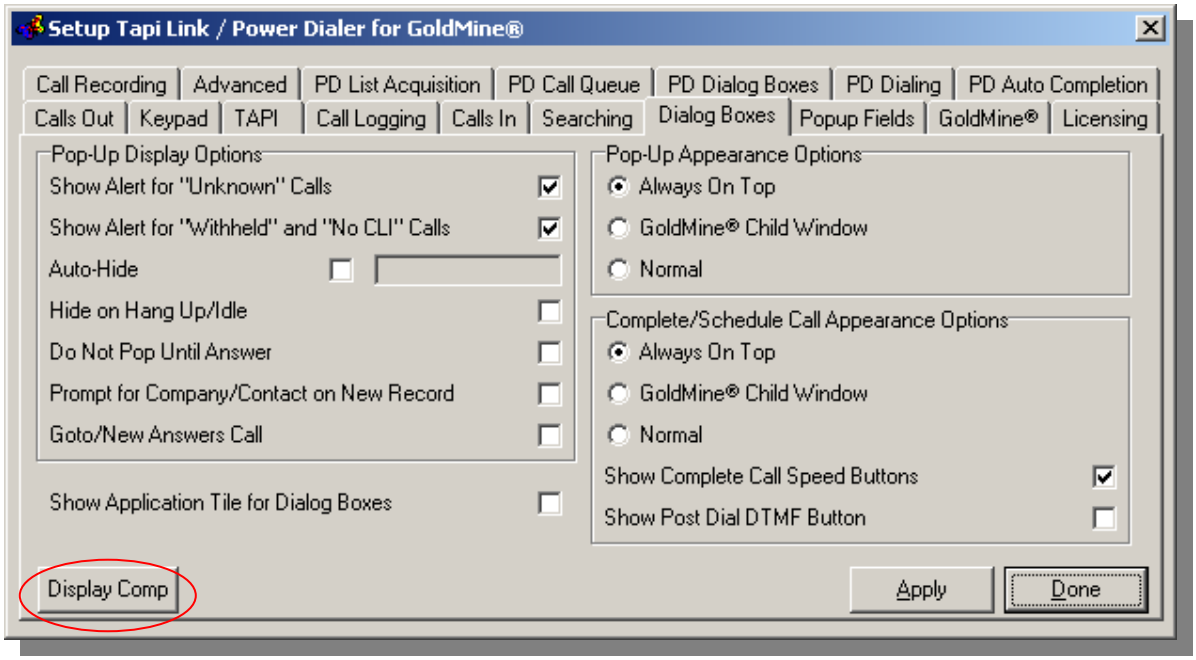
The standard GoldMine® incoming and outgoing Call Completion dialog boxes appear as follows:

However, if you check the **Show Complete Call Speed Buttons** option on the **Dialog Boxes** tab:

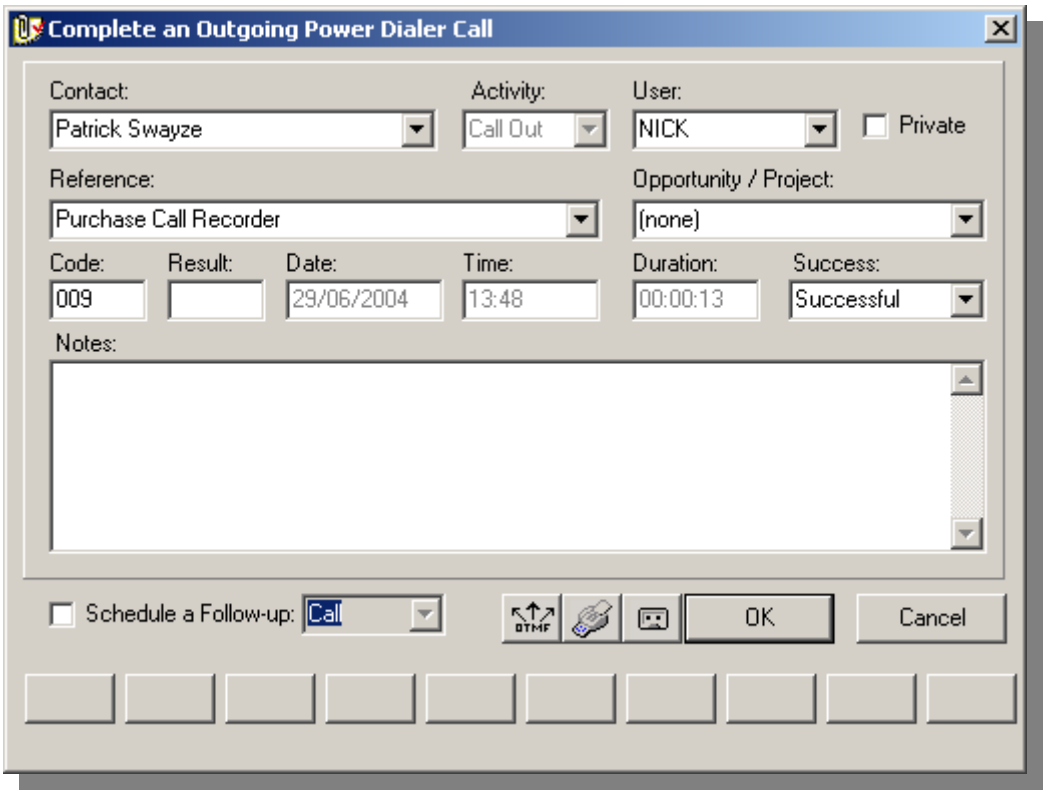


continued . . .

and then click on the **Display Comp** button. (i.e. ***Display*** *Call* ***Comp****letion dialog box*)



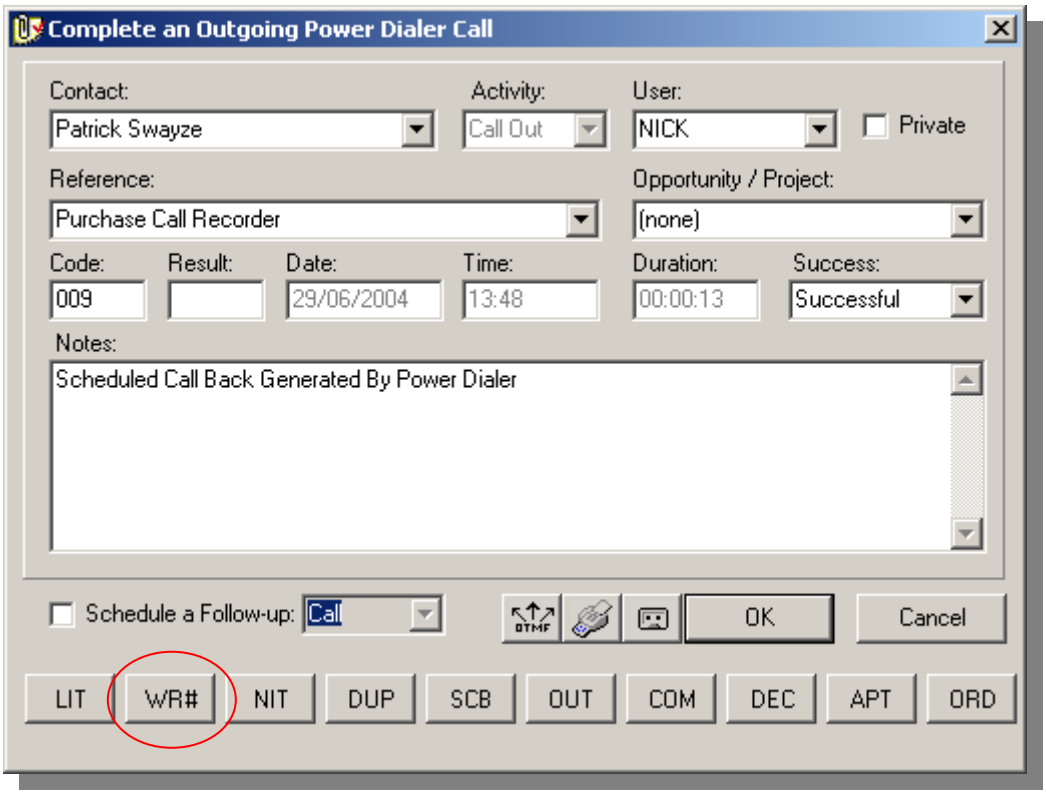
A row of blank Speed Buttons will appear along the lower section of the Call Completion dialog box:



Each button can be programmed to automate a variety of tasks.

continued . . .

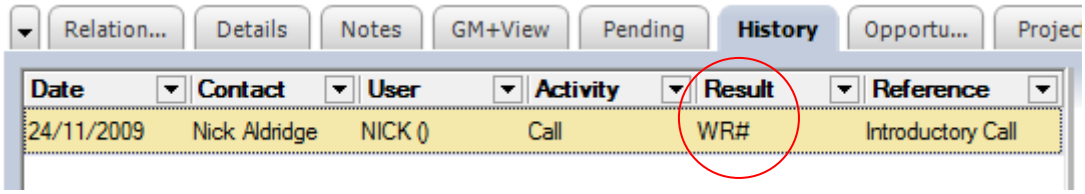
Once the programming is completed, the interface will appear similar to the following example (although the codes shown are simply examples and the actual choice is entirely your own):



(The example shows an *outgoing* call dialog box. However, the same principle applies to both incoming and outgoing call completion boxes.)

Clicking on one of the Speed Buttons will instantly complete and close the dialog box. The GoldMine® History tab will be populated with the completed call entry - including the chosen **Result Code** and the designated **Reference** (or the original depending on your choice).

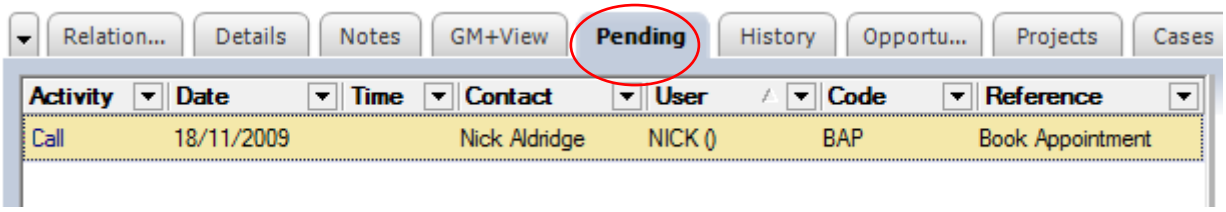
For example, clicking on the **WR#** button above would complete and close the dialog box and also create a History item as follows -



continued . . .

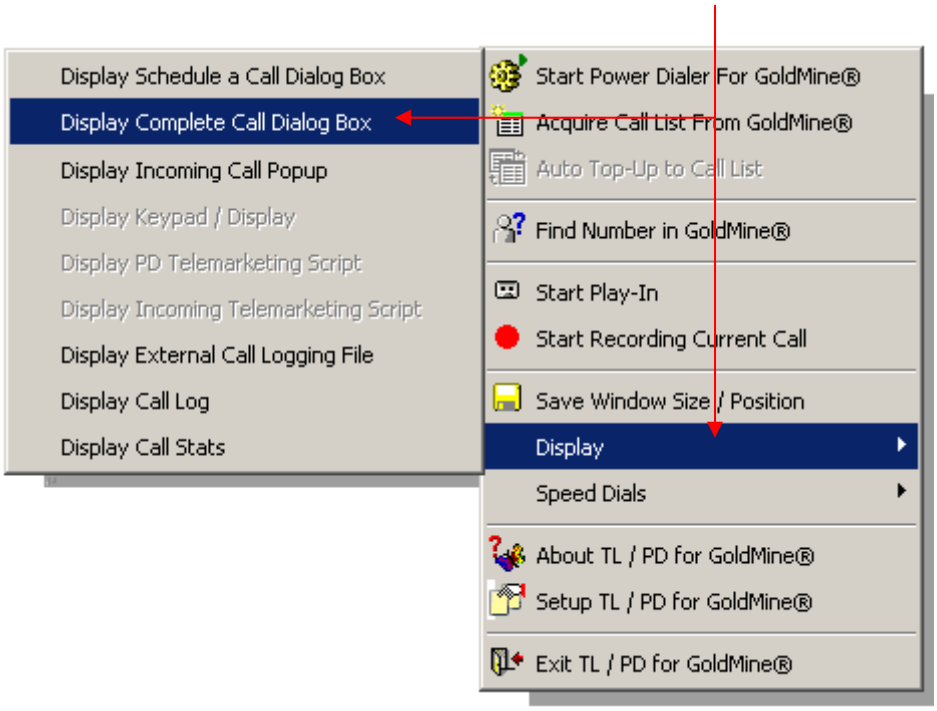
Additional options exist to enable the automatic scheduling of follow up calls or other activities.
These can be scheduled for the same user or other users and at future intervals of your choice – also with your choice of Activity Codes and References.)

If this optional 'follow up scheduling' has been programmed, a pending call or other type of activity will also be generated - as in the following example -



(The Speed Button facility also obviates the need to use the **OK** button to complete and dismiss the Call Completion dialog boxes.)

You can quickly check your current Speed Button settings by right-clicking on the Tapi Link icon and selecting **Display** from the context menu and then **Display Complete Call Dialog Box** from the sub-menu:



(The above call completion and re-scheduling functions can be supplemented further still by enabling each Speed Button to be programmed to automatically update up to 2 different data fields in GoldMine®. However, the implementation and configuration of this extra feature is not available via the agents' own local interface.
It is only configurable remotely via the Managers Console. For further details of the Managers Console please contact Papillon Technology – details can be found at the end of this guide.)

Speed Buttons – Programming your requirements

The Speed Buttons can be configured to rapidly complete and automate a number of time-consuming and repetitive tasks. The extent of automation available can be visualised as falling broadly into three main levels.
You might perhaps consider the three categories as –
Minimum automation, **Medium automation**, **Maximum automation**.

In fact, the second and third levels simply add further automated tasks to those of the preceding level, as indicated in the chart below.
So, each button can be assigned any one of those three main levels of automation, however each of the individual processes within any main level is also optional.

The capabilities within each level are listed below.
The optional processes are indicated with the symbol ▶

WITHOUT any follow up activity	**SEMI-AUTOMATED follow up activity**	**FULLY-AUTOMATED follow up activity**
▶Assigns an Activity Code in History ▶Assigns a Result Code in History ▶Assigns a Reference in History ▶Automatically closes the Call Completion dialog box.	▶Assigns an Activity Code in History ▶Assigns a Result Code in History ▶Assigns a Reference in History ▶Automatically closes the Call Completion dialog box. **AND ALSO ……** ▶Generates a follow up activity but permits manual intervention for annotation etc. at the point of re-scheduling.	▶Assigns an Activity Code in History ▶Assigns a Result Code in History ▶Assigns a Reference in History ▶Automatically closes the Call Completion dialog box. **AND ALSO ……** ▶Automatically schedules a follow up call/activity to another user (or the same user). ▶Automatically schedules the follow up call/activity to any point in the future. ▶Automatically schedules the follow up call/activity with a pre-determined Reference. ▶Automatically schedules the follow up call/activity with a pre-determined Activity Code.
	▶May also populate or update one or two designated GoldMine® fields – if this has been implemented via the Managers Console.	▶May also populate or update one or two designated GoldMine® fields – if this has been implemented via the Managers Console.

Each of the three levels summarised above, and how to configure them, is detailed in the following sections:

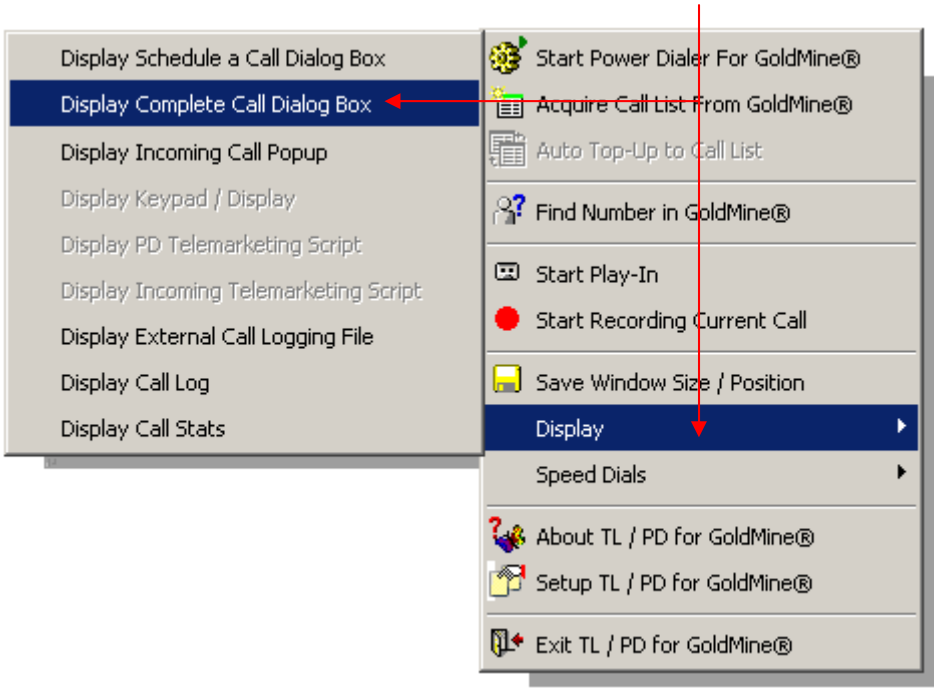
WITHOUT any follow up activity

This option will complete a History item in GoldMine® with the Result Code which appears on the Speed Button and (optionally) a pre-determined Reference and Activity Code.

To access the buttons for programming - click on the **Display Comp** button on the **Dialog Boxes** tab mentioned earlier, or alternatively:

Right-click the Tapi Link icon in the system tray:

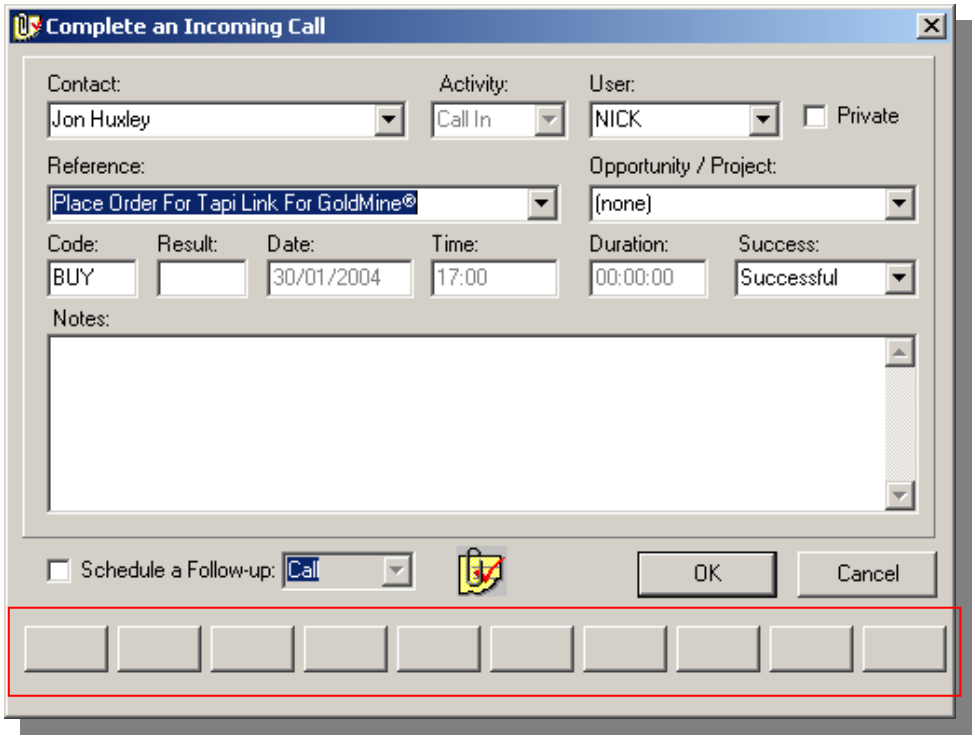
Select **Display** from the context menu:



From the nested sub-menu, select **Display Complete Call Dialog Box**:

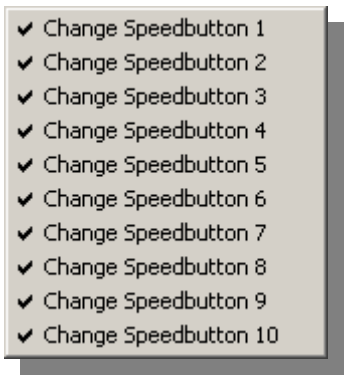
continued . . .

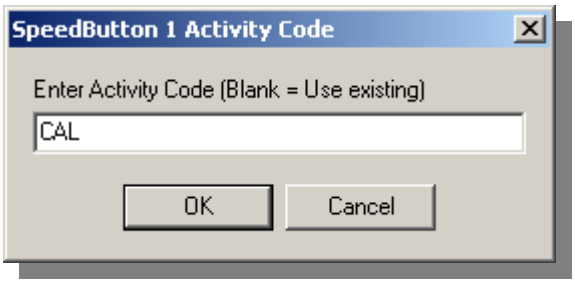
A representation of the Complete Call dialog box appears. (This applies to incoming or outgoing calls):



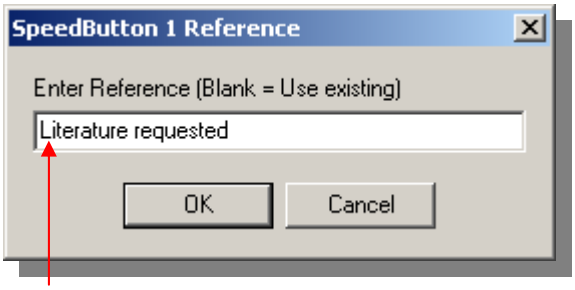
Right-click on any button to commence programming.

From the context menu that appears – select whichever button you wish to program:



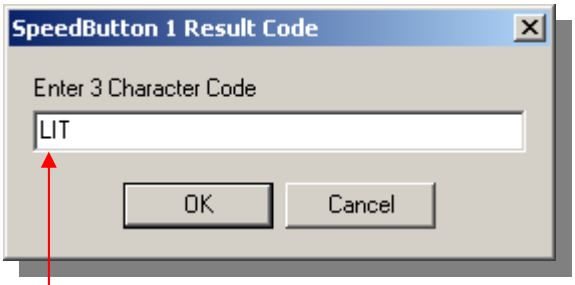


If you wish to automatically populate the GoldMine® History with an Activity Code enter your chosen Activity Code and click on **OK**. (If you click on the **OK** button without entering any text – the original Activity Code will remain unchanged.)



If you wish to automatically populate a Reference - enter your chosen Reference and click on **OK**.
(If you click on the **OK** button without entering any text – the original Reference for the call will remain unchanged.)

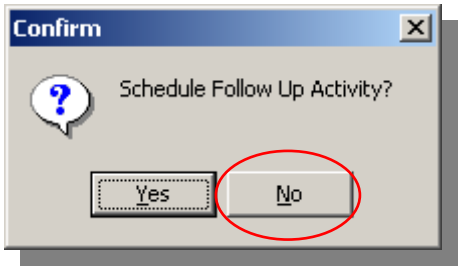
This will raise the next dialog box for the Result Code entry:



Enter your chosen Result Code.
(For example, the code **LIT** as above could signify that literature needs to be sent.)

Click on **OK**.

The next dialog box invites you to choose whether you also wish to have a follow up call/activity scheduled when this particular Speed Button is clicked.

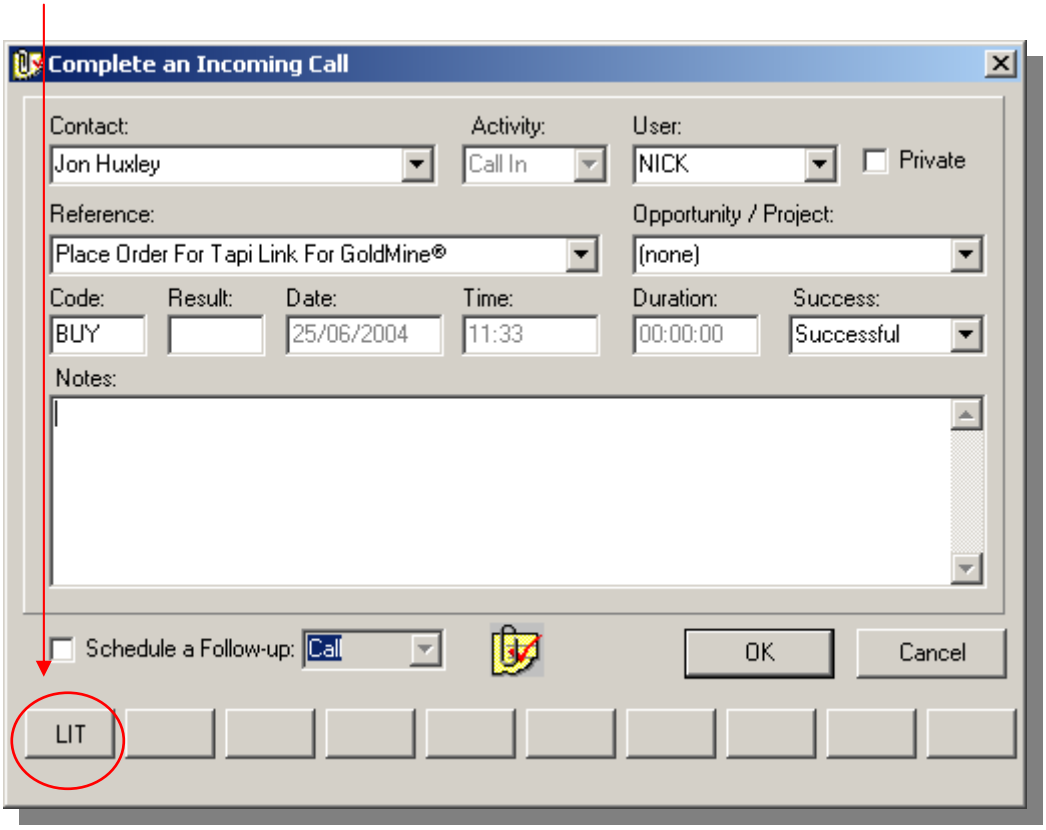


Click **No**.

(If, however, you clicked **Yes** you will have escalated the automation up to the next level – as detailed in the following option entitled **SEMI-AUTOMATED follow up activity**.)

continued . . .

This completes the programming of the chosen Speed Button as in the following example-



To program the other Speed Buttons with this preliminary level of automation - right-click on any Speed Button and proceed as before.

SEMI-AUTOMATED follow up activity

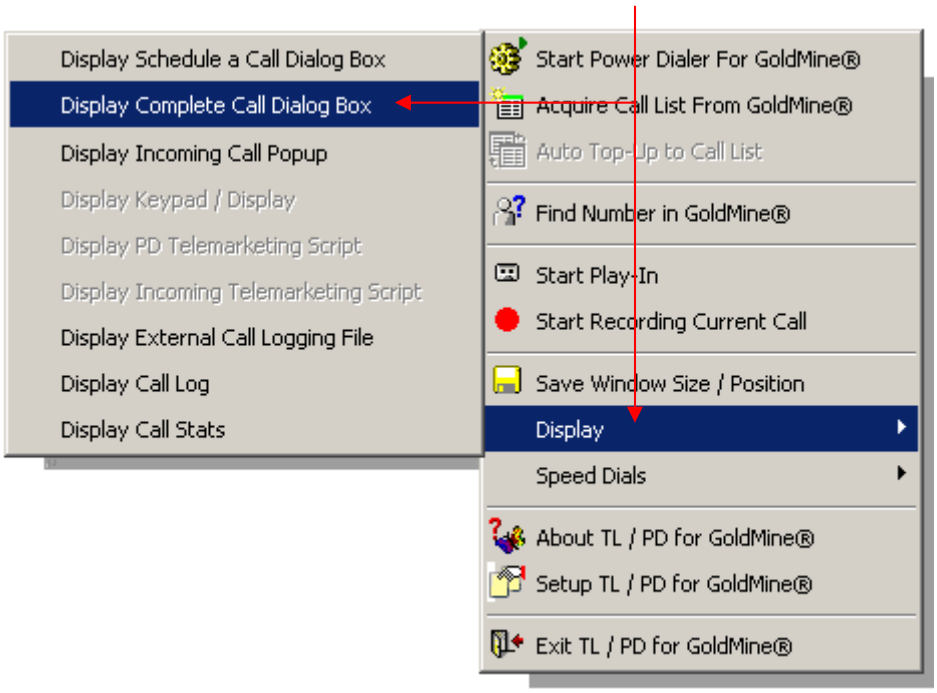
This option will complete a History item in GoldMine® with the Result Code which appears on the Speed Button and optionally a pre-determined Activity Code and Reference. In addition, as the Speed Button is clicked it will automatically launch a follow up dialog box. i.e. as opposed to the fully automated re-scheduling process, this will permit manual intervention by the user for annotation etc. at the time of scheduling that follow up call/activity.

To access the buttons for programming - click on the **Display Comp** button on the **Dialog Boxes** tab mentioned earlier, or alternatively:

Right-click the Tapi Link icon in the system tray:

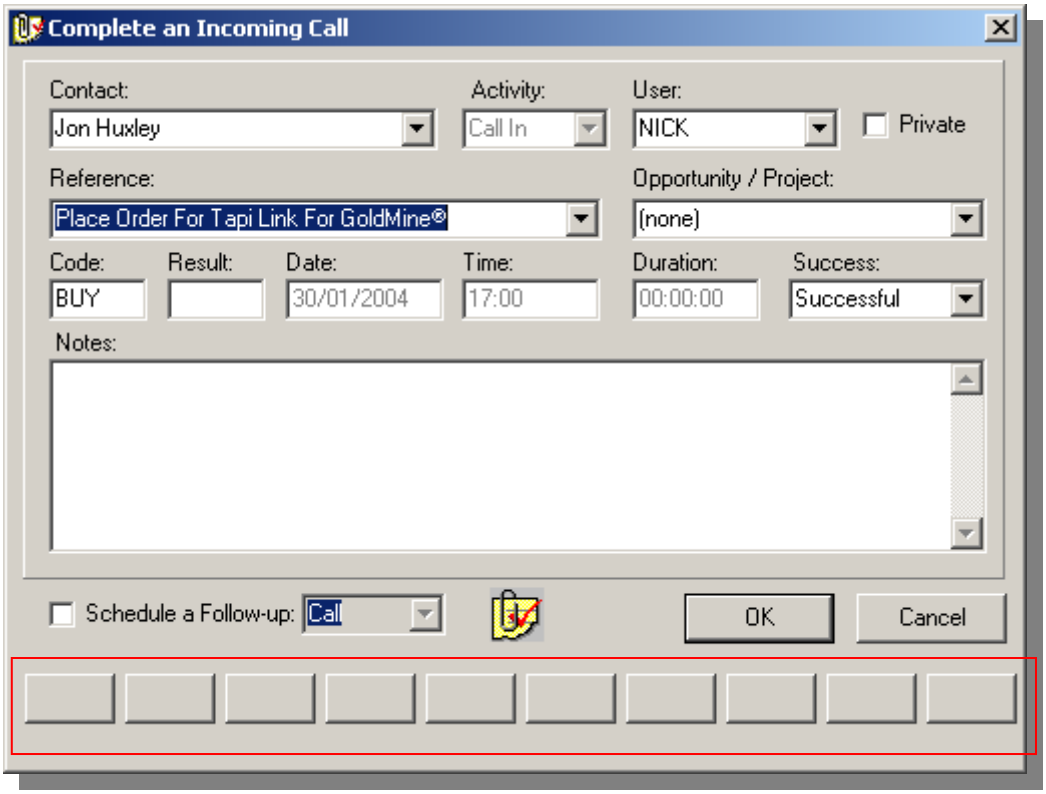
Select **Display** from the context menu:

Select **Display** from the context menu:



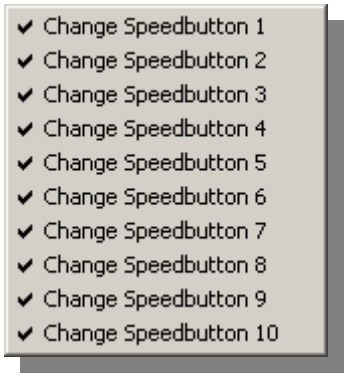
From the nested sub-menu, select **Display Complete Call Dialog Box**:

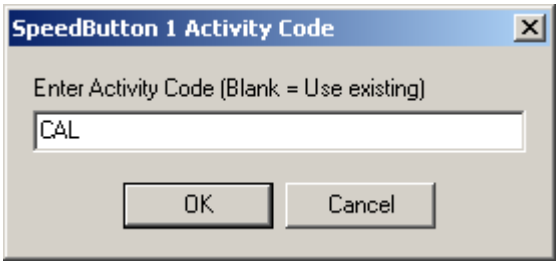
A representation of the Complete Call dialog box appears. (This applies to either incoming or outgoing calls):



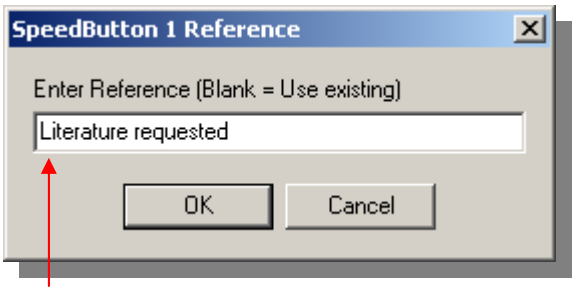
Right-click on any button to commence programming.

From the context menu that appears – select whichever button you wish to program:



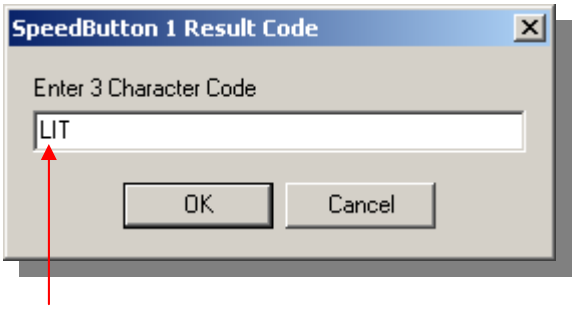


If you wish to automatically populate the GoldMine® History with an Activity Code enter your chosen Activity Code and click on **OK**.
(If you click on the **OK** button without entering any text – the original Activity Code will remain unchanged.)



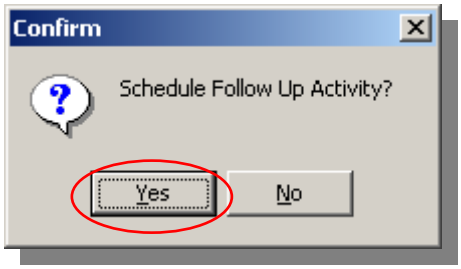
If you wish to automatically populate a Reference - enter your chosen Reference then click on **OK**.
(If you click on the **OK** button without entering any text – the original Reference for the call will be retained.)

This will raise the next dialog box for the Result Code entry:



Enter your chosen Result Code.
(For example, the code **LIT** as above could signify that literature needs to be sent.) Click on **OK**.

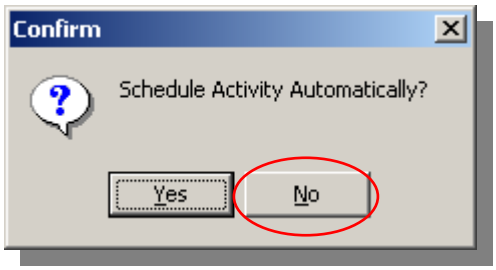
The next dialog box invites you to choose whether you also wish to have a follow up call/activity scheduled when this particular Speed Button is clicked.



Click **Yes**.

(If, however, you clicked **No** you will have reduced the extent of the automation process to that of the previously described level – as detailed in the section entitled **WITHOUT any follow up activity**.)

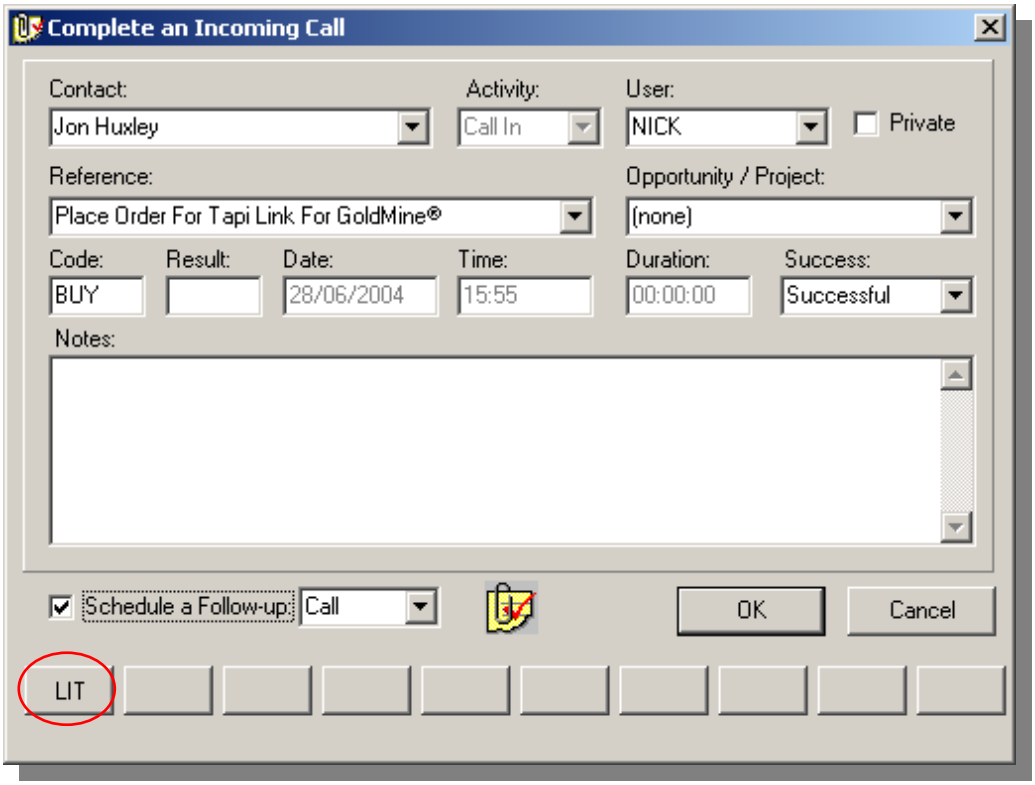
If you chose **Yes** to scheduling a follow up call/activity, you will then be asked to choose if you wish the activity to be scheduled automatically:



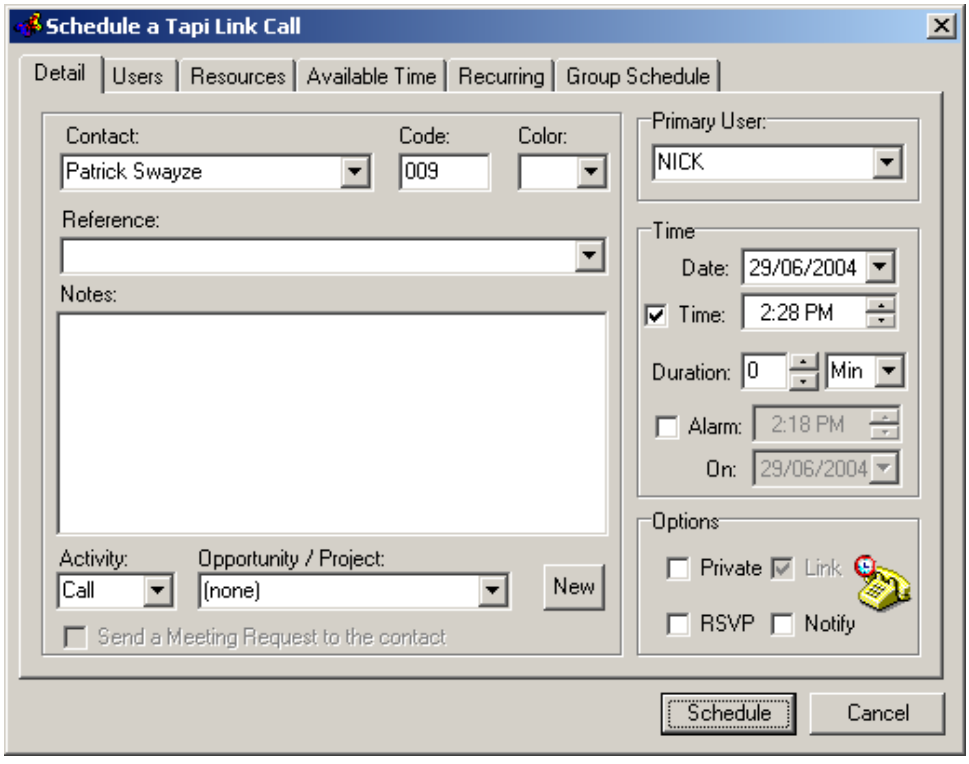
Select **No.**

This completes the programming of the chosen Speed Button as in the following example-

continued . . .



When the **LIT** Button is clicked, a further scheduling box will appear as follows - to allow the user to *manually* configure the settings for a follow up call or other type of activity:



To program the other Speed Buttons with this second level of automation - right-click on any Speed Button and proceed as before.

FULLY-AUTOMATED follow up activity

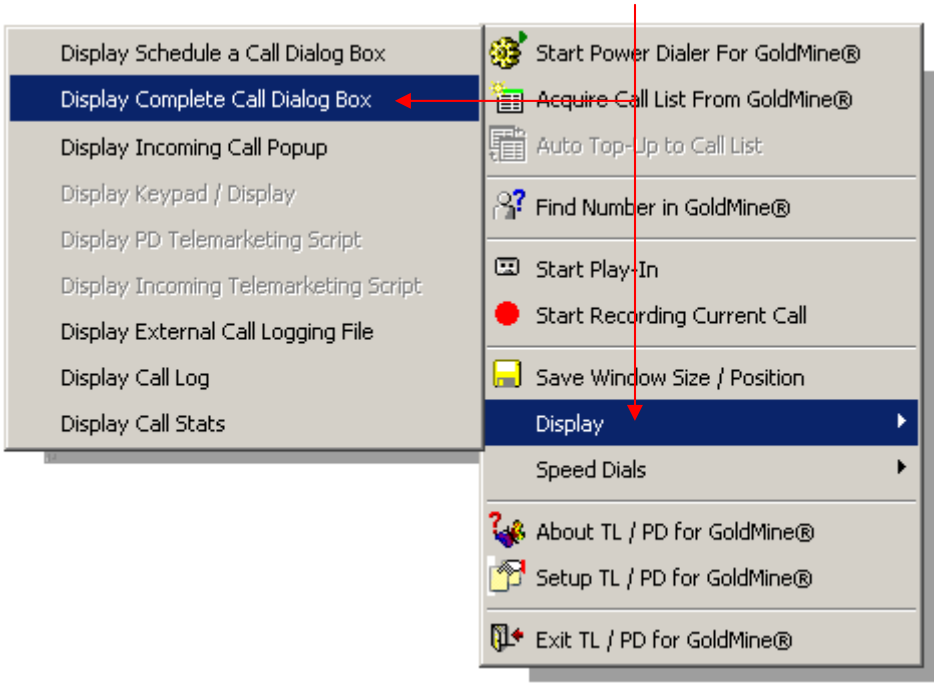
This option will complete a History item in GoldMine® with the Result Code which appears on the Speed Button and (optionally) a pre-determined Reference and Activity Code.
In addition, it can also automatically schedule a follow up –

- with a pre-determined activity type of your choice
- to another user (or the same user)
- to another point in the future
- and including a pre-determined Reference and/or Activity Code of your choice.

To access the buttons for programming - click on the **Display Comp** button on the **Dialog Boxes** tab mentioned earlier, or alternatively:

Right-click the Tapi Link icon in the system tray:

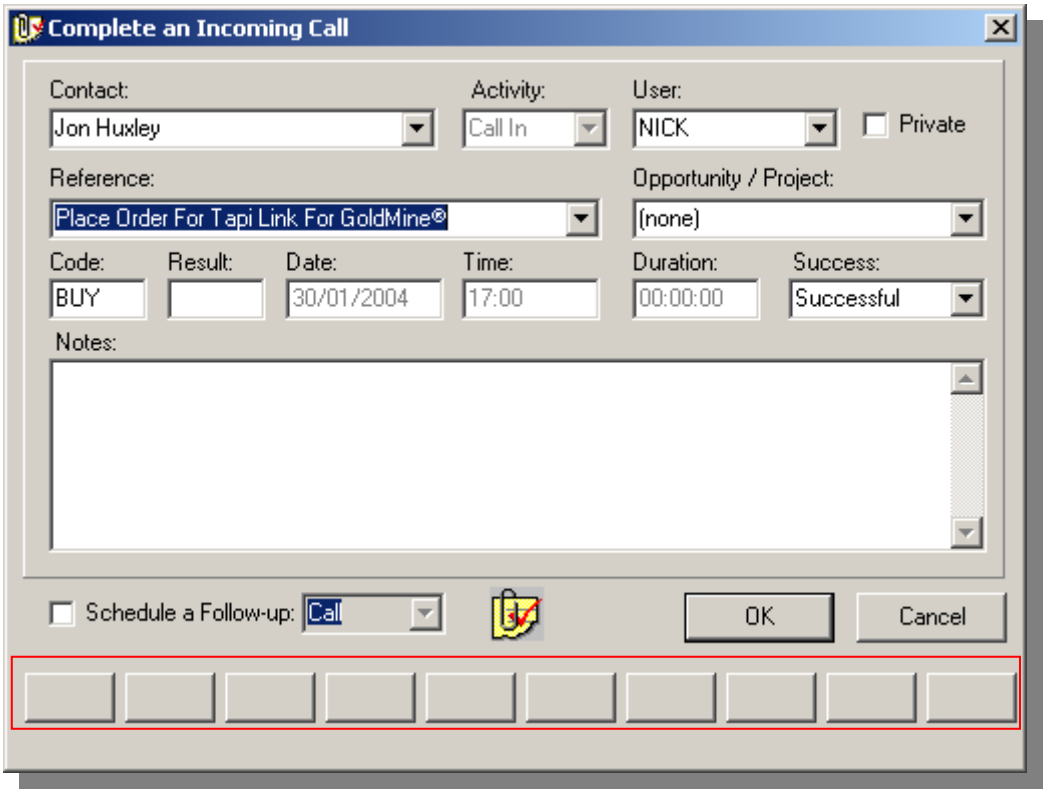
Select **Display** from the context menu:



From the nested sub-menu, select **Display Complete Call Dialog Box**:

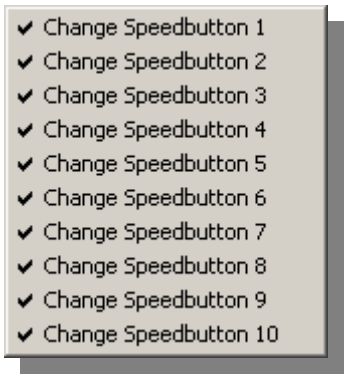
continued . . .

A representation of the Complete Call dialog box appears. (The same interface programs both incoming and outgoing calls dialog boxes.) -

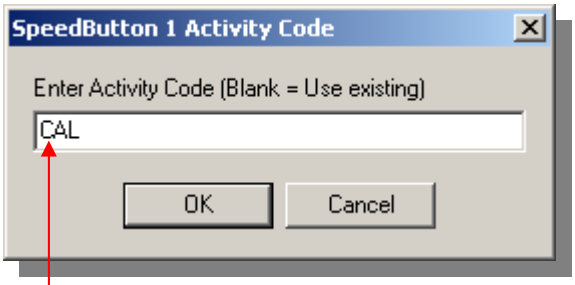


Right-click on any button to commence programming.

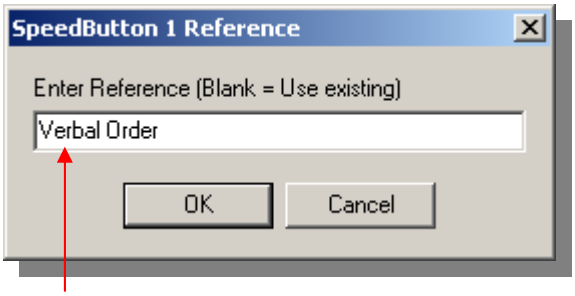
From the context menu that appears – select whichever button you wish to program:



continued . . .

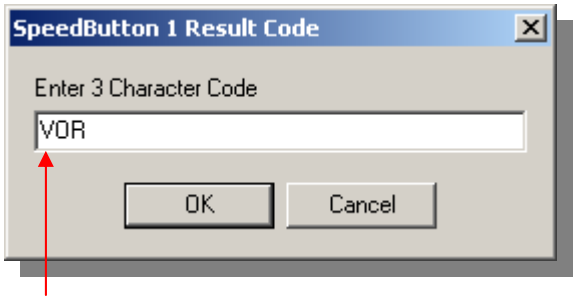


If you wish to automatically populate the GoldMine® History with an Activity Code enter your chosen Activity Code and click on **OK**.
(If you click on the **OK** button without entering any text – the original Activity Code will remain unchanged.)



If you wish to automatically populate a Reference - enter the chosen Reference.
(If you click on the **OK** button without entering any text – the original Reference for the call will remain unchanged.)

This will raise the next dialog box for the Result Code entry:

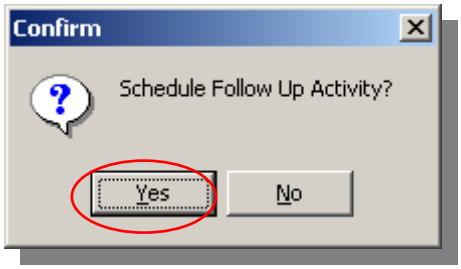


Enter the chosen Result Code.
(For example, the code **VOR** as above could signify a verbal order for products/services.)

Click on **OK**.

continued . . .

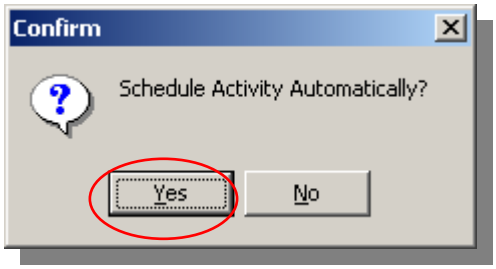
The next dialog box invites you to choose whether you also wish to have a follow up activity scheduled when this particular Speed Button is clicked.



Click **Yes**.

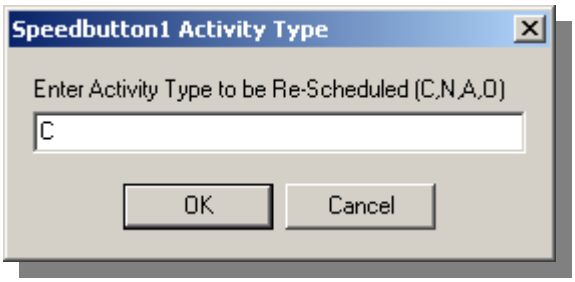
(If, however, you clicked **No** you will have reduced the automation to the first level – as detailed in the section entitled **WITHOUT any follow up activity**.)

If you chose **Yes** to scheduling a follow up call, you will then be asked to choose if you wish the activity to be scheduled automatically:



Select **Yes**.
(If, however, you clicked **No** you will have reduced the automation to the preceding level – as detailed in the option **SEMI-AUTOMATED follow up activity**.)

The **Activity Type** dialog box will appear:

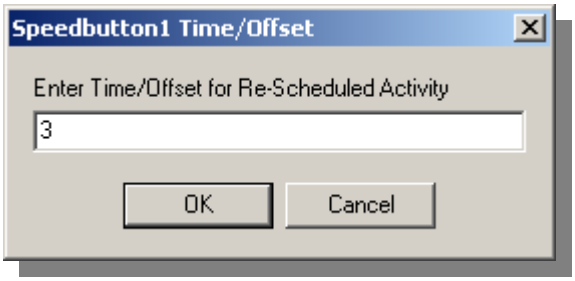


Enter the desired **Activity Type** -
C = **C**all **N** = **N**ext Action **A** = **A**ppointment **O** = **O**ther Action

Click on **OK**.

continued . . .

The **Time/Offset** dialog box will appear:



Time/Offset

Depending on the result of certain calls, you may wish to configure Tapi Link to schedule a particular follow up activity to occur – either after a specific period of time has elapsed, or alternatively at a specific time of day.

This option sets the amount of lead time between the completion of this particular call, and the time scheduled for the follow up activity.

The specific time of day, (or alternatively the interim period that you wish to elapse before the next activity is due) should be entered, choosing one of the following formats:

Absolute Time
hh:mm. (For example, an entry of **13:30** would signify a re-scheduled call at half past one.)

OR

Relative Time
Any value from **1** up to **144** [where each unit equals a period of 10 minutes]
(For example, an entry of **36** would signify a re-scheduled call in 6 hours time.)

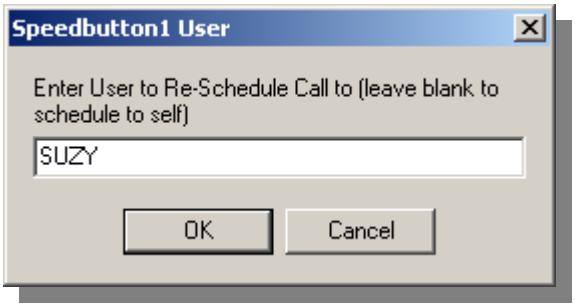
For example, an afternoon call completed at 4.00 pm could have an associated activity scheduled for the following morning at 10.00am. In this case you could enter either 10:00 or 108 in the respective fields above. [If using relative time, a simple rule of thumb would be to remember that 144 is the equivalent of one full day (24hours) ahead.]

Alternatively, you can use the following format:

09:30 +1 which signifies 9.30 am tomorrow. (i.e. 9.30 plus 1 day forward)

Click **OK** to continue to the **User** dialog box:

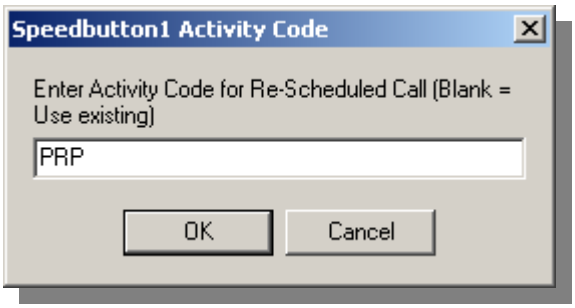
continued . . . .



Enter the username of the person you wish to have conduct the follow up call. (For example, this could be the agent who books appointments or collects payments arising from this call.)
Leave the entry blank if you prefer the call to be re-scheduled to yourself.

Click on **OK**.

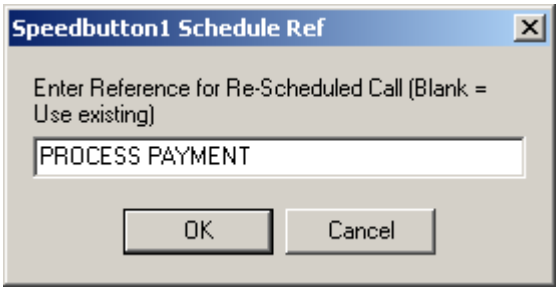
The **Activity Code** dialog box will appear:



Enter the Activity Code for the follow up call.
(Leave the entry blank if you wish to use the existing Activity Code.)

Click on **OK**.

The **Schedule Ref** dialog box will appear:



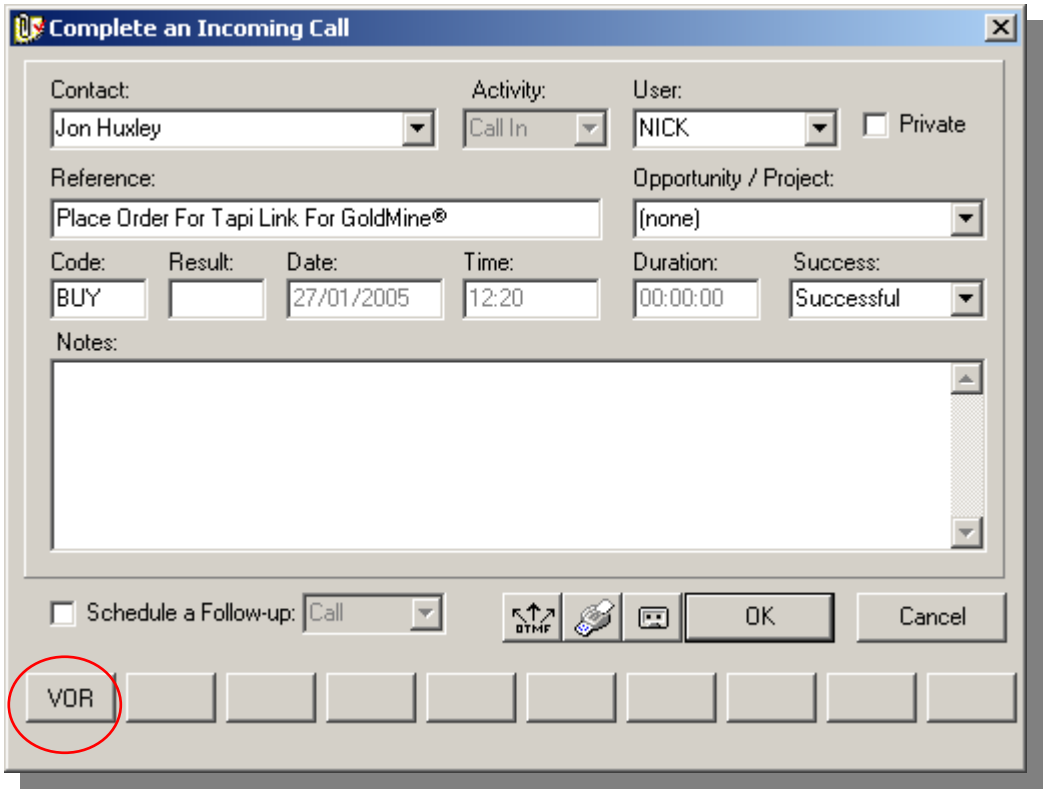
Enter the Reference for the follow up call.

Leave the entry blank if you wish to use the existing Reference.

Click on **OK**.

continued . . .

This completes the programming of the chosen Speed Button as in the following example-



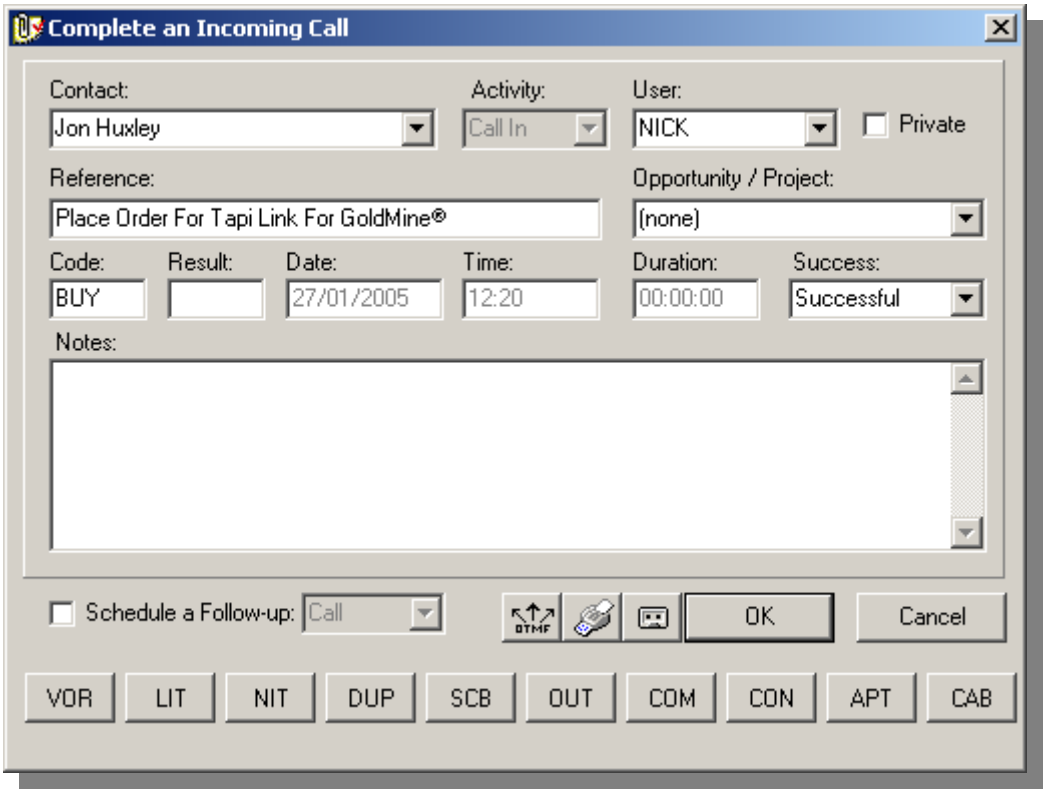
To follow through on the above example (based on each of the previously determined settings), from the perspective of the agent taking a verbal order by telephone, simply clicking on the **VOR** button will automatically -

- Complete and close the dialog box
- Create a GoldMine History item recording the event.
- Populate the Reference field with the entry '**Verbal Order'**.
- Populate the Result Code field with the entry **VOR**.
- Populate the Activity Code field with the entry **CAL**
- Schedule a follow up activity (a telephone call in this particular case) -
  - to different user named **SUZY**,
  - with a Reference of **'Process payment'**
  - and an Activity Code of **PRP**,
  - scheduled for **thirty minutes** later.

continued . . .

To program the other Speed Buttons with this level of automation - right-click on any Speed Button and proceed as before.

A Call Completion dialog box with all Speed Buttons programmed might appear as in the following example:

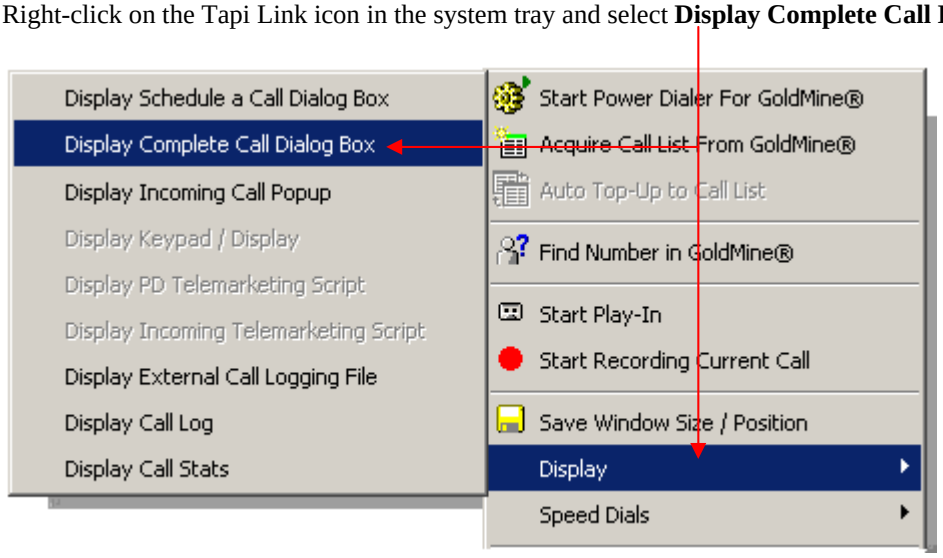


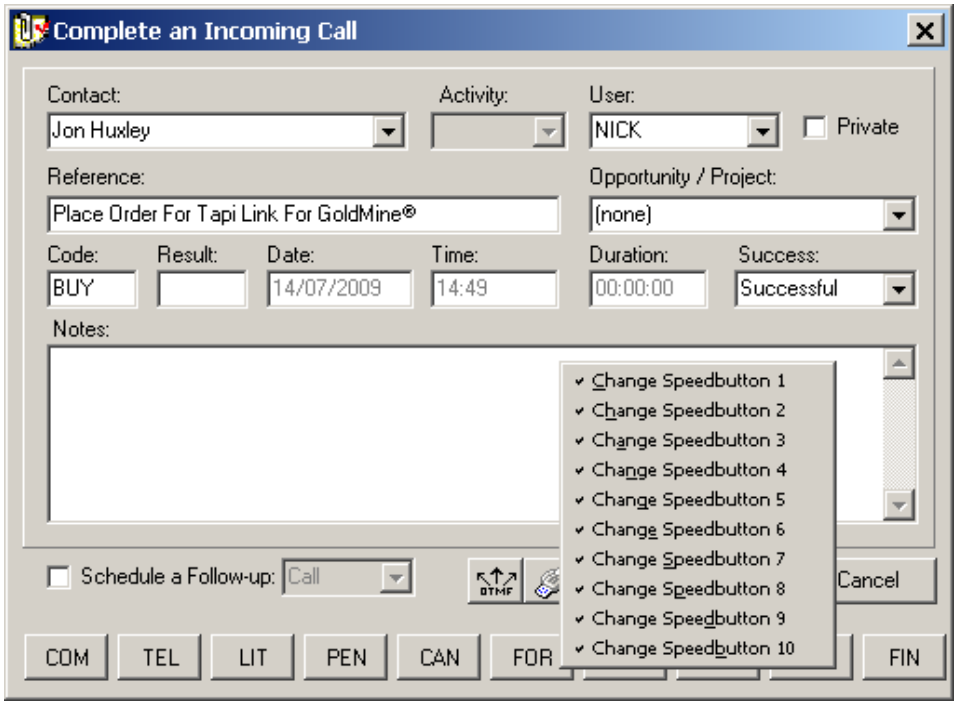
As an alternative, the entire Speed Button setup and configuration can be implemented for any individual user, or for all users, via the Managers Console. Further details of the Managers Console are available at the following location: http://www.papillontechnology.co.uk/ManCons.htm - or contact Papillon Technology for further details.

Revising / Reprogramming the Speed Buttons

Any of the individual programmed elements within each Speed Button can be altered independently, without disturbing any other associated settings in the sequence. To do so, proceed as follows:

Right-click on the Tapi Link icon in the system tray and select **Display Complete Call Dialog Box –**



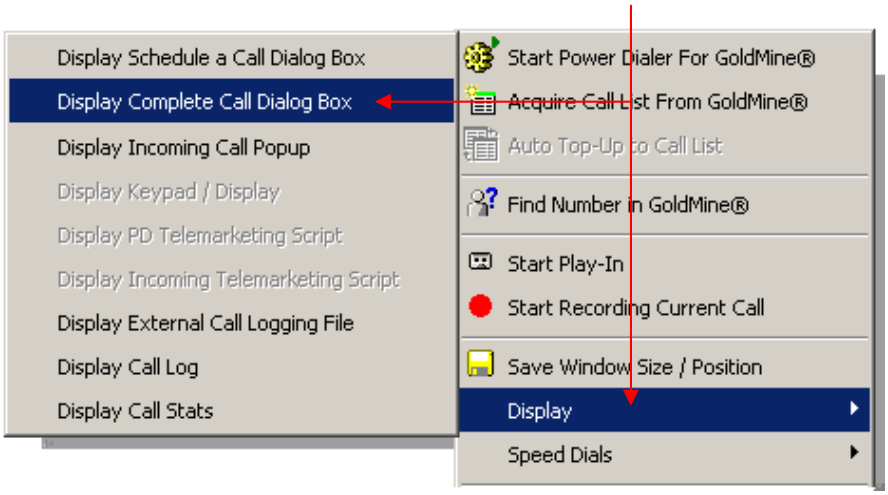


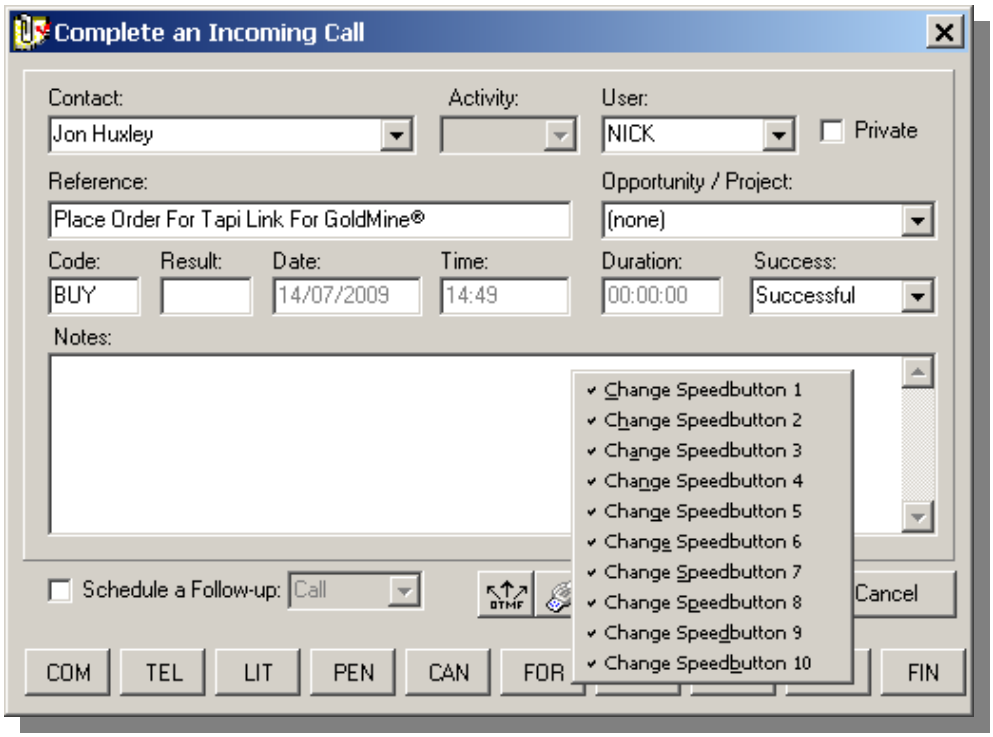
Right-click on any Speed Button then select the particular button which has specific elements you wish to alter.

Cycle through the sequence, by-passing any of the dialog boxes which have data that you wish to retain. Only the parameters where you make a specific alteration or deletion (and then click on the **OK** button) will be affected – all other existing settings will be retained. Therefore you may alter any individual parameter completely independently of all the other settings.

Hiding or Removing a Speed Button

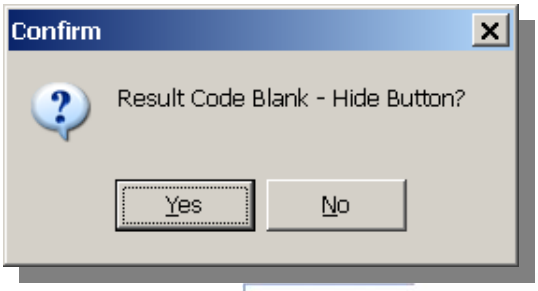
Any of the individual Speed Buttons may be removed or hidden from the interface as follows:
Right-click on the Tapi Link icon in the system tray and select **Display Complete Call Dialog Box –**





Right-click on *any* Speed Button, then select the specific button which you wish to remove.
Click **Cancel** on the *first two* dialog boxes.
On the *third* dialog box relating to the **Result Code** – delete any existing entry and then click **OK**

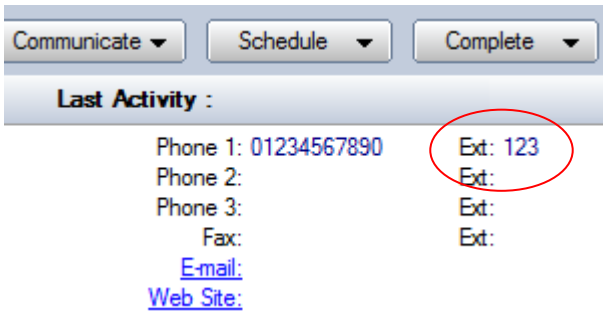
The **Confirm** dialog box will appear.
Click **Yes** to remove the relevant button.



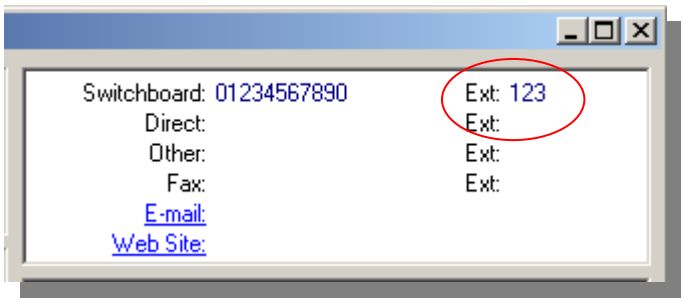
Speed Buttons – Auto Attendant

Certain outbound calls may be responded to by an IVR system (Integrated Voice Response) also known as an Auto-Attendant, whereby an automated announcement requests that additional digits be dialed in order to connect you with various destination options. (i.e. "Dial 1 for Accounts, 2 for Sales…etc.")
Tapi Link can be programmed to transmit the required numerical response via the **DTMF** speed button when the **Outgoing Call Completion** dialog box is used.

The number(s) required should be entered in the Phone1 **Ext:** field in the relevant contact record(s) as follows:

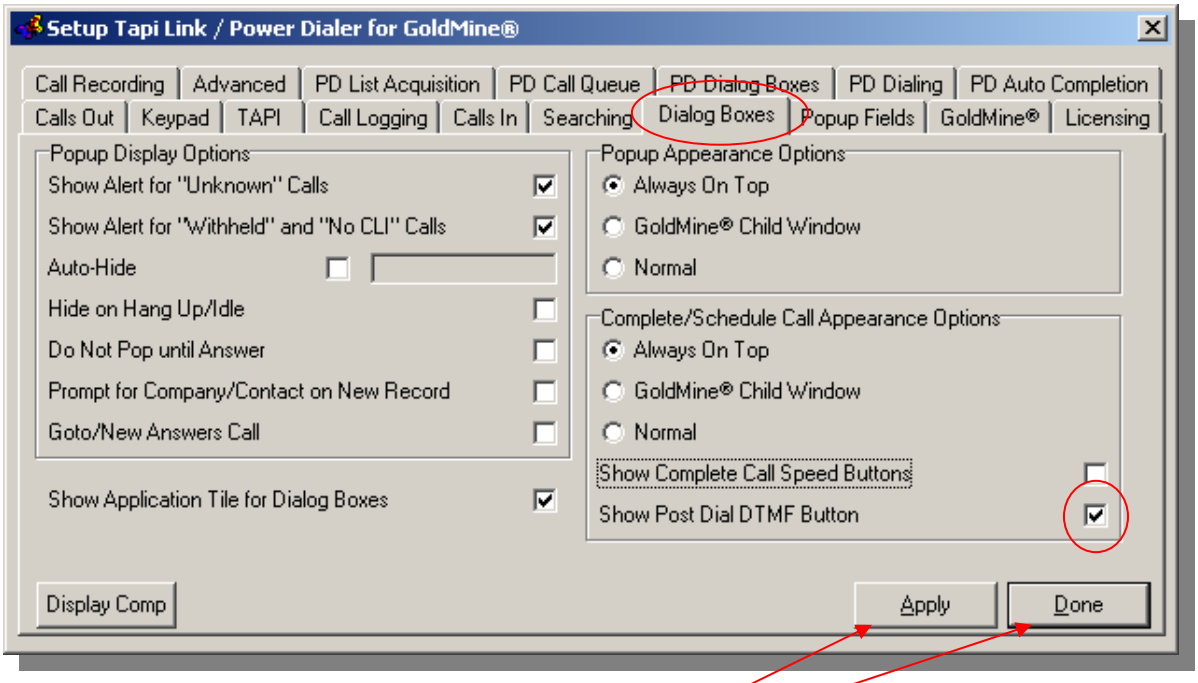


Earlier versions of GoldMine®



To activate this feature proceed as follows:

Select the **Dialog Boxes** tab:

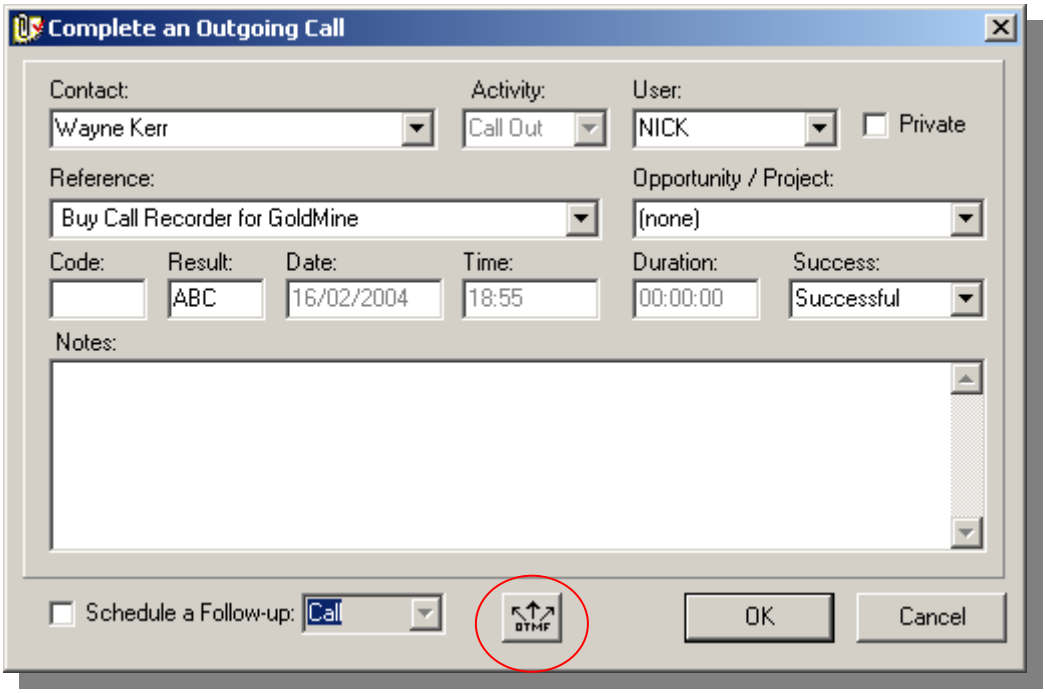


Check the **Show Post Dial DTMF Button** field as above.

Click on the **Apply** button and then the **Done** button.

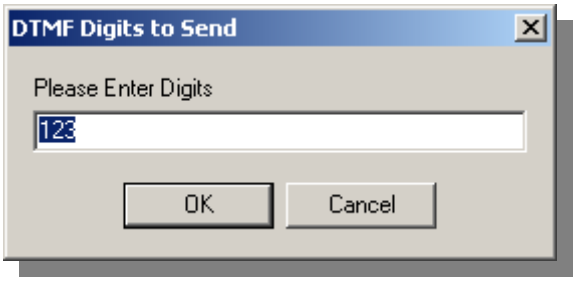
continued . . . .

Outgoing Call Completion dialog boxes will now appear as follows, including the additional **DTMF** button:



Click on the **DTMF** button.

This will summon the following **DTMF Digits to Send** window:



(By default, the digits shown will be those from the **Phone1 Ext:** field.)

Click on **OK** to transmit the pre-determined digits from the **Ext:** field when instructed to do so during the call.

Alternatively, type in the required digit(s) and then click **OK**.

The relevant digits will be transmitted.

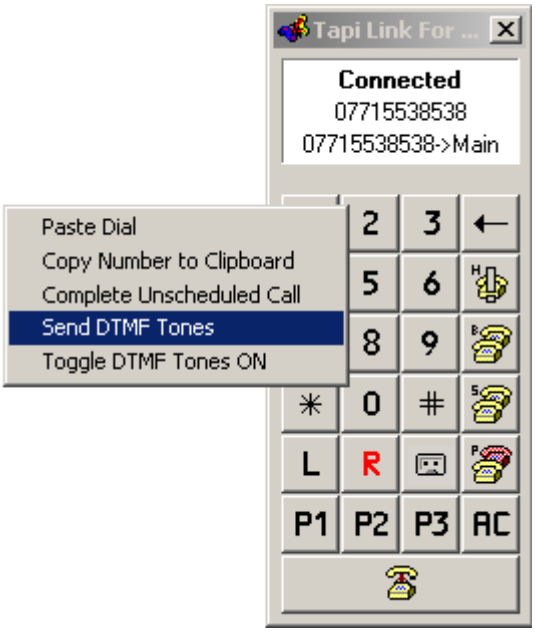
continued . . .

If using the **Keypad** to dial, you may use the following procedure:

At the audible instruction to enter the required digit(s) –

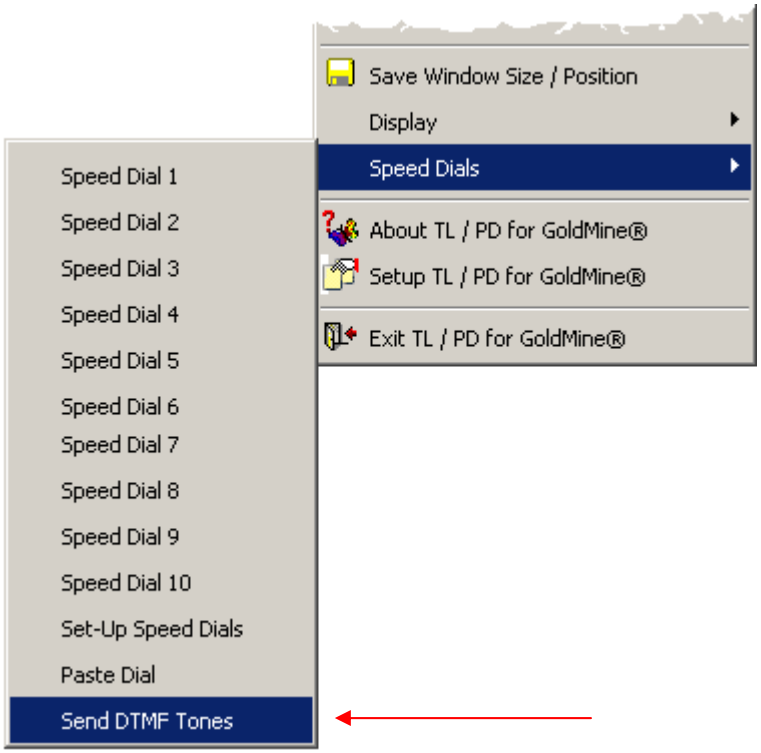
1. Press the **G** key on your computer keyboard.
2. Enter the required digit(s) via the Keypad or the computer keyboard
3. Press the **D** key on your computer keyboard.

Alternatively, right-click on the Keypad and select **Send DTMF Tones**.



…. then enter the required digits

This option is also available from the Tapi Link icon context menu as follows:

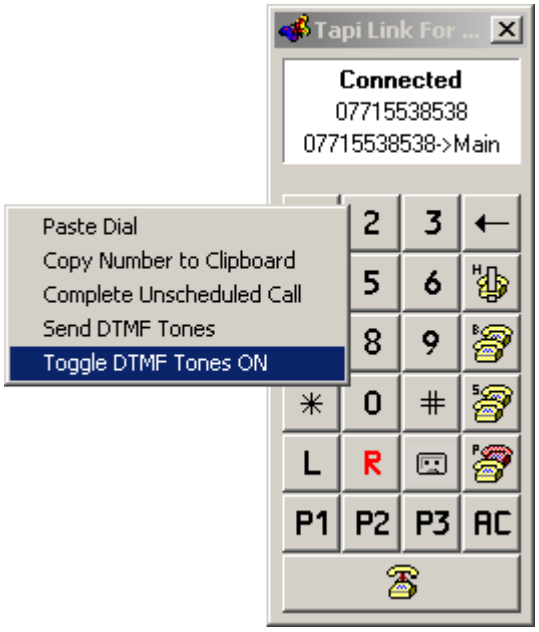


continued . . .

A further option to send DTMF tones during a call is as follows:

Enable the DTMF Tones by right-clicking on the Keypad during the call and selecting **Toggle DTMF Tones ON**.

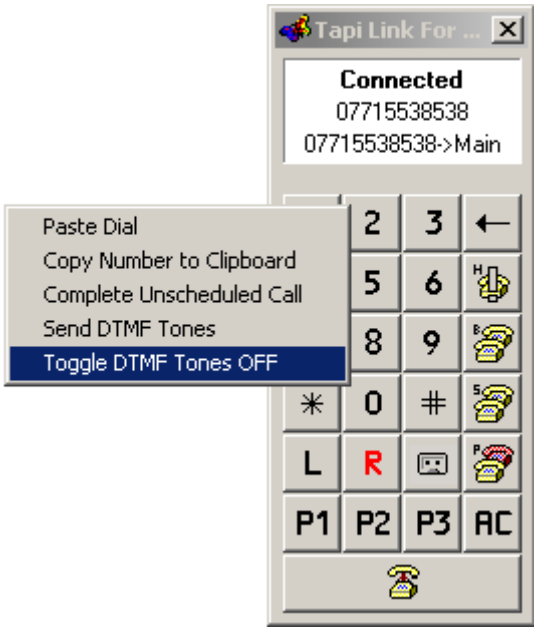
From this point, any digit entered will be transmitted as a DTMF tone until such a time as **Toggle DTMF Tones OFF** is selected.



(This can also be achieved by pressing **T** on the computer keyboard.)

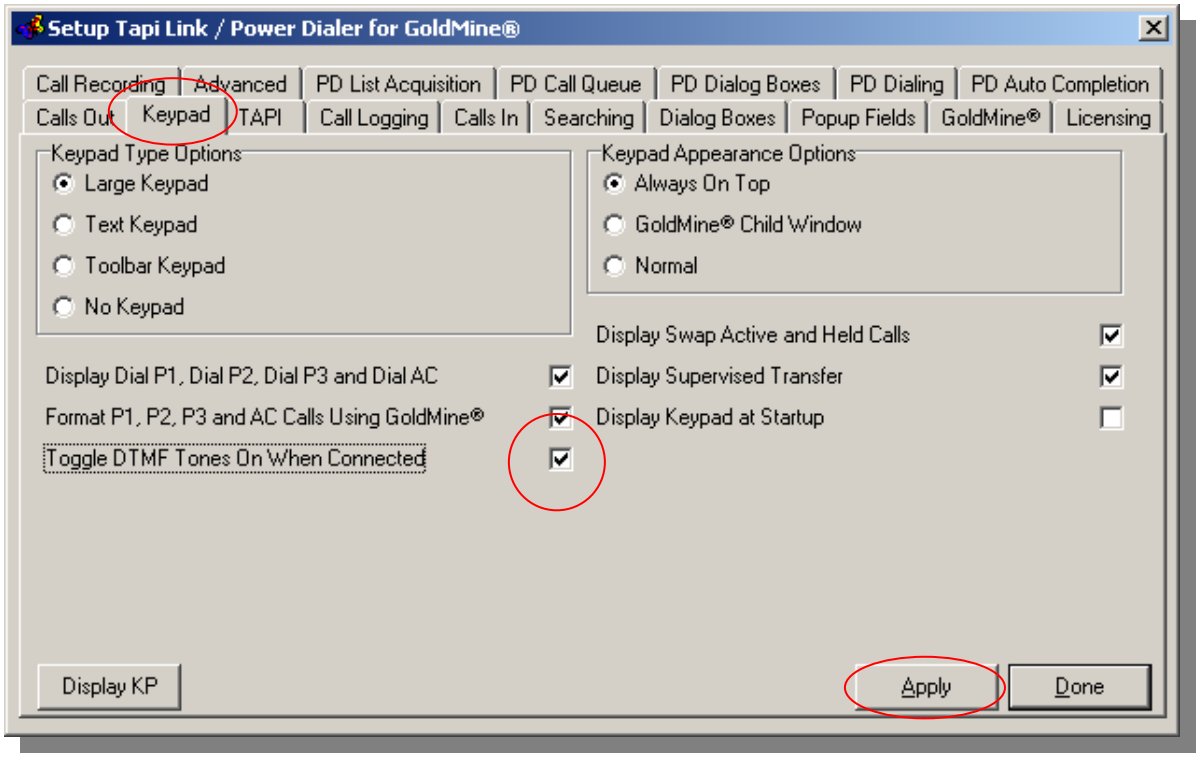
When pressed, the numbers on the Keypad will now send DTMF tones.

Select **Toggle DTMF Tones OFF** to return to normal functionality:



continued . . .

The facility to use DTMF tones can also be made the default, whenever a call is connected, by selecting the following option on the **Keypad** tab:



Click on the **Toggle DTMF Tones On When Connected** option.

Click on the **Apply** button to save the setting.

Toggling between Event Logs

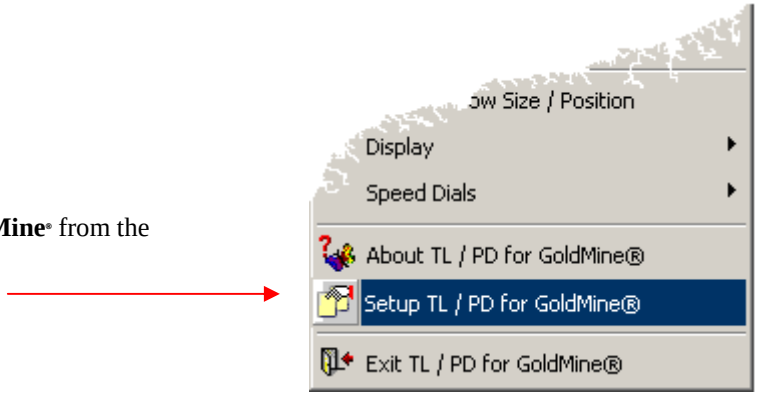
The functionality of the fourth tab of the Tapi Link **Setup** dialog box may be toggled between two different types of logging. The title and contents of this tab will alter to reflect one of the following:

Call Logging - The logging of incoming and outgoing calls
OR
Application Log - The logging of telephone system and other events

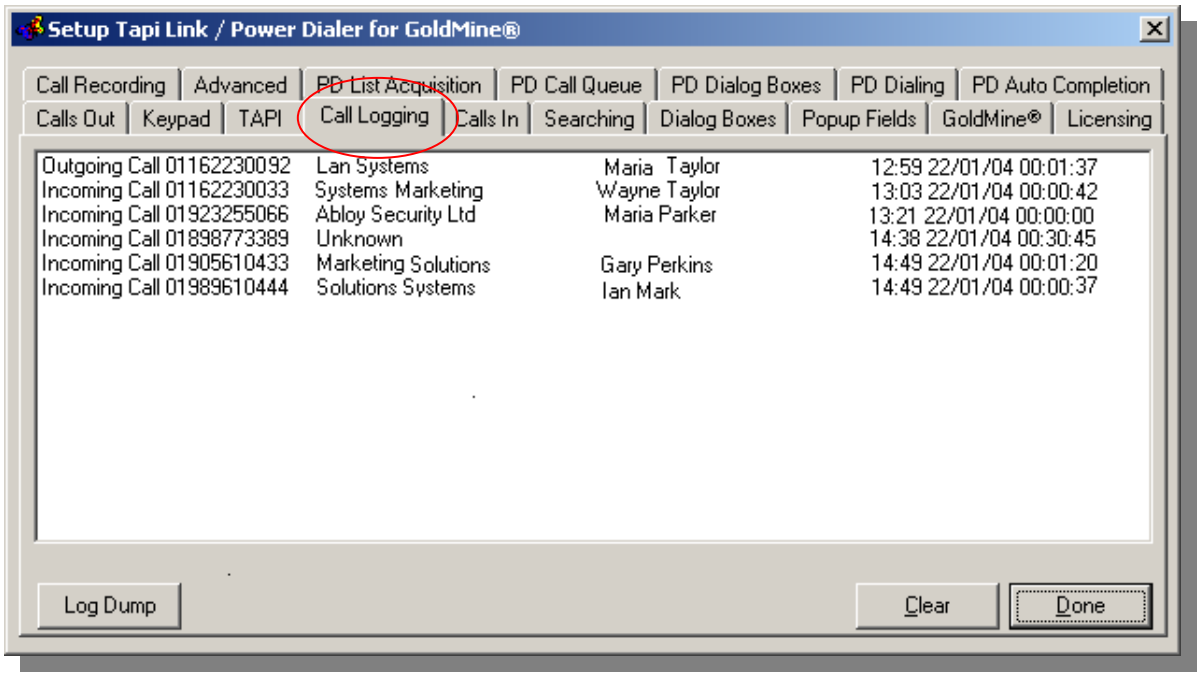
To access the logs –

Right-click on the Tapi Link icon in the system tray:

Select **Setup TL / PD for GoldMine®** from the context menu.

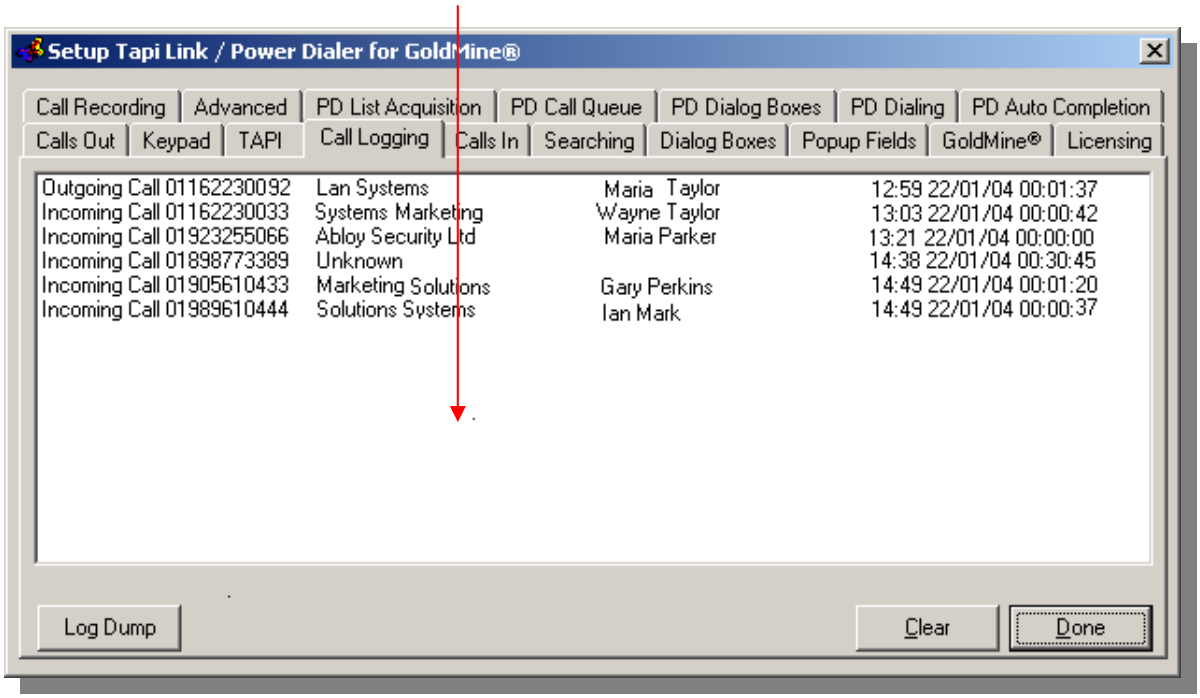


From the **Setup** dialog box select the FOURTH tab:

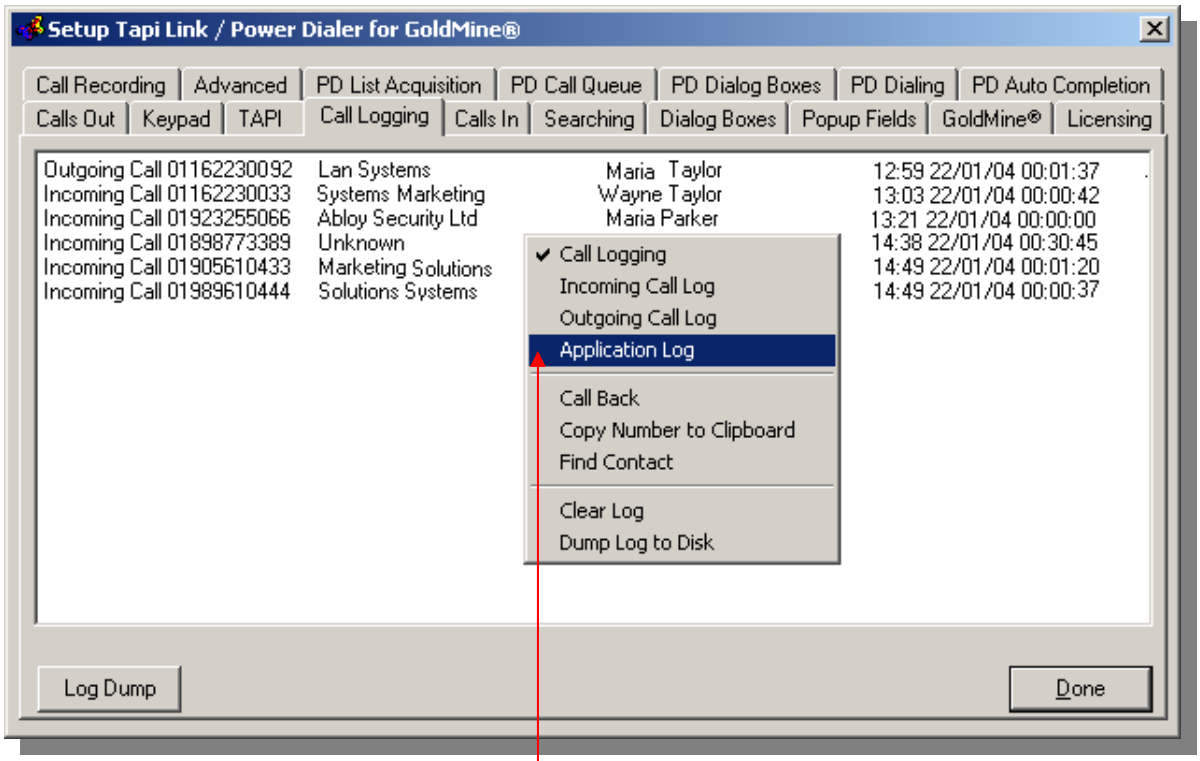


At the start of the *first* of each separate and independent session of using Tapi Link (i.e. usually at each daily log-on to windows®) the default view of this tab will be that of **Call Logging**, as depicted below.

Right-click anywhere within the text area of the dialog box:

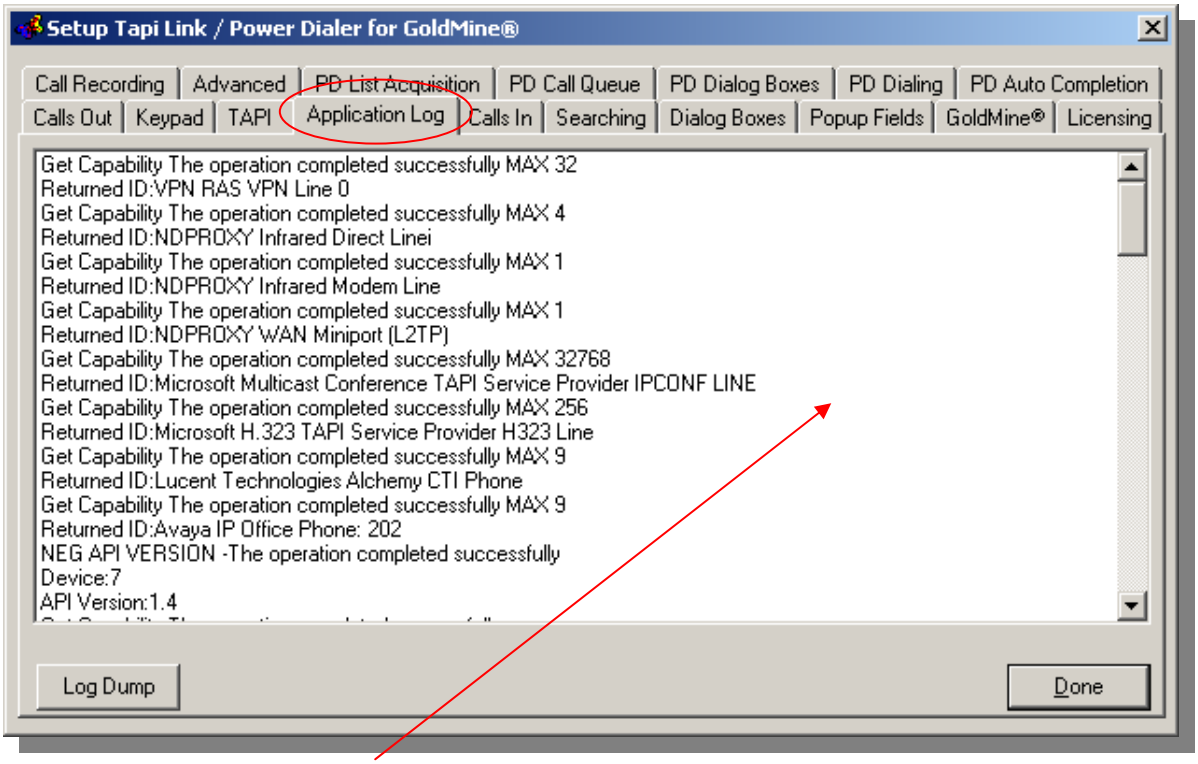


This action will summon a context-sensitive menu:

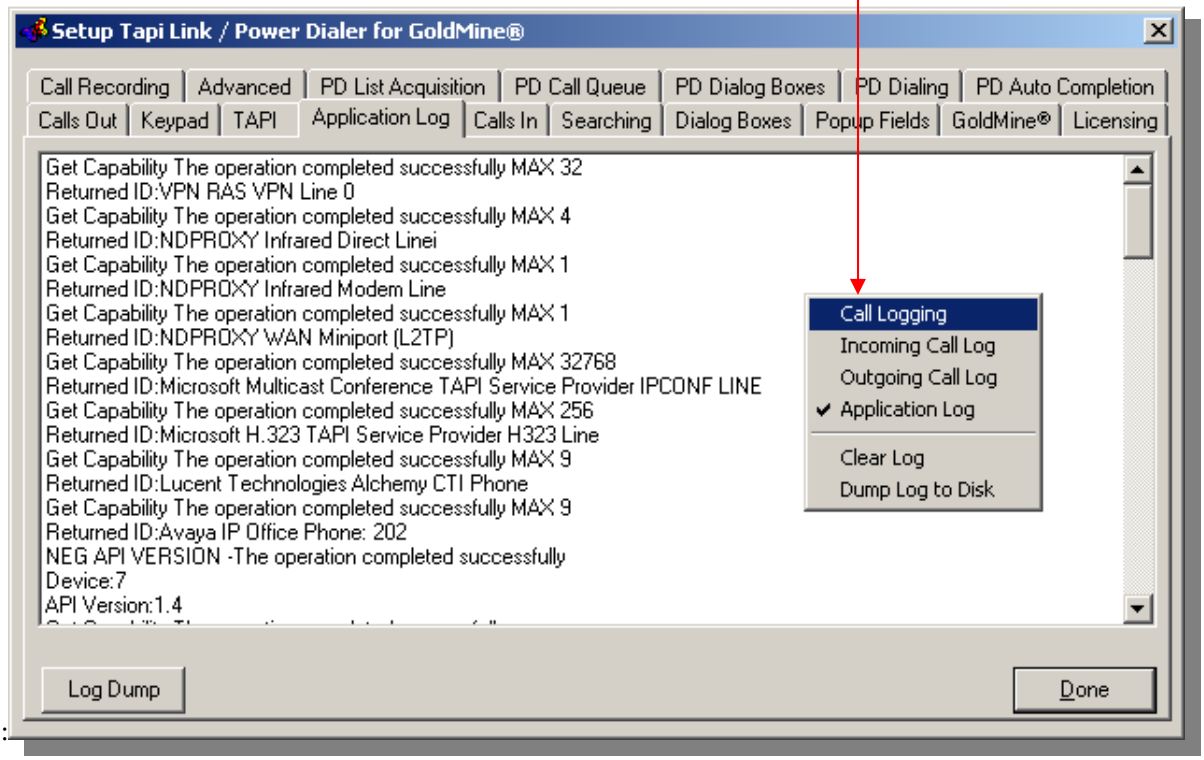


Select the *unchecked* option - **Application Log**.

This will switch to the **Application Log** view:

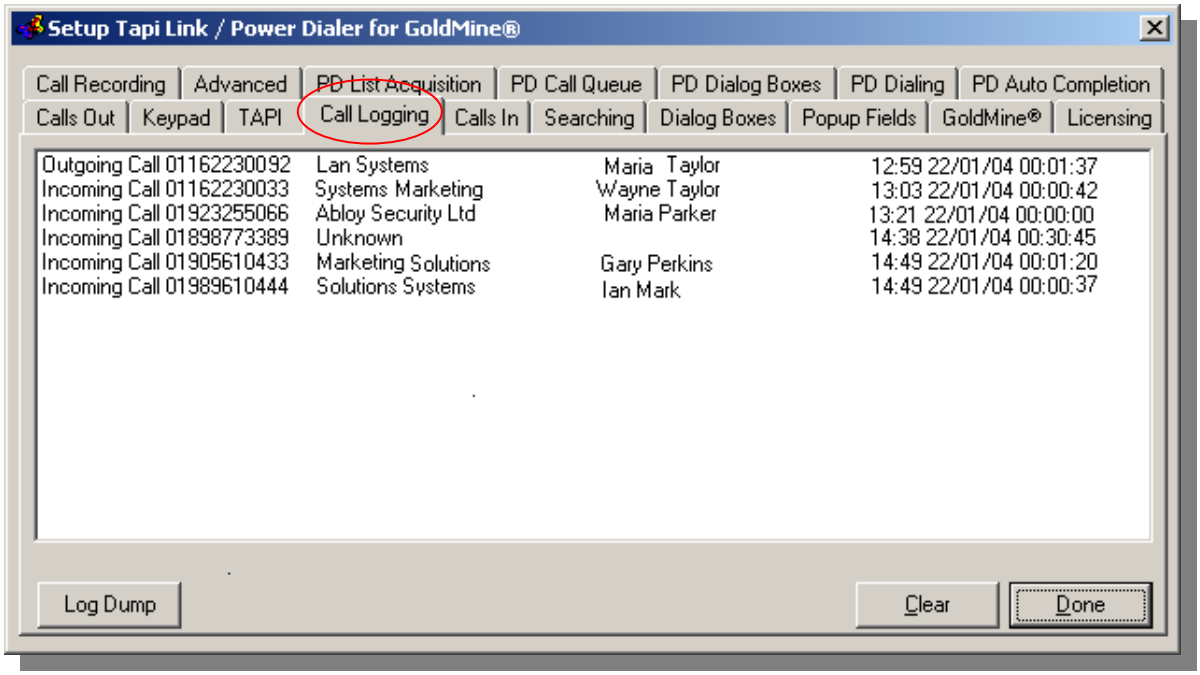


Right-click anywhere within the text area of the dialog box and select **Call Logging** from the context-menu



:

This action will switch back to the original **Call Logging** view:



The **Call Logging** view shows details of incoming and outbound calls and the corresponding telephone numbers involved.

Right-clicking on a selected call detail enables you to call back to that particular number. (Further details are provided in the section entitled ‘Outbound Dialing – via the Call Back facility’.)

You may also right-click on a highlighted call entry and choose to summon the corresponding contact record within GoldMine®. (Further details are provided in the section entitled ‘The Find Contact Feature’.)

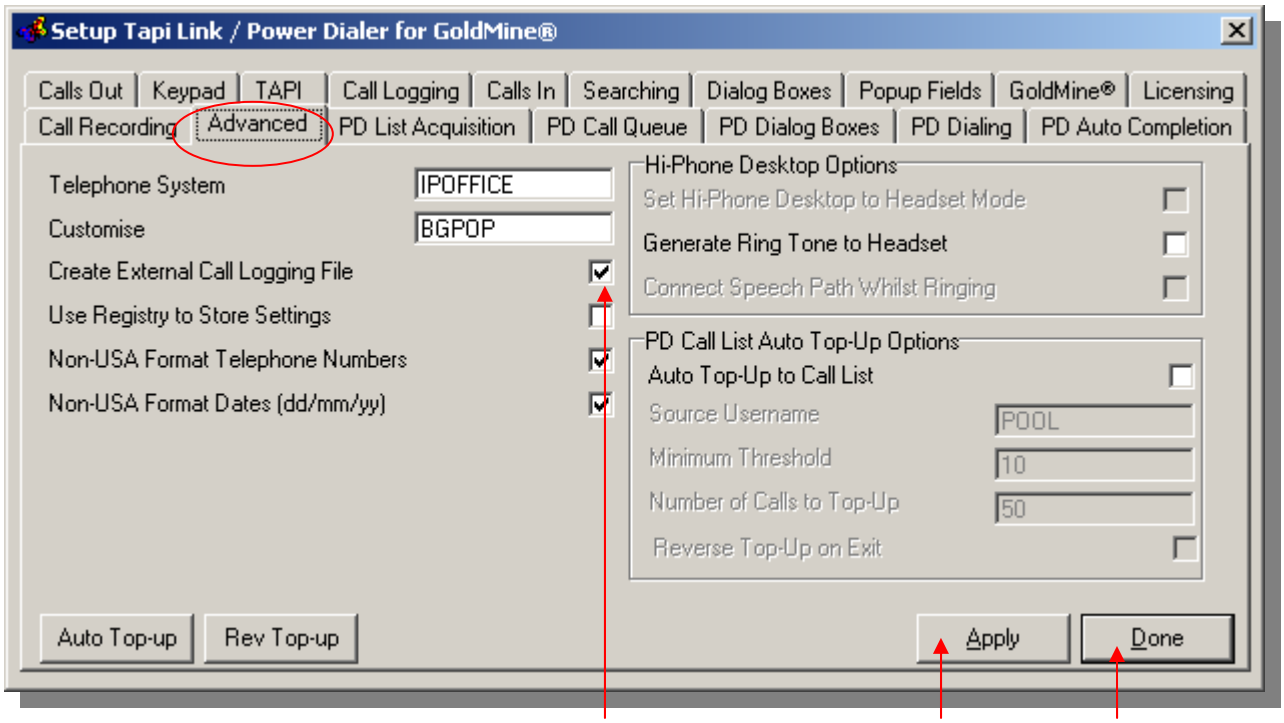
The **Application Log** view provides details relating to ongoing events such as call handling data, version information, user log-on and licensing details etc. This information would be significant in the event of a technical support query – for further details see the section entitled ‘Contacting Technical Support’

Creating a permanent Call Log

In addition to the single-session call logging features which creates a record of the *current days calls only*, (available for viewing via the **Call Logging** tab or alternatively via the context menu option **Display** > **Display Call Log**) - Tapi Link can create a permanent record of incoming and outgoing calls in a separate log file.

If you wish to enable this feature proceed as follows –

Select the **Advanced** tab:



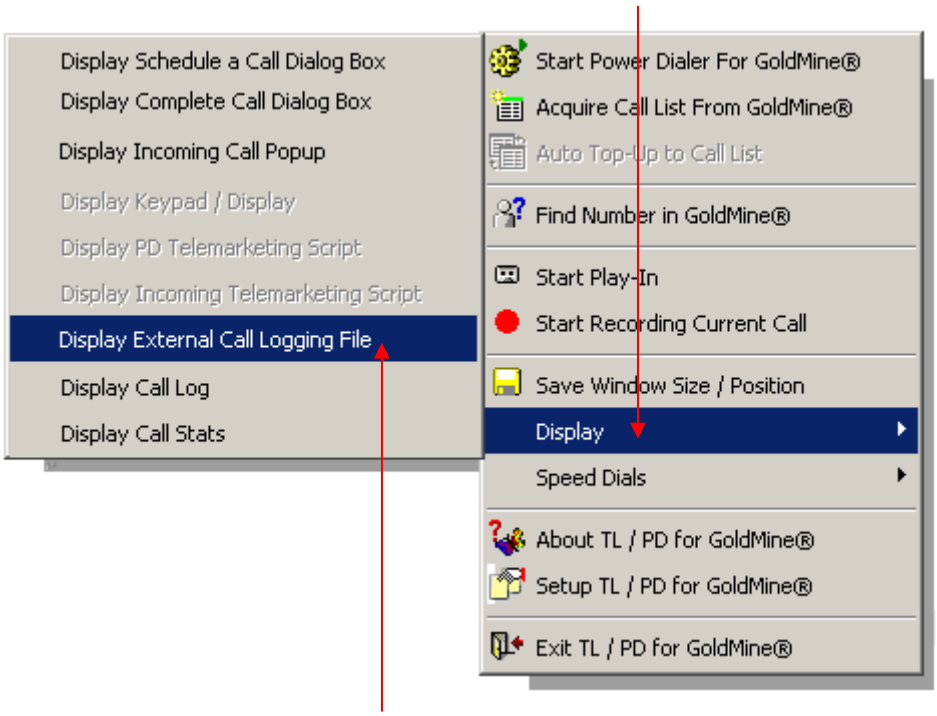
Check the **Create External Call Logging File** box. Click on **Apply** and then **Done**.

To view the call log -

Right-click on the Tapi Link icon in the system tray:

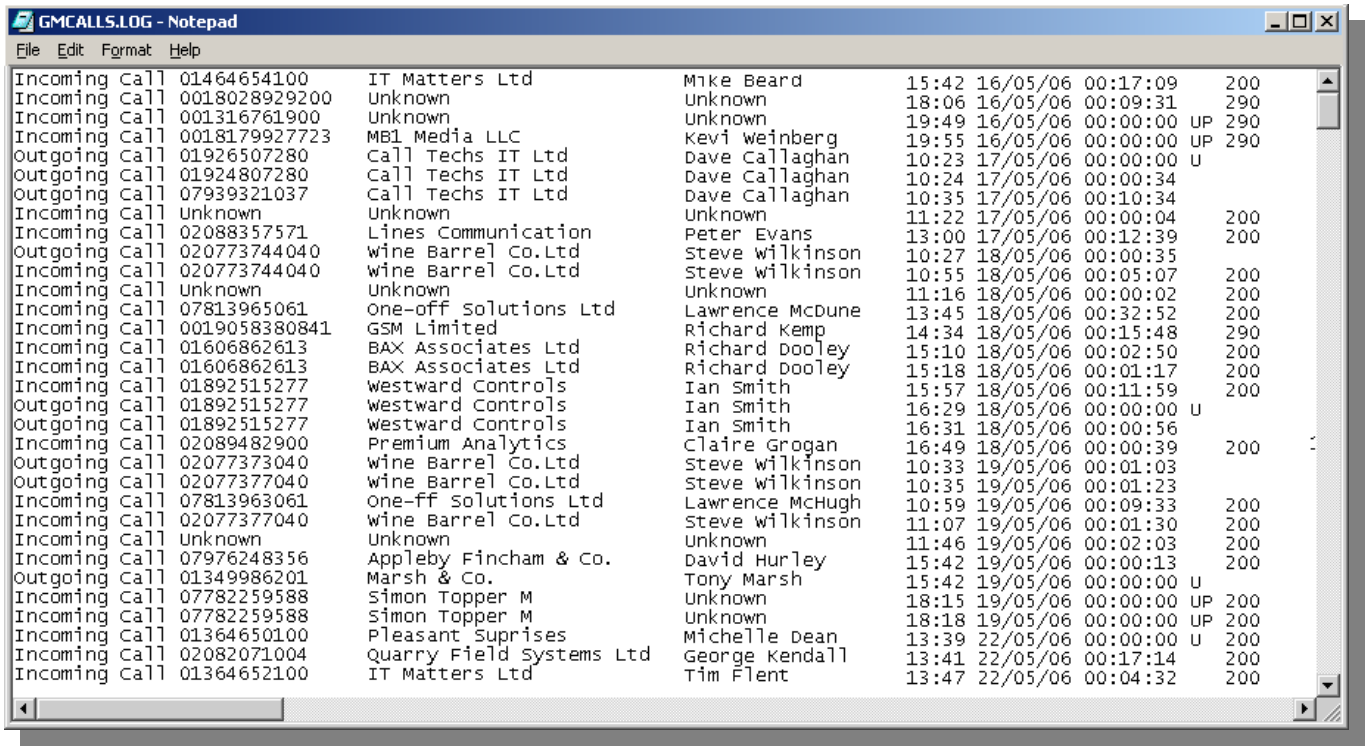
continued . . .

From the context menu select **Display**:



… and then select **Display External Call Logging File**.

This will open Notepad® with a view of the permanent call log:



GMCALLS.LOG - Notepad

File Edit Format Help

```
Incoming Call  01464654100     IT Matters Ltd              Mike Beard       15:42 16/05/06 00:17:09     200
Incoming Call  0018028929200   Unknown                    Unknown          18:06 16/05/06 00:09:31     290
Incoming Call  001316761900    Unknown                    Unknown          19:49 16/05/06 00:00:00 UP 290
Incoming Call  0018179927723   MB1 Media LLC              Kevi Weinberg    19:55 16/05/06 00:00:00 UP 290
Outgoing Call  01926507280     Call Techs IT Ltd          Dave Callaghan   10:23 17/05/06 00:00:00 U
Outgoing Call  01924807280     Call Techs IT Ltd          Dave Callaghan   10:24 17/05/06 00:00:34
Outgoing Call  07939321037     Call Techs IT Ltd          Dave Callaghan   10:35 17/05/06 00:10:34
Incoming Call  Unknown         Unknown                    Unknown          11:22 17/05/06 00:00:04     200
Incoming Call  02088357571     Lines Communication        Peter Evans      13:00 17/05/06 00:12:39     200
Outgoing Call  020773744040    Wine Barrel Co.Ltd         Steve Wilkinson  10:27 18/05/06 00:00:35
Incoming Call  020773744040    Wine Barrel Co.Ltd         Steve Wilkinson  10:55 18/05/06 00:05:07     200
Incoming Call  Unknown         Unknown                    Unknown          11:16 18/05/06 00:00:02     200
Incoming Call  07813965061     One-off Solutions Ltd      Lawrence McDune  13:45 18/05/06 00:32:52     200
Incoming Call  0019058380841   GSM Limited                Richard Kemp     14:34 18/05/06 00:15:48     290
Incoming Call  01606862613     BAX Associates Ltd         Richard Dooley   15:10 18/05/06 00:02:50     200
Incoming Call  01606862613     BAX Associates Ltd         Richard Dooley   15:18 18/05/06 00:01:17     200
Incoming Call  01892515277     Westward Controls          Ian Smith        15:57 18/05/06 00:11:59     200
Outgoing Call  01892515277     Westward Controls          Ian Smith        16:29 18/05/06 00:00:00 U
Outgoing Call  01892515277     Westward Controls          Ian Smith        16:31 18/05/06 00:00:56
Incoming Call  02089482900     Premium Analytics          Claire Grogan    16:49 18/05/06 00:00:39     200
Outgoing Call  02077373040     Wine Barrel Co.Ltd         Steve Wilkinson  10:33 19/05/06 00:01:03
Outgoing Call  02077377040     Wine Barrel Co.Ltd         Steve Wilkinson  10:35 19/05/06 00:01:23
Incoming Call  07813963061     One-ff Solutions Ltd       Lawrence McHugh  10:59 19/05/06 00:09:33     200
Incoming Call  02077377040     Wine Barrel Co.Ltd         Steve Wilkinson  11:07 19/05/06 00:01:30     200
Incoming Call  Unknown         Unknown                    Unknown          11:46 19/05/06 00:02:03     200
Incoming Call  07976248356     Appleby Fincham & Co.      David Hurley     15:42 19/05/06 00:00:13     200
Outgoing Call  01349986201     Marsh & Co.                Tony Marsh       15:42 19/05/06 00:00:00 U
Incoming Call  07782259588     Simon Topper M             Unknown          18:15 19/05/06 00:00:00 UP 200
Incoming Call  07782259588     Simon Topper M             Unknown          18:18 19/05/06 00:00:00 UP 200
Incoming Call  01364650100     Pleasant Suprises          Michelle Dean    13:39 22/05/06 00:00:00 U  200
Incoming Call  02082071004     Quarry Field Systems Ltd   George Kendall   13:41 22/05/06 00:17:14     200
Incoming Call  01364652100     IT Matters Ltd             Tim Flent        13:47 22/05/06 00:04:32     200
```

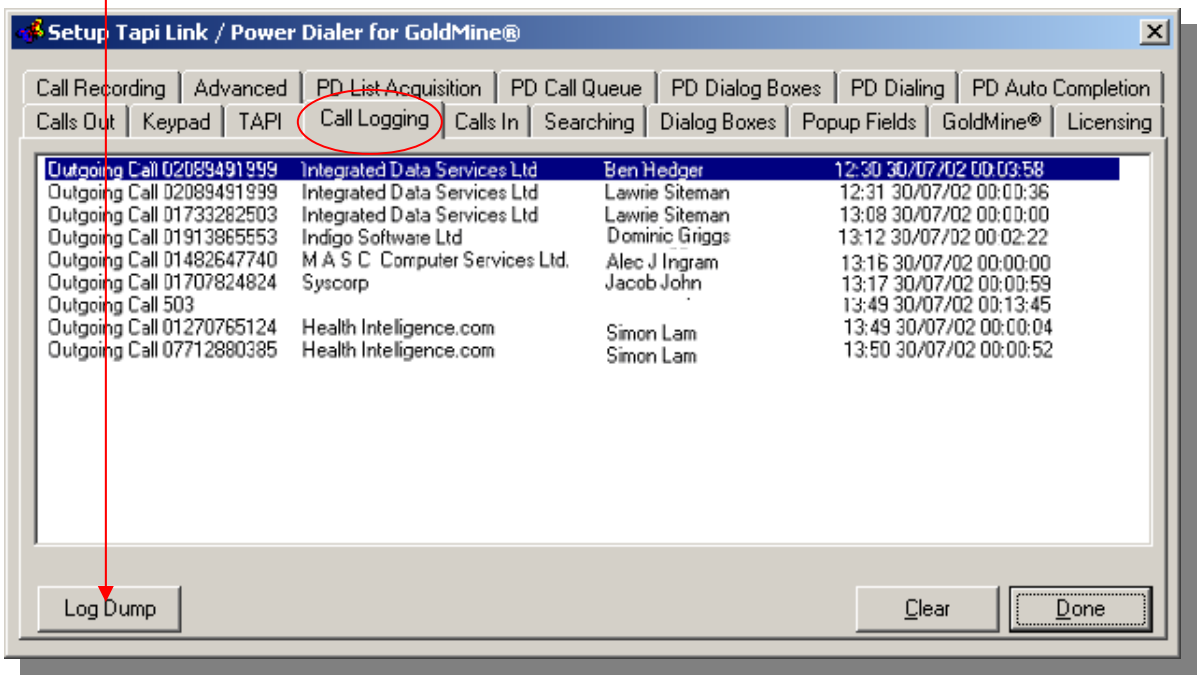
continued . . .

By default this file is named GMCALLS.LOG and is located in the root of the local C drive (C:\GMCALLS.LOG) and can be viewed (and also edited if necessary) with Windows® Notepad or other word processor.

Bear in mind that as the ongoing quantity of your calls increases, so of course will the size of the corresponding **External Call Logging File**. Depending on the quantity of calls made and received, you may find it prudent to edit, relocate, archive, or delete the file at intervals to prevent it becoming excessively large.

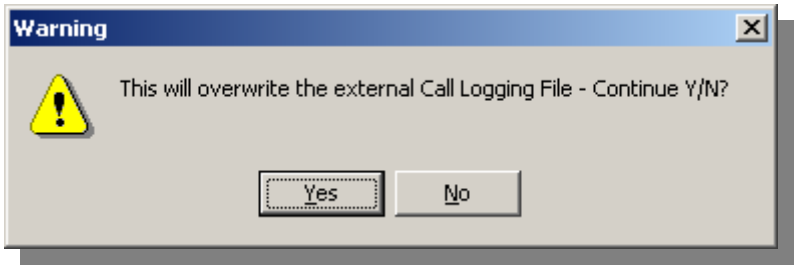
Note:

If you click on the **Log Dump** button on the **Call Logging** tab to create a log file on disk (which would contain *the current session only)* –



and you already have an existing **External Call Logging File** storing your calls to date . . . . .

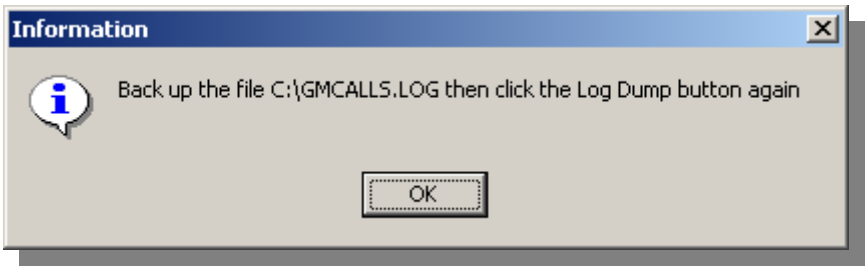
. . . . you will be presented with the following dialog box:



This is a safety measure designed to prevent you from inadvertently overwriting an existing **External Call Logging File** (which probably contains many historic calls), with a new and more recent call log.

If you click on **YES** the original file will be overwritten.

You should click on **NO** if you wish to backup and save the original **External Call Logging File** first.



Note:

Backing up your original External Call Logging File is NOT an automatic process – you must copy and save the original file manually if you wish to preserve it..

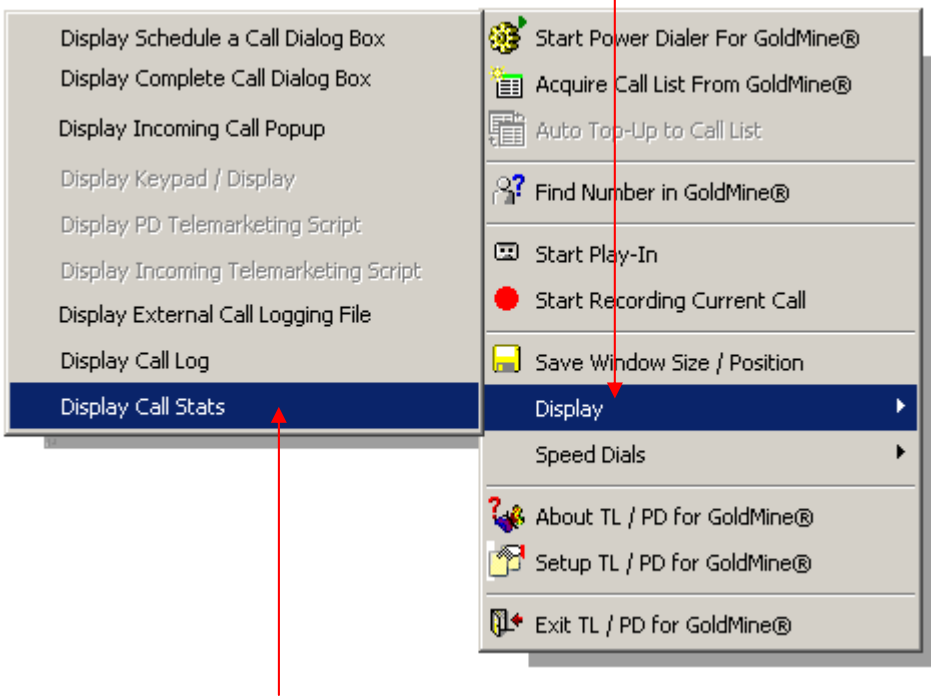
(Unless alternative arrangements have been made for the storage location of the log files, users must be granted appropriate access rights to the root of the C drive in order to use this particular feature.)

Display Call Stats

Tapi Link provides instant access to basic call statistics via the context menu.

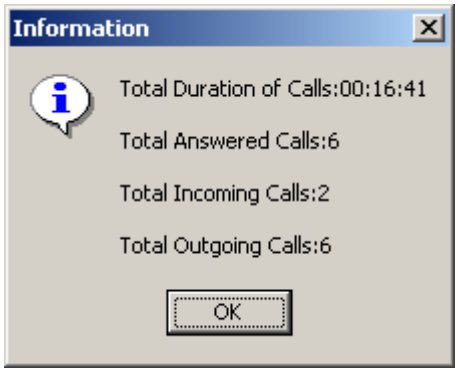
Right-click on the Tapi Link icon in the system tray:

From the context-menu select **Display** >



From the nested sub-menu select **Display Call Stats**.

The call statistics information will be displayed:



Note:
The statistics provided relate to *the current day only*.

(If required, historical statistics can be provided via the Managers Console – further details are available from Papillon Technology or via the following online link - http://www.papillontechnology.co.uk/ManCons.htm .)

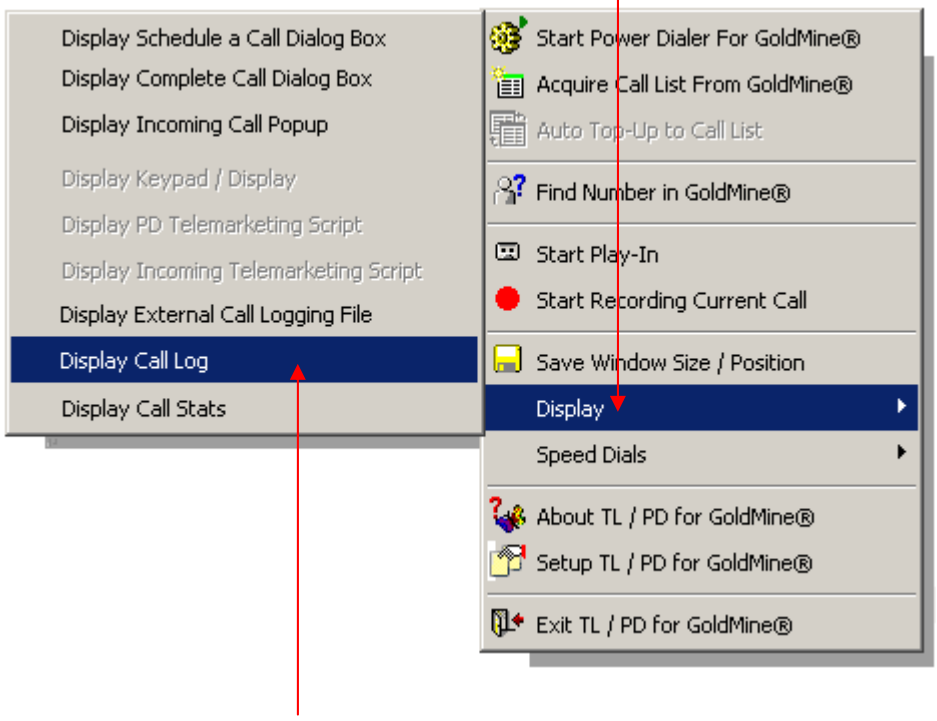
Display Call Log

In addition to the interactive call logging features provided on the **Call Logging** tab, Tapi Link also provides a quick access to a 'view-only' **Call Log** for the current day.

To access the **Call Log** –

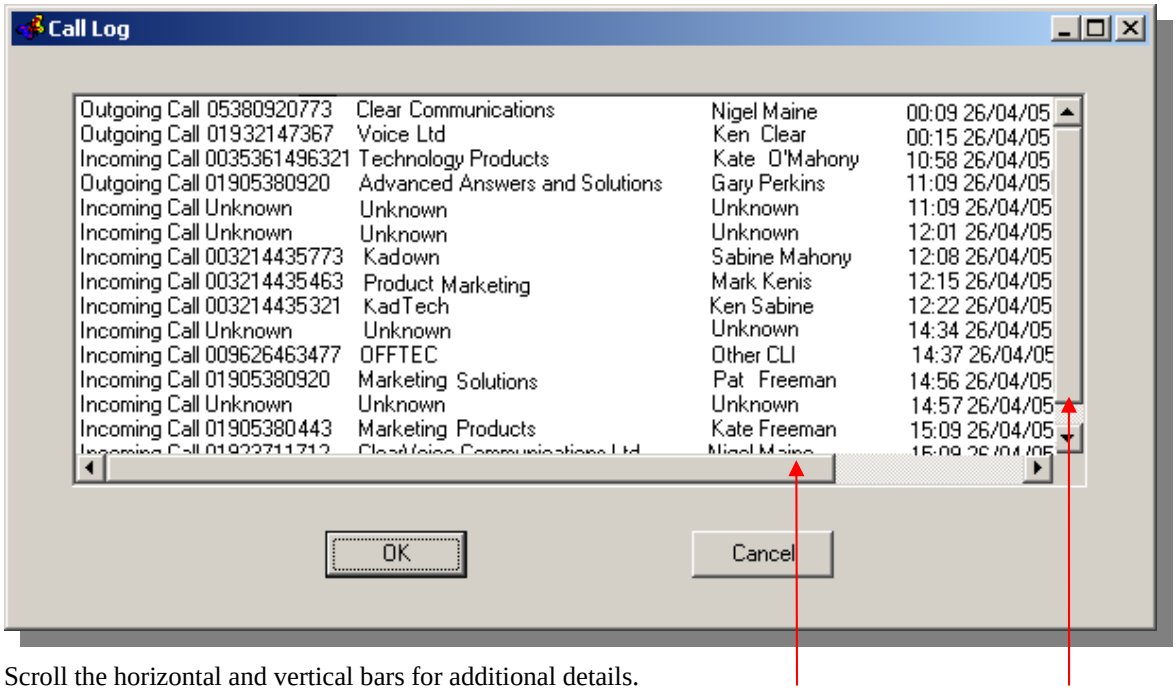
Right-click on the Tapi Link icon in the system tray:

From the context-menu select **Display >**



From the nested sub-menu select **Display Call Log**.

continued . . .



Scroll the horizontal and vertical bars for additional details.

The **Call Log** displays:

- Incoming or Outgoing call status
- Number dialed or incoming CLI
- Destination or source contact and company name
- Time of call
- Date of call
- Duration of call

Note:

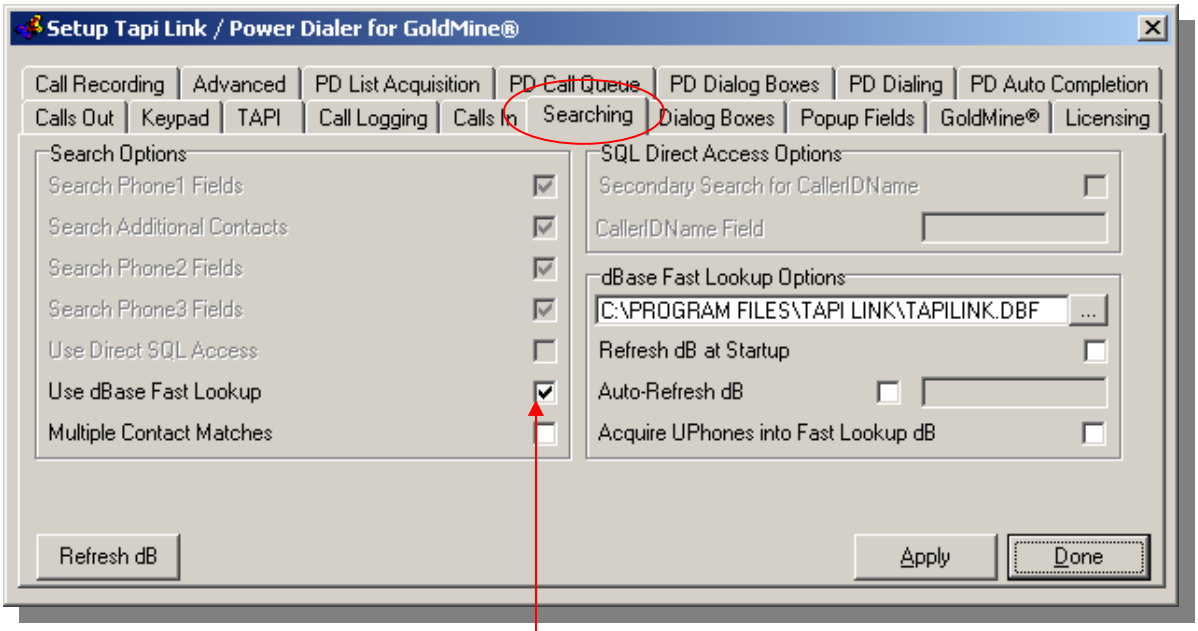
Unlike the entries on the **Call Logging** tab, the entries displayed in this interface are 'view-only' - they are not interactive, and cannot be manipulated.

The dBase Fast Lookup facility

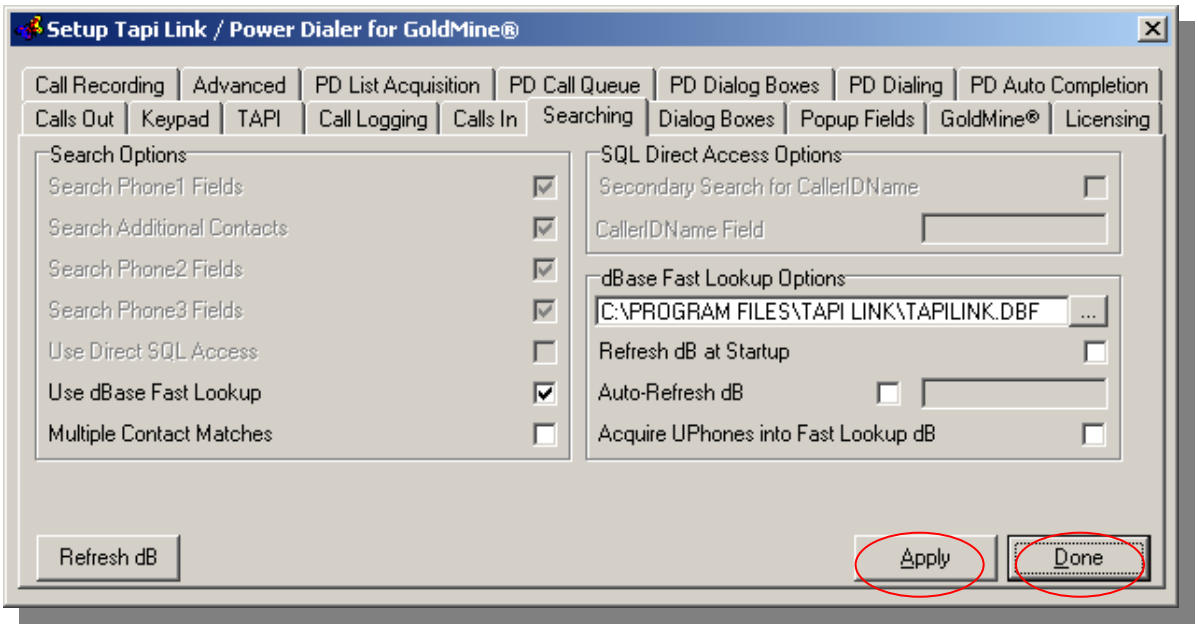
(This section is **only of concern to users of dBase GoldMine® systems** who are NOT using GoldMine® Front Office Sales & Marketing in conjunction with Microsoft® SQL Server, and is of no relevance to users of Goldmine® 7, 8, and 9 versions.)

The **dBase Fast Lookup** facility provides optimised screen-popping performance for dBase versions of GoldMine® by the use of an external data table maintained by Tapi Link. This feature maximises the speed at which contact record data is searched and propagated to the Popup screen.

To enable the **dBase Fast Lookup** facility, select the **Searching** tab:



Check the **Use dBase Fast Lookup** box.



Click on the **Apply** button, and then click on the **Done** button. **N.B.** At this point Tapi Link **must** be closed down and restarted again in order to fully initialize and complete this process. Do so by right-clicking on the icon in the system tray and selecting **Exit TL / PD for GoldMine®**. Then **RESTART** Tapi Link from the taskbar - **Start Menu > Programs > Papillon Technology > Tapi Link for GoldMine®**.)

Optimising Fast Lookup for networks or single users

(This section is divided into two parts, **and only concerns users of dBase GoldMine® systems** who are NOT using GoldMine® Front Office Sales & Marketing in conjunction with Microsoft® SQL Server, and is of no relevance to users of Goldmine® 7, 8, and 9 versions.)

The following is a method of optimising the screen-popping process to suit your particular environment.
There are two options from which to choose. The nature of your usage of Tapi Link will determine which particular option is relevant to your specific requirements. However, the choice you make is not critical – it is simply an optimisation method.

Select either option A or B below and then proceed to the relevant instructions:

A. STANDALONE
This is for users of Tapi Link at a standalone workstation which is not connected to a network with other GoldMine® users - and/or for users who wish to maintain a LOCAL dBase Fast Lookup table. Using this option means that you will hold a unique and separate 'personal' version of the Fast Lookup tables that are not synchronised with any other users tables. i.e. they may be more up-to-date, or more out-of-date than the lookup tables of others.

OR

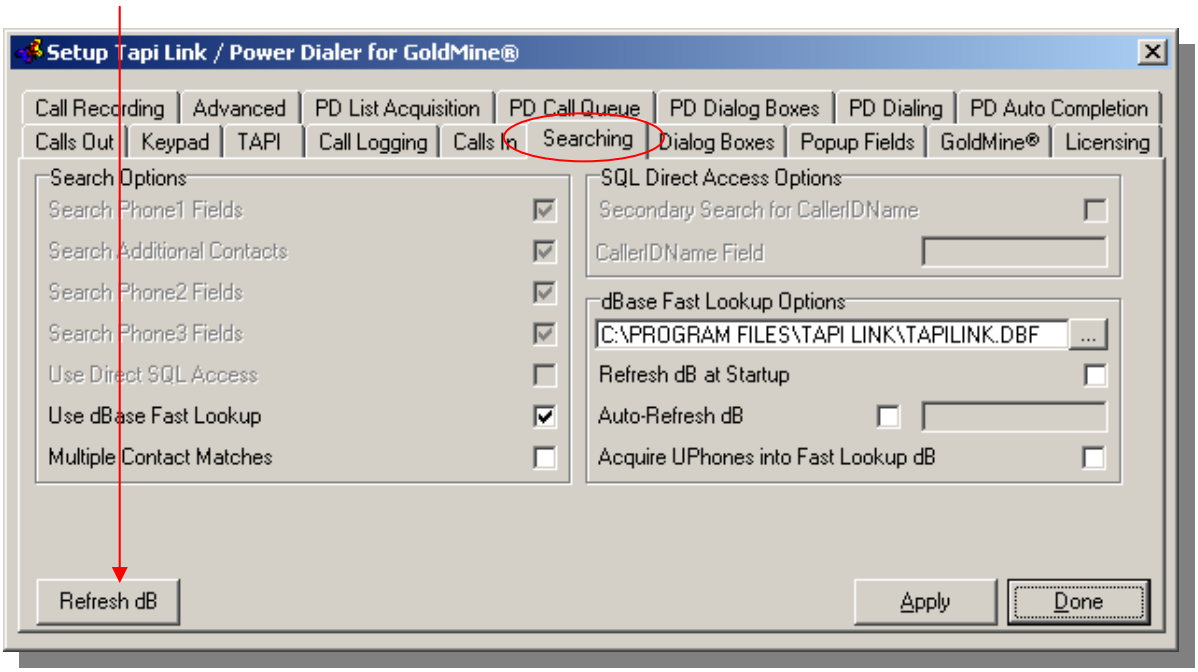
B. NETWORK
This is for users of Tapi Link who are part of a networked installation of GoldMine® which includes other GoldMine® users, all of whom wish to share a COMMON dBase Fast Lookup table that will be maintained centrally, and therefore all users will have a common data table maintained to the same standard.

A. STANDALONE

For users of Tapi Link at a STANDALONE workstation which is NOT connected to a network with other GoldMine® users and/or for users who wish to maintain a LOCAL dBase Fast Lookup table:

Select the **Searching** tab.

Click on the **Refresh dB** button:

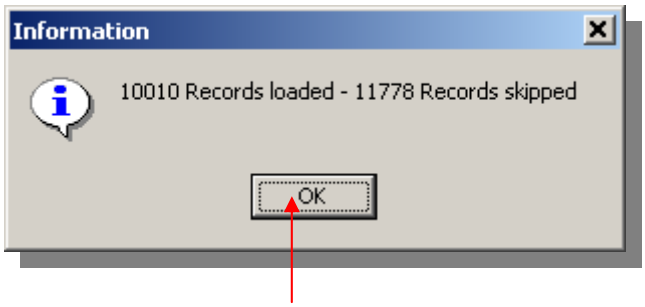


This will summon the **Refreshing dBase Fast Lookup Table** dialog box which indicates the ongoing progress of loading of the latest telephone number entries from your GoldMine® contact records:

If the **Records Skipped** figure is greater than zero this indicates that one or more of the telephone number fields in your GoldMine® database is empty or otherwise invalid.

(This will include records bearing unpopulated fields such as Phone2 & Phone 3, as well as Phone 1. However, the **Records Loaded** figure will, naturally, still include records that have at least one of these fields populated.)

Further details are available by consulting the information displayed within the **Application Log** tab.



Once the records have completed loading click on the **OK** button

Return to the **Searching** tab and

Click on the **Apply** button and then on the **Done** button to exit the dialog box.

This completes this section for users at a standalone workstation which is NOT connected to a network with other GoldMine® users and/or for users who wish to maintain a LOCAL dBase Fast Lookup table.

DO NOT continue with the following section number 2.

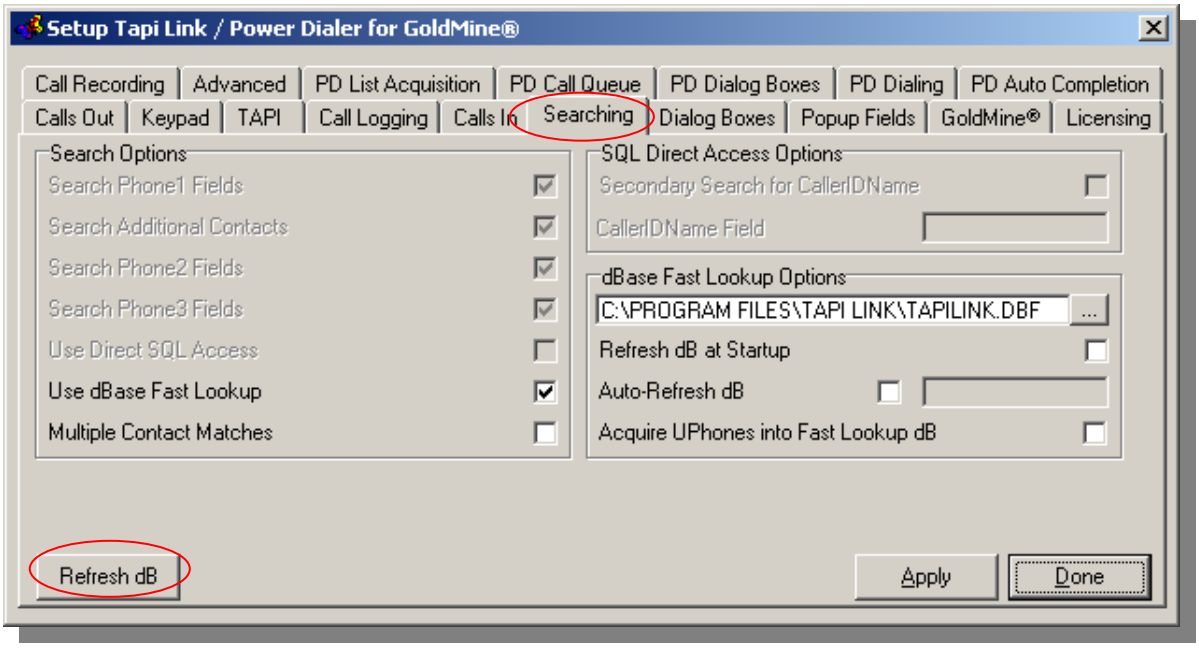
B. NETWORK

For users of Tapi Link who are part of a networked installation of GoldMine® which includes other Tapi Link users, all of whom wish to share a COMMON dBase Fast Lookup table that will be maintained centrally:

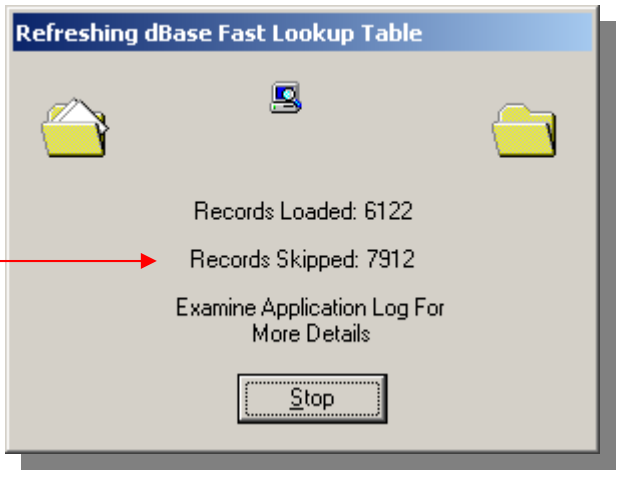
In order to ensure that each individual user's **dBase Fast Lookup** facility is properly synchronized with all other Tapi Link users (i.e. every user has access to *single, uniform source of data*) proceed as follows:

[a] Tapi Link should be run initially from one, single, local workstation which is connected to the network.

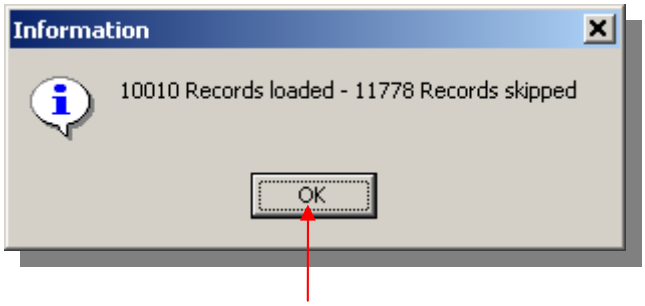
[b] To initialize and incorporate the latest telephone number entries held within your GoldMine® contact record database - select the **Searching** tab and click upon the **Refresh dB** button:



This will summon the **Refreshing dBase Fast Lookup Table** dialog box which indicates the ongoing progress of loading of the latest telephone number entries from your GoldMine® contact records:



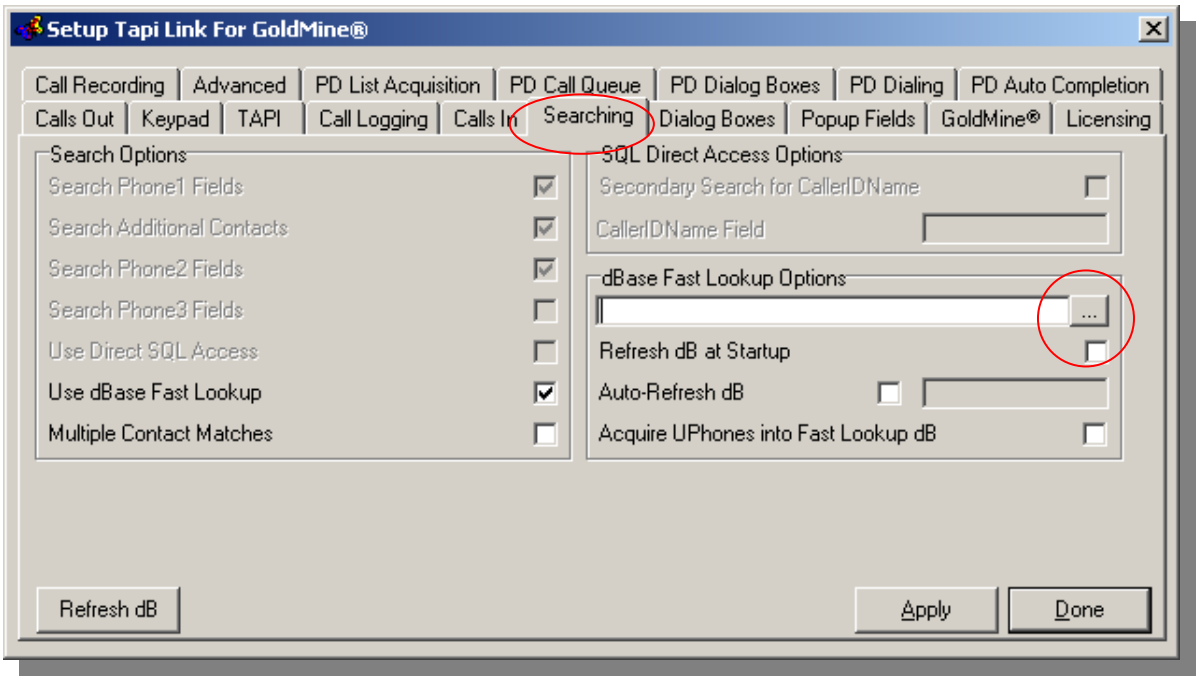
If the **Records Skipped** figure is greater than zero this indicates that one or more of the telephone number entries in your GoldMine® database are blank or otherwise invalid.
This will include records bearing unpopulated fields such as Phone2 & Phone 3, as well as Phone 1. However, the **Records Loaded** *figure will, of course, still include records that have at least one of these fields populated.*
Further details are available by consulting the information displayed within the **Application Log** tab.



Once the records have completed loading click on the **OK** button

[c] Copy the newly refreshed files TAPILINK.DBF and TAPILINK.MDX (produced at the local workstation) to the shared GoldMine® system files directory on the central server.
(For example, from C:\Program Files\Tapi Link\ or C:\Program Files\Papillon Technology\Tapi Link\ to X:\Gmshare\GoldMine\ or whatever your own particular locations are).

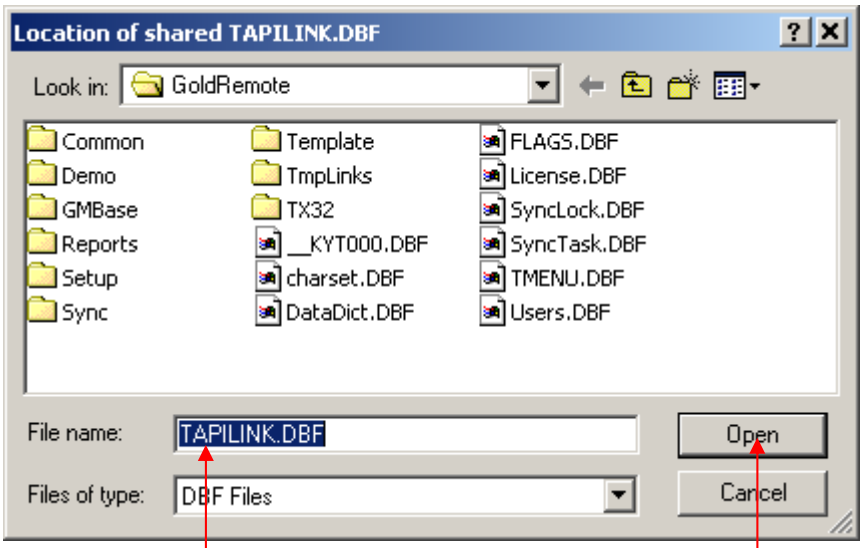
[d] Then select the **Searching** tab:



Via the **ellipsis button,** configure the first workstation to recognize the central location of the relocated **dBase Fast Lookup** files by browsing to the appropriate directory on the server (previously chosen at [c] above).

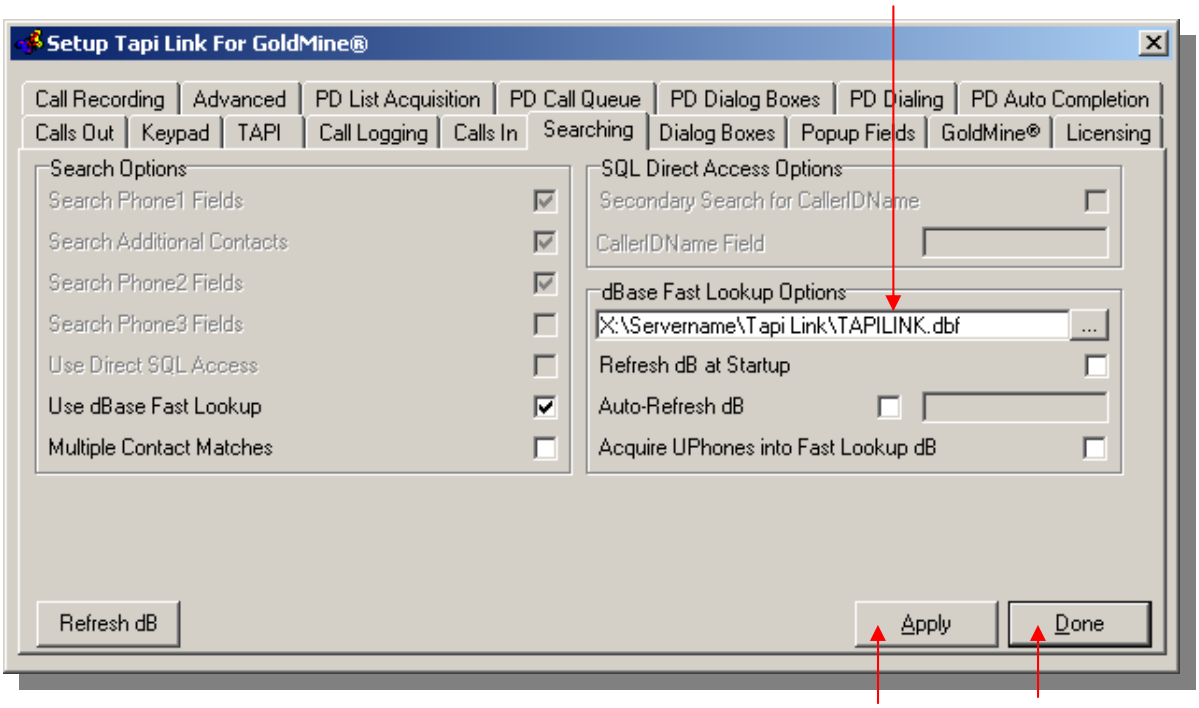
continued ….

Clicking on the ellipsis button will summon the following file browsing dialog box – **Location of Shared TAPILINK.DBF**:



Browse to the newly designated location and select the TAPILINK.DBF file - then click on the **Open** button.

You will be returned to the **Searching** tab where the path to the **dBase Fast Lookup** files will have been populated:



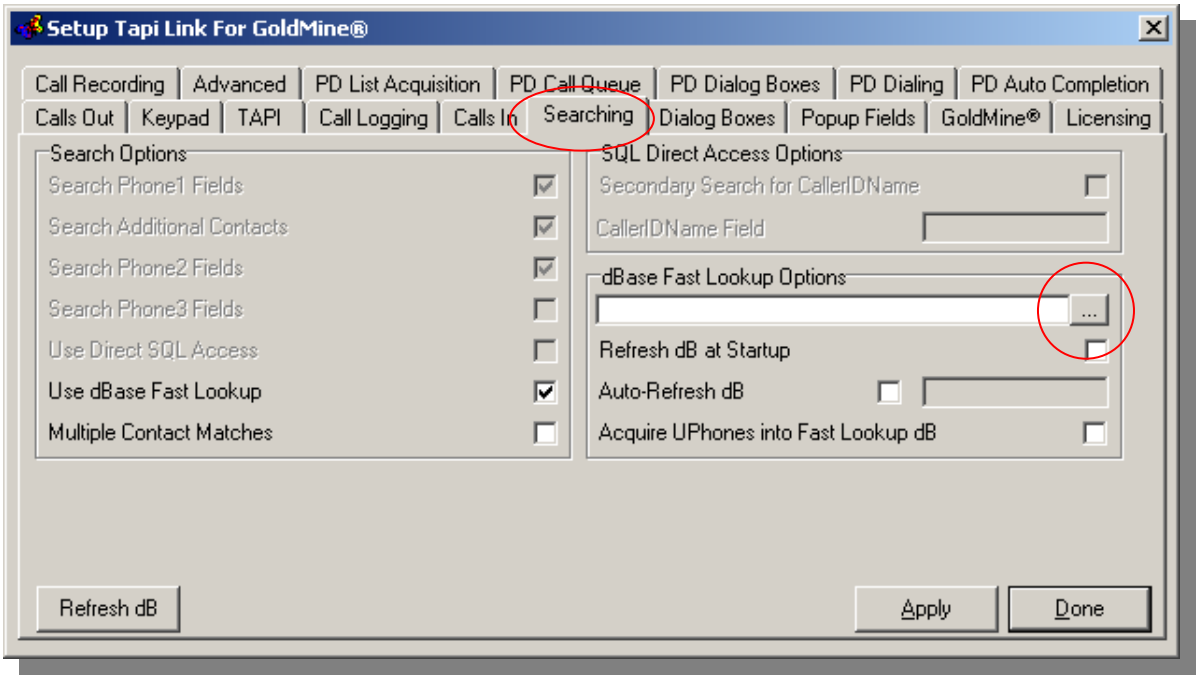
Once you have established and confirmed the correct path, click on the **Apply** button and the **Done** button to dismiss the dialog box. You must now **EXIT** and **RESTART** Tapi Link for all changes to take effect.

(The path to the dBase Fast Lookup files illustrated above is an example for illustrative purposes only and will differ significantly from that required at your own particular location.)

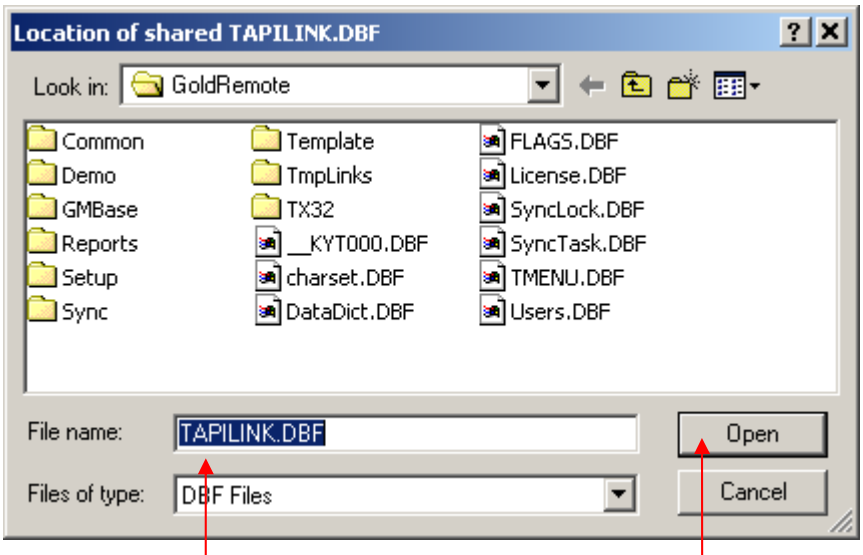
continued ….

[e] In order to ensure that each individual user's **dBase Fast Lookup** facility is properly synchronized with all other GoldMine® users (i.e. every user has access to *single source of uniform* data) it will be necessary to instruct each installation of Tapi Link to use the centrally shared file which you positioned earlier.
To do so, proceed as follows:

At EVERY appropriate user's workstation select the **Searching** tab:

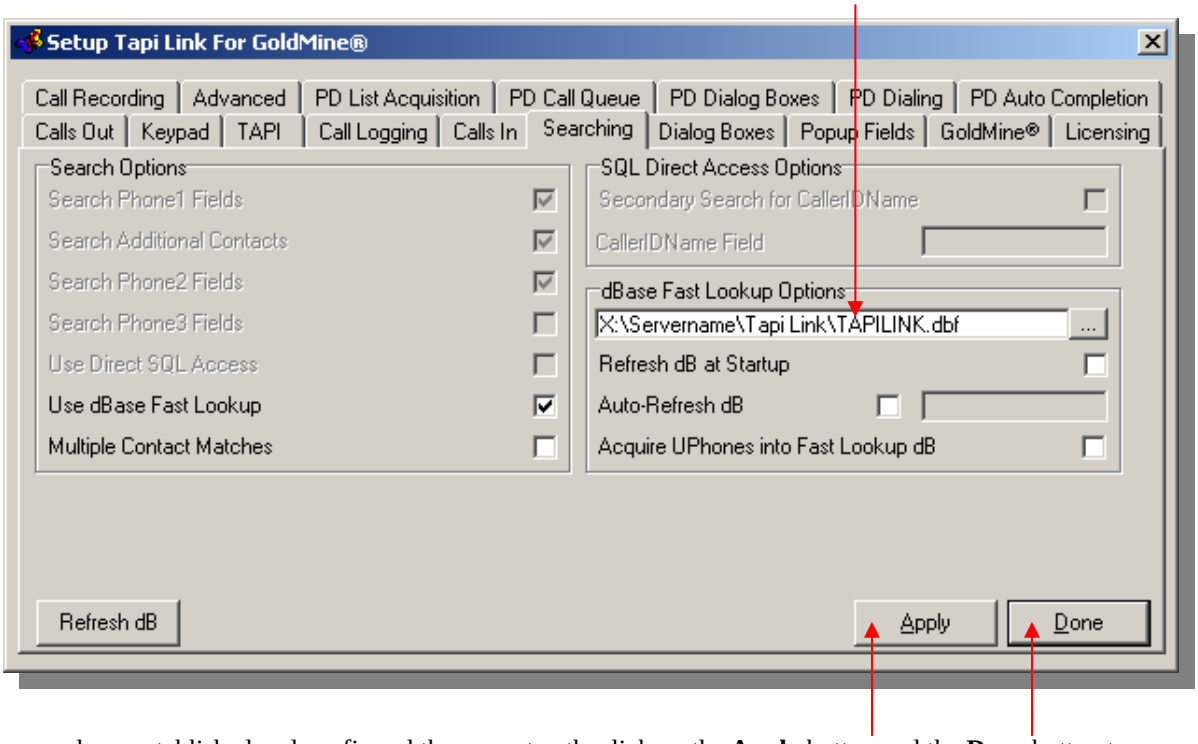


Via the **ellipsis button,** configure *each individual workstation* to recognize the central location of the relocated **dBase Fast Lookup** files by browsing to the appropriate directory on the server (previously chosen at [c] above). Clicking on the ellipsis button will summon the following file browsing dialog box – **Location of Shared TAPILINK.DBF**:



Browse to, and select the TAPILINK.DBF file - then click on the **Open** button.

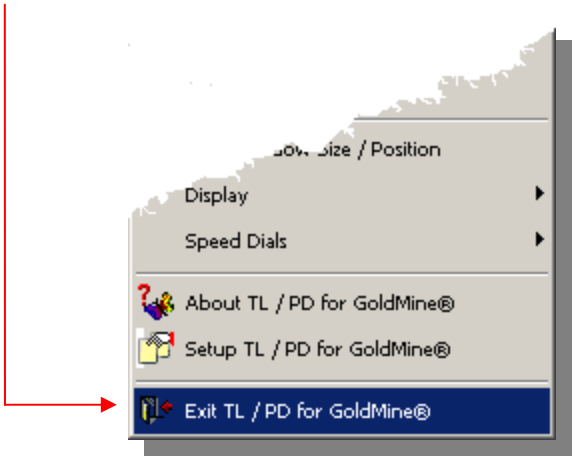
You will be returned to the **Searching** tab where the path to the **dBase Fast Lookup** files will have been populated:



Once you have established and confirmed the correct path, click on the **Apply** button and the **Done** button to save your configuration and dismiss the dialog box.
You must now **EXIT** and **RESTART** Tapi Link for all changes to take effect.

(The path to the dBase Fast Lookup files illustrated in these examples is for illustration purposes only and will differ significantly from that shown at your particular location.)

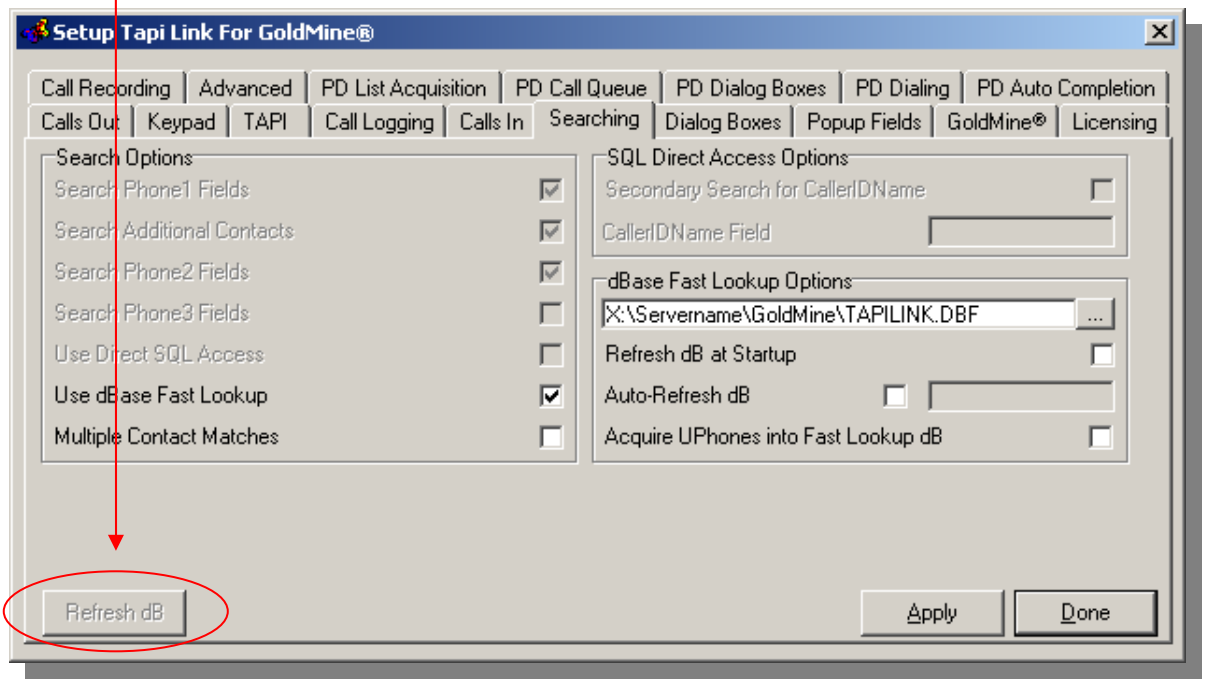
To do so, right-click on the Tapi Link icon in the system tray of the windows taskbar and select **Exit TL / PD for GoldMine®** from the context menu:



Then **RESTART** Tapi Link via the **Start | Programs** menu.

continued . . .

The **Refresh dB** button on the **Searching** tab will now be 'greyed-out' and unavailable on each workstation that has been configured to use the centralized **dBase Fast Lookup** tables located on the server.



Since all users will be using a shared, centralized and unified data source, the disabled button prevents any individual user from attempting to rebuild the **dBase Fast Lookup** tables while other users are accessing them.

(For instructions on *updating* the data sources utilised by the **dBase Fast Lookup** facility - refer to the section entitled 'Updating the dBase Fast Lookup tables'.)

Troubleshooting Note:
If, upon exiting and restarting Tapi Link an error message similar to the following appears, it indicates that you need to check and amend the path declared on the **Searching** tab:

Having made any necessary corrections on the **Searching** tab proceed as follows:
Click on the **Apply** button and then click on the **Done** button.
EXIT and then **RESTART** Tapi Link

Updating the dBase Fast Lookup tables

(This section is only of concern to users who are NOT using GoldMine® Front Office Sales & Marketing in conjunction with Microsoft® SQL Server, and is of no relevance to users of Goldmine® 7, 8, and 9 versions.)

As your database grows and changes you may consider it necessary to update the **dBase Fast Lookup** tables to ensure that they incorporate the latest information.

This can be achieved in three different ways, either:

(a) automatically each time Tapi Link is launched,

(b) automatically at user-defined intervals,

(c) manually – whenever you see fit to do so.

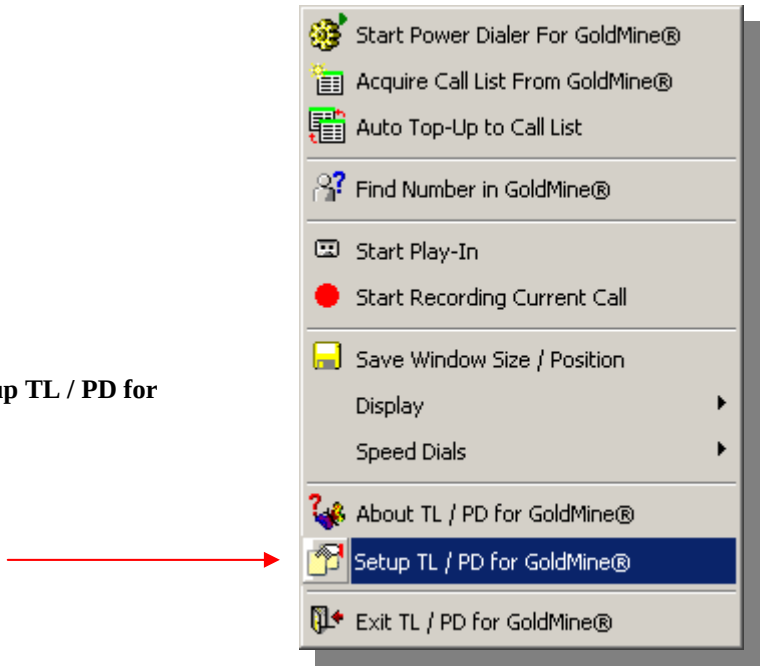
(Or any combination of the above.)

(a) Automatically updating the dBase Fast Lookup tables at startup

If you wish to automate the process of updating the **dBase Fast Lookup** tables proceed as follows:

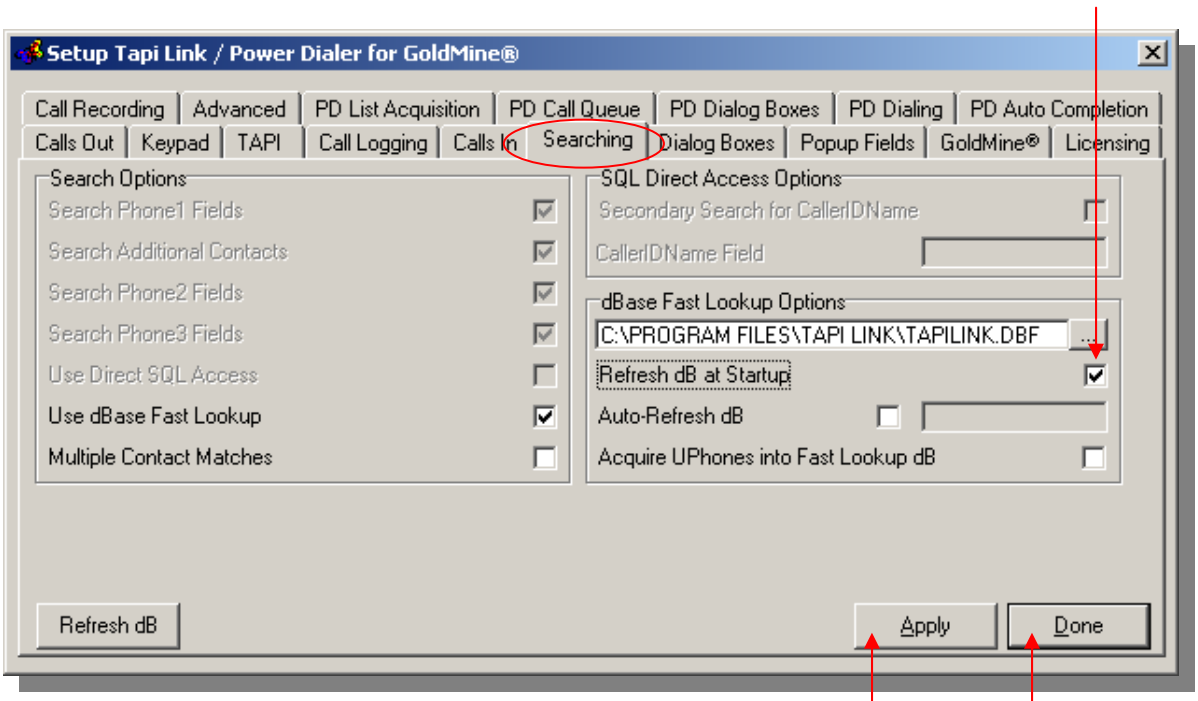
Right-click on the Tapi Link icon in the system tray:

From the context menu select **Setup TL / PD for GoldMine®**.



continued ….

Select the **Searching** tab and check the **Refresh dB at Startup** box:



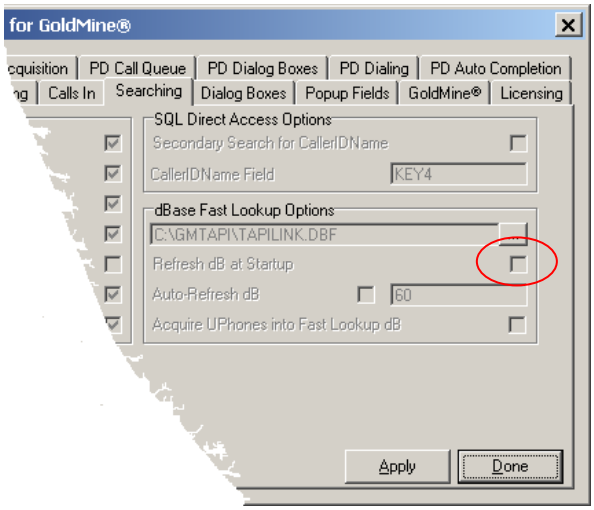
Click on the **Apply** button, then click on the **Done** button.

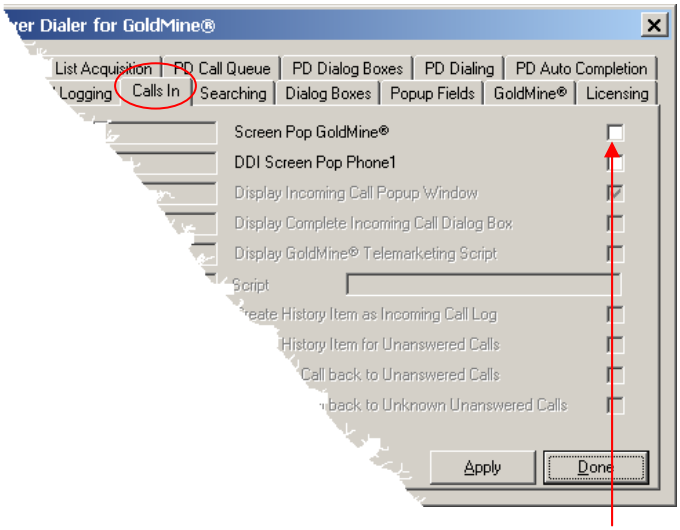
Each time Tapi Link is launched the **dBase Fast Lookup** tables will then be updated to incorporate the latest additions, modifications and deletions (if any) to the telephone numbers stored within your Goldmine® contact database.

Note that the automated process described above will only occur when Tapi Link is launched (e.g. directly from the Start Menu or alternatively, via a shortcut in the **Startup** group which is launched automatically when a user logs on to Windows®.) If this is the only refresh option selected - the automatic refreshing of the **dBase Fast Lookup** tables will, therefore NOT occur if a Windows® session is merely left running and no new windows® session is started, for example if windows® or the computer is not shut down.

Troubleshooting Notes:

If the **Refresh dB at Startup** checkbox is 'greyed-out' and unavailable as indicated below left:





Select the **Calls In** tab and check the **Screen Pop GoldMine®** box. Click on the **Apply** button to save your changes.

(b) Automatically updating the dBase Fast Lookup tables at intervals

The frequency at which your GoldMine® data increases or alters may necessitate specific pre-determined occasions upon which the **dBase Fast Lookup** tables are refreshed and updated.

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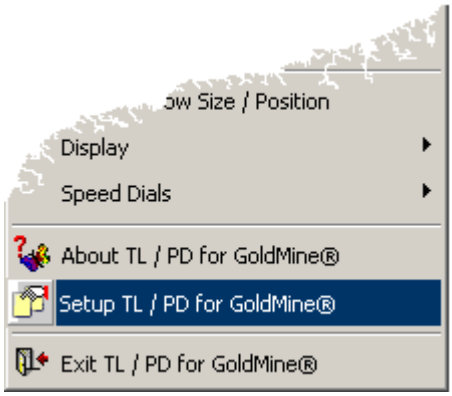
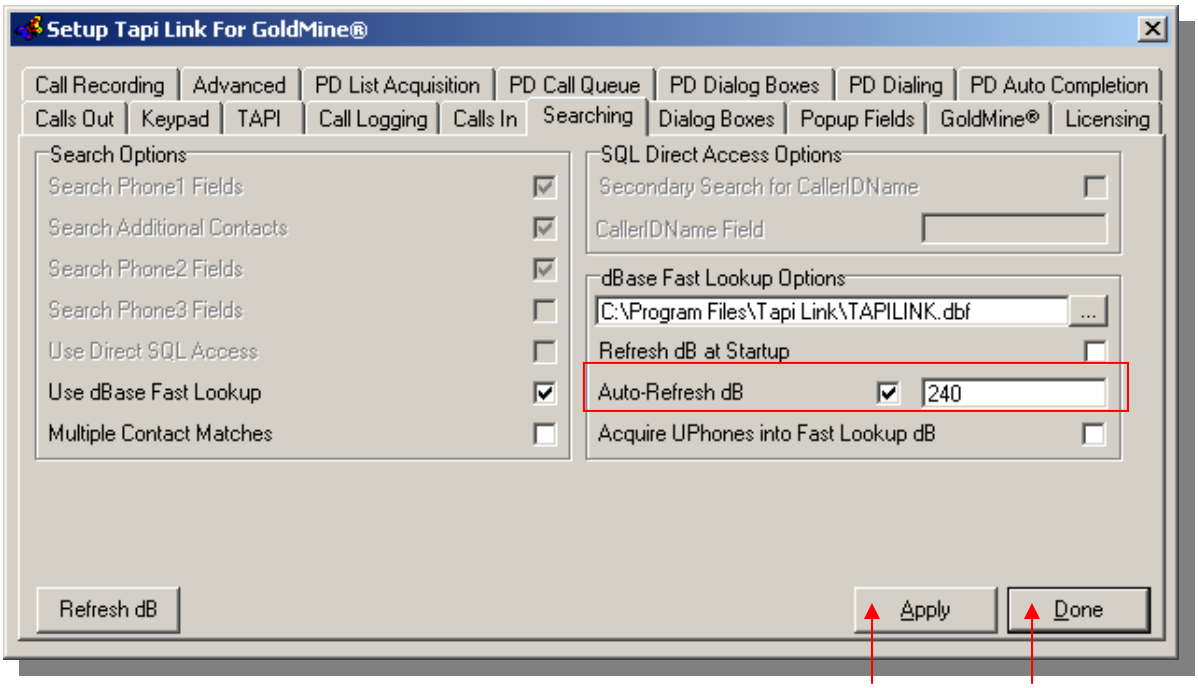
To automate the process of updating the **dBase Fast Lookup** tables at regular and pre-defined intervals proceed as follows:

Right-click on the Tapi Link icon in the system tray:

From the context menu select **Setup TL / PD for GoldMine®**.



Select the **Searching** tab and check the **Auto-Refresh dB** box. Enter the required refresh interval (in minutes).



Click on the **Apply** button, then click on the **Done** button.

At the specified interval, the **dBase Fast Lookup** tables will be updated to incorporate the latest additions, modifications and deletions (if any) to the telephone numbers stored within your Goldmine® contact database (assuming you are logged in to windows®, and Tapi Link is running.). GoldMine® does not necessarily need to have been started.

(c) Manually updating the dBase Fast Lookup tables – when using a shared, common table

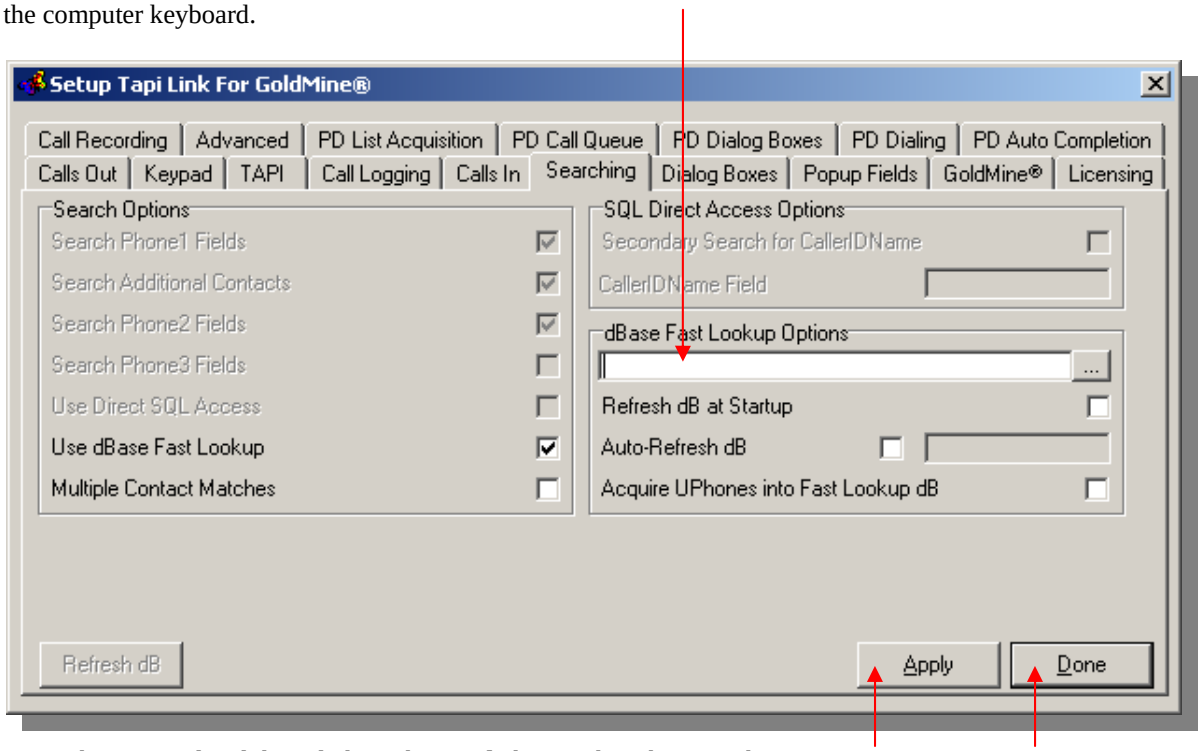
Individual users, (and any users having their own, local dBase Fast Lookup) table may click on the Refresh dB button to update their individual Fast Lookup table whenever they choose. For users in those circumstances, the following section is irrelevant.

However, if you are part of a networked installation of GoldMine® which includes other Tapi Link users, who are sharing a COMMON dBase Fast Lookup table, proceed as follows:

[a]
Tapi Link should be running on one, single, local workstation which is connected to the network. All other Tapi Link users should be logged out.

[b]
To initialize and incorporate the latest telephone number entries held within your GoldMine® contact record database into the **dBase Fast Lookup** tables it is necessary to prepare the required files on the local workstation and then to copy them to the centralized location for all users to share.

Firstly, *blank out* the **Shared Location Field** by highlighting the text in it and pressing the **DEL** key (or Delete key) on the computer keyboard.

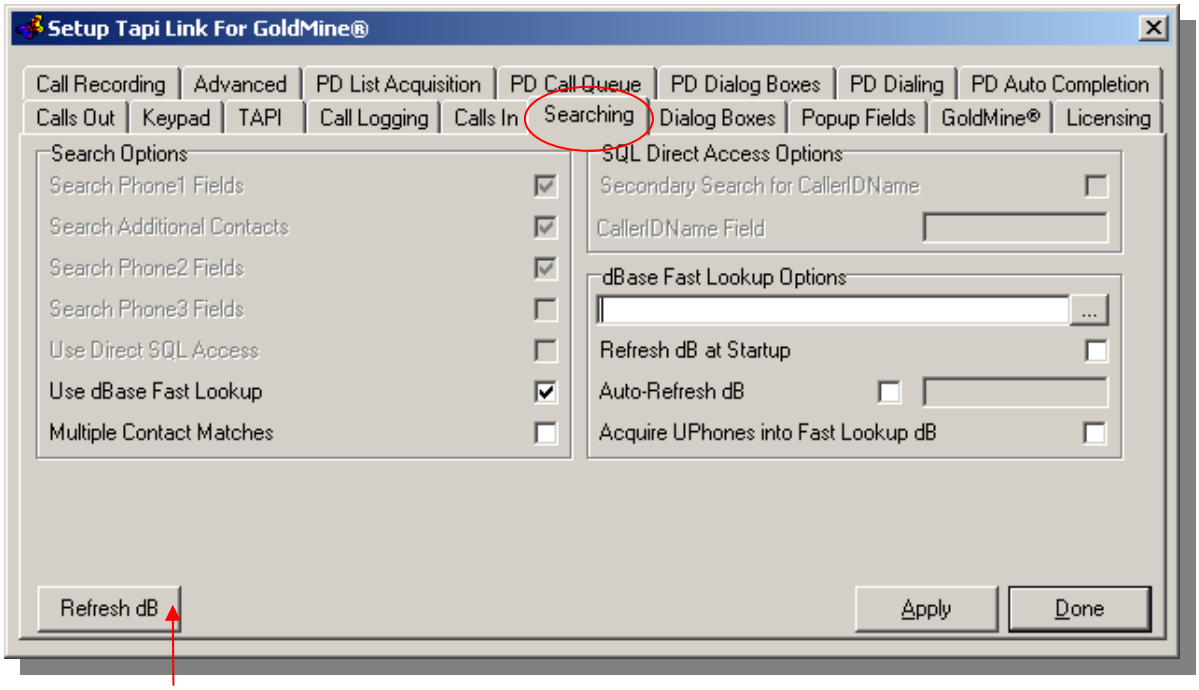


Once you have completed this, click on the **Apply** button then the **Done** button

[c]
You must now **EXIT** and **RESTART** Tapi Link for all changes to take effect.

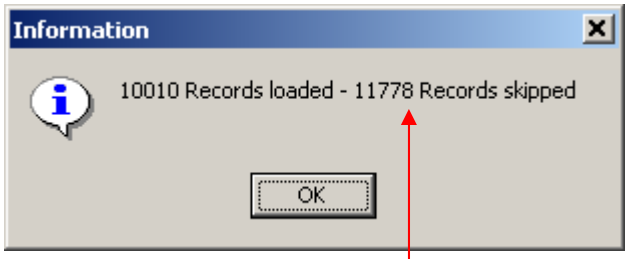
[d]
Once Tapi Link has been restarted select the **Searching** tab and you should find that the **Refresh dB** button is no longer 'greyed-out'.

continued . . .



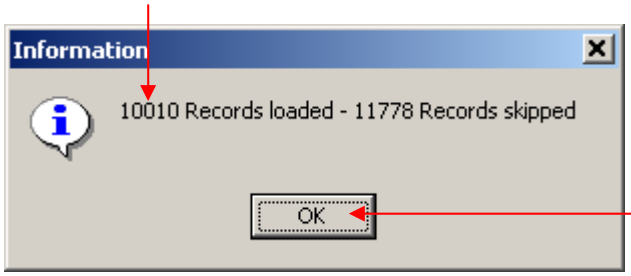
Click on the **Refresh dB** button:

This will summon the **Refreshing dBase Fast Lookup Table** dialog box which indicates the ongoing progress of loading of the latest telephone number entries from your GoldMine® contact records:



If the **Records Skipped** figure is greater than zero this indicates that one or more of the telephone number entries in your GoldMine® database is blank.

(*This will include records bearing unpopulated fields such as Phone2 & Phone 3, as well as Phone 1. However, the* **Records Loaded** *figure will include records that have at least one of these fields populated.*)

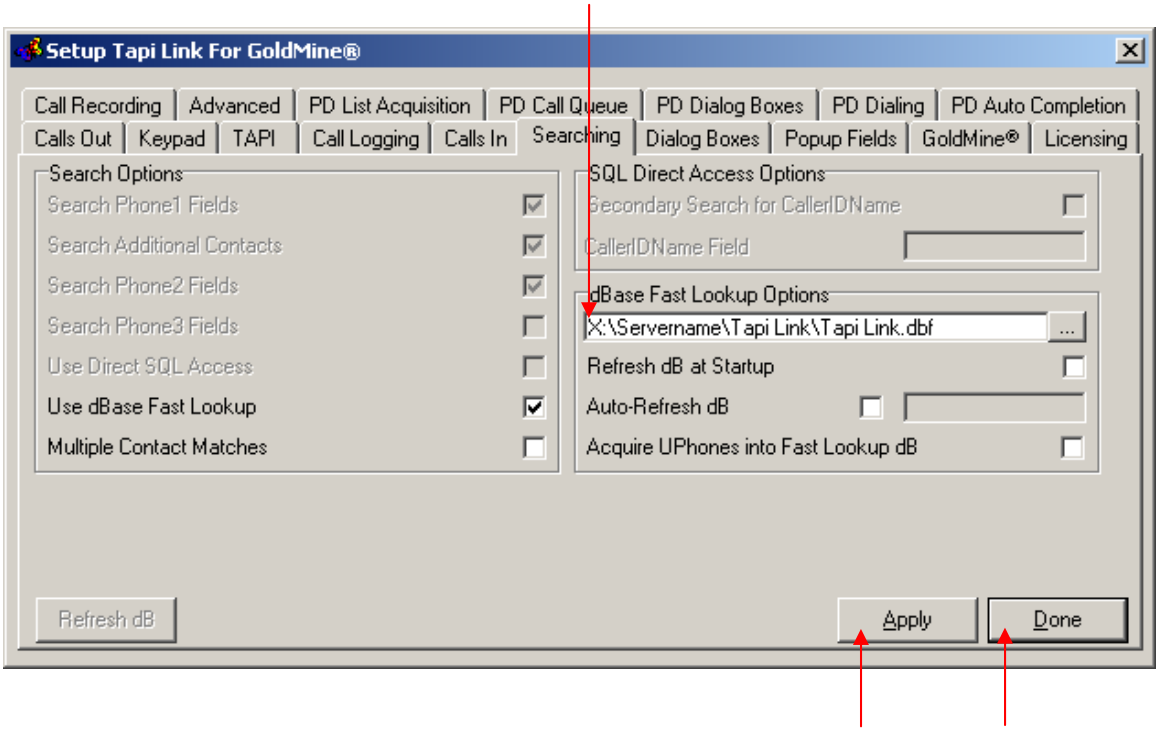


Once the records have completed loading click on the **OK** button

Further details are also available by consulting the information displayed within the **Application Log** tab.

[e]
Using Microsoft Explorer® or similar, move the newly refreshed files TAPILINK.DBF and TAPILINK.MDX produced at the local workstation to the shared GoldMine® SYSTEM directory on the central server, and overwriting any existing files of the same name.

[f]
You must now reconfigure the workstation to use the shared **dBase Fast Lookup** table. Follow the same procedure as before (see the section 'Further dBase Fast Lookup Instructions' [d] above) ensuring that the path shown to the file TAPILINK.DBF is correctly displayed on the **Searching** tab:



[g]
Click on the **Apply** button and then the **Done** button to dismiss the dialog box.

[h]
You must now **EXIT** and **RESTART** Tapi Link for all changes to take effect.

This completes the necessary procedure to update the **dBase Fast Lookup** tables to ensure that all networked users have access to the same, uniform information. Follow the foregoing procedure again, at any stage in the future, when you wish to *manually* update the **dBase Fast Lookup** tables to incorporate the latest additions and revisions to your GoldMine® contact records.

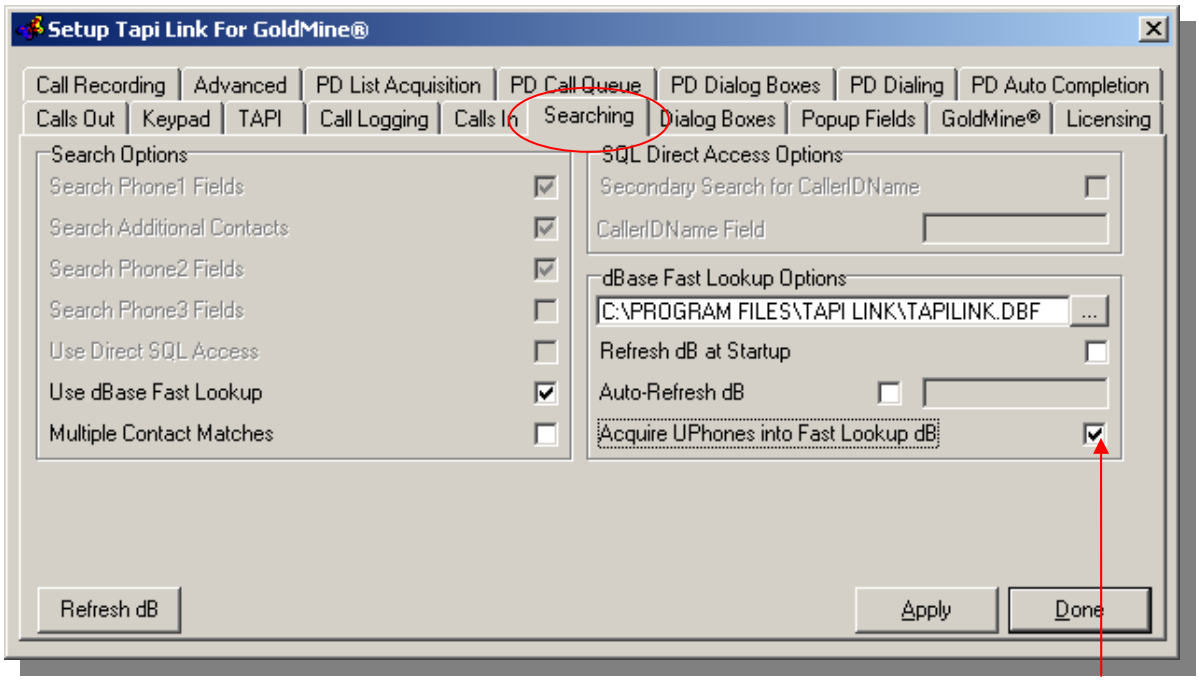
Screen-popping from User-defined Phone Fields

This section only concerns users of dBase GoldMine® systems, (i.e. users who are NOT using GoldMine® Front Office Sales & Marketing in conjunction with Microsoft® SQL Server, or GoldMine® versions 7, 8, and 9), and experienced users who have a sound knowledge of the structure of GoldMine® and how it is configured.

In addition to the familiar telephone fields (i.e. Phone1, Phone2, Phone3, and areas within the Additional Contacts fields) GoldMine® has the ability to store extra telephone numbers in special user-defined fields known as **UPhone** fields.

If you are storing extra telephone numbers in **UPhone** fields in a dBase system, you may also choose to screen-pop from those fields by proceeding as follows:

Select the **Searching** tab:



Check the **Acquire UPhones into Fast Lookup dB** field.
Click on the **Apply** and **Done** buttons.

When next refreshed, this will load the relevant data into the **dBase Fast Lookup** tables and permit screen-popping for up to 10 specially defined **UPhone** fields.

(If necessary, see your GoldMine® system administrator for further details of defining UPhone fields within GoldMine®.)

Remember that the dBase Fast Lookup tables will need to be refreshed either manually or automatically to incorporate these newly assigned fields – before they can be searched effectively for screen-popping purposes.

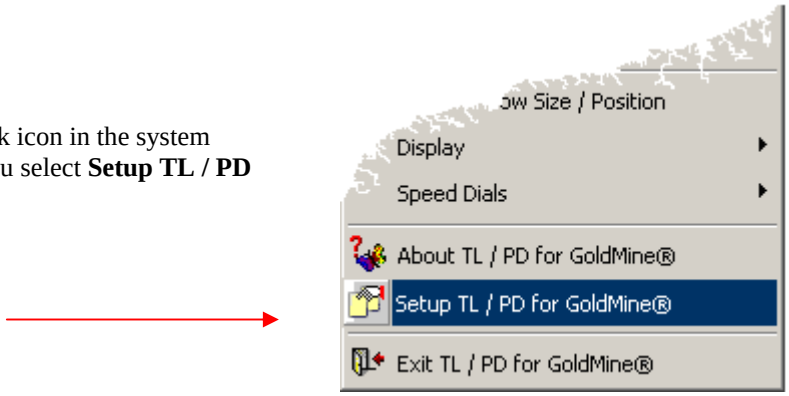
Screen-Popping with multiple Contact Sets

(This section is only of concern to users of dBase GoldMine® system who are NOT using GoldMine® Front Office Sales & Marketing in conjunction with Microsoft® SQL Server, and is of no relevance to users of GoldMine® versions 7, 8, and 9.)

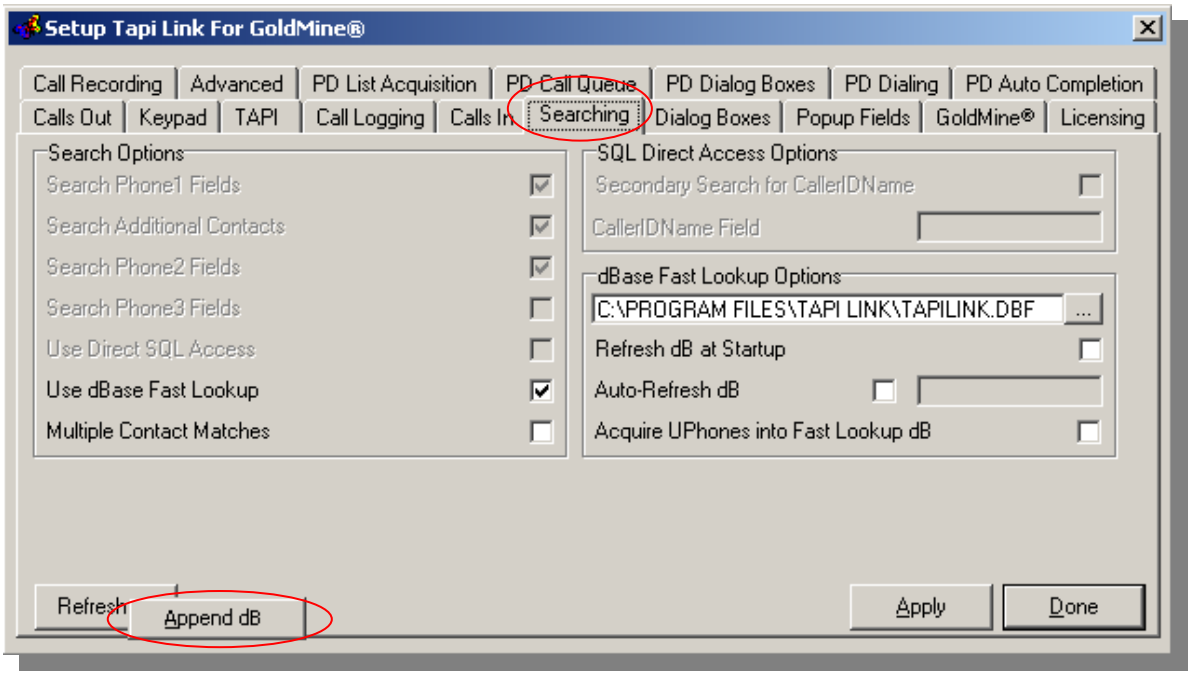
Bear in mind that although screen-popping will function even if GoldMine® is not currently running, Tapi Link can only search the contact set that is currently logged-in. Therefore, if you have multiple contact sets in your database and you wish to enable screen-popping from more than one of them, you will need to ensure that data from *each individual contact set* is amalgamated with the dBase Fast Lookup tables.
(It is assumed at this point that the dBase Fast Lookup tables already contain data from at least one contact set - which will be specified on the **Setup Tapi Link** > **GoldMine®** tab in the **Contact Files** field.)

In order to combine the necessary data from various contact sets, proceed as follows:
1. On the menu bar of GoldMine® select **File** | **Open Database** and open the next contact set that you wish to amalgamate with the existing dBase Fast Lookup tables.

2. Right-click on the Tapi Link icon in the system tray and from the context menu select **Setup TL / PD for GoldMine®**.



Select the **Searching** tab, right-click on the **Refresh dB** button and then click **Append dB**.



You will need to repeat the above procedure for any further contact sets that you wish to incorporate with the dBase Fast Lookup tables for screen-popping purposes. You do not need to alter any of the settings on the GoldMine® tab.

Call Recorder - configuration

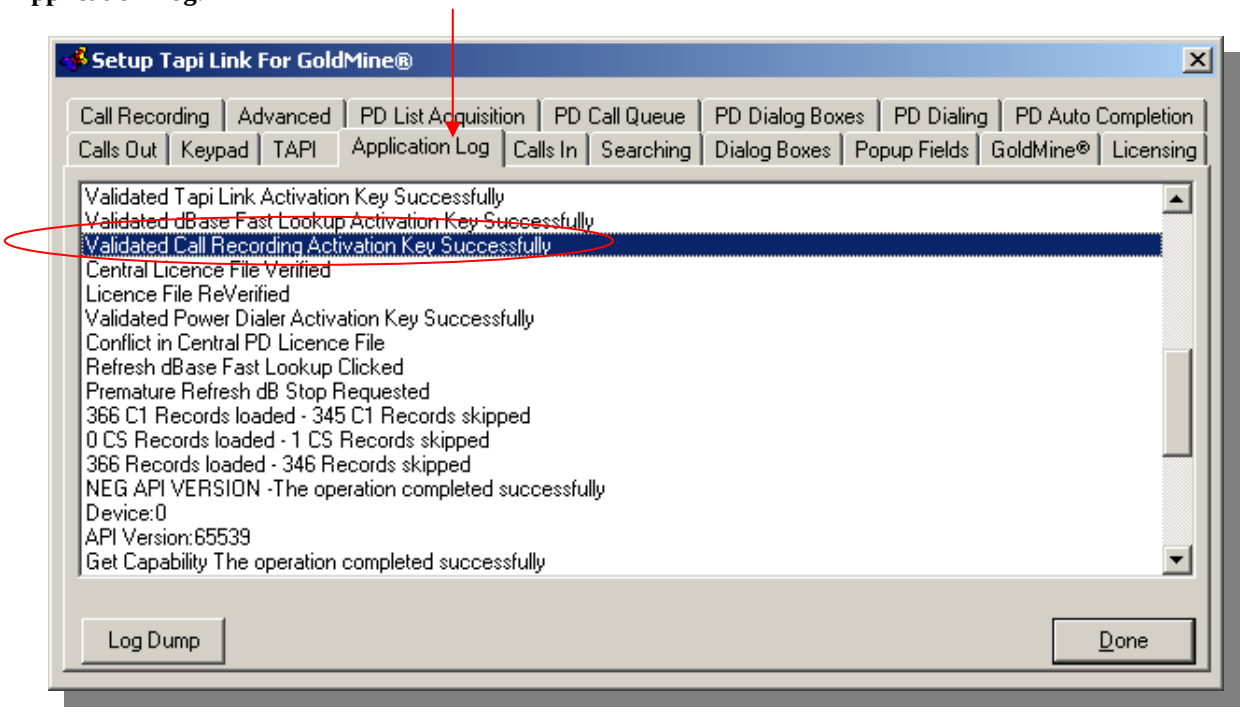
Call Recording is an optional feature and not part of the default functionality of Tapi Link for GoldMine®.
For further information contact your GoldMine® Reseller or Papillon Technology by telephone on 01992 560487 (+44 1992 560487) from the US on +1 (614) 559-2270 by fax: 01992 560489 (+44 1992 560489) or by email to sales@papillontechnology.com

The Call Recording feature allows GoldMine® users to:

- ✓ record any individual calls on demand
- ✓ record every call automatically.
- ✓ record a specific percentage of calls at random.
- ✓ transmit pre-recorded announcements on outbound calls
- ✓ transmit a choice of announcements to incoming calls

The recorded calls can be automatically attached to your client's GoldMine® record via the Links tab; thereby ensuring sure you have an accurate and complete record of your telephone conversations immediately to hand. Recorded calls can be replayed from any standard multimedia-equipped computer. (Neither GoldMine®, Tapi Link, nor the Call Recorder hardware is required for playback purposes.)
In addition to the ability of replaying of calls from the Links tab, you may also replay them directly from the designated storage location (e.g. via Explorer). This means that you can sort and browse through calls by using other criteria, for example sorting by user, or by date etc.

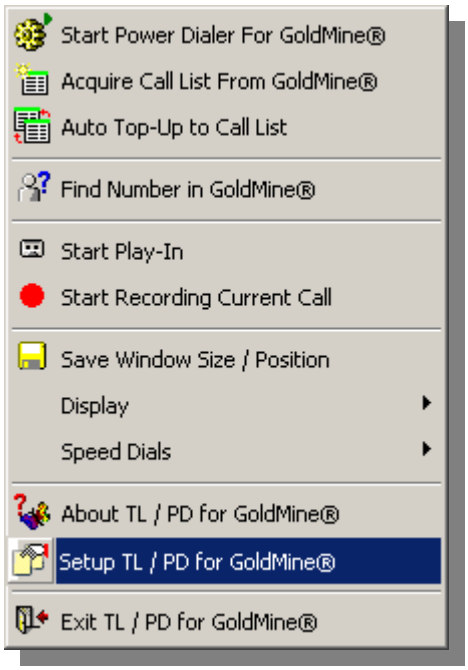
The **Call Recording** feature will need to have been properly activated either during the Quick Start Wizard, or as explained in the section entitled 'Activating SQL Direct Access, dBase Fast Lookup, and Call Recording' and can be confirmed by the appearance of the entry "*Validated Call Recording Activation Key Successfully*" in the **Application Log**:



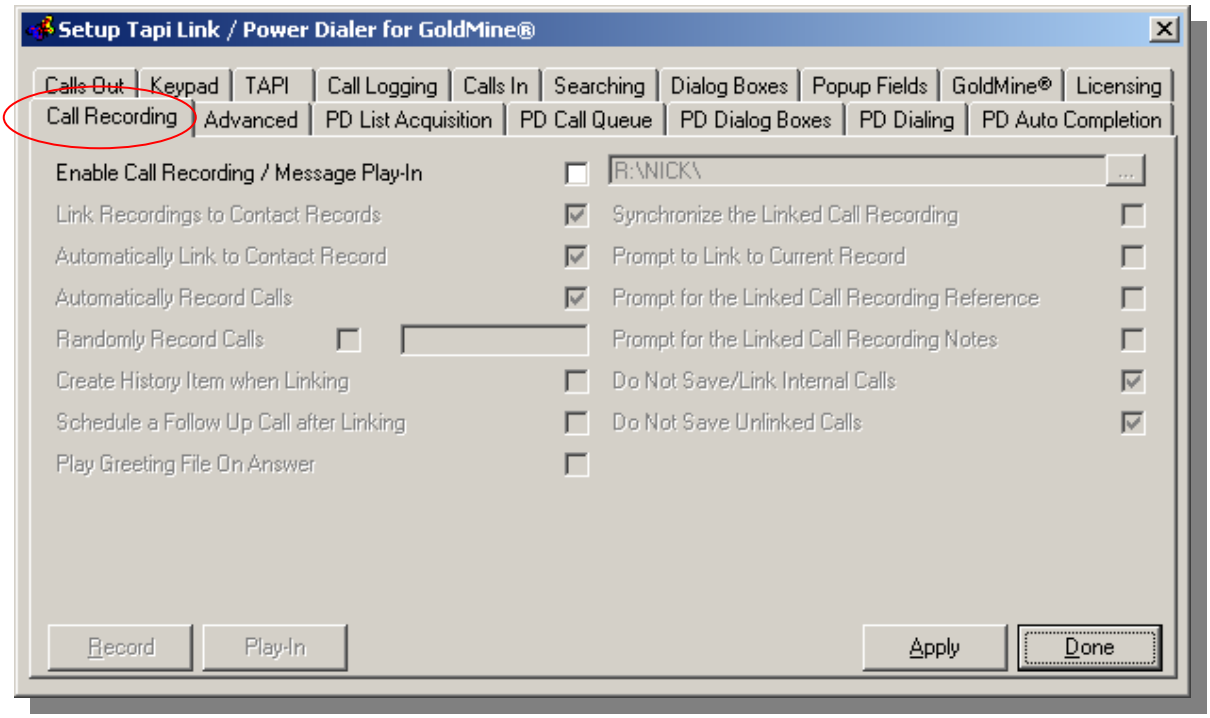
If this is the case, proceed to configure the **Call Recording** feature as follows:

Right-click on the Tapi Link icon in the system tray:

From the context menu select **Setup TL / PD for GoldMine®**.



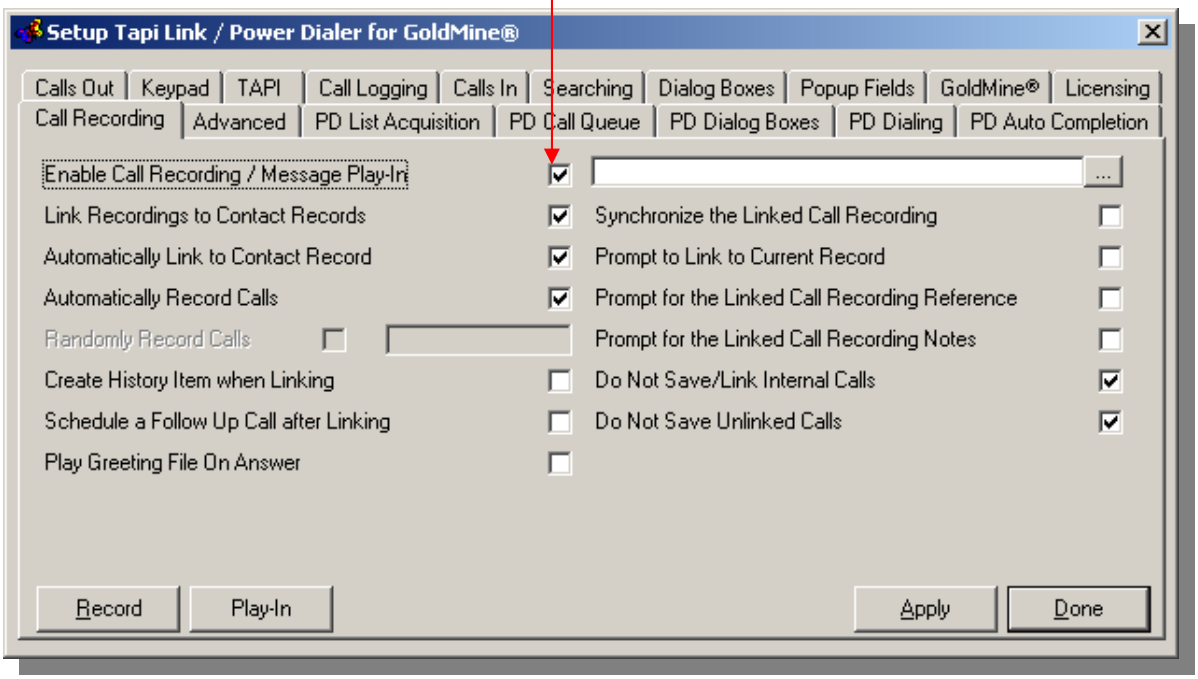
This will summon the **Setup** window:



Select the **Call Recording** tab.

continued . . .

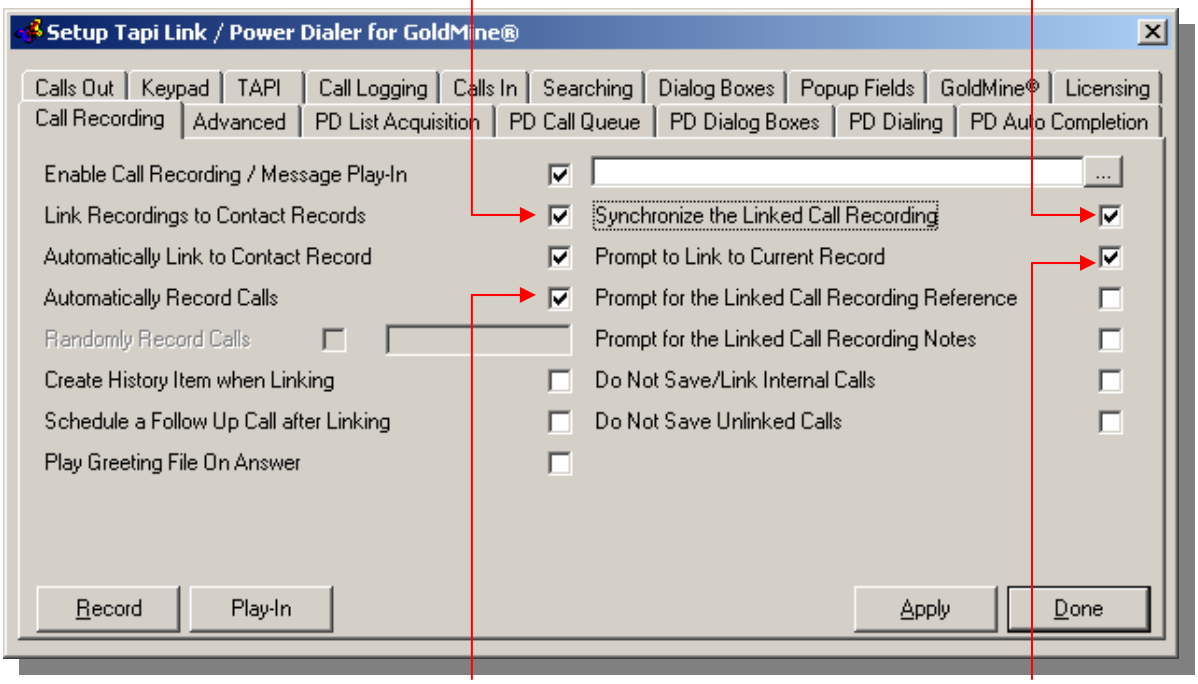
All of the configuration options are 'greyed-out' and inaccessible (as depicted above) until you click on the **Enable Call Recording / Message Play-In** check-box:



The following illustrations explain the elements of the **Call Recording** tab:

Choose to link Call Recordings to GoldMine® contact records via the Links tab.

Choose to include linked recordings in the synchronization of linked documents between GoldMine® sites.

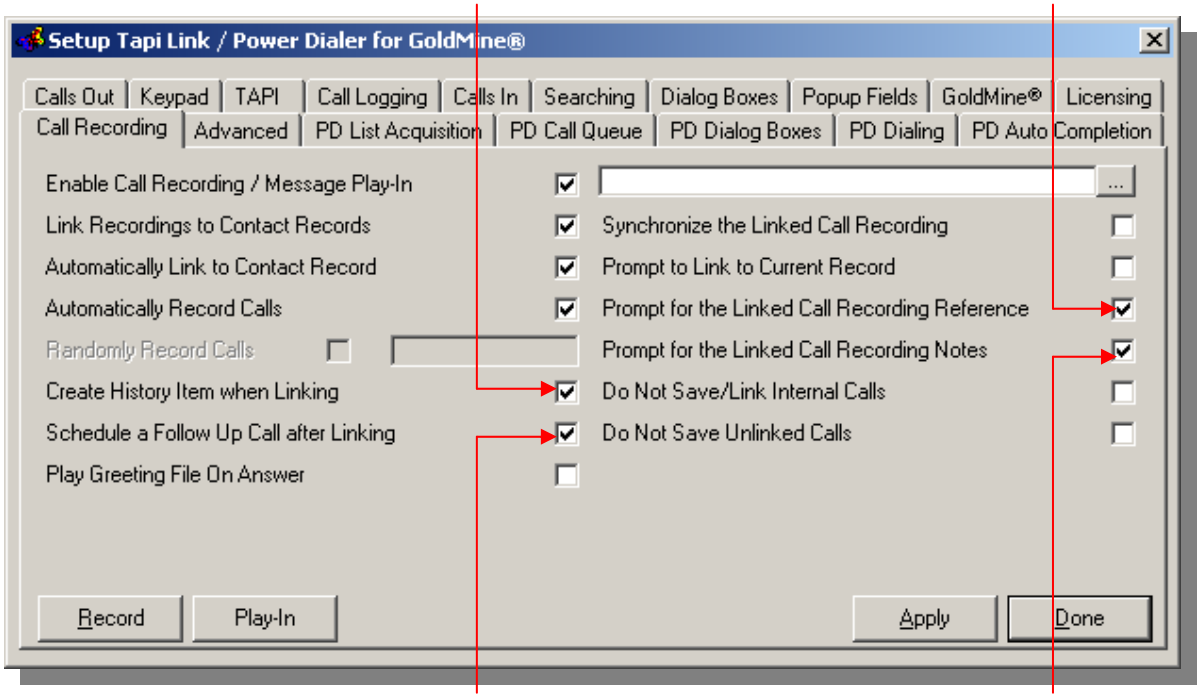


Choose to automatically start recording when calls commence, and to stop recording when calls are terminated.

Check this option to be **prompted** to link the recording to the contact record. Otherwise the Call Recording will be linked automatically to the *currently active* record.

Complete an “Other Action” as a History item when linking a Call Recording.

Choose to be prompted for a Reference for the linked call recording.
(Otherwise, a default entry is created.)

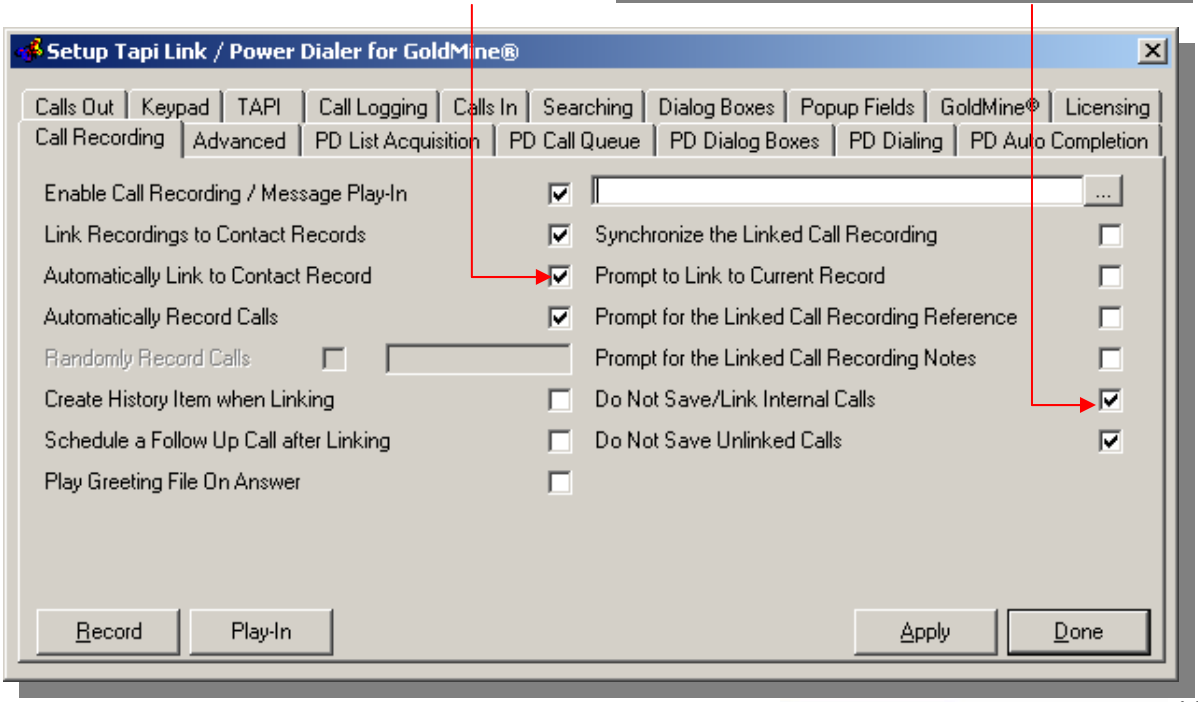


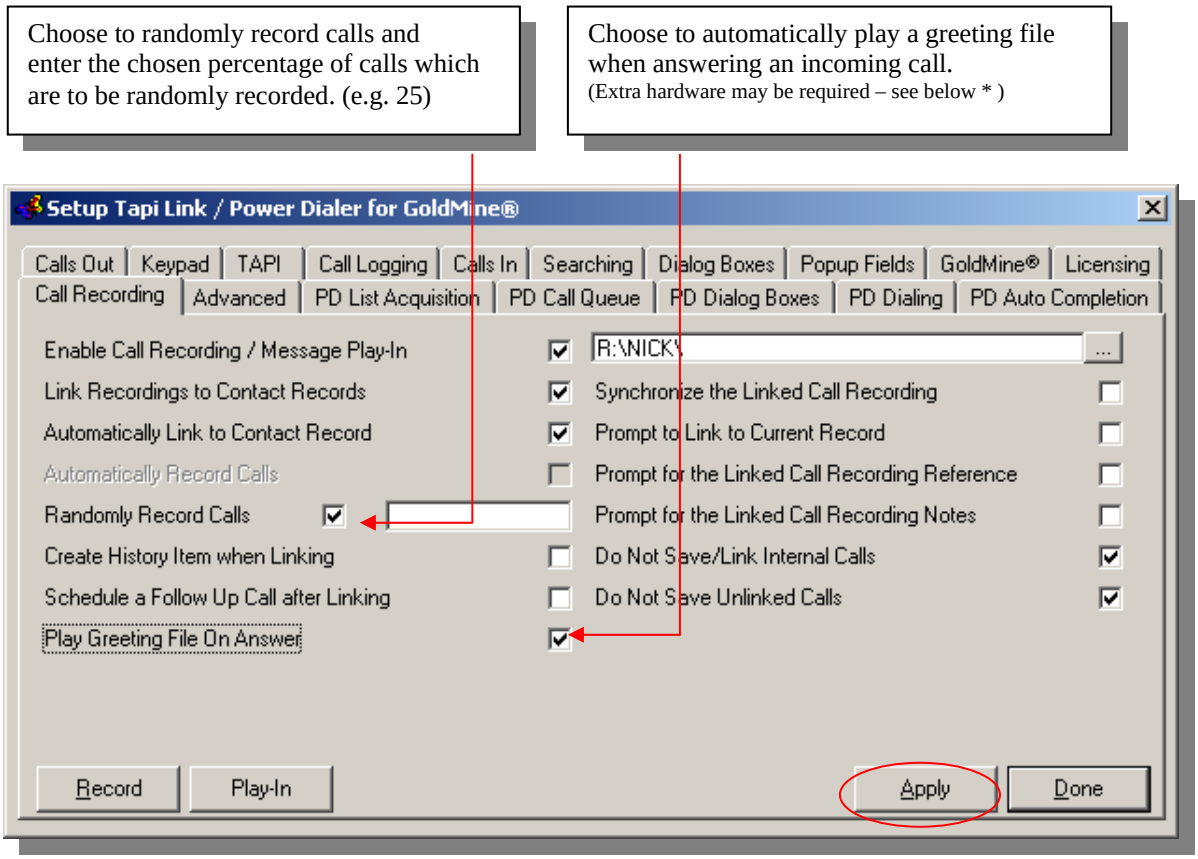
Check this option to summon a **Schedule FollowUp Call** dialog box after linking the recorded call.

Check this option to be prompted to annotate the Call Recording link entry.
(Otherwise, a default entry is created.)

Choose to automatically link recordings to contact records whether dialed from screen-popped records or the current record.

Choose NOT to link *internal* telephone call recordings and NOT to save them.





Click on the **Apply** button to save your preferences.

IF you have already determined the location for the storage of your **Call Recordings** click on the **Done** button to dismiss the dialog box.

IF NOT, proceed to the next section entitled 'Call Recording – storage location'.

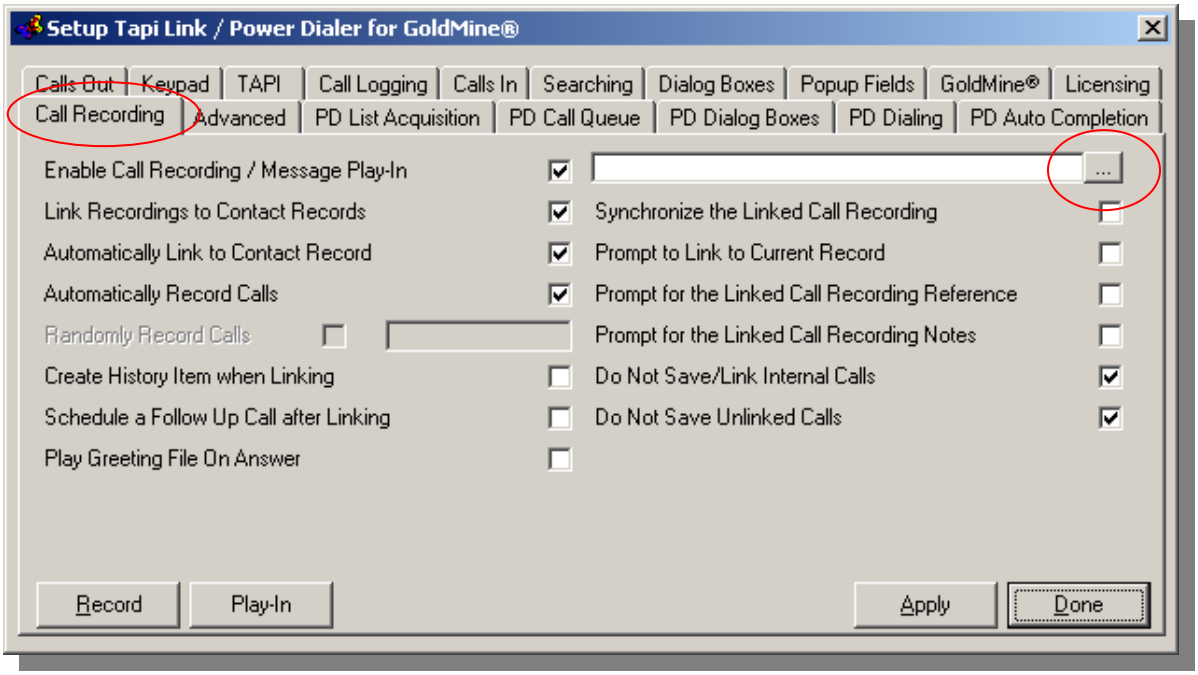
The Play-In feature
No additional hardware is required for the Play-In feature if you are using the Hi-Phone Desktop in conjunction with Tapi Link. Otherwise, for *concurrent* usage of both the call recording AND Play-In features, an additional Call Recorder for GoldMine® hardware unit is required to work in tandem with the first unit. For further information see the section entitled 'The Play-In Feature'.

Alternatively, if using just a single Call Recorder hardware unit you would need to alter the setting on the unit from 'Record' to 'Play' and also remove the audio cable from the soundcard input and replace it into the output.

Call Recording – storage location

Having selected your configuration preferences for Call Recording you will need to determine the storage location for the files which contain the recorded calls. The paths shown in the examples below will vary considerably from those available at your own site – but you may choose any suitable location. Bear in mind that you should specify a shared location if you wish all users to have the ability to replay calls from the Links tab. It is also generally advisable to store your Call Recording files in a specially designated location – usually separate from your operating system or database files – depending upon available space and archiving requirements etc.

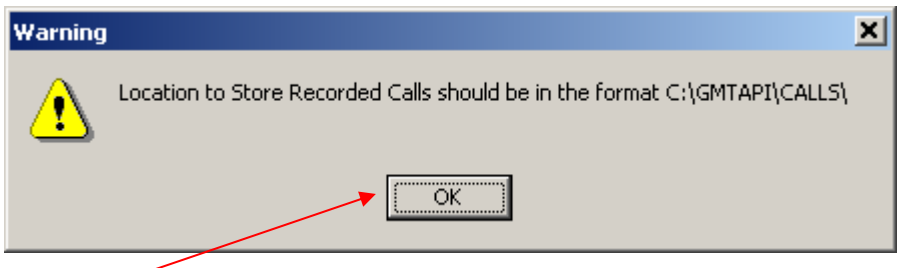
To specify the location for storage, select the **Call Recording** tab and browse to your chosen location by clicking on the ellipsis button:



Note that the path specified –

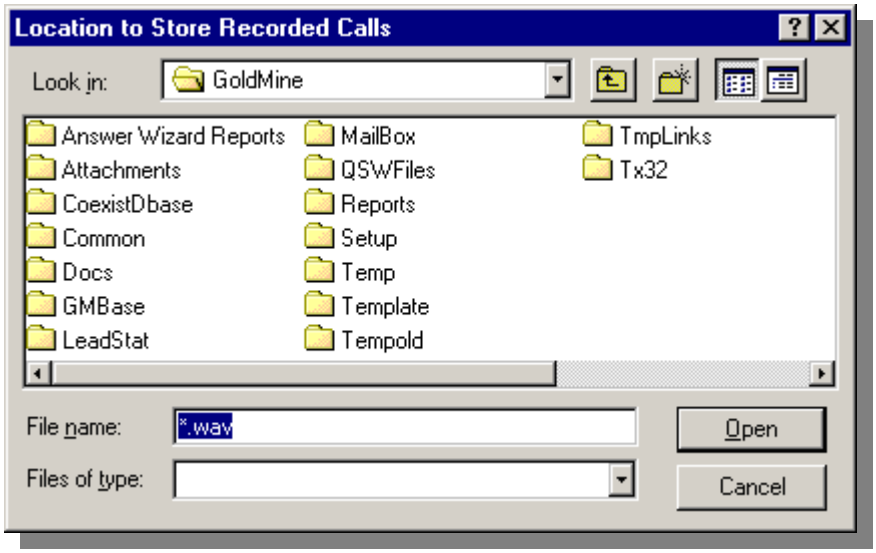
- must be a valid and existing location and
- must terminate with a backslash \ (as shown in the example dialog box below.)

If you specify an invalid path a **Warning** dialog box will appear:

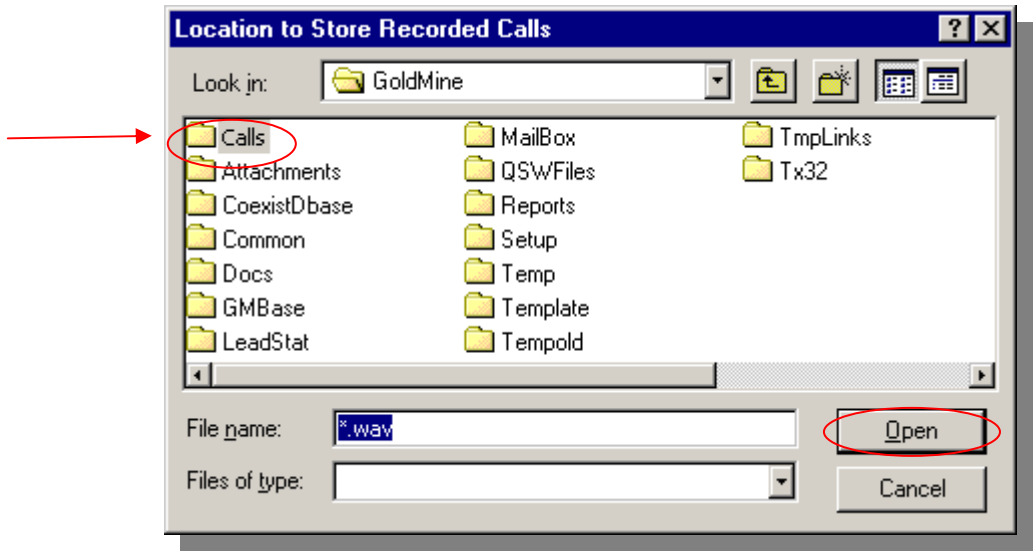


Click on the **OK** button.
Return to the **Call Recording** tab and amend the path to the Recorded Calls Files Location.

Clicking on the ellipsis button will summon a window from which you may browse through your directories:



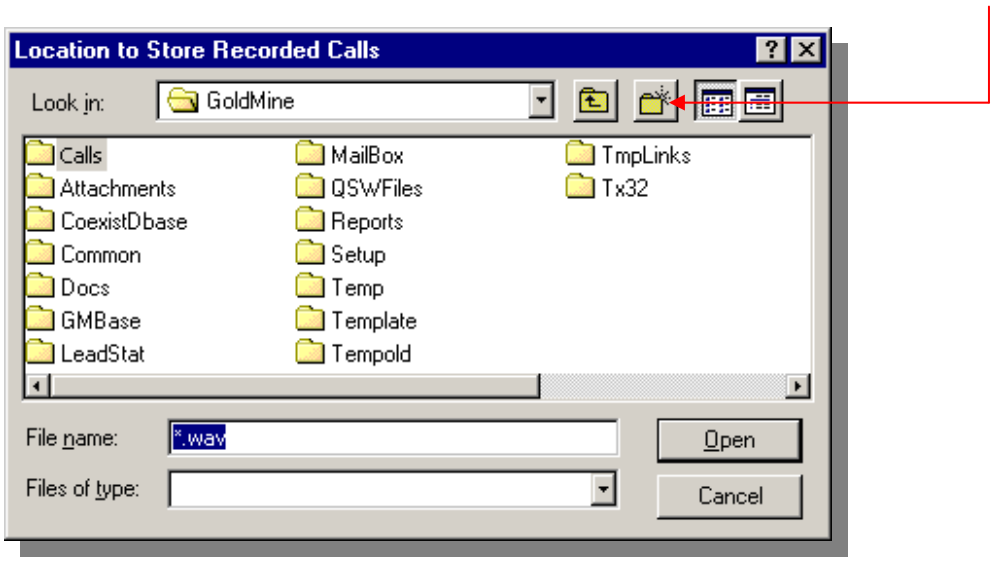
Find a directory you wish to designate as the **Location to Store Recorded Calls** –
Then highlight it:



Then click on the **Open** button.

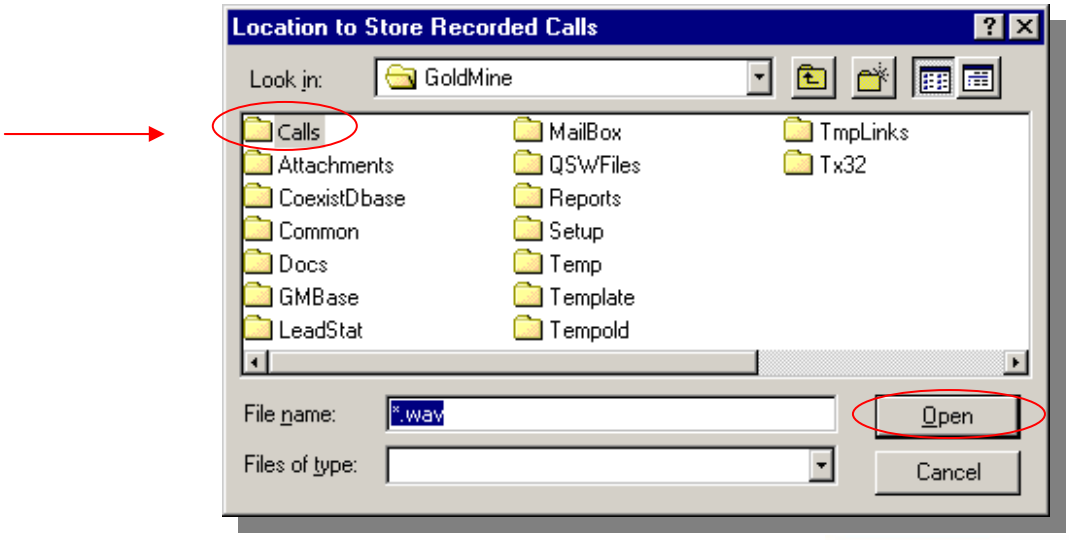
continued ….

However, if you wish to create a *new* directory especially for this purpose, click the **New Folder** button:

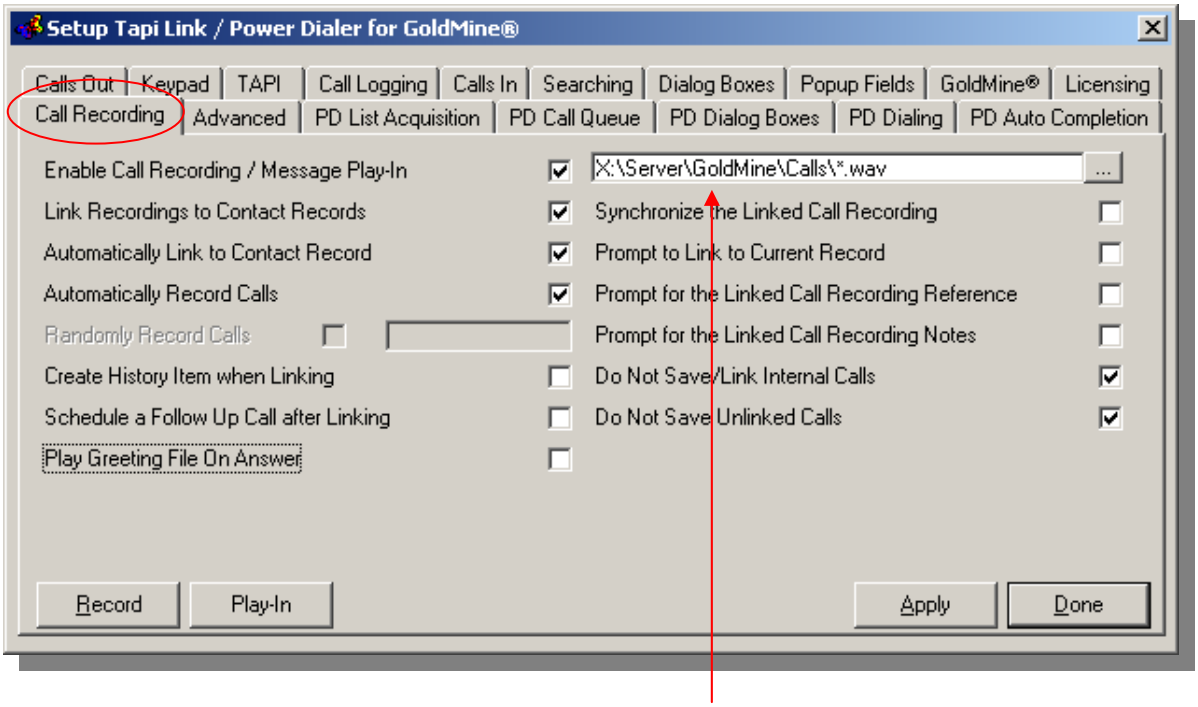


Type a folder name of your choice. (i.e. overtype the default 'New Folder' name.)

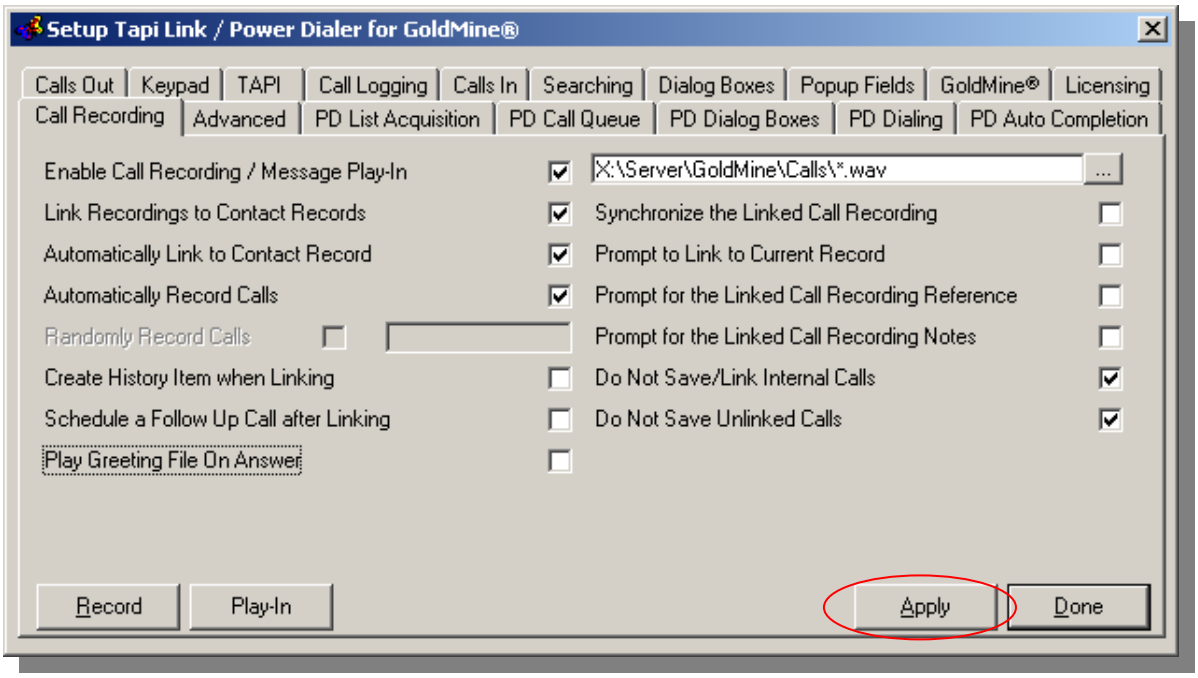
Highlight the newly created folder (in this example, now called **Calls**) and then click on the **Open** button.



This will return you to the **Call Recording** tab:

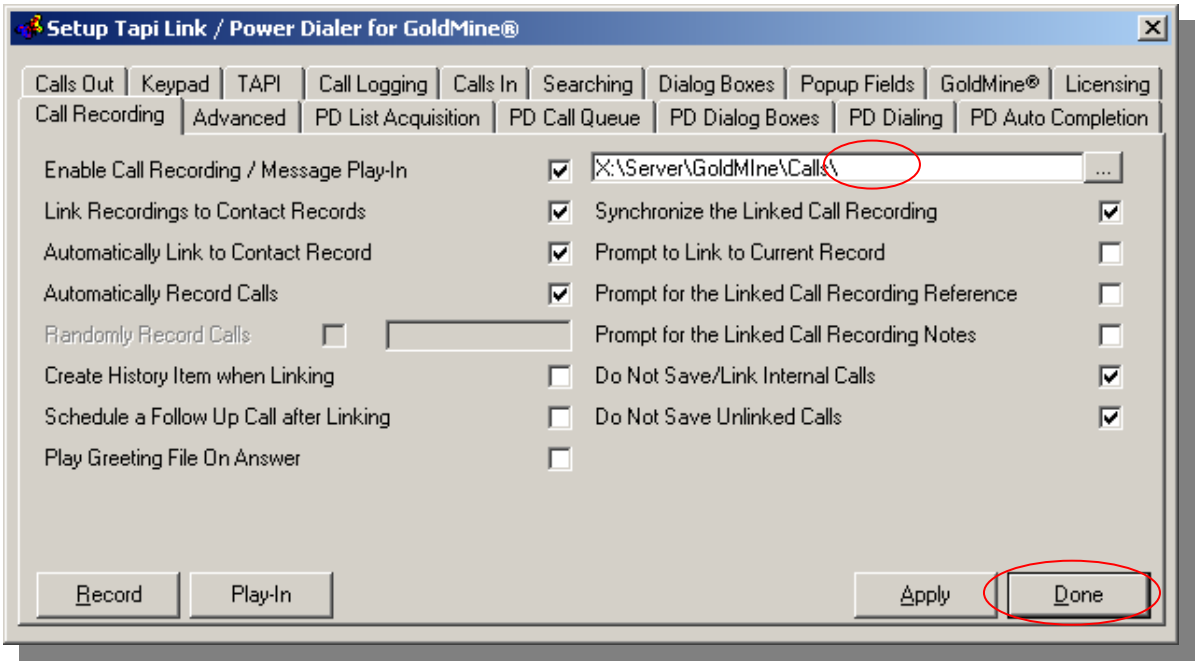


Your chosen path to the storage location for the recorded calls will now have been populated.



Click on the **Apply** button to save your settings.

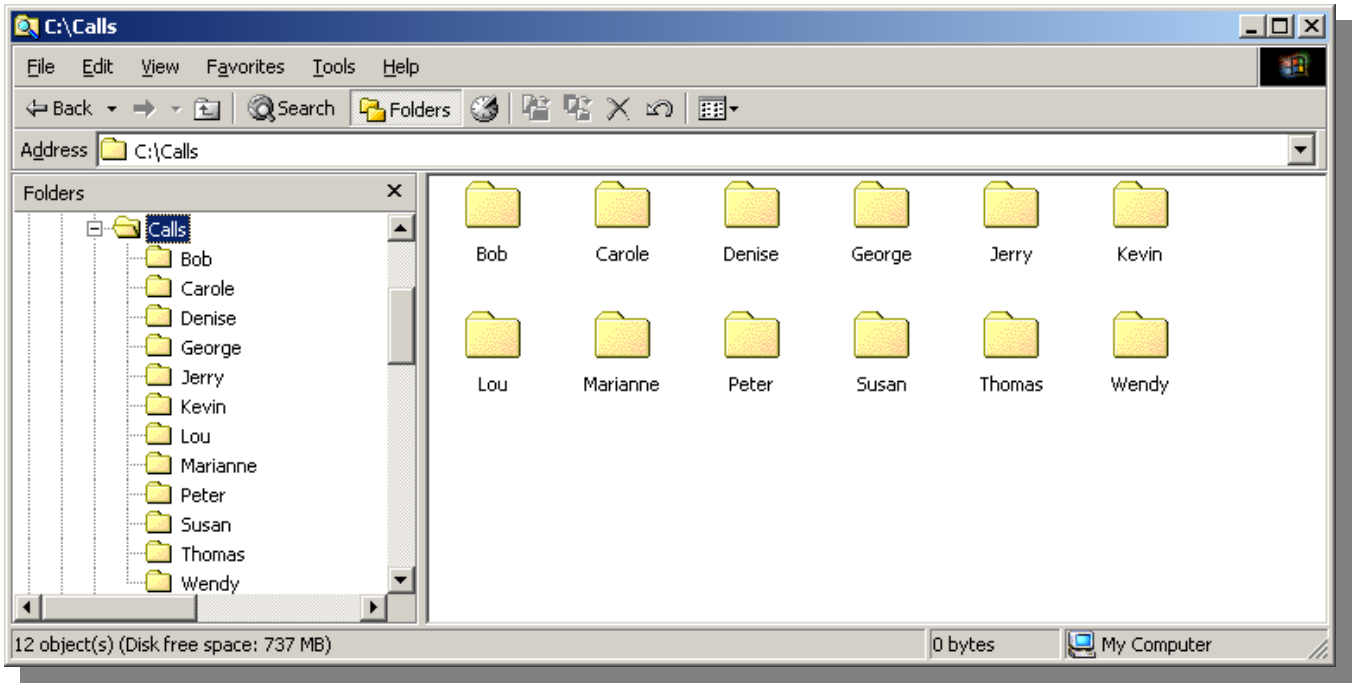
(Clicking on the **Apply** button will remove the *.wav file extension from the path shown in the Recorded Calls Files Location as shown in the following example.)



Click on the **Done** button to dismiss the dialog box.

(The above network path is merely an example. You should determine a path appropriate to your own individual machine or network drive.)

Rather than using one central repository you may wish to configure separate storage locations for each user - For example by storing each user's calls within unique, individually named directories as shown in the example below.



This enables you to isolate and review any specific calls by user, or by date, duration etc.

This can also facilitate the implementation of various access permissions to recordings on the network.

Recording and Linking Calls

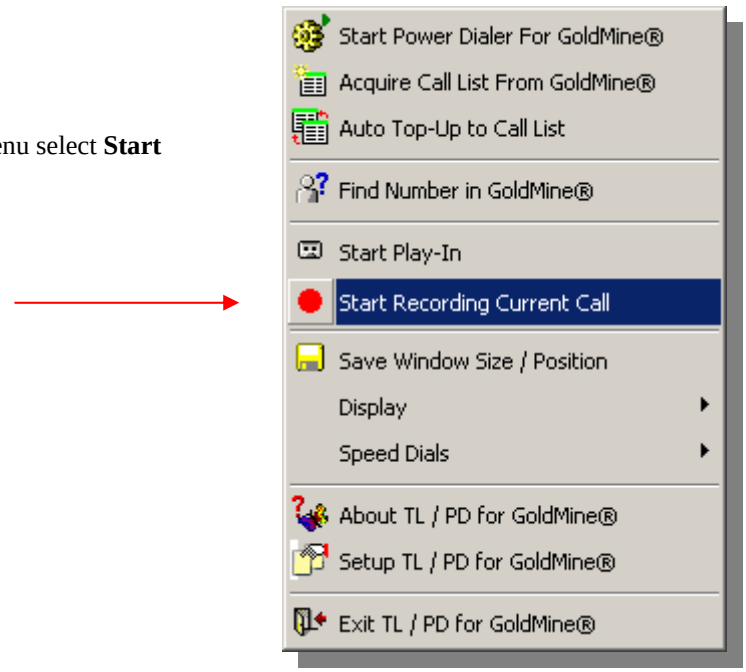
Call Recorder for GoldMine® is an optional feature and is not activated in the default Tapi Link installation unless properly licensed. It also requires a small hardware unit – but requires no additional software. Contact Papillon Technology for further details.

When Call Recorder for GoldMine® is activated, telephone calls can be recorded either manually or automatically. This section deals with manual recording.
Refer to the section entitled 'Call Recorder – configuration' for details of automatic recording.

To record a telephone conversation manually you may either:

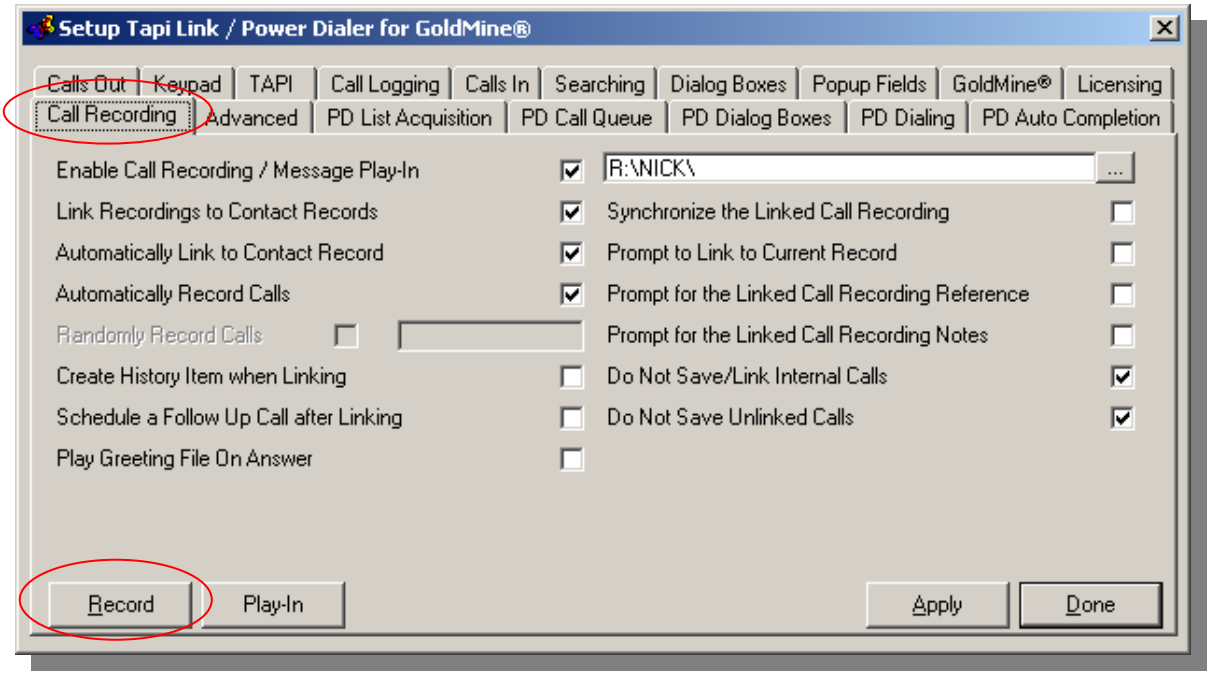
Right-click on the Tapi Link icon in the system tray:

From the resulting context-menu select **Start Recording Current Call**:

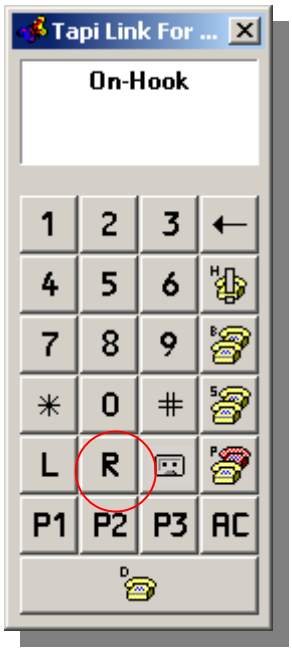


continued . . .

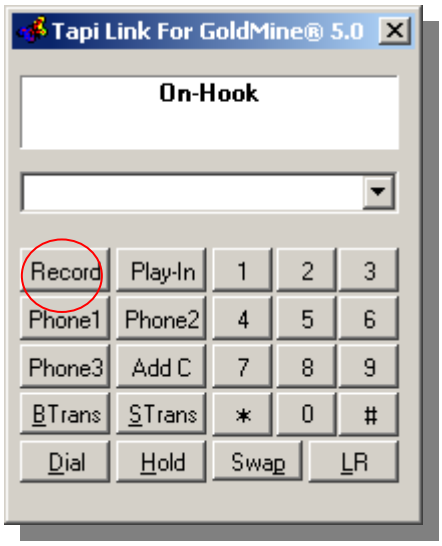
Or, alternatively, click on the **Record** button on the **Call Recording** tab:



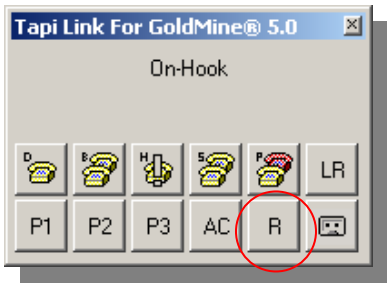
Or, click on the **R** or **Record** button on any one of the available **Keypads** -



Large Keypad



Text Keypad

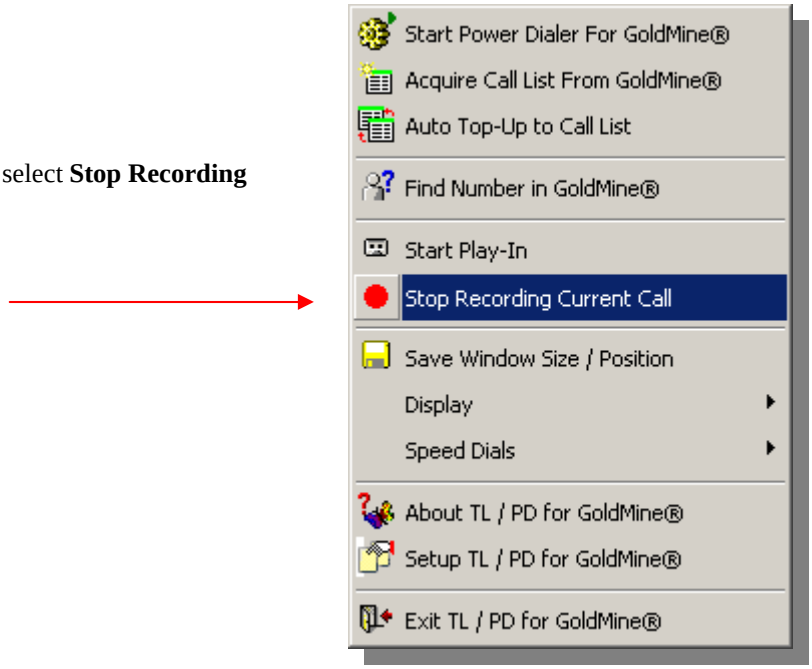


Toolbar Keypad

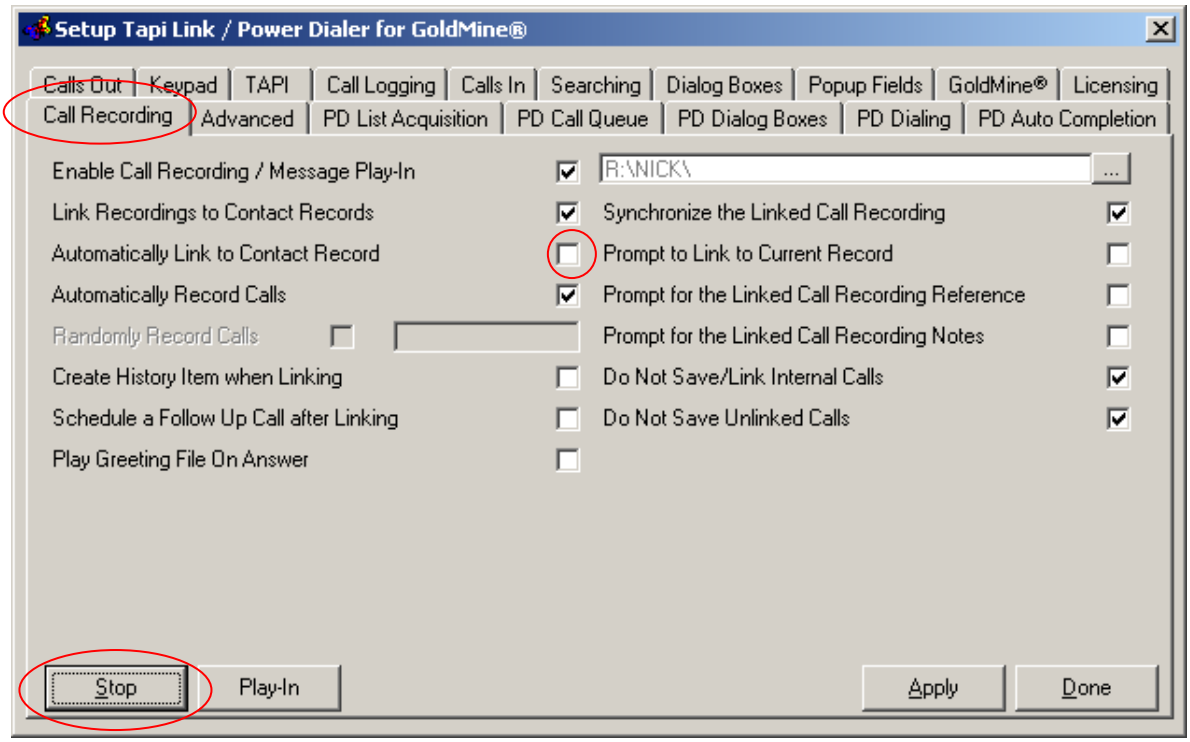
continued . . .

To **STOP** the **Call Recording** right-click on the Tapi Link icon in the system tray:

From the context-menu select **Stop Recording Current Call**:

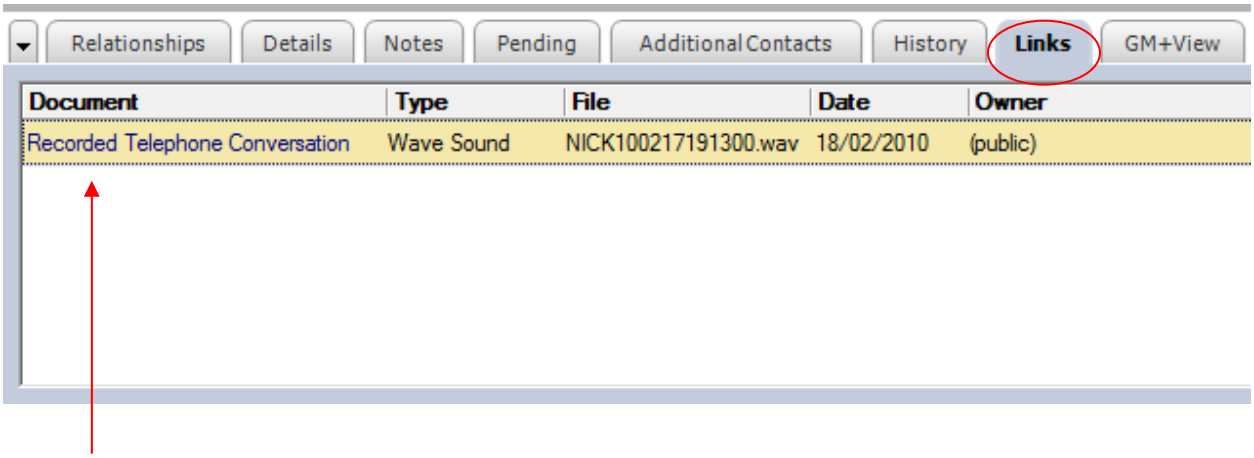


Alternatively, click on the **Stop** button on the **Call Recording** tab:



At this point, if you have NOT checked the **Automatically Link to Contact Record** box, you will be prompted to decide whether you wish to link the Call Recording to the current contact record:

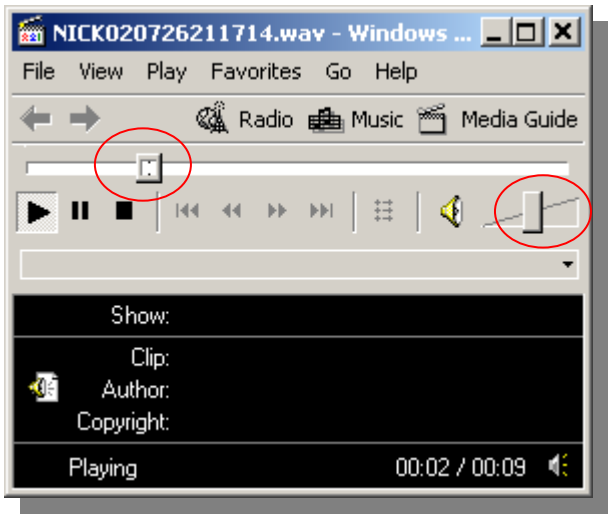
If you click the **Yes** button the **Links** tab of *the currently active* GoldMine® contact record will be updated with a link to the recorded call. (This is the default entry denoting a recorded call – but you may choose different text.)
:



Double-click on the link if you wish to replay the Call Recording. This will summon your default media player and replay the recording -

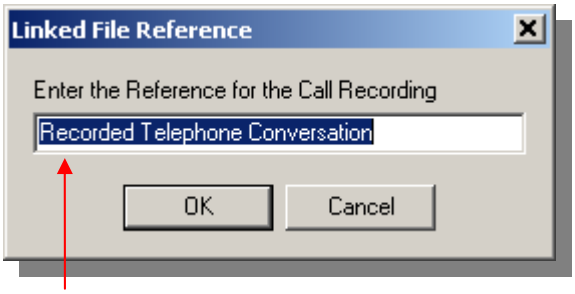
You may **Stop and Pause** the recording with the controls indicated
.

You may also **Replay** the recording from any particular point, and alter the playback **Volume** by adjusting the slider controls indicated



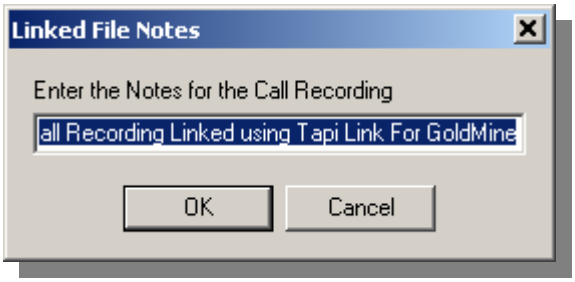
(Note that the appearance of your own particular media player will probably vary significantly from the example shown above. This is dependent upon your operating system, your media player version, and the individual visual configuration of the player application per user.)

In addition, if you have opted for **Prompt for Linked Call Recording Reference** on the **Call Recording** tab - the **Linked File Reference** window will also appear:



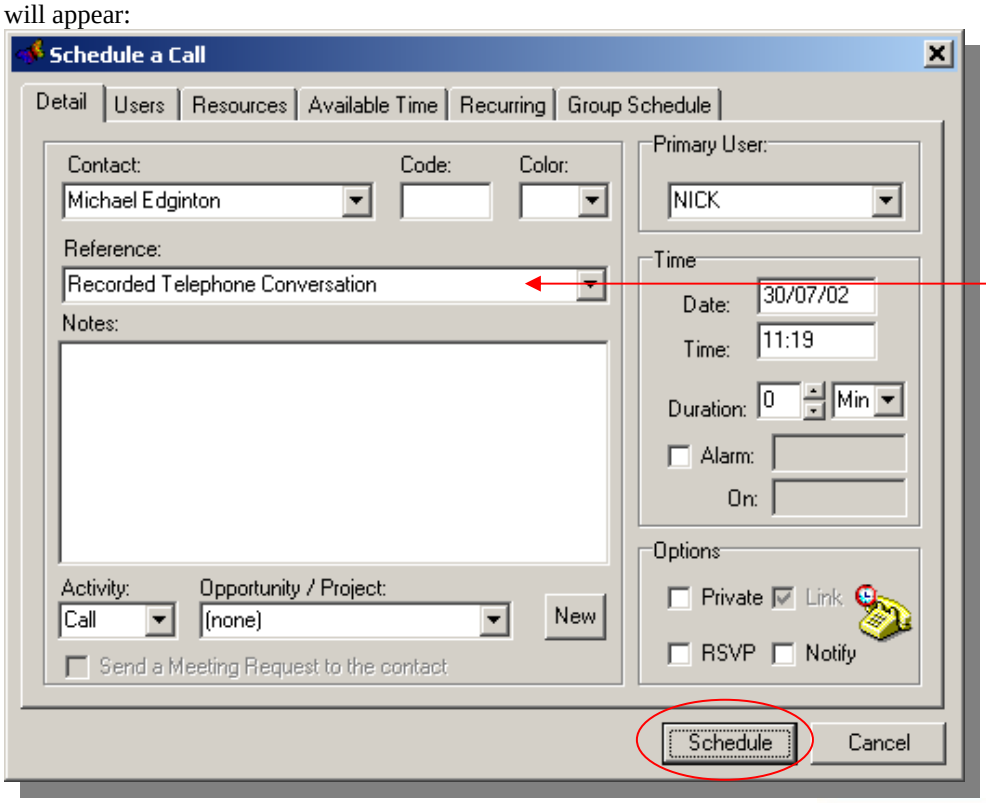
The above example shows the default entry - which would be used if you were to click **OK** at this point. However, you may now overtype the default entry with any reference of your choice.
Click on **OK** to proceed.

If you have also opted for **Prompt for Linked Call Recording Notes**, the **Linked File Notes** window will appear:



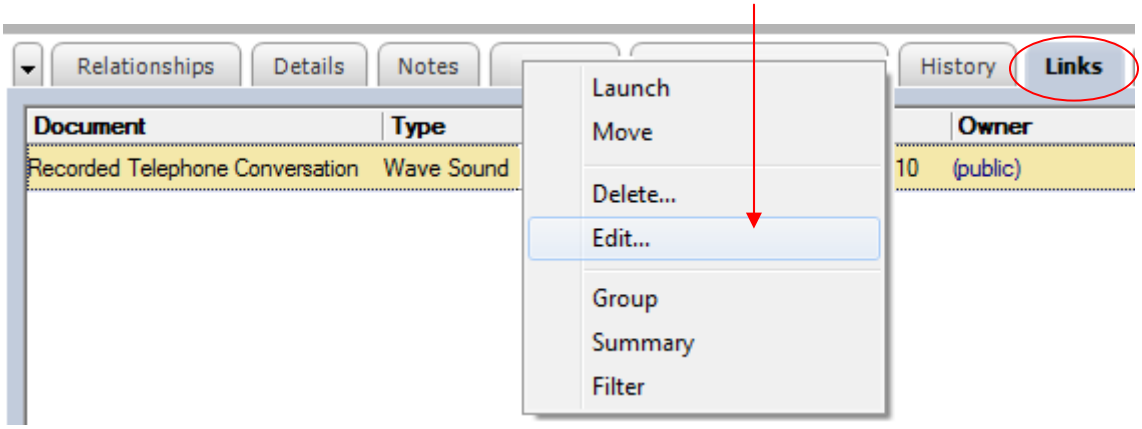
These are the *default notes* that would be entered in GoldMine® when you have NOT chosen to be prompted to enter your own.
If you wish, overwrite the existing entry with you own text, and then click **OK.**

If you have also ticked the **Schedule a Follow Up Call after Linking** checkbox, the **Schedule a Call** dialog box will appear:

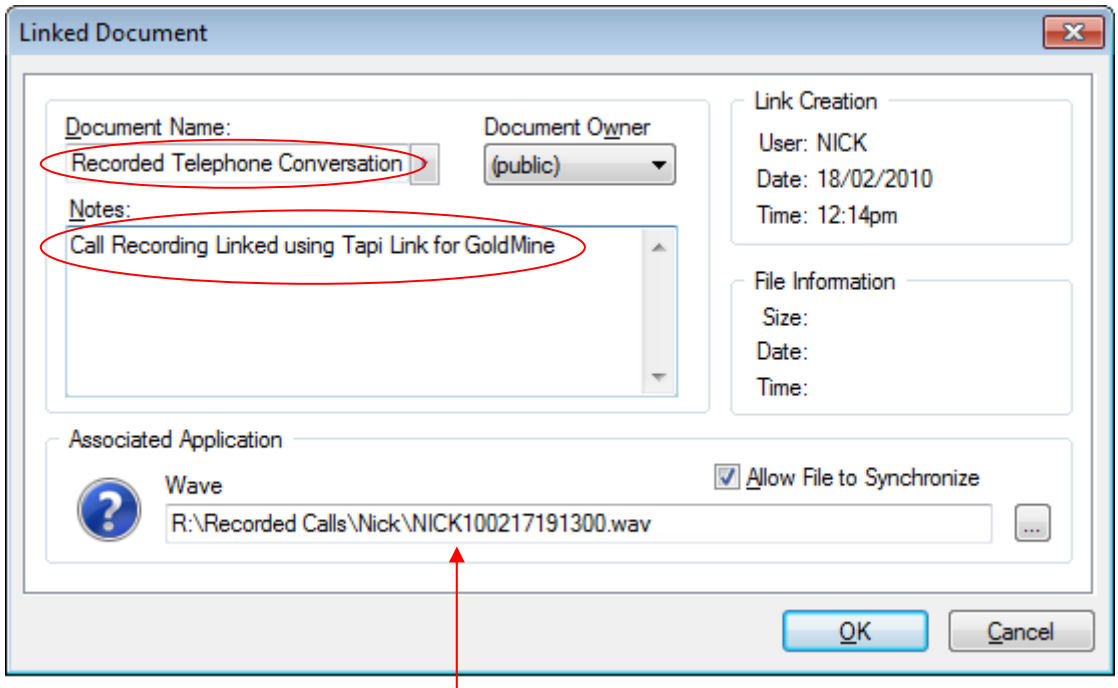


This field shows the default **Reference** entry which can be modified as required.
Complete any other details as appropriate, then click on the **Schedule** button to finish.

Notes and descriptions of recorded calls may be altered or embellished subsequently by right-clicking on the appropriate Recorded Call entry on the GoldMine® **Links** tab and selecting **Edit**:



Within the resulting dialog box you may alter the default description for the **Call Recording** or add any further notes as required:

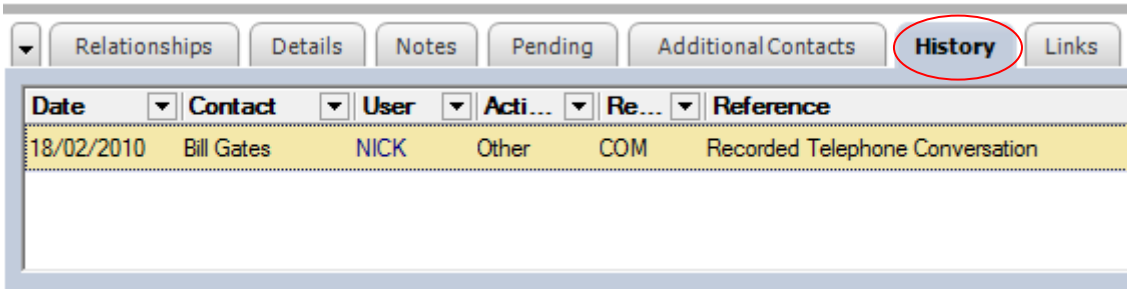


Each recorded call is automatically allocated a unique file name.

Having completed any changes, click on **OK** to dismiss the dialog box.

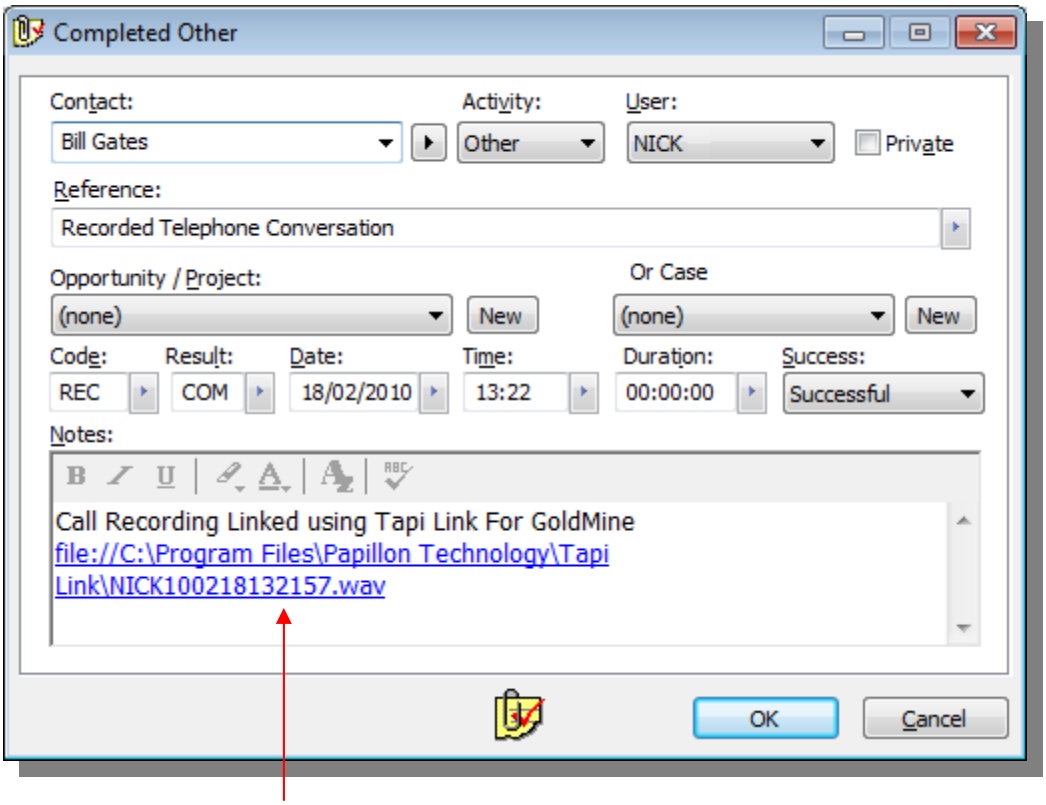
continued . . .

If you have ticked the **Create History Item when Linking** checkbox, an entry recording the event will also appear on the relevant GoldMine® **History** tab:



This option is customarily used when you require a complete history of events and/or a reminder in History that additional information is also avalable elsewhere on the Links tab.

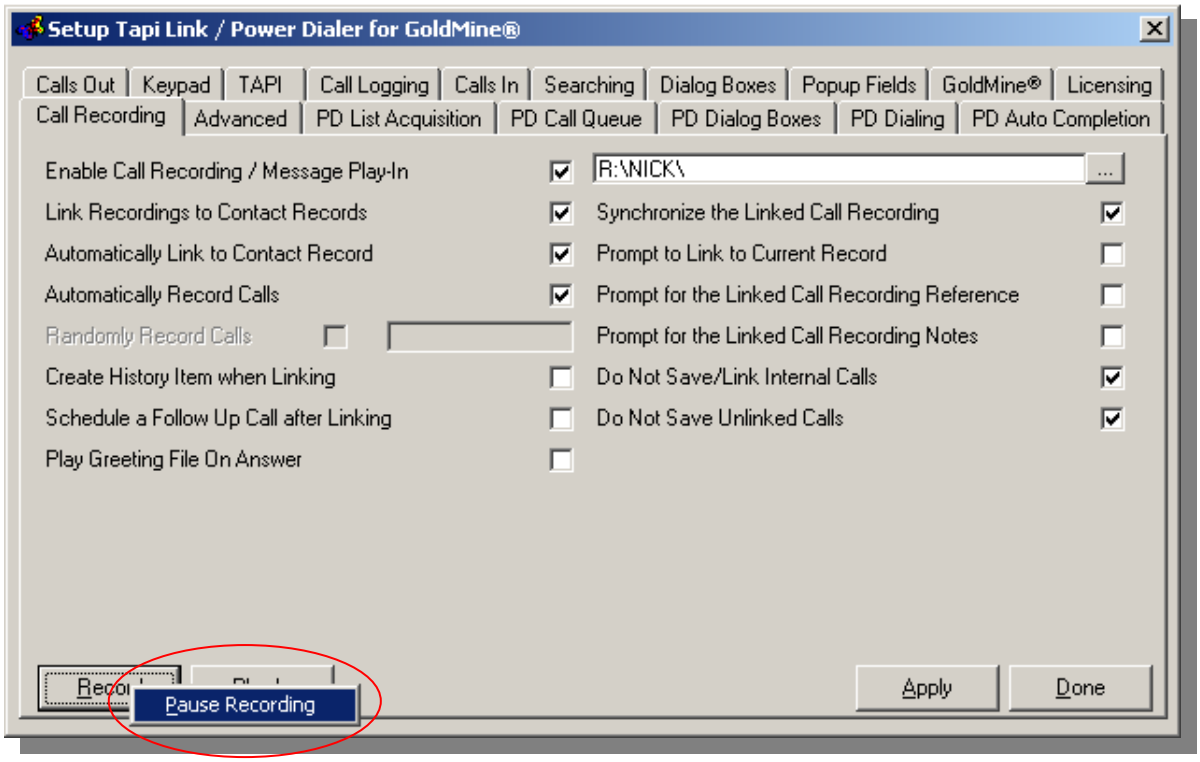
Double-clicking on the History item will display further details relating to the call.
This also includes an additional hyperlink which can be used to replay the recorded telephone conversation –



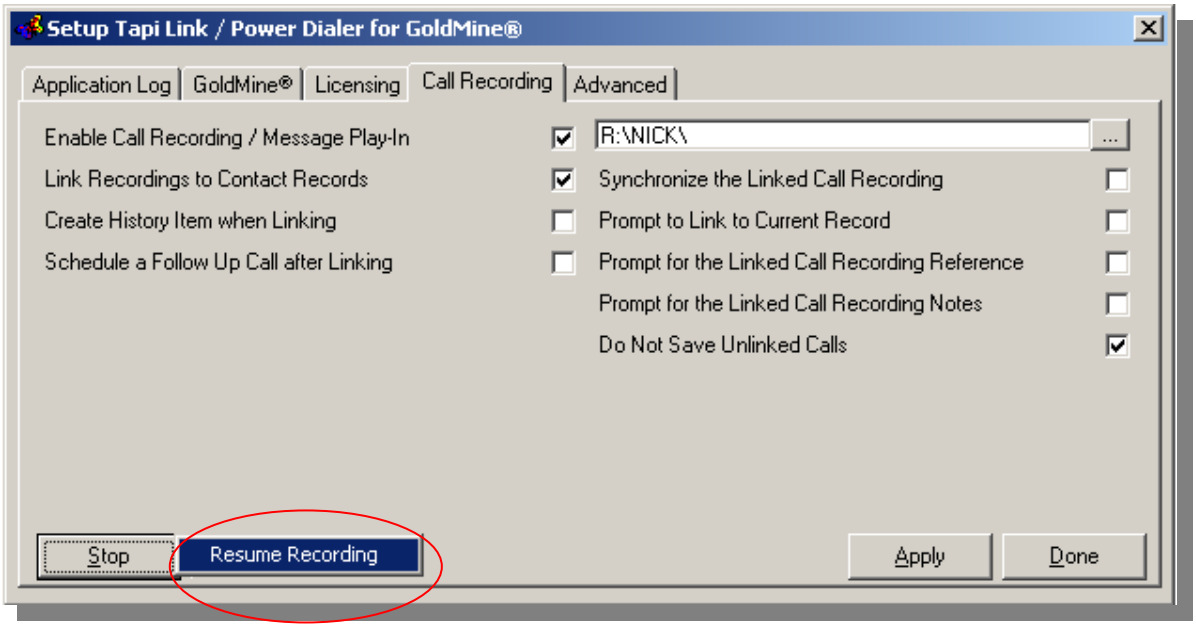
Click to replay the relevant conversation.

Pausing & Resuming a recording

To momentarily pause a recording –



Right-click on the **Record** button and select **Pause Recording** and to resume recording again right-click and select **Resume Recording**.



continued . . .

Similar options are available from within the Keypad interface –

Use the **R** button to start and stop recording, and the right click options to pause and resume recording.

The **R** button will appear static while recording is paused and will resume flashing when recording is resumed.

The Play-In feature

The **Play-In** feature enables users to maintain a completely 'uniform delivery' of announcements or salutations by –

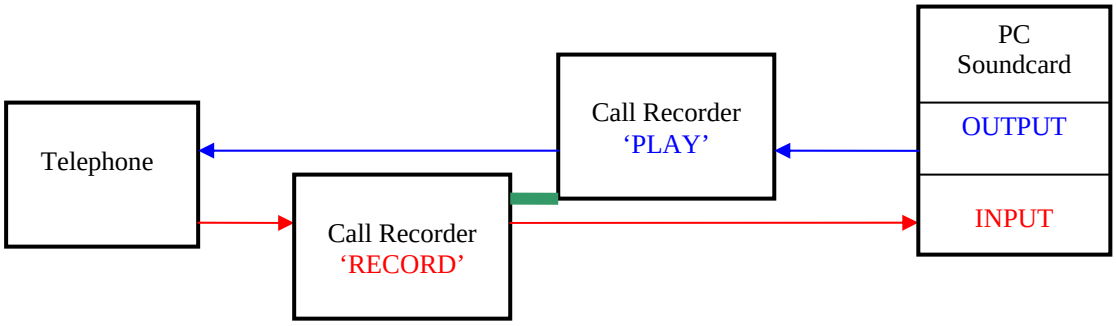
- transmitting pre-recorded announcements – for the purposes of leaving voicemail or answering machine messages. (For example you might wish to avoid the arduous task of verbally repeating many similar voicemail messages.)
- transmitting an automated response to incoming calls. (For example, you may wish your standard telephone greeting to sound as 'fresh' at the end of the day as it was at the beginning by simply playing your salutation 'template' immediately before actually speaking.)

The **Play-In** functionality requires:
A.
A licensed copy of Call Recorder for GoldMine® with appropriate hardware.
B.
A *second* call recorder hardware unit.*
C.
Your own pre-recorded announcement file(s) in WAV format.

*
EXCEPT in the following circumstances -
If using the Hi-Phone Desktop – in which case no additional hardware is required. The Hi-Phone Desktop provides the dual functionality of both Call Recording and the Play-In feature in the one single unit.
However, existing users of Call Recorder for GoldMine® who require a supplementary hardware unit should contact their GoldMine® Reseller or Papillon Technology directly by telephone on 01992 560487 [+44 1992 560487] from the US on +1 (614) 559-2270 by fax: 01992 560489 [+44 1992 560489] or by email to sales@papillontechnology.com.

OR
If you only wish to use the Play-In feature exclusively, i.e. without the Call Recording element.
In this event, simply switch the hardware device from the 'Record' setting to the Playback' setting and also remove the audio cable from the soundcard *input* and replace it into the *output*.

The Call Recording process receives the output from the telephone to the PC or network storage location. On the other hand, the **Play-In** feature works in the opposite direction and is *sending* a pre-recorded message from the PC to the telephone. Therefore, if you wish to use both features concurrently - one hardware unit is used for recording purposes, and the second for playback of the announcement.



The two devices are 'daisy-chained' together. One is set to 'Record' and sends the audio output to the PC (microphone input); the second device is set to 'Play' and sends the audio output from the PC (audio output) to the telephone.

For **outbound** calls - you may deploy up to 5 different pre-recorded announcements.

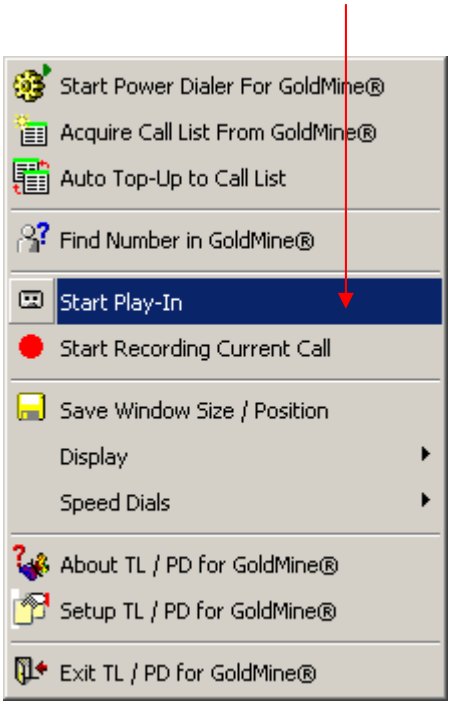
These files must be recorded in advance with your desired message and saved in the Tapi Link installation directory (normally C:\Program Files\Papillon Technology\Tapi Link).

The respective filenames for these announcements are as follows:

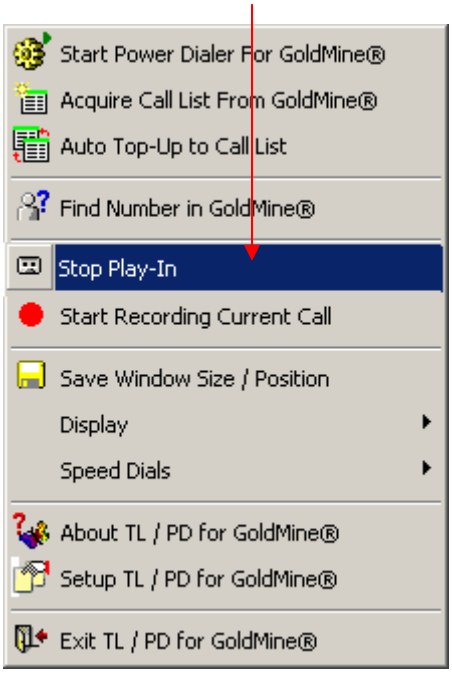
Playback.wav
Playback1.wav
Playback2.wav
Playback3.wav
Playback4.wav

To transmit your announcement right-click on the Tapi Link the icon in the system tray:

From the context-menu select **Start Play-In**

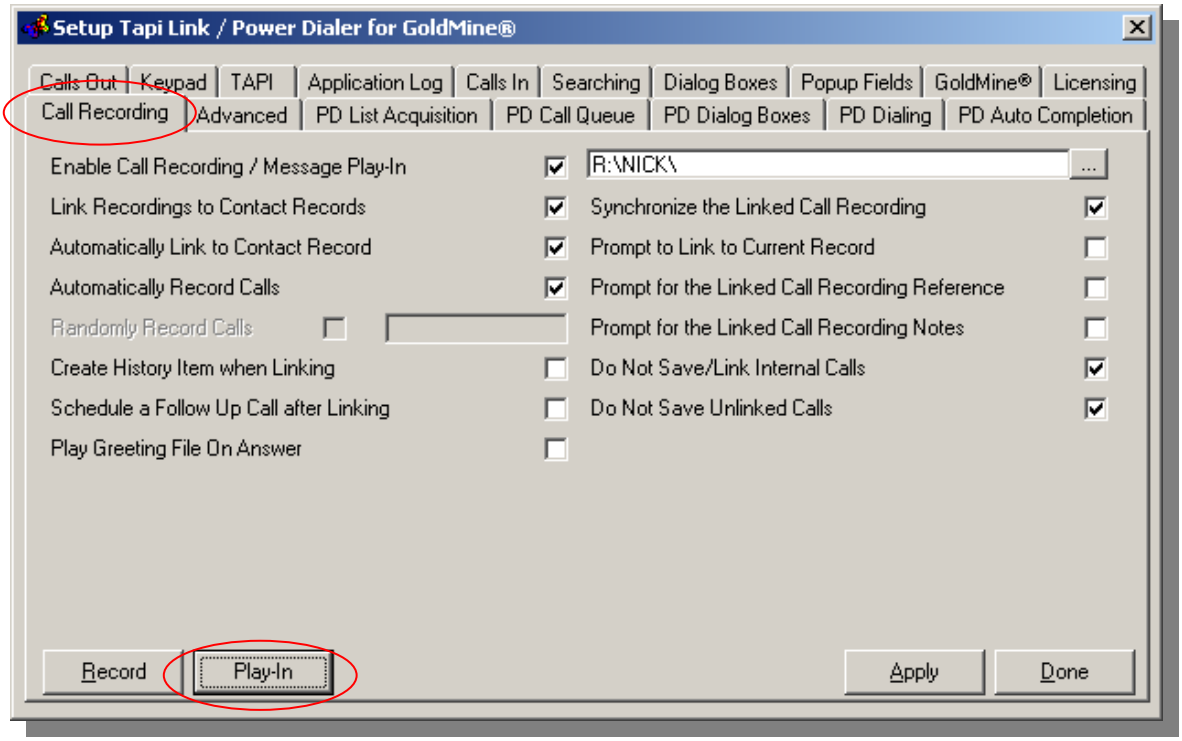


You can terminate the processes at any time during playback by selecting **Stop Play-In** from the context menu:

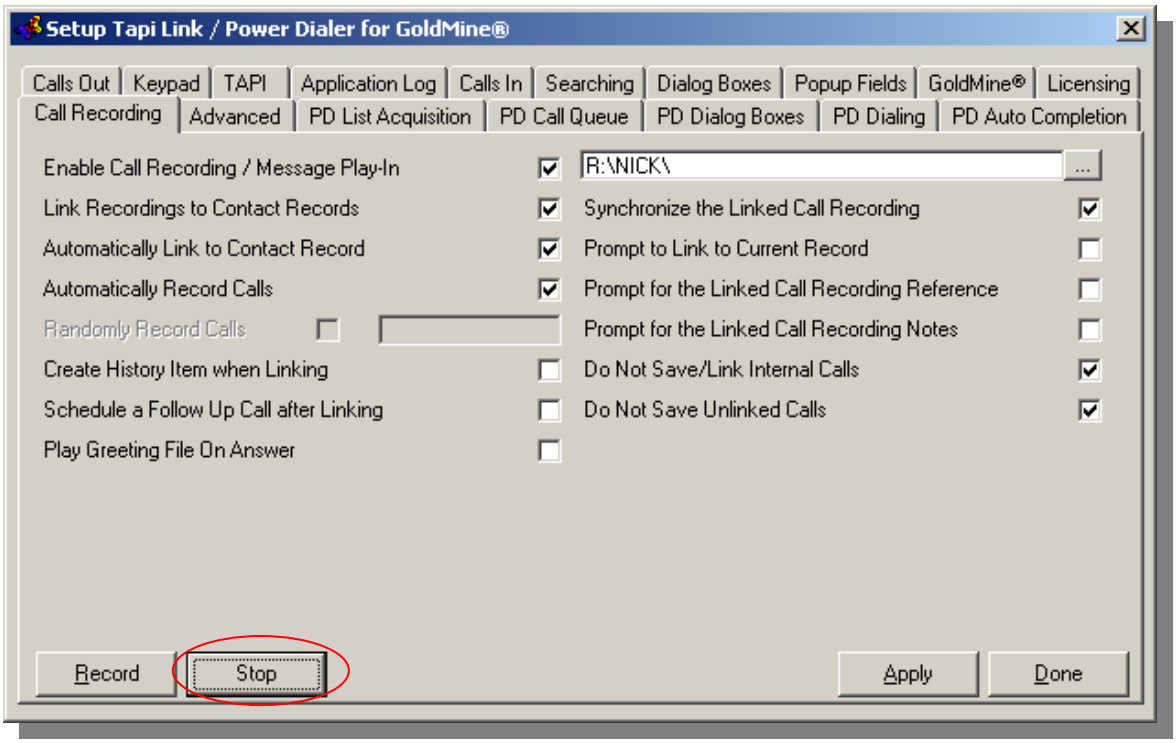


continued . . .

Alternatively, while still experimenting with, or configuring your requirements, you may also access the feature via the **Call Recording** tab:



Similarly, the **Play-In** button starts the process and toggles to read **Stop** whilst it is in progress. You may click on the **Stop** button at any time to halt the process. (This is useful if, for example, the call recipient answers the telephone whilst **Play-In** is in progress.)

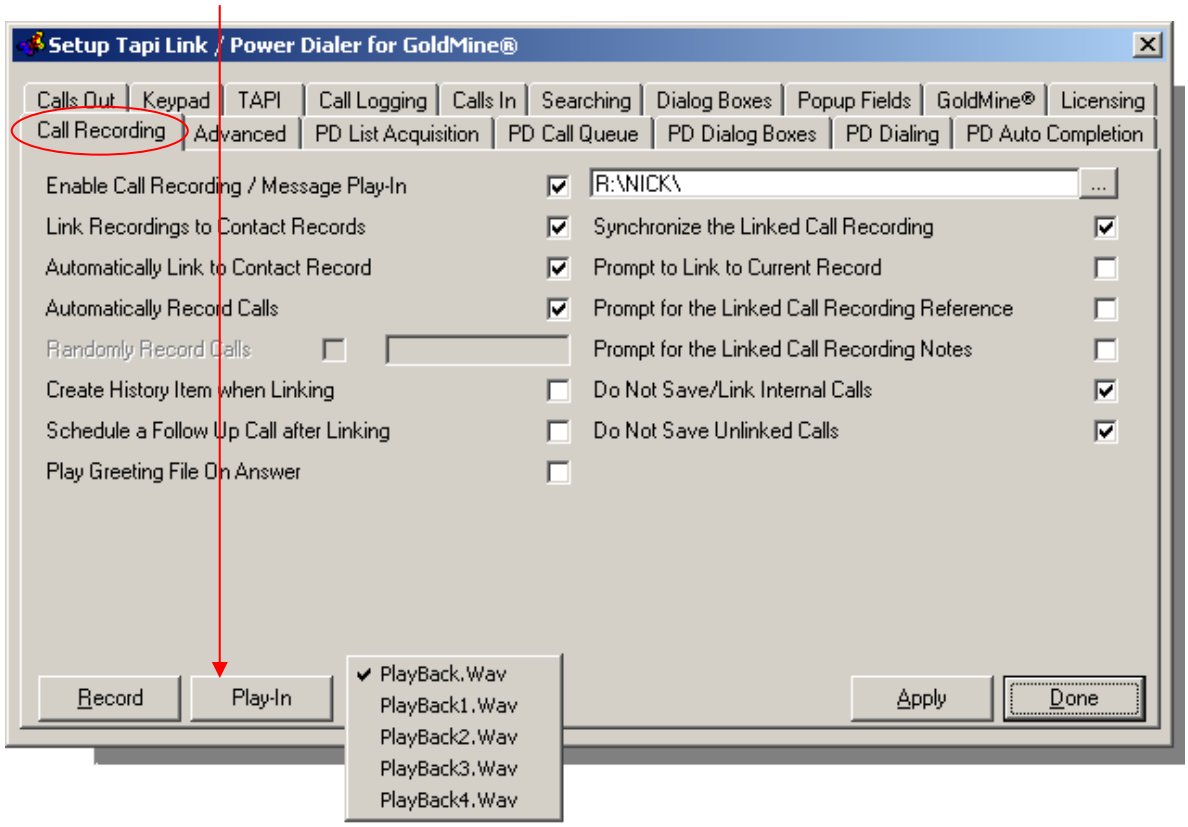


Selecting an Announcement / Message

To choose from amongst your selection of pre-recorded announcements proceed as follows:

Select the **Call Recording** tab.

Right-click on the **Play-In** button:



Select your chosen announcement from the five available choices.

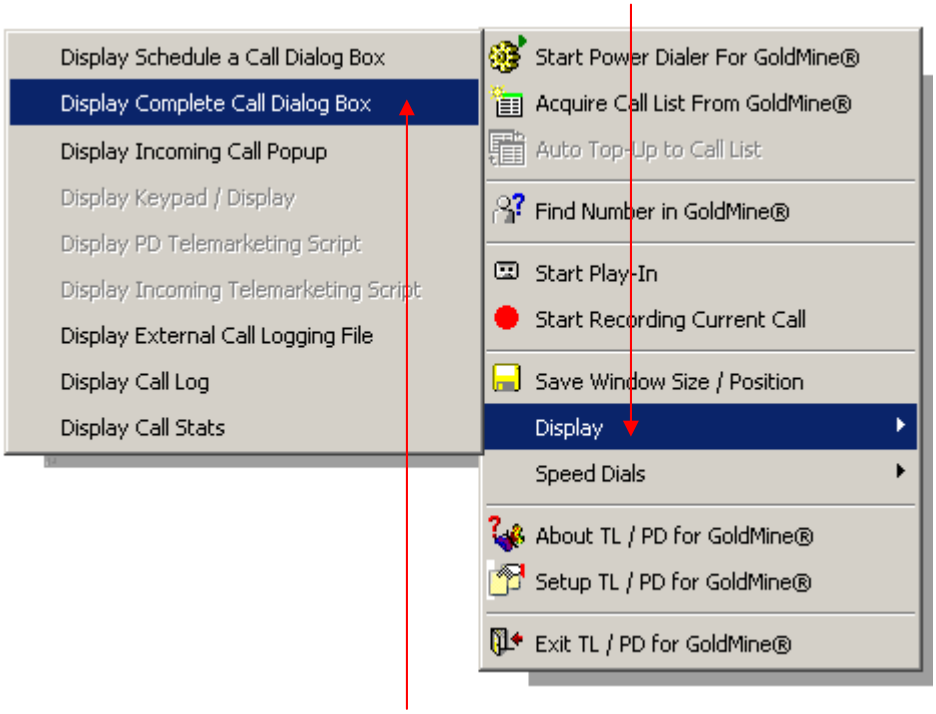
(The selected announcement will remain as the default, for that session, until an alternative is chosen.)

If you are using Tapi Link in conjunction with Power Dialer for GoldMine® it is generally more convenient to switch amongst the announcement options from within the Call Completion Dialog Box. (Assuming you have chosen to present one of these during an outbound call.)

You can choose the initial setting as follows:

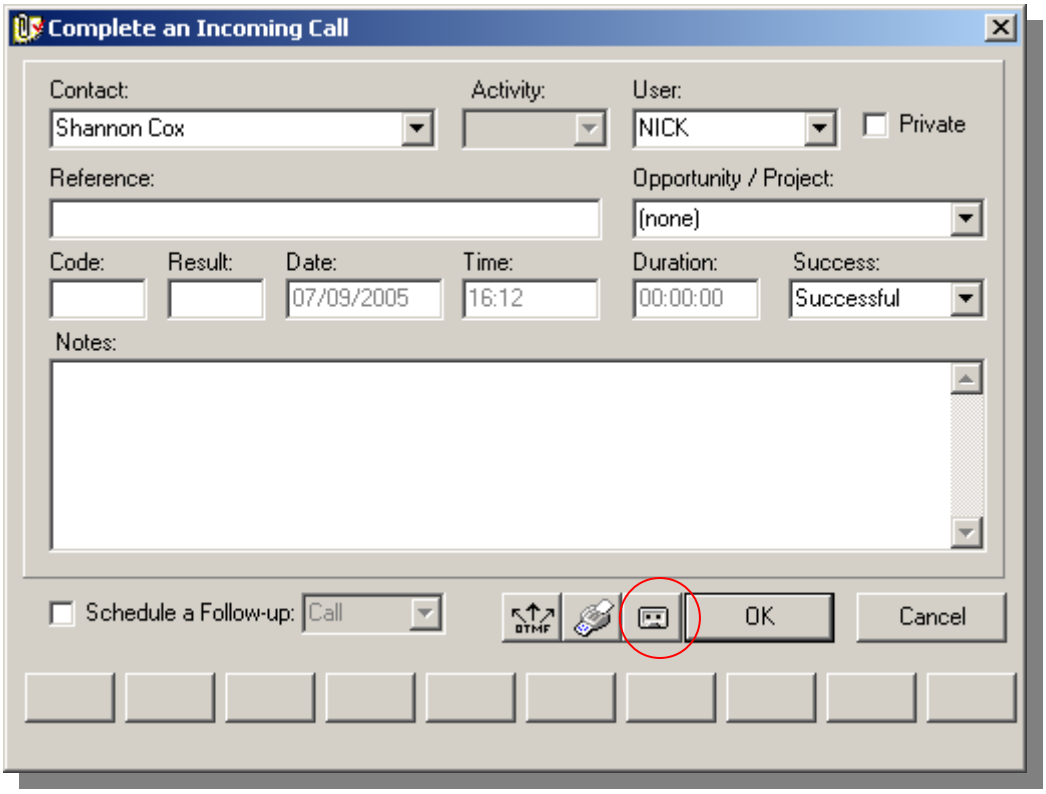
Right-click on the Tapi Link the icon in the system tray:

From the context menu select **Display**



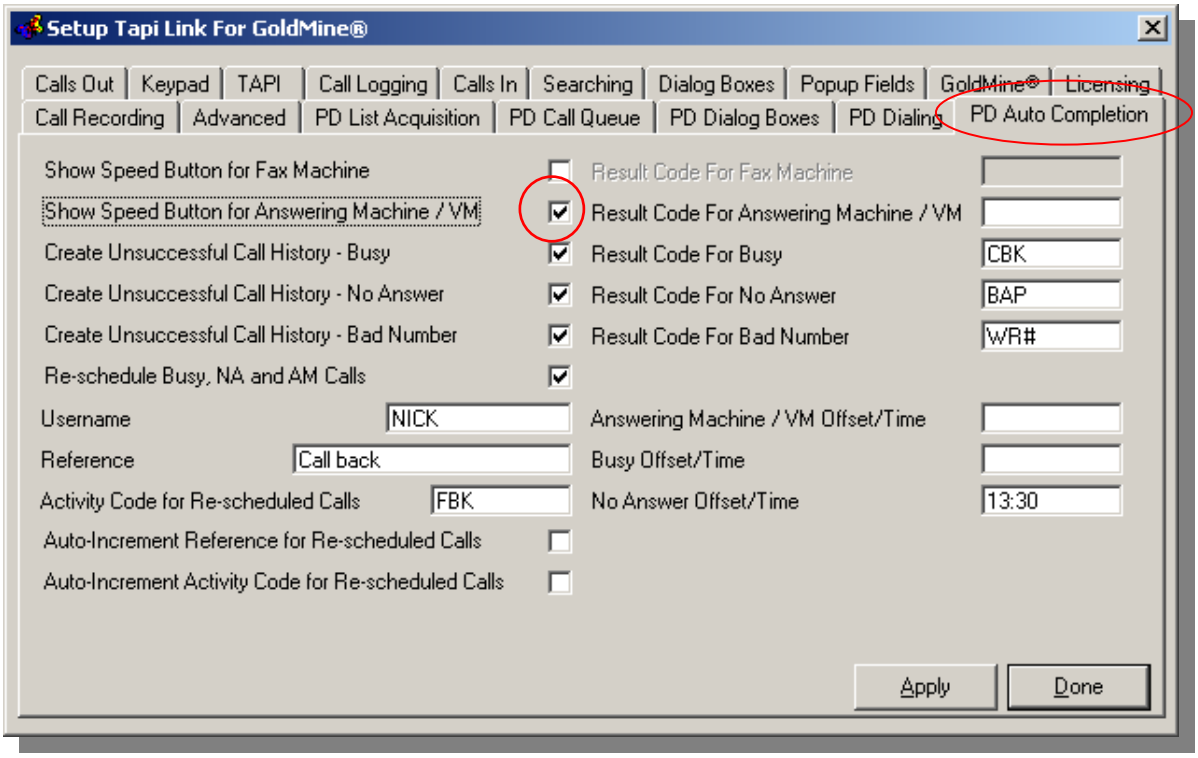
Then, from the sub-menu select **Display Complete Call Dialog Box**

This will summon an example of the Call Completion box (Although the example shown is entitled 'Incoming Call' this procedure applies to outbound calls. The dialog box is the same regardless of the call direction.)

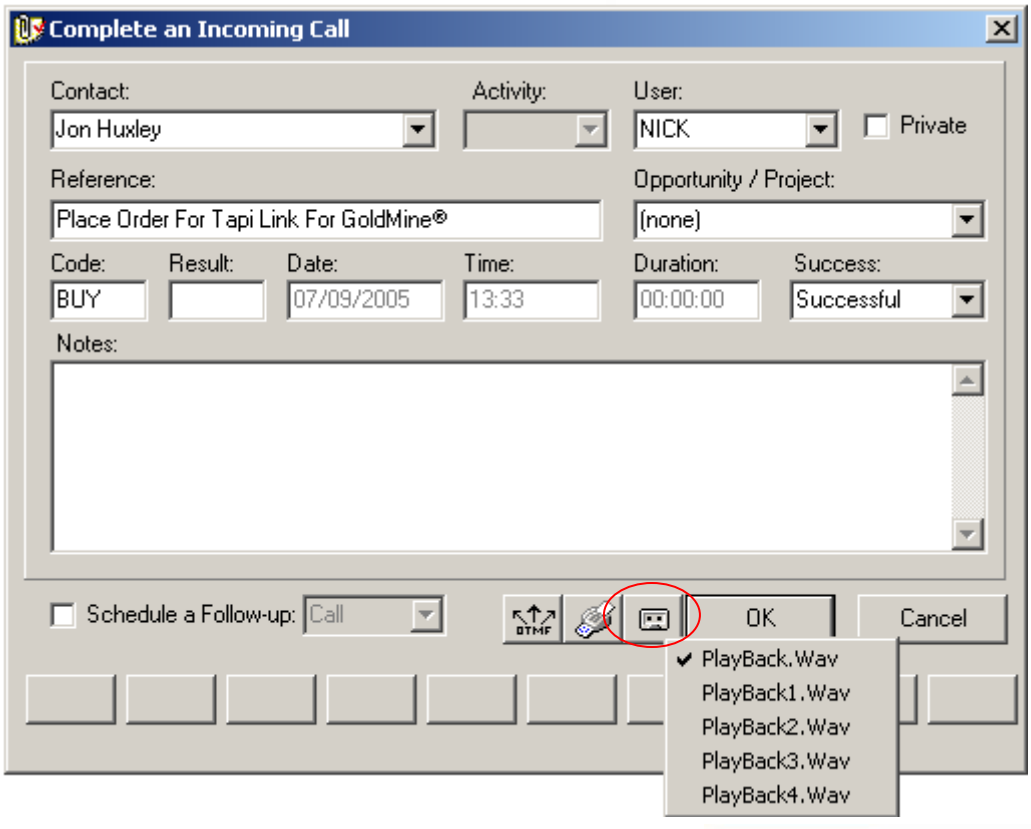


This dialog box depicts the optional Speed Button which facilitates leaving a message with Voicemail or Answering Machines.

In the current build of Tapi Link it is necessary to check the following option on the **PD Auto Completion** tab if you wish to enable the Speed Button for Voicemail/Answering Machine:



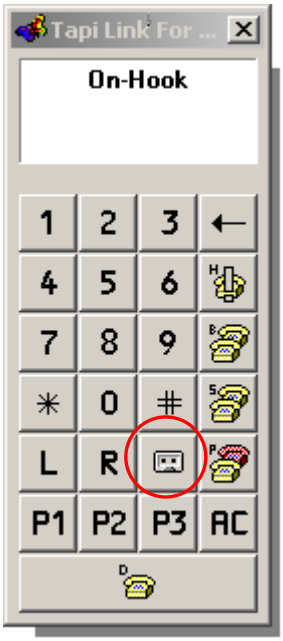
Returning to the dialog box, right-click on the Speed Button (the cassette icon) and select your chosen message from amongst the five possible options. Clicking on this button will transmit the message, and close the dialog box: (Naturally, the call must continue while the message is being transmitted.)



The same ability to transmit the message (along with the choice of message options) is available from the Keypad.

Right-click on the **Play-In** button

Select your chosen message from the five available choices.



Click on the Speed Button to transmit the outbound message.

Automation of announcements / salutations

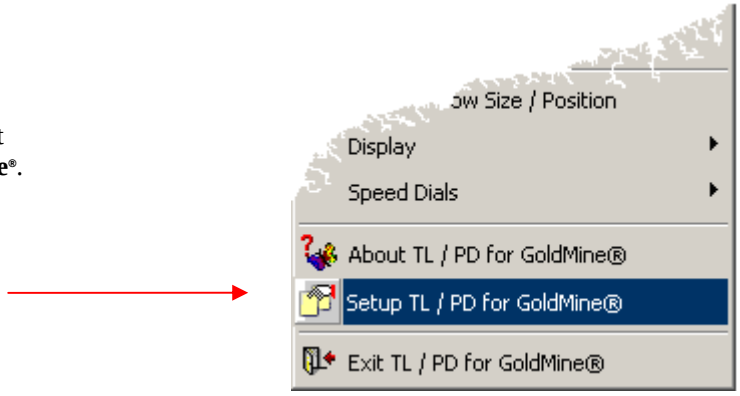
If using the feature for salutation purposes when accepting an inbound call, you can have your chosen announcement/salutation play automatically each time you answer a call. To enable this feature, proceed as follows:

1.
Record your announcement and save it as a file named **greeting.wav**

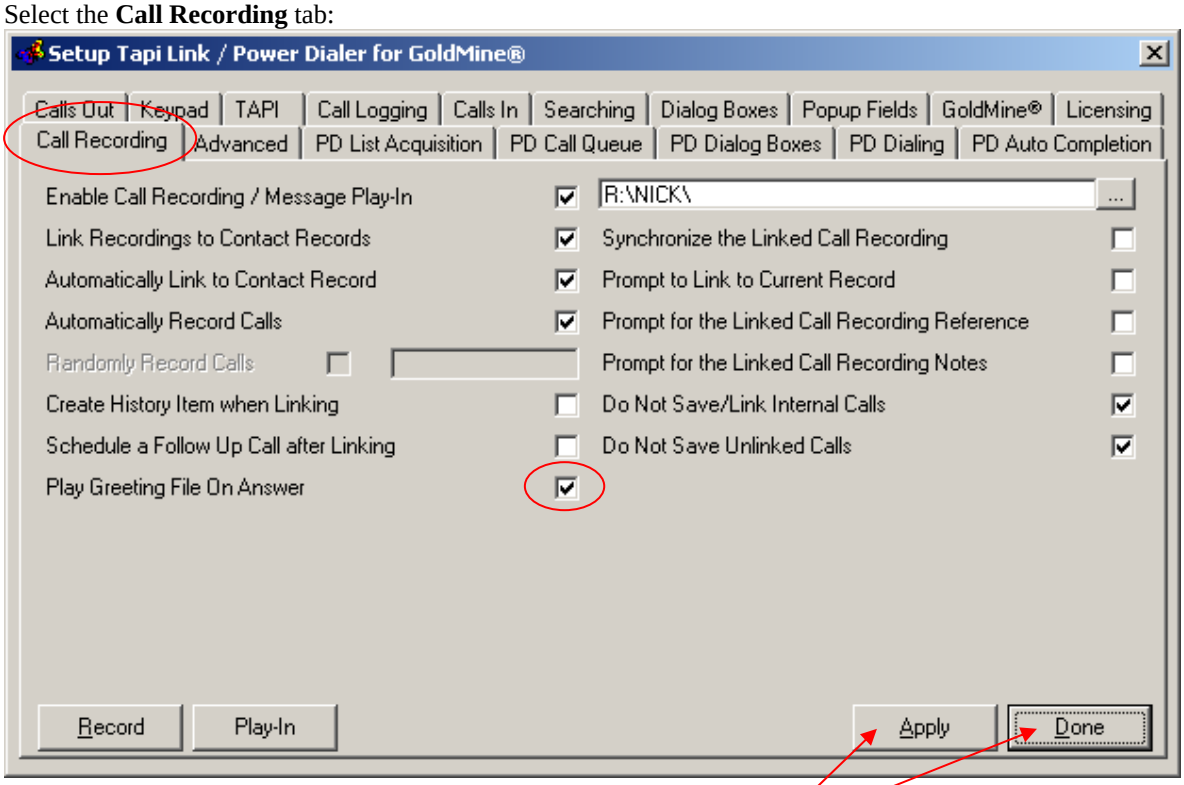
2.
Copy or move the file into the Tapi Link installation directory. (Currently, the default location of the installation directory is C:\Program Files\Papillon Technology\Tapi Link.)

Right-click on the Tapi Link the icon in the system tray:

From the context menu select
Setup TL /PD for GoldMine®.



Select the **Call Recording** tab:



Check the option marked **Play Greeting File On Answer**.
Then click on the **Apply** button, and then the **Done** button to dismiss the dialog box.
Your announcement will be played automatically when an incoming call is answered.

The Recording/Play-In feature with the Hi-Phone Desktop

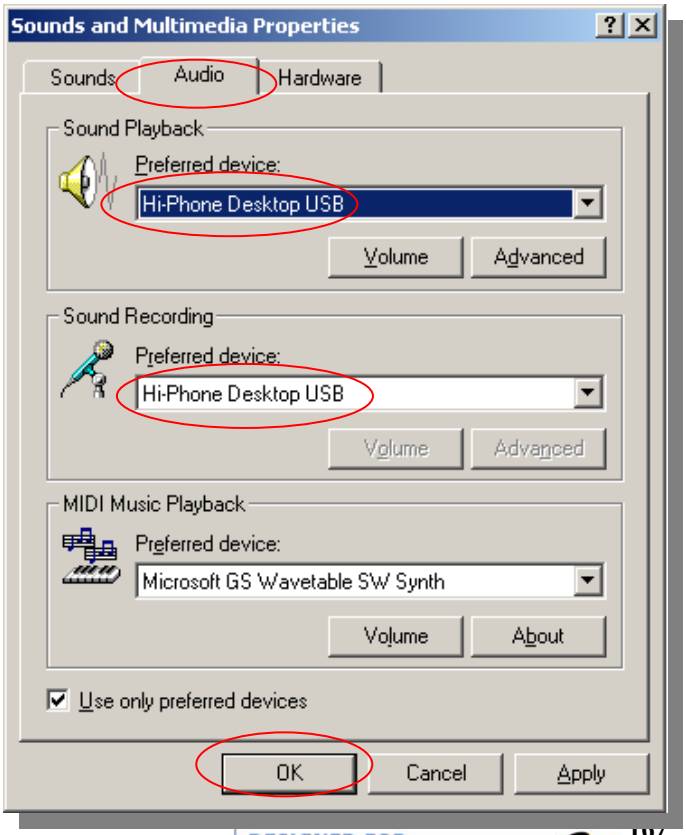
(This section is only of relevance to users who are using Tapi Link/Call Recorder for GoldMine® in conjunction with the Hi-Phone Desktop telephony device.)
In order to use the Hi-Phone Desktop for playback and recording purposes it must be designated as the chosen device within the windows operating system itself. To do so, proceed as follows -
From the Programs menu select **Start** > **Settings** > **Control Panel**:

Select **Sounds and Multimedia** or **Sounds & Audio Devices** (depending on your operating system).

Select the **Audio** tab:

In the drop-down lists, select the **Hi-Phone Desktop USB** device.

Click on the **OK** button.



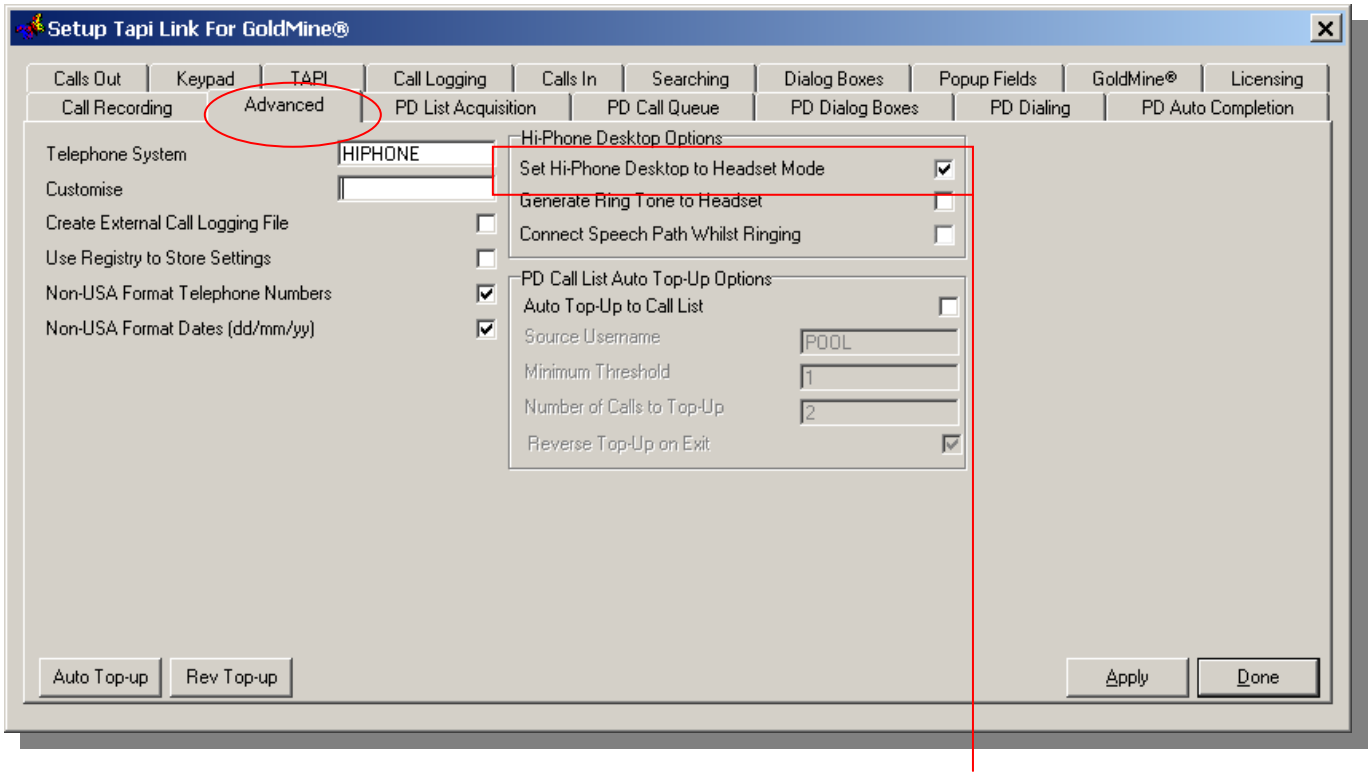
Headset Mode with the Hi-Phone Desktop

(This section is only of relevance to users who are using Tapi Link in conjunction with the Hi-Phone Desktop device.)

If you are using the Hi-Phone Desktop device **AND** a telephone headset (as opposed to a telephone handset standalone) in conjunction with any of the following:

- Tapi Link for GoldMine®
- Call Recorder for GoldMine®
- Power Dialer for GoldMine®

it will be necessary to configure a setting on the **Advanced** tab as follows:



Check the **Set Hi-Phone Desktop to Headset Mode** box.

Click the **Apply** button and then the **Done** button.

Then **EXIT** Tapi Link.

Switch **OFF** the power to the Hi-Phone Desktop for a few seconds.
This should be done at the mains supply switch, or by simply removing the power supply mains plug.
Do not disconnect the power cable from the Hi-Phone unit itself.
Switch the power supply to the Hi-Phone Desktop back **ON** again.

RESTART Tapi Link.

FAQs (Frequently Asked Questions)

General Issues
(SQL and dBase systems)

Certain options are 'greyed-out' and unavailable in the **Display** context-menu. (e.g. Telemarketing Scripts, Keypad.) or elsewhere in the Tapi Link setup tabs.
These items need to be enabled from the relevant **Setup** tab e.g. **PD Dialog Boxes** or **Keypad** tabs before they are accessible. In the main, Tapi Link options are context-sensitive and interdependent. So unless a feature has been specifically enabled, then the corresponding configuration choices are not needed and are therefore inaccessible.

How does Tapi Link deal with multiple incoming calls?
When a second or third call comes in on a line where there is already a conversation taking place this is handled by the telephone system. If you have 'call waiting' enabled, and a second call comes in while you are on the phone, then Tapi Link will screen pop the second incoming call. (If 'call waiting' is available, it may need to be configured within the properties of the respective telephone systems' TAPI Driver.)

Why do the Call Logging details show a zero duration for some of the calls?
Your own individual Tapi Link call log is concerned with your own calls and will show zero duration unless you personally take the call.

Tapi Link was operating perfectly until the computer was rebooted (or shut down and restarted) whereupon it failed to function.
Windows® may have failed to recognize the correct telephony device driver after restarting/rebooting.
Navigate to the **TAPI** tab and observe which driver is highlighted. If the appropriate driver for your particular telephone system is *not highlighted* – highlight it. Then click on the **Apply** and then the **Done** button.

I need a greater number of options to modify telephone number prefixes and suffixes than the Match and Replace options currently available on the Calls Out tab.
Contact Technical Support at Papillon Technology.

What points should be borne in mind if using a GoldMine® Predial.ini file?
If you prefer to use the Predial.ini file then make sure that **Format P1, P2 , P3 and AC Calls Using GoldMine®** on the **Keypad** tab is checked. Copy the Predial.ini file to your GoldMine® directory. Exit GoldMine® and restart it so that it will read and use the file instructions. Ensure that **Dial Numbers As Entered** is checked via GoldMine® | Edit | Preferences | Modem (or Telephony) tab. (If you need to alter this - exit and restart GoldMine® once again.)
However, if possible it is recommended to use Microsoft TAPI instead. (i.e. Via Control Panel | Phone and Modem options | Area Code Rules | New.) Here you will be able to specify multiple area codes, so that they are included when dialing. If you use this option you will need to check the **Translate using Tapi** option on the **Calls Out** tab of Tapi Link Setup.

The **Find Number** feature does not function.
Screen-popping has not been enabled (via the **Calls In** tab).

The **Complete Existing Scheduled Call if Available** option on the **Calls Out** tab does not appear to function.
The **GoldMine® User Name** specified on the **GoldMine®** tab may not be the same as the user currently logged in to GoldMine®. (Check that the user name on the status bar of GoldMine® matches that on the Tapi Link **GoldMine®** tab.) Also check that there actually are pending calls scheduled to the currently logged on GoldMine® user.

Will Tapi Link function with iGoldMine®?
Yes, but this will require direct consultation with Papillon Technology. Contact us for further details.

Buttons such as the **Apply** and **Done** are not visible on the interface.
Reset the font size from 120 to Standard 96 dpi then reboot the machine.

My particular question is not dealt with in these FAQs.
Refer firstly to the 'Troubleshooting & Reconfiguration' section in the guide and then if necessary the section entitled 'Contacting Technical Support'.

General Issues
(dBase systems only)

My database changes fairly infrequently so I would like to refresh the dBase Fast Lookup tables at much greater intervals.
Firstly you will need to have the setting **Refresh dB at Startup** checked and ensure that this is functioning satisfactorily. To enable this feature you will need to manually edit the GMTAPI5.INI file which is located in the Tapi Link installation directory.
Go to the section entitled [SEARCH] and add the line
REFRESHDAYS=x
where x is the number of days between refreshes. Save and close the file.
The next time you start Tapi Link it will refresh the dB at startup as normal, it will then automatically post a date into the gmtapi5.ini file x days into the future. When you restart Tapi Link it will not refresh at startup until this date is reached. When the date is reached it will refresh the table, and once this is complete it will change the date to be x days from that date and so on.

Should I use a local dBase Fast Lookup table, or a remote shared version?
The advantage of a locally held table is that it is not subject to the prevailing speed and resources of the network. Also, the table can be refreshed at will and independently of all other users. However, unless the refresh interval is set to the same frequency for all users there is a likelihood that some user's tables may become 'out of sync' i.e. certain user's tables may not be quite as up-to-date as those of others.
On the hand, a common table, shared across the network will be used by everyone and therefore everyone will have access to identical data. However, in this case any network deficiencies as mentioned above may impact upon screen-popping responsiveness for all users. Also, all users will be subject to the shared tables being adequately maintained.

Can the refreshing of the dBase Fast Lookup tables be achieved in the evening as a batch/scheduled function?
It is commonplace to locate the shared dBase Fast Lookup tables on the network server where all users regularly access data. The command **gmtapi5.exe update** will perform the necessary process to update the tables - but it must be run from the directory in which that executable file and the dBase Fast Lookup tables reside. You may use Windows Task Scheduler for this purpose if you wish.

A centralised, shared dBase Fast Lookup table appears to be a good method of avoiding lack of synchronisation for screen-popping purposes. Are there any disadvantages?
A centralised, shared dBase Fast Lookup table can sometimes impact upon the speed of screen-popping depending upon the network infrastructure and level of usage etc. – but this can vary considerably from site to site. In general terms, the default configuration with local dBase Fast Lookup tables held at each client workstation would usually tend to provide better performance.

When clicking on the **Refresh dB** button there seems to be no response.
Ensure that the **Use dBase Fast Lookup** option on the **Searching** tab is checked.
Check the details on the **GoldMine**® tab and make a note of the path shown to the **Contact Files** is correct. If necessary, click on the **Get Info** button to refresh the details. You may observe a change to the original path. If changes were made, click on the **Apply** button and then upon the **Done** button. Exit down Tapi Link and then relaunch it. Check also that your **dBase Fast Lookup Activation Key** is correct.

When using the dBase version of GoldMine® with **dBase Fast Lookup** activated, screen-popping functions correctly on some machines but not on others.
The machines are using their own *unsynchronized* copy of the **dBase Fast Lookup** tables and not a centralized copy. Refer to the section entitled 'Further dBase Fast Lookup instructions'.

Dialing Issues

When attempting to outbound dial from a contact record within GoldMine® nothing appears to happen.
Check the telephone formatting options from the GoldMine® menu via **Edit | Record Properties | Phone Formatting** and select the correct option for your particular location i.e. USA Format or Non-USA Format. Also check that the correct device has been selected on the Tapi Link > **Setup** > **TAPI** tab.

When outbound dialing from GoldMine® the **Preferences** > **Modem** dialog box or other dialing interface appears.
Select the **Calls Out** tab within Tapi Link setup and click on the **UserName.ini** button. Follow the instructions on screen to exit and restart GoldMine®.

Double-clicking on Phone1 fails to place a call.
Phone1 is a GoldMine® indexed field. If you double-click on the Phone1 field it will raise the Contact Search Center. It is hard-coded into GoldMine® and designed for searching, and not for dialing purposes. However, Phone2, and Phone3, do not have this restriction. See the **'Outbound Dialing via GoldMine'®** chapter, and specifically the section entitled **Dialing from the GoldMine® Icons** in order to add a specific icon for dialing Phone1.

When attempting to dial using the GoldMine® **Dial** icons (Dial, Dial 2, Dial 3) no dialing occurs.
From the GoldMine® menu select **Contact > Dial Phone > Dial Phone 1**. If this option is not available then this particular feature has been denied to the user via the GoldMine® security settings. The **Dial** icons will not function unless the relevant GoldMine® permissions are granted.

Tapi Link seems slow to dial.
This problem can be experienced in certain environments whereby the Windows Firewall blocks certain packets that are used by Tapi Remote Service Provider. Even if one computer that is running Tapi Link has Windows Firewall turned on, it can affect the performance of the server and therefore all of the users. Tapi Remote Service Provider uses RPC to communicate with the workstations.
To configure the Windows Firewall to allow Tapi Link to communicate through it, select **Start> Settings > Control Panel > Windows Firewall**. Select the **Exceptions** tab. Click on **Add Port**. Enter the name as Tapi Link for GoldMine. Enter the **Port Number** as 2555. Select the radio button **TCP**. Click on OK. Click on OK again. Then close Control Panel and relaunch Tapi Link.

Tapi Link fails to dial the first number correctly, but dials correctly on the second attempt.
This is usually indicative of a failure to have Tapi Link launched and running before attempting to dial (i.e. the yellow telephone icon should be visible in the system tray.). Launch Tapi Link from the Programs menu or alternatively, ensure that Tapi Link is always started and ready for use by including a shortcut to it in the **Startup Folder**. (A shortcut for this purpose is already provided as part of the original installation process.)

When dialing the Tapi Link splash screen is observed, indication that the program has been launched, but a 'Socket Error' message appears, or the first number fails to dial correctly, and/or a Tapi Link 'tile' remains visible on the windows Task Bar.
This is usually indicative of a failure to have Tapi Link launched and running before attempting to dial (i.e. the yellow telephone icon should be visible in the system tray.). Launch Tapi Link from the Programs menu or alternatively, ensure that Tapi Link is always started and ready for use by including a shortcut to it in the Startup Folder. (A shortcut for this purpose is already provided as part of the original installation process.)

When dialing, a dialog box appears requesting a GoldMine® password.
This indicates a different user has logged into GoldMine® during the same windows session. Tapi Link recognises the change of user in these circumstances and requests the new user's password in order to ensure that History entries etc. are allocated to the correct user.

If I need to use a GoldMine® PreDial.Ini file - what else will require attention?
It would usually be preferable to use Microsoft TAPI instead if possible -.via **Control Panel | Phone & Modem options | Area Code Rules |** and then selecting **New**. Here you will be able to specify the area codes required, and that they should be included when dialing. If you use this option you will need to check the **Translate using Tapi** option on the **Calls Out** tab of Tapi Link **Setup** configuration. However, if using a PreDial.Ini file GoldMine® must

be set to **Dial Numbers As Entered** on the **Edit > Preferences > Modem/Telephony** tab. Then exit and restart GoldMine® for the changes to take effect.

Operating System Issues and Error Messages

An error message appears stating 'Corrupt file other than header'
The file C:\Program File\Papillon Technology\Tapi Link\TAPILINK.MDX is probably corrupted.
Exit Tapi Link. Delete this file along with its counterpart file TAPILINK.DBF. Then relaunch Tapi Link.
Both of these files will be recreated.

An 'I/O error' message appears when dialing.
This may occur in a Terminal Services environment when one or more of the file paths in the registry are either incorrect or misspelt, or that the user does not have the necessary access permissions to the particular location(s) specified. Ensure that the user(s) are granted Full Control within the security settings.

An error message appears stating 'Table 4 - cannot perform this operation on a closed data set'.
The Managers Console and/or Tapi Link/Power Dialer have conflicting versions or outdated versions.

When first launching the program an error message appears stating '**Asynchronous socket error 100049'**
The program must be ready and running in order to use it. Therefore you must first launch the program before attempting to dial. (All recent installation routines place a shortcut in the **Startup** folder which enables the program to launch automatically each time you log in to windows®.)

An error message appears stating '**Entry point not found in NTDLL.DLL - GMtapi5.exe'** error message.
This is generally caused by installing one or more applications that are designed solely for Windows XP® on a machine with a Windows 2000® operating system.

Settings are not retained between windows sessions, and/or a message appears stating 'Your Tapi configuration may have changed. Please check your Tapi driver selection on the TAPI tab.'
Only if you are not working in a Terminal Services environment: Select the **Advanced** tab. Uncheck the option **Use Registry to Store Settings**. Click on the **Apply** button. Exit and restart Tapi Link.

An error message appears stating '**System Files Path Invalid**'
There can be a number of reasons for this. Firstly, check that the paths are correct and exactly match the same path values shown in the dialog box which appears when selecting the **GoldMine®** > **Help** menu > **About** > **System** button.
Also check that the file NTWDBLIB.DLL in the C:\WINNT\system32\ (or C:\Windows\system32) directory is neither missing nor corrupt.
Also ensure that the GoldMine® shared directory is designated as a mapped drive in windows Explorer®.
Finally, check the **GoldMine®** tab in the Tapi Link configuration settings. The **System Files Path** should end with a trailing backslash [\]. Also check the very same path in the file named GM.INI which is located in the main GoldMine® directory. It should bear an entry in the section entitled [GoldMine] complete with the trailing backslash as in the following example: sysdir=*exampleservername\examplesharename\examplegoldmine*\
If the trailing backslash is missing, add it to the line and save and exit the file. Then exit and restart both Tapi Link and GoldMine®.

An error message appears stating 'External Call Logging File Does Not Exist'.
This option has not been enabled on the **Advanced** tab. After enabling, click on the **Apply** button and then exit and restart Tapi Link for the changes to take effect.

When launching Tapi Link you receive a 'Stack Overflow' message.
You must either install Internet Explorer® version 5.0 (or greater) or obtain a COM update.

continued .. . .

Licensing / Installation Issues

GoldMine® 7, 8, and 9 users
There are some minor differences in the visual interface of this software if you are using GoldMine® versions 7, 8, or 9. For example, since there is no Borland Database Engine in the later GoldMine® versions the Licensing tab (and the Searching tab) have been simplified and will appear differently to the software versions of this product running with GoldMine® 6.x or earlier, and which are depicted in this guide. These visual differences do not affect the functionality of the product.

The 'About' dialog box reads "Unlicensed Evaluation Copy" - yet the details entered on the Licensing tab are correct.
Until Tapi Link has successfully logged into GoldMine® and validated the activation keys the licensing defaults to 'evaluation' status. Log into GoldMine® and then click on the **LogIn** button on the Tapi Link **GoldMine®** tab. A 'greyed-out' **LogIn** button indicates a successful login to GoldMine®. There will also be an entry in the Application Log verifying this.

When attempting to install Tapi Link (by running setup.exe) I receive the following error message: *"C:\Windows\system32\autoexec.nt. The system file is not suitable for running MS-DOS and Microsoft® Windows applications. Choose 'Close' to terminate the application."*
It is likely that the file named AUTOEXEC.NT is missing from the windows\system32 directory.
Search for the file in the windows\repair directory and copy it to the windows\system32 directory.

The setup.exe file will not update my existing installation.
The current software setup routine is based upon the latest Microsoft Installer (MSI). If your original installation of Tapi Link was conducted earlier than May 2005 then the setup.exe routine will not update your existing installation. There are alternatives available (contact Papillon Technology). However, if you wish to use the setup.exe file, you would need to uninstall the current software and re-install it using setup.exe.

After increasing the number of licensed users of the software, a licensing error message appears.
For a smooth transition when new licenses have been purchased in addition to existing licenses, follow these steps to increase the license count:
You will have been issued a replacement serial number and activation key.
On the **Licensing** tab of existing workstations, replace the serial number and activation key with the new details and click **Apply**. Then exit Tapi Link / Power Dialer. DO NOT restart Tapi Link / Power Dialer on the workstations until you have completed the next step.
On ONE workstation restart Tapi Link / Power Dialer and note that you see a license conflict message. Click OK and proceed to the **Licensing** tab again. Click on the **Reset License** button. Confirm the message that appears then exit Tapi Link / Power Dialer. Restart Tapi Link / Power Dialer on all workstations.
To verify the correct license count, please check the information on the '**About ...**' screen.

After uninstallation the product seems to remain linked to GoldMine® and it is not possible to revert to any alternative dialer.
The product has not been properly uninstalled. Re-install the software and then follow the instructions in the section entitled **Uninstalling Tapi Link**.

Keypad Issues

Do I need the Keypad?
The Keypad is not required in most circumstances and generally most users choose not to have it displayed. It can be useful initially for diagnostic purposes – for example to check whether the outgoing or incoming number is correctly formatted for dialing and screen-popping purposes. However, most of the Keypads functionality is already available directly from within GoldMine® itself and therefore the Keypad simply occupies valuable screen space unnecessarily.

When clicking upon the **Display KP** button or selecting **Display Keypad / Display** from the context menu no Keypad appears on screen.

a) The option **No Keypad** is selected on the **Keypad** tab.

b) In very rare instances certain monitors can exhibit unusual characteristics due to particular combination of restrictive screen display area and screen resolutions. In such cases you may find that the **Keypad** is not visible on screen. In this situation, if the **Keypad** has been properly invoked, but does not appear, it is likely that it is 'off-screen', i.e. out of the monitors current display area.

Close down Tapi Link by right-clicking on the icon in the system tray and selecting **Exit TL / PD for GoldMine®**. Using Windows Explorer® or My Computer, browse to the folder where you originally installed the program files for Tapi Link. (If you installed the program files to the default directory this would normally be C:\Program Files\Papillon Technology\Tapi Link\) Locate the file named GMTapi5.ini and make a backup copy. Double click upon the ORIGINAL GMTapi5.ini file to open it in Windows® Notepad. Scroll down to the section headed [KEYPAD1] Locate the entry XPOS=nnn (where nnn is a three digit number such as 800 for example) Alter this number to read 100 and then save the file.

(If you are using another **Keypad** style such as the **Text Keypad** or the **Toolbar Keypad** make the same adjustments under the sections headed [KEYPAD2] and /or [KEYPAD3] respectively.)

Screen-Popping Issues

When configuring screen-popping, should I choose the 'splash-screen' style screen-pop, or opt to display the full contact record instead?

There are three broad options to choose between. **A**. displaying the full contact record. **B**. displaying the 'splash-screen' or **C**. displaying a secondary contact window.

Before using the product, many users initially believe that the best choice is to have the full contact record appear on screen. However, in practice, when an incoming call arrives most users are actually working on a contact record in GoldMine® – so to have this displaced by a *completely different* contact record could be a frustrating experience. Most users will therefore opt for the 'splash-screen' from which you can choose to **Ignore** the call, to **Goto** the contact record, or to raise a **New Window** (i.e. a *supplementary* contact record).

Screen-popping (in the UK) functions correctly for inland calls but not for calls from the USA which appear as 'Unknown' caller.

The **Non-USA** format options on the **Advanced** tab are incorrectly configured.

Can screen-popping function with multiple databases?

SQL versions of GoldMine® cannot handle screen-popping from multiple databases. Only dBase systems have this capability. You must change databases in order for screen-popping to function with SQL versions. With dBase versions - right-click on the **Refresh dB** button and select **Append dB** from the context menu.

Despite using SQL Server, the screen-popping functionality seems rather slow.

Check the Application Log for an entry reading "*Not using Direct SQL Access*". Ensure that the **Use Direct SQL Access** checkbox on the Tapi Link **Searching** tab is correctly checked. Click on the **Apply** button, then on the **Done** button to dismiss the dialog box. Tapi Link **must** be closed down and restarted again in order to fully initialize and complete the process. If symptoms persist, refer to the section entitled 'Contacting Technical Support' for further guidance.

Does GoldMine® need to be actively running for screen-popping purposes?

No, the screen-popping will still function – but remember the screen-pop buttons marked **Goto**, **New Record**, and **Add Additional** will be ineffective unless GoldMine® is running.

When using the dBase version of GoldMine® with **dBase Fast Lookup** activated, correct screen-popping does not seem to function correctly despite the fact that the relevant contact record exists and the appropriate telephone number has been duly entered.

The **dBase Fast Lookup** tables have not been refreshed in order to incorporate this later information. Refer to the section entitled 'Further dBase Fast Lookup instructions'.

How does the screen-popping feature deal with curtained records?

A screen-pop relating to a curtained record is clearly labeled as such, and bears no contact information. The dialog box will simply display an 'Ignore' button rather than the usual 'Goto' options.

Is it possible to enable screen-popping for internal calls as well as external calls?

Internal screen-popping is not enabled by default and the option to do so is not accessible via the normal user interface. To enable this functionality it is necessary to create an entry in the initialisation file named GMTAPI5.INI which is located in the Tapi Link installation directory.
Locate the section entitled [SEARCH]
Create a new entry on a new line in that section, which reads as follows:
Numberlen=
Immediately after the equal sign, enter a digit that is one *less* than the number of digits in your extensions. So for example if the extensions are 4225 or similar, the entire entry would read *Numberlen=3*
Save and exit the file, then exit and restart Tapi Link for the changes to take effect.

Screen-popping does not occur when running GoldMine® from a different database.

SQL systems do not handle screen-popping from multiple databases. Only dBase systems can provide this functionality. You must change databases in SQL. Otherwise, when using dBase systems, right-click on the **Refresh dB** button on the **Searching** tab and select **Append dB** for each different database.

Selecting the **Goto** button on a screen-pop dialog box fails to summon the relevant contact record when a filter or group is active.

If you wish to screen-pop whilst a filter or a group is active - raise a secondary contact window before using the **Goto** button.

Users tend to deliberately avoid certain incoming calls because the screen-pop alerts them to the fact that the caller is known to be angry / boring / difficult to deal with etc.

Select **Do Not Pop until Answer** on the **Dialog boxes** tab. The Popup screen will only appear and identify the caller once the call has actually been answered.

If there are spaces in the telephone numbers in GoldMine® will Tapi Link still perform screen-popping effectively?

Using dBase versions of GoldMine®, it is possible to use spaces by using the **dBase Fast Lookup** option. Tapi Link will build an index of the numbers to be searched in the same format.
If using SQL versions of GoldMine®, Tapi Link will find the telephone number regardless of spaces and hyphens etc. (Since it is no longer really necessary to visually memorise telephone numbers or indeed even to look at them, it is common practice to simply enter telephone numbers in one long uninterrupted string e.g. 01234567890 in order to maintain consistency of data entry amongst all users.)

The **Secondary Search for CallerIDName** feature does not appear to function.

This feature functions only with SQL versions and not dBase versions of GoldMine®, and at the time of publication the **CallerIDName** facility is not universally available.

On a dBase version of GoldMine® screen-popping fails to function correctly for known numbers that are definitely held within the contact records.

Whilst Tapi Link compiles new numbers that have been added via screen-popping into the dBase Fast Lookup Tables, those tables are not updated to accommodate any other numbers that have been added, amended (or deleted), including those on newly created or deleted contact records (and additional contact records). These will require the manual (or automatic) refreshing of the tables before the numbers can be used for screen-popping purposes.

Screen-popping fails to occur.

Check that the **Screen-Pop GoldMine®** option is enabled on the **Calls In** tab. Check that the Caller ID service itself has been activated by the telephone service provider - if so you would usually expect to see the incoming number displayed on the physical telephone itself. Check that the option **Hide Tapi Link Completely** has not been selected via the Managers Console.

Other Operational Issues

How do I retrieve a call that has been placed On Hold via the Keypad?
To retrieve the call - press the **Hold** key again.

The telephone handset does not ring back to indicate that a call has been placed.
Observe the telephone icon in the system tray. The icon can usually mirror the status of the telephone line. If the handset appears to be placed vertically on the deskset part of the icon, rather than at rest – then the called party is busy [engaged]. (You would normally have been aware of this if using a headset, as there is an audible signal indicating a busy line.)

How do I hang up a call?
Well, if you have the telephone in your hand – simply replace the handset! (You can also click on the telephone icon in the system tray.)

When I place a call On Hold I cannot transfer it.
If you wish to transfer a call you should NOT put the call on hold with the **Hold** key first. You should use the appropriate transfer key ONLY.

I cannot place a call immediately on hold.
The call must first be answered before it can subsequently be placed on hold.

If using a single windows® log on, what happens when for example, the working shifts change and another user logs into GoldMine®?
When the GoldMine® user changes within the same windows® and Tapi Link session, Tapi Link will automatically alter the user name on the **GoldMine®** tab and also prompt for the password of the different user.

One or more of my References and/or Activity Codes do not appear in the Tapi Link drop-down lists within the Call Completion Dialog Boxes.
Exit and restart Tapi Link. (Also see below.)

References that have been setup in GoldMine® do not appear in the Tapi Link drop-down lists within the Call Completion Dialog Boxes (or only the default References which appear to be GoldMine® demonstration examples are evident).
Firstly, refer to the question and answer above. Next, if the above solution does not rectify the situation and you are using a version of Tapi Link that is earlier than 2.2.1.632, proceed as follows. From within **GoldMine®**, select **Complete > Scheduled Call**. Click within the **Reference** field. Click on the F2 button on your keyboard. Click on the **New** button at the top of the dialog box. Add all of your new References using this process. Exit and restart Tapi Link to allow it to collect the new References.
In all versions from 2.2.1.632 onwards the References should be configured via Schedule > Call as oppose to Complete > Scheduled Call.
If the above fails to resolve the issue, check that the paths shown on the **GoldMine®** tab are correct. If they require amendment, click on the **Apply** and **Done** buttons after alterations have been completed, and then exit and restart Tapi Link.

There is a problem with HTML formatted notes within scheduled calls.
The use of HTML notes is not currently supported. Use plain text for notes.

Dates are being recorded incorrectly in GoldMine®
It is important to correctly configure the format settings on the **Advanced** tab. Select **USA** or **Non-USA** settings according to the country in which this application is being used.

A newly created script is not appearing in the drop-down list of available scripts.
Exit and relaunch Tapi Link.

What happens if I have selected **Create History Item as Outgoing Call Log** (on the **Calls Out** tab) – but then I also raise and complete a Call Completion Dialog Box?
The option **Create History Item as Outgoing Call Log** is designed NOT to create duplicates if the user completes a Call Completion Dialog Box. If the user completes the dialog box first, then Tapi Link will update the details of the call history with the correct duration at the end of the call - without adding a duplicate history item.

Although entries for calls are being created on the **Call Logging** tab some of them show a zero duration.
The call duration is monitored and recorded in the appropriate log at the relevant user's machine where the call actually took place.

Tapi Link is not displaying or completing a previously scheduled call despite the fact that the **Complete Existing Scheduled Call if available** option is checked.
It is likely that the call is actually scheduled to one of the additional contacts on the contact record or that the name differs from the person for whom the call is intended.
The **Complete Existing Scheduled Call if available** feature only displays calls that are scheduled to the specific main or additional contact that was dialed. It also displays a list from which to choose if there is more than one call scheduled to the main or additional contact.

When selecting the **Reverse Search on Manual Outgoing Call** on the **Calls Out** tab nothing seems to happen.
This feature operates inconspicuously. No dialog boxes appear. Its function is to automatically link call recordings and to place appropriate data in the call log.

The **External Call Logging File** data is displayed in a haphazard fashion rather than in organised columns.
Simply un-check the 'Word Wrap' option in Notepad®.

Can Tapi Link update certain GoldMine® fields automatically?
Yes. But this feature can only be implemented via the Managers Console.

A 'File Access Denied' message appears when terminating a call.
The user concerned does not have adequate access rights to the location of the log files. This can be resolved by granting 'Full Control' security permissions to the user at the designated location.

Call Recording / Play-In Issues

There is no option to **Start Recording Current Call** on the context menu, when right-clicking on the **Call Recorder** icon in the system tray.
Select **Enable Call Recording** on the **Call Recording** tab.

Calls are not recorded properly, or cannot be replayed.
Check that the proper drivers for your soundcard are installed. Consult the documentation that came with your soundcard, and also check the manufacturer's web site for information.
Check that the Call Recorder hardware is properly installed and connected. Check the settings within Windows® Volume Controls. (Note that there are TWO separate and independent on-screen controls. One is for Playback and the other for Recording.) Upon lifting the telephone handset and discerning a dial tone, a visible response pattern should be evident in Windows® Sound Recorder when you click on the record button.

Call Recordings are not linked to the contact records.
Ensure that you have designated the correct database on the **GoldMine®** tab.

The Message Play-In/Greeting File feature does not seem to function.
This particular feature requires an additional call recorder hardware unit which is 'daisy-chained' to the first. One unit is used for input purposes (the recording element) and the other is used for the output (the playback element). Alternatively, *one unit alone* can be used solely for 'Play-In' purposes but it must be set to 'Play' and not 'Record'. Contact Papillon Technology for further details. (However, if you are using the Hi-Phone Desktop as your telephony device then no additional hardware is required as it will serve both functions.)

There are conflicting sounds and interruptions when using the **Play-In** feature, and these are evidently left on the call recipient's voicemail/answering machine.
When using the **Play-In** feature it is recommended that you disable windows® event sounds - as this can interfere or conflict with your announcement. (e.g. a simple mouse-click or another completely unrelated event such as the arrival of email could trigger a sound which could unwittingly be transmitted with your outbound message.)

Will my call recordings consume a great deal of disk space?
Call recordings currently use GSM 6.10 format. This is ten times smaller than standard windows® WAV files and better than MP3 compression so storage requirements are very conservative. (Moreover, hard disks now have a vast capacity and are relatively inexpensive.)

When using two call recorder units 'daisy-chained' together there is no sound when attempting to replay either a pre-recorded announcement or a recorded conversation.
The effect of inserting a jack in the output socket of the PC soundcard is to mute the usual audible playback in favour of the new audio output destination. Simply remove the jack from the socket temporarily in order to hear the sound.

Hi-Phone Desktop Issues

(This section is only of relevance to users who are using Tapi Link for GoldMine® in conjunction with the Hi-Phone Desktop telephony device.)

How can I resolve problems with low volume or sound quality issues when using the Hi-Phone Desktop in conjunction with Tapi Link?
On the **Advanced** tab, in the **Hi-Phone Desktop Options**, select **Set Hi-Phone Desktop to Headset Mode** and then click on the **Apply** button. Then exit and restart Tapi Link.

Can I send faxes via the Hi-Phone Desktop?
The Hi-Phone Desktop is not designed for this purpose and neither is Tapi Link for GoldMine®. This feature is not supported, but it may possibly work with certain varieties of fax software.

How can I improve the performance or reduce the likelihood of problems?
The Hi-Phone Desktop should have a clear and completely exclusive and uncluttered channel directly to the wall socket. i.e. with no other accessories, adaptors, cable splitters, 'Y' adaptors, answering machines, extensions, or any thing else on that particular cable. Whenever powering down the unit, always switch off the power either at the mains supply or alternatively remove the wall plug from the power source, rather than removing the power supply jack from the unit.

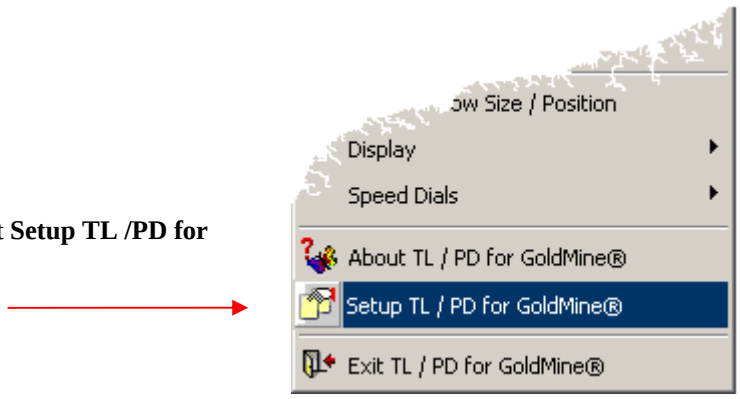
Calls tend to disconnect when the **Play-In** feature is invoked.
Exit Tapi Link. Via Control Panel > Phone & Modem Options > Advanced tab select the Hi-Phone driver Properties and reduce the 'Voice Detection Threshold' to '1'. Restart Tapi Link.

What are the preferred headsets and cables for use with the Hi-Phone Desktop?
The recommended headsets are the Plantronics H51, H51N, H61, H61N, but it can function satisfactorily with other headsets from the H series (The amplifier is not needed). There are two kinds of cable connection that are used by Plantronics which have differing polarity. The Plantronics cord that should be used is the 27190-01. This is the cord for Plantronics 'Polaris' series of headsets. The others will not function satisfactorily with those headsets and the Hi-Phone Desktop. Most headset microphones have specific polarity, and consequently a suitable headset should be used.

1. Verifying a correct and properly configured installation

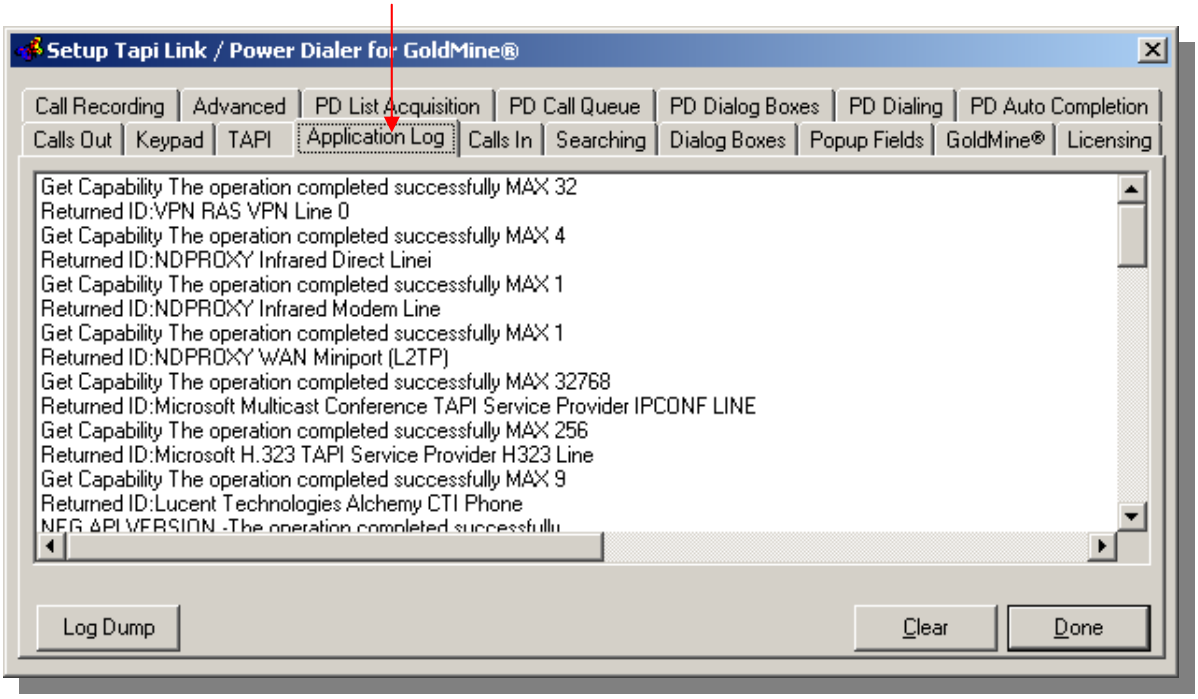
In order to verify a correct and properly configured installation right-click on the icon in the system tray:

From the context menu select **Setup TL /PD for GoldMine®**.



The following **Setup** dialog box will appear:

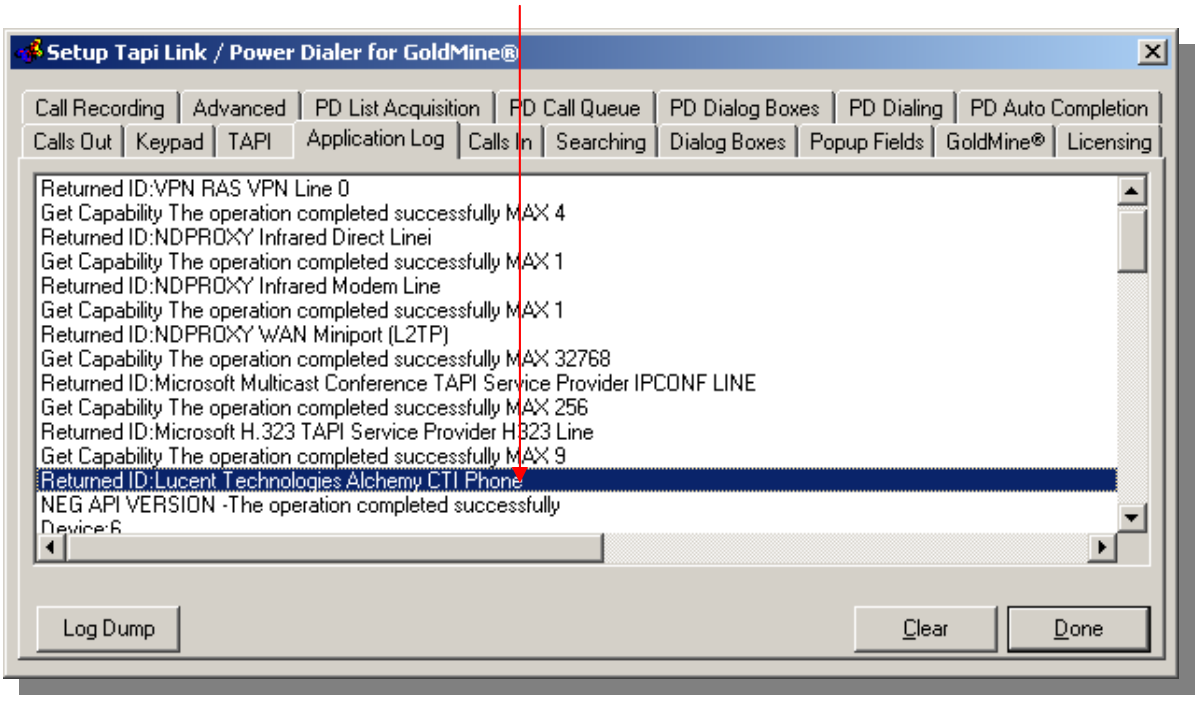
Select the FOURTH tab - **Application Log**:

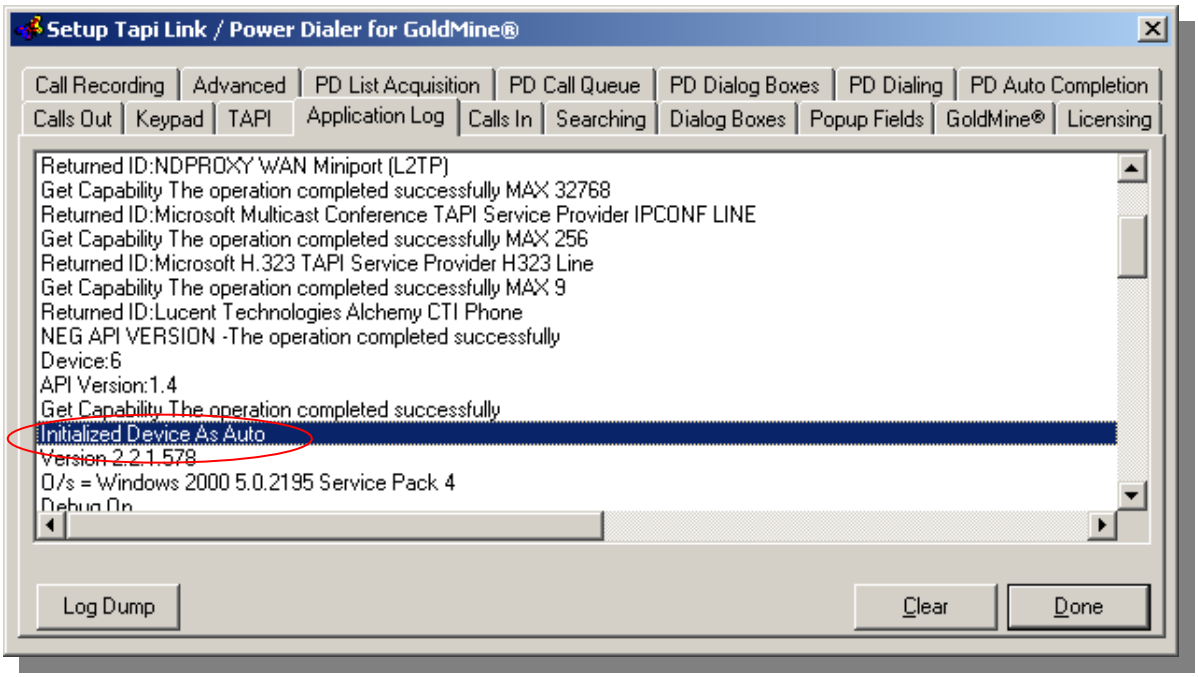


(If the fourth tab is labeled **Call Logging** and not **Application Log** – please refer to the section entitled 'Toggling between Event Logs'.)

If Tapi Link has been properly installed and configured to correctly integrate with:

- *your chosen Tapi Service Provider's driver software*
  - you will observe text entries that identify and acknowledge the devices present in your system in the **Application Log** as highlighted in the examples below:

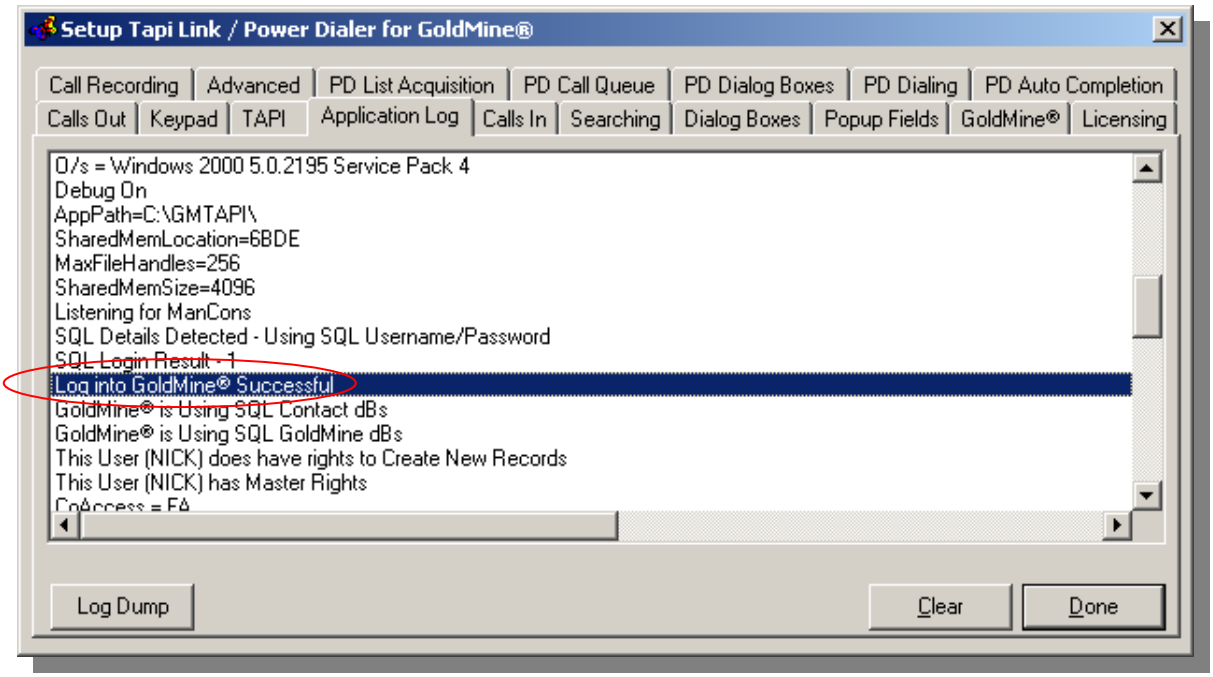




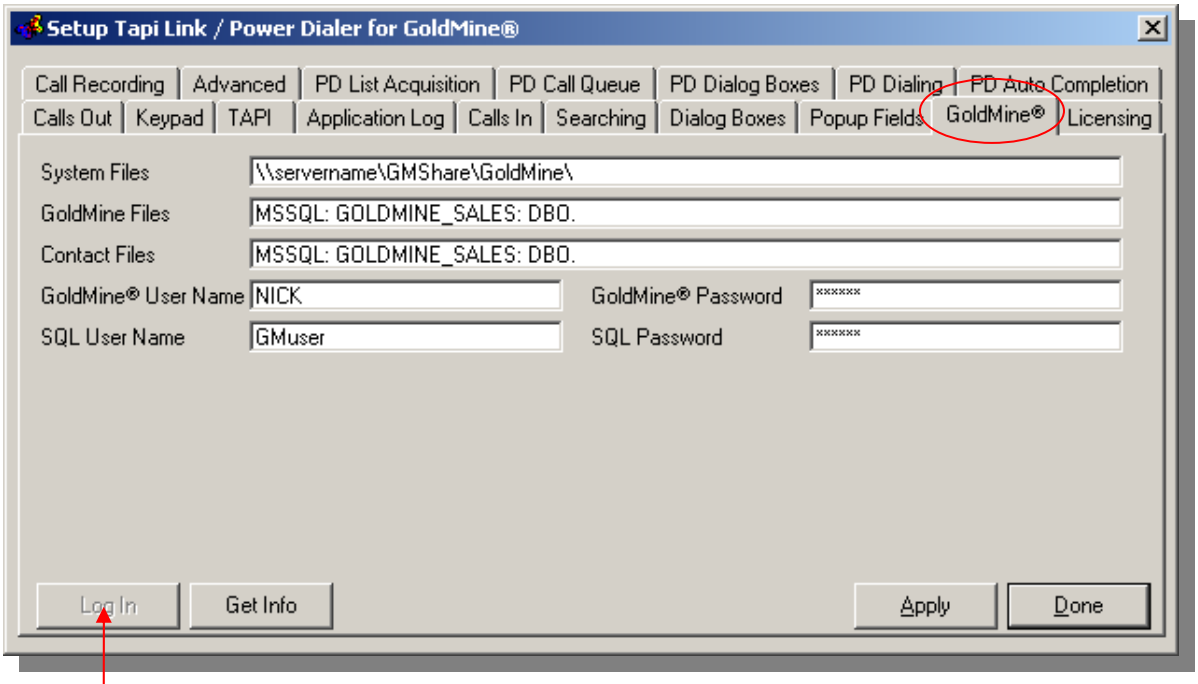
If there are no entries relating to your particular telephony system this indicates that the relevant devices(s) have NOT been correctly installed.

(The above examples are for illustrative purposes only. The precise entries observed within the **Application Log** window are dependent upon the nature of the actual telephony device and the corresponding drivers installed at your particular location, and will therefore vary accordingly.)

In addition, if Tapi Link has been properly installed and configured to correctly integrate with your GoldMine® software you will observe the text "*Log into GoldMine® Successful*" in the **Application Log** tab as highlighted in the example below:



Confirmation of a successful installation can also be viewed on the **GoldMine®** tab:



If the **Log In** button is 'greyed-out' and unavailable as shown above, you are successfully logged-in with a properly validated activation key.

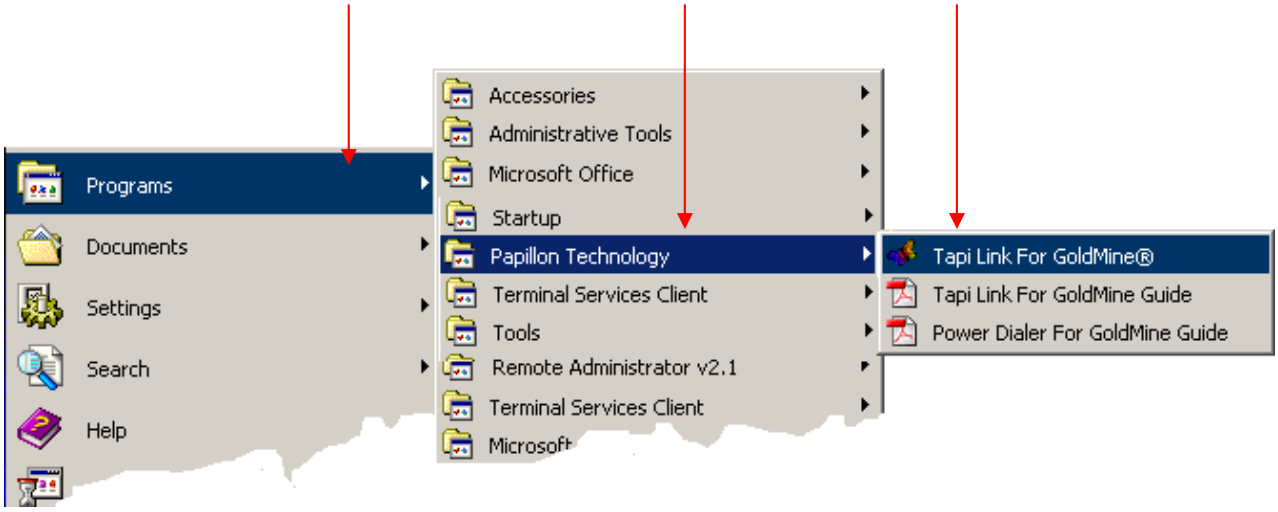
(If the main Tapi Link activation key is correct and successfully validated, Tapi Link will function properly, although any other features with non-validated activation keys will remain disabled.)

2. Setting up without using the Quick Start Wizard

This section can be disregarded entirely if you have previously and successfully installed Tapi Link for GoldMine® using the Quick Start Wizard. (The Quick Start Wizard runs automatically, *the very first time only* that you launch the application, and asks a series of questions such as the product serial numbers, and your user password etc. in order to setup a basic configuration.)

The following sections are generally only of use if
(a) you did NOT follow the Quick Start Wizard after installation or
(b) you are experiencing difficulty with an initial installation or
(c) you have made significant alterations which have had an impact on an existing installation - such as changes of user, telephony devices, data locations etc.

1.
From the **Start Menu**, select **Programs | Papillon Technology | Tapi Link for Goldmine®**

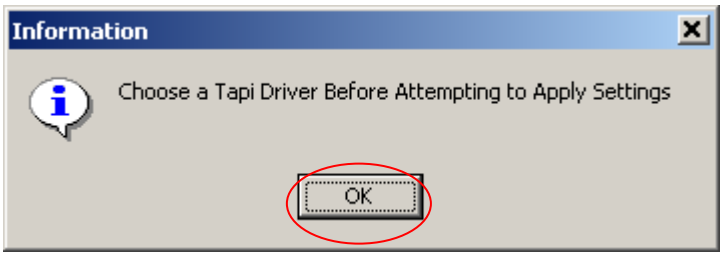


2.
If, at the time of the original installation, you by-passed or cancelled the Quick Start Configuration Wizard then Tapi Link will need to be setup manually. If this is the case, a dialog box will appear advising you that the drivers relating to your Tapi Service Provider need to be properly initialized before you can use Tapi Link:

To proceed with the initialization click on **OK**.

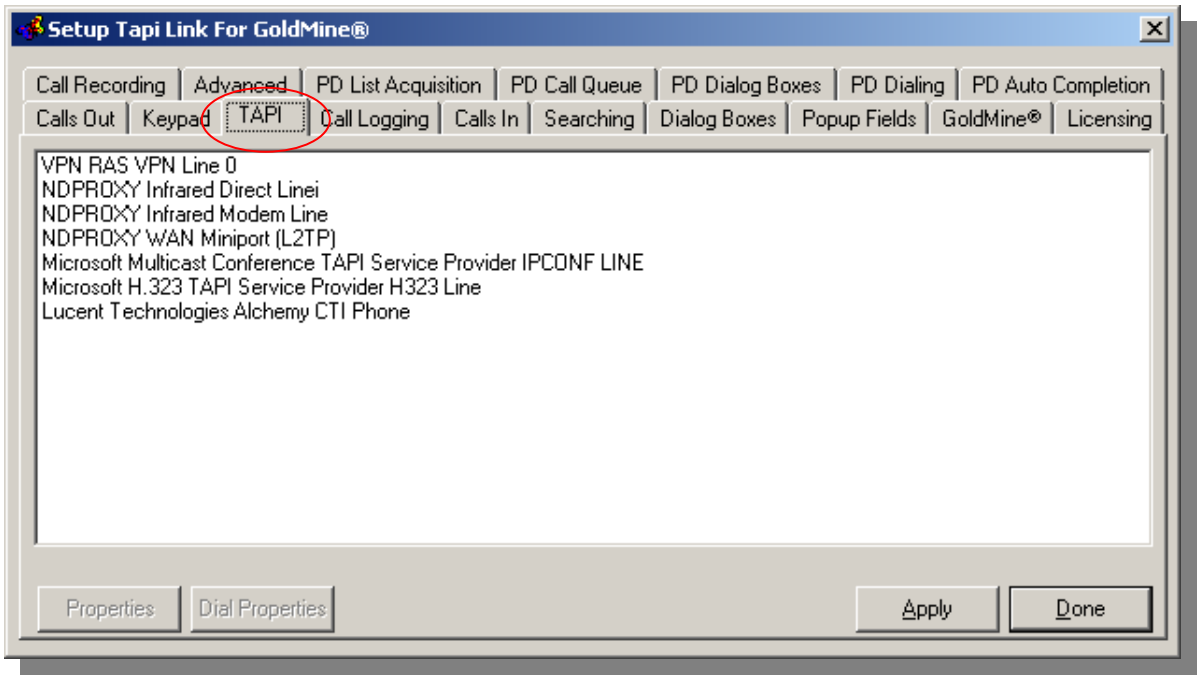
continued . . .

If you attempt to configure any other settings prior to properly initializing the drivers you will see the following **Information** dialog box which warns that you need to configure the entries on the **TAPI** tab *before* any other settings:



Click on the **OK** button to dismiss the dialog box.

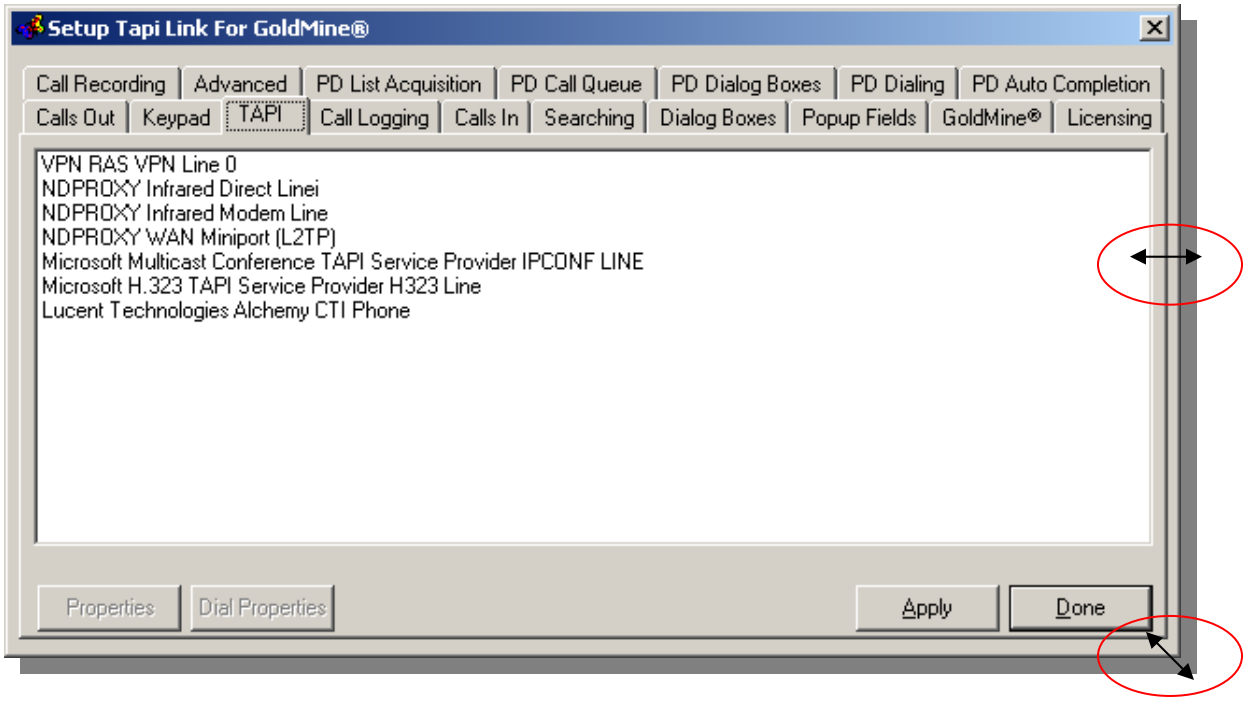
3.
Right-click on the Tapi Link telephone icon in the system tray and select **Setup Tapi Link**
Select the **TAPI** tab:



At this point you may need to adjust the dimensions of the dialog box to suit the display resolution settings of your particular monitor so that none of the elements of the dialog box are obscured. If necessary, this can be achieved by employing the standard window frame-resizing methods as follows:

continued . . .

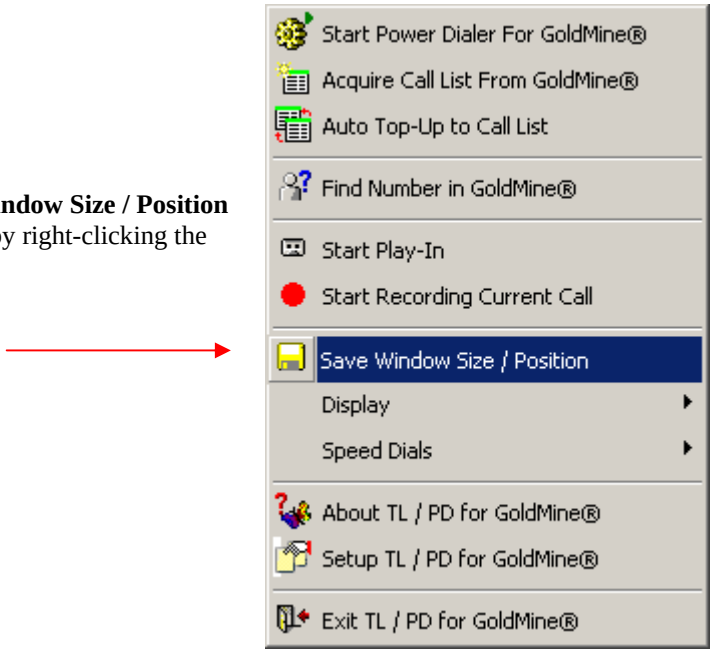
Position your mouse cursor carefully to point at any edge or corner of the window. Then gradually move the pointer back and forth by just a few millimetres until the pointer changes to a 'double arrowhead' as indicated:



While the cursor remains as a 'double arrowhead' - click and hold down the mouse button and then drag the edge or corner of the window back or forth until the optimum window size is achieved and none of the elements of the dialog box are obscured.

Once you have adjusted the final dialog box dimensions to suit, this setting must be saved permanently.

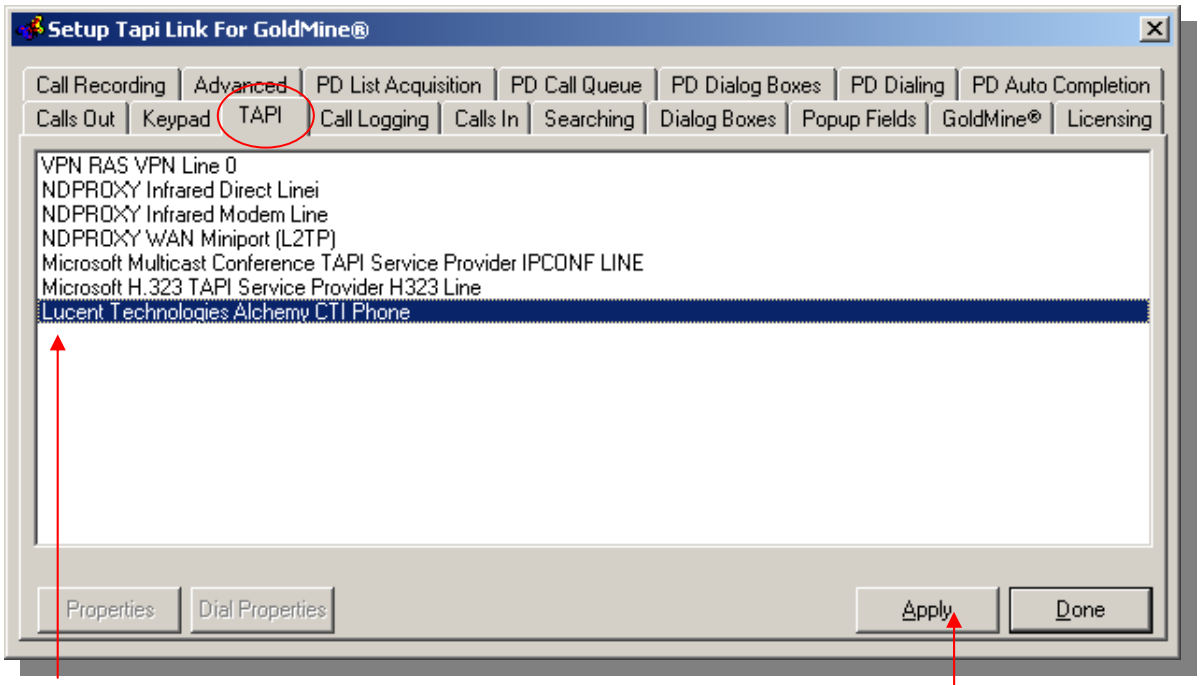
To do so, click on the .**Save Window Size / Position** in the context menu (accessed by right-clicking the Tapi Link telephone icon):



(Bear in mind that any changes to either the proportions or on-screen placement of any of the Tapi Link elements will not be made permanent unless you select **Save Window Size / Position**.)

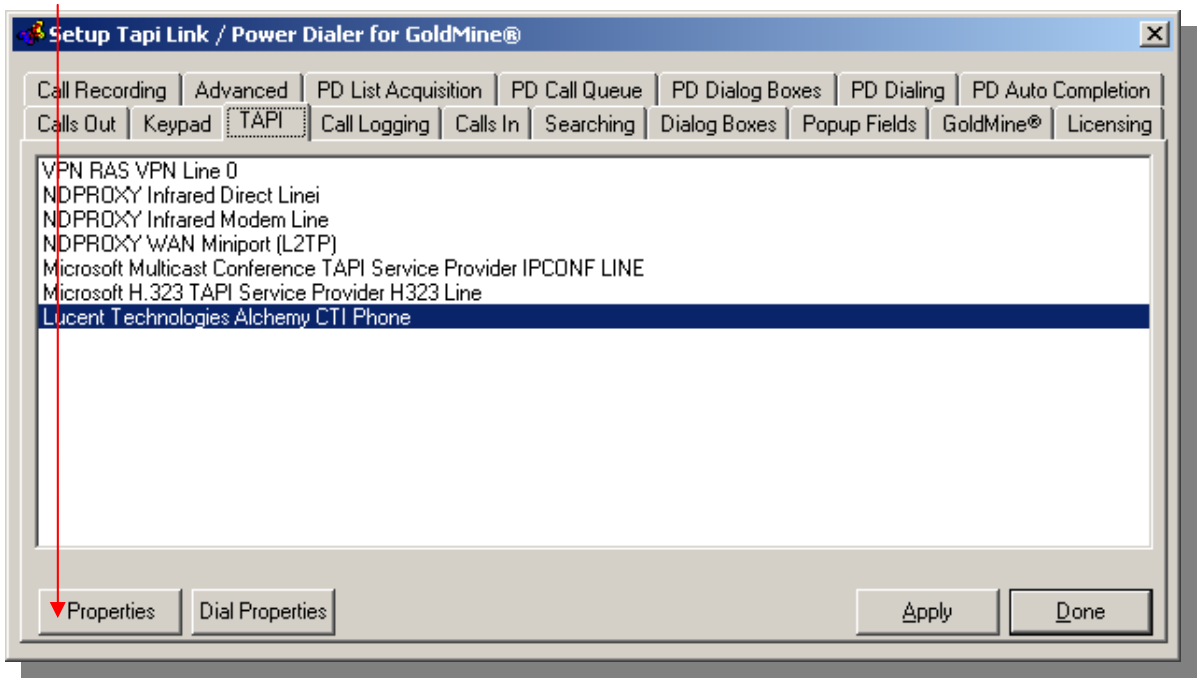
4.

Ensure that you still have the **TAPI** tab selected.
This tab displays all devices installed on the computer related to telephony. (These may include ISDN terminal adapters, modems and VPN adapters as well as voice-only devices.)

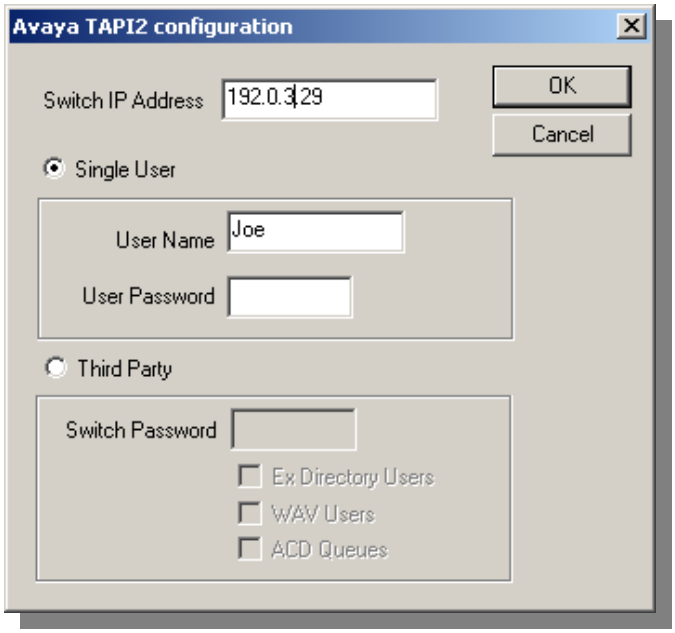


Highlight your chosen TAPI Service Provider by selecting it from the list of available drivers depicted in the window of the **TAPI** tab. Then click on the **Apply** button.
This action will attempt to initialize your chosen TAPI driver, and may take a few moments to complete.

5.
Once you have done so, the **Properties** button on the left (which is initially 'greyed out', as depicted above) will now become 'activated':
You may now click on the **Properties** button to configure your preferred settings for the device - if you have not already done so.



(Note that some TAPI drivers supplied for certain telephone devices do not support this feature, and consequently you may see an error message – but this is perfectly normal. For more information regarding the configuration of your specific TAPI provider's device – refer to the system provider/administrator or the documentation supplied with your TAPI compliant telephone system.)



The above example displays IP address of the telephone device and the username or extension of the relevant user which may need to be specified. The properties which appear, if they exist for your own installation, will vary considerably depending upon the particular device in use. The above is simply an example of many possible variations.

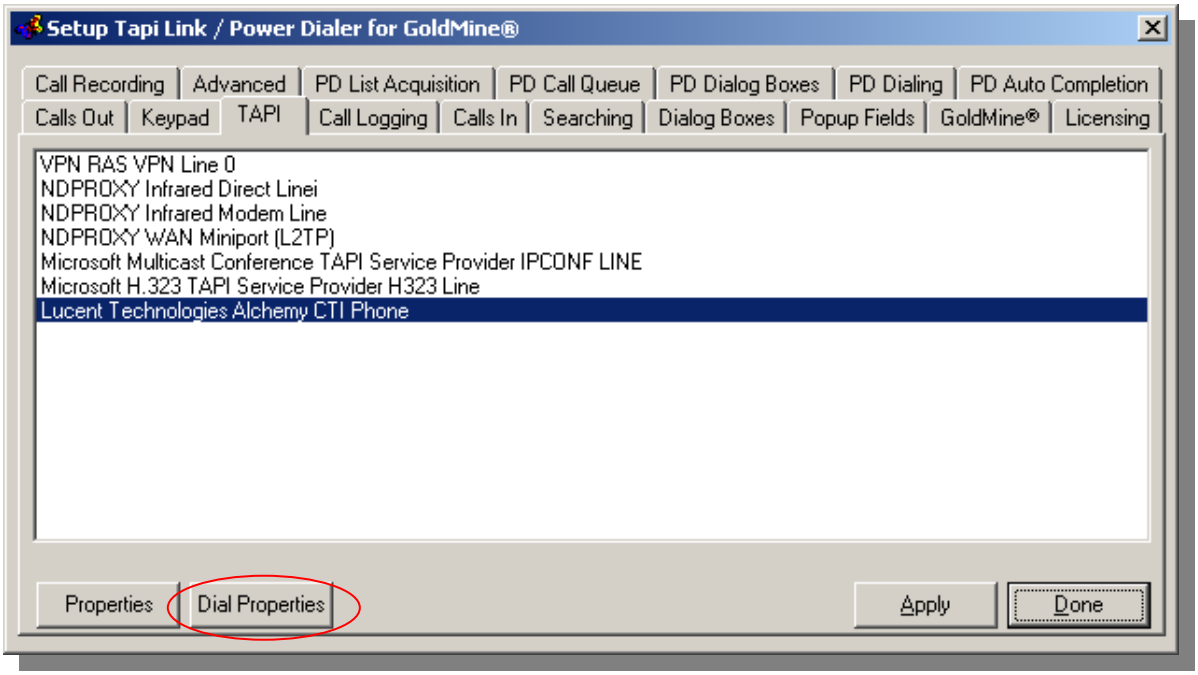
If your particular telephone system relies upon a Remote Service Provider you may have no local control over the specific configuration of your telephony device. In this case, clicking upon the **Properties** *button will invoke the following error dialog box*:

If the above error message appears, click on the **OK** *button.*

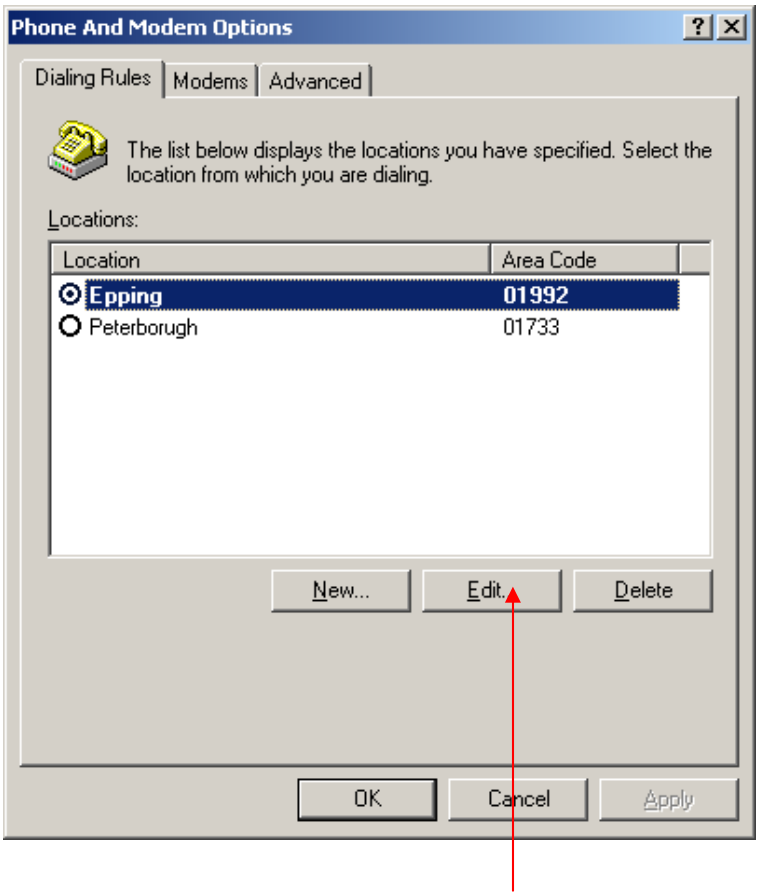
N.B.
Bear in mind that the examples of devices shown in the ***TAPI*** *tab and the device properties themselves are for illustrative purposes only. Both the quantity and the type of devices listed for your individual machine are dependent upon your own particular telephone system and the corresponding device drivers installed, and will therefore vary significantly from the samples shown above.*

continued . . .

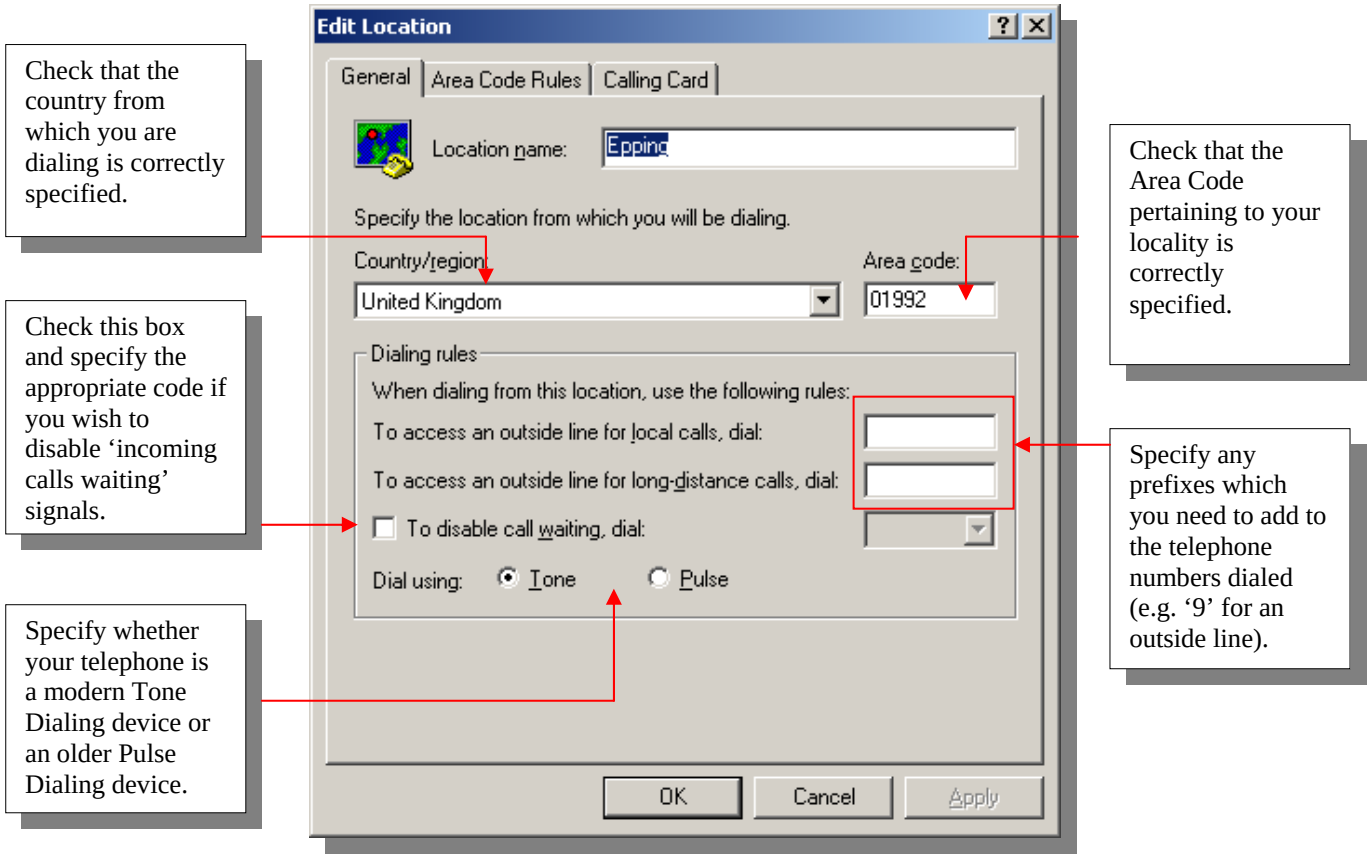
Click on the **Dial Properties** button:



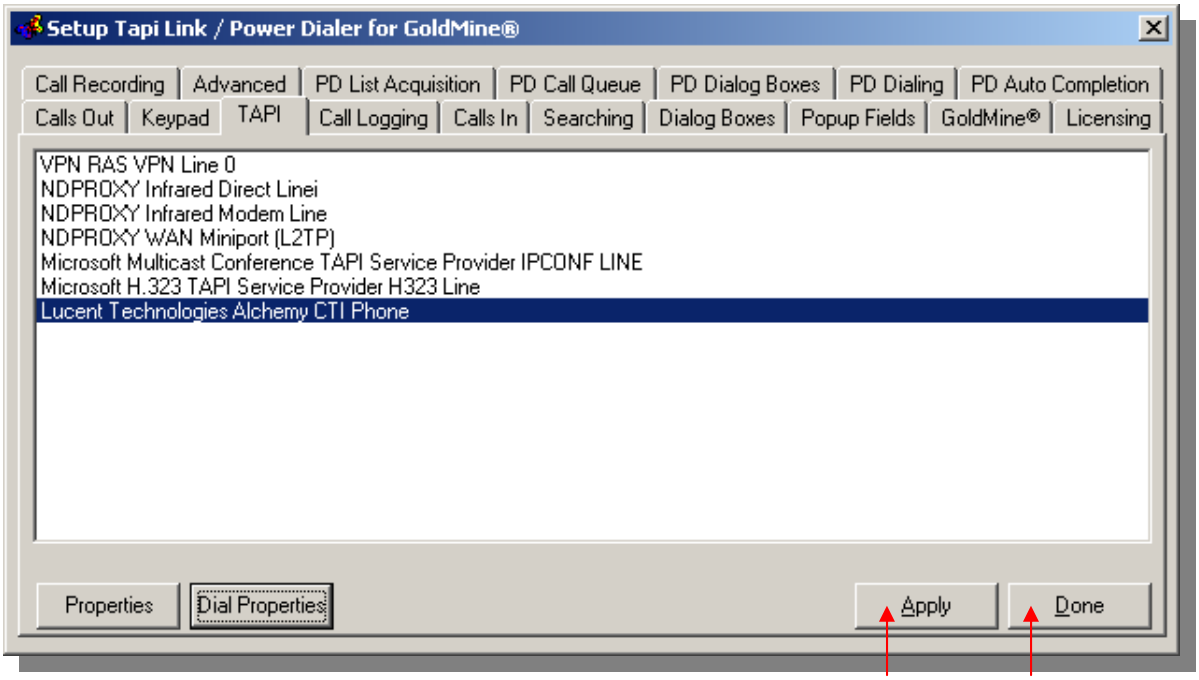
This will summon the **Phone and Modem Options** window:



Select and highlight the appropriate **Area Code**, then click on the **Edit** button.



Further options to adjust the dialing properties can be configured from within the **Calls Out** tab - please refer to the section entitled 'Outbound Dialing - further configuration'.



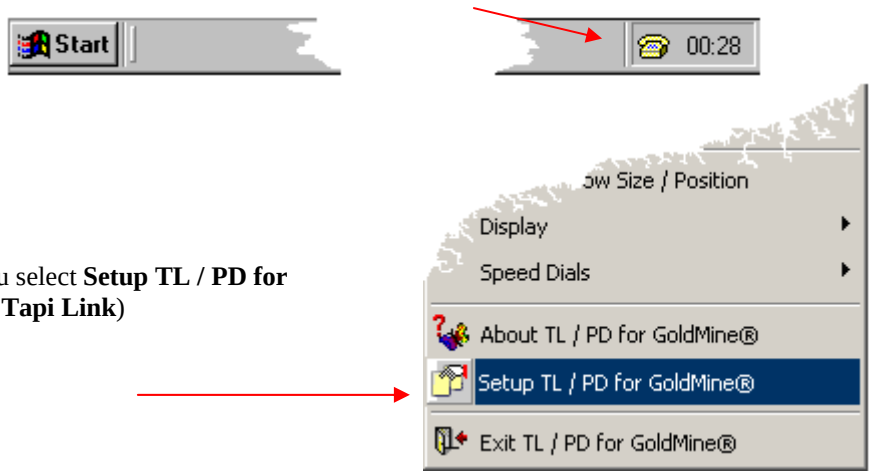
Having finalized your choices click on the **Apply** button and then on the **Done** button to finish.
*(Note that the **Done** button does not save changes – you must click on the **Apply** button first, if you wish to save changes.)*

3. Integrating Tapi Link with GoldMine®

This section can be disregarded if you have previously and successfully installed Tapi Link for Goldmine® using the Quick Start Wizard. (The Quick Start Wizard runs automatically, *the very first time only* that you launch the application, and asks a series of questions such as the product serial numbers, and your user password etc. in order to setup a basic configuration.)

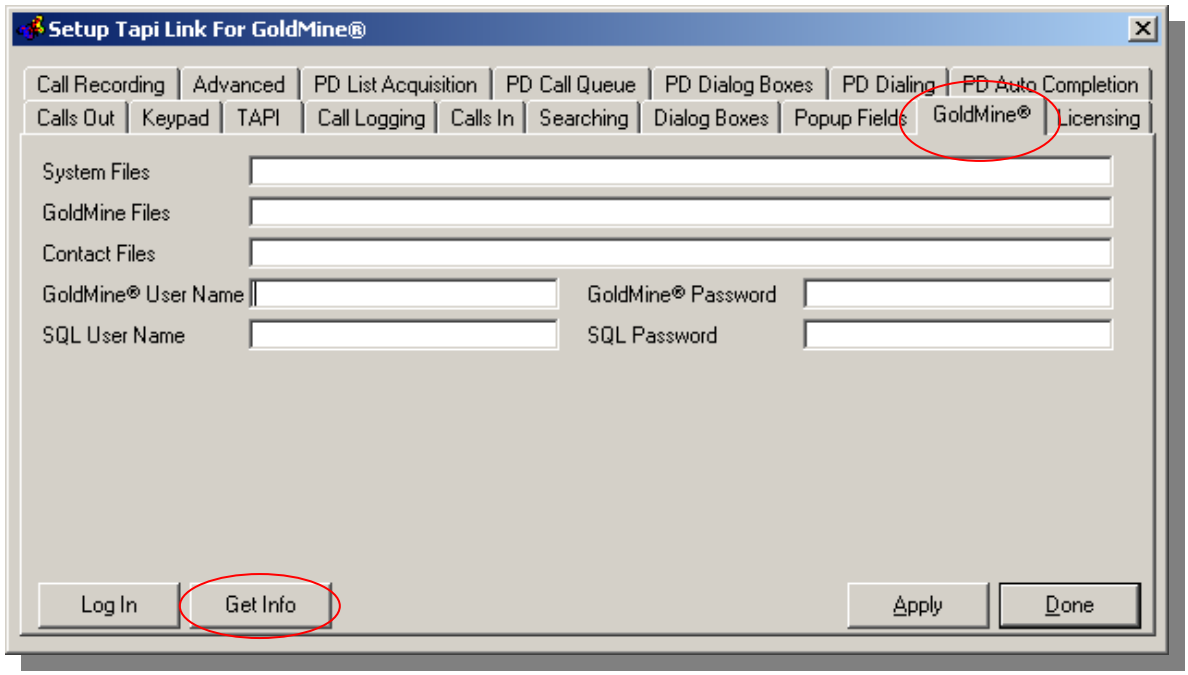
The following sections are generally only of use if
(a) you did NOT follow the Quick Start Configuration Wizard at the time of installation or
(b) you are experiencing difficulty with a new installation or
(c) you have made significant changes which have had an impact on an existing installation such as those concerning the Goldmine® user, telephony devices, data locations etc.

To integrate Tapi Link with GoldMine®, proceed as follows:
Firstly, ensure that GoldMine® is running (in the background).
Right-click on the Tapi Link icon in the system tray:



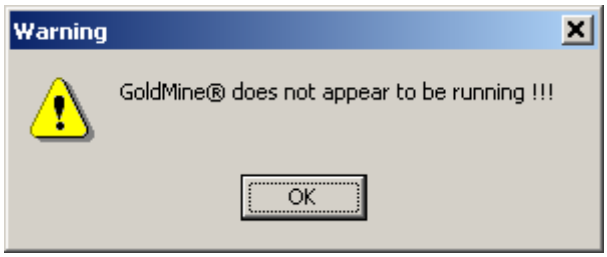
From the context menu select **Setup TL / PD for GoldMine®** (or **Setup Tapi Link**)

The **Setup** window will appear. Select the **GoldMine®** tab.



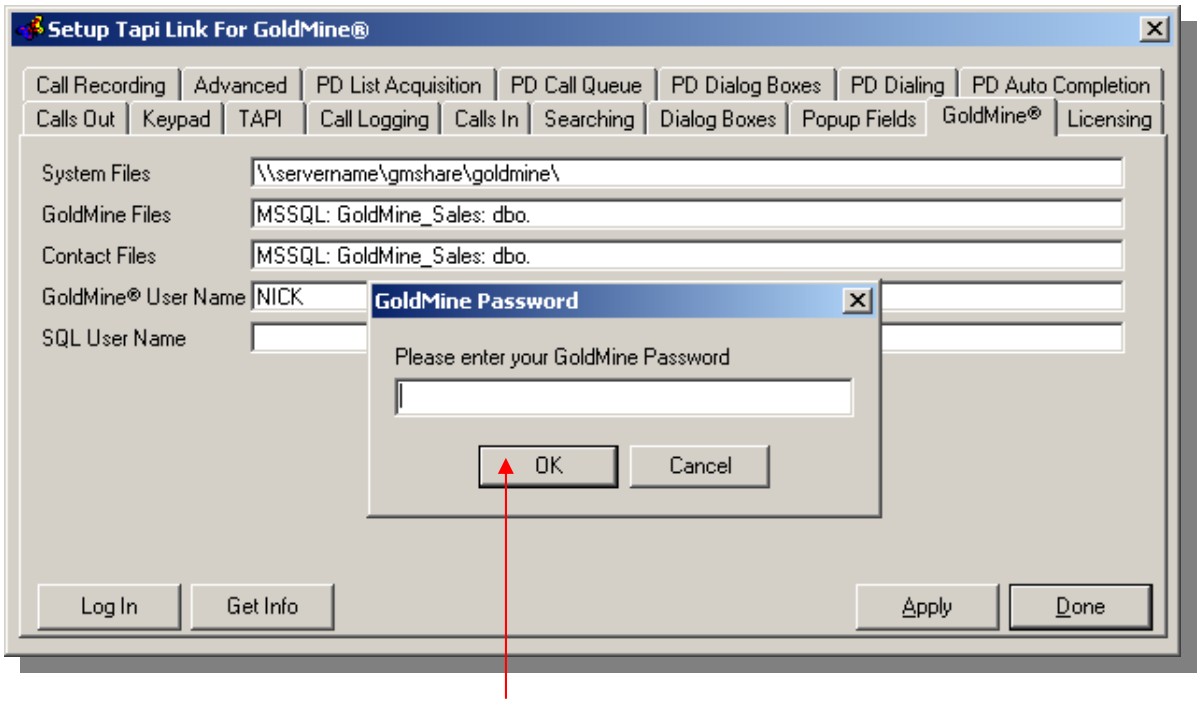
To enable Tapi Link to acquire the location of various GoldMine® system files click the **Get Info** button:

If you have omitted to ensure that GoldMine® was running - the following dialog box will be presented:



*Click on the **OK** button, then launch and log into GoldMine®, and leave it running in the background.*

This process will transfer the correct locations of the **System Files**, **Goldmine® Files**, **and Contact Files** to the relevant fields and an additional dialog box will request your GoldMine® password:
:

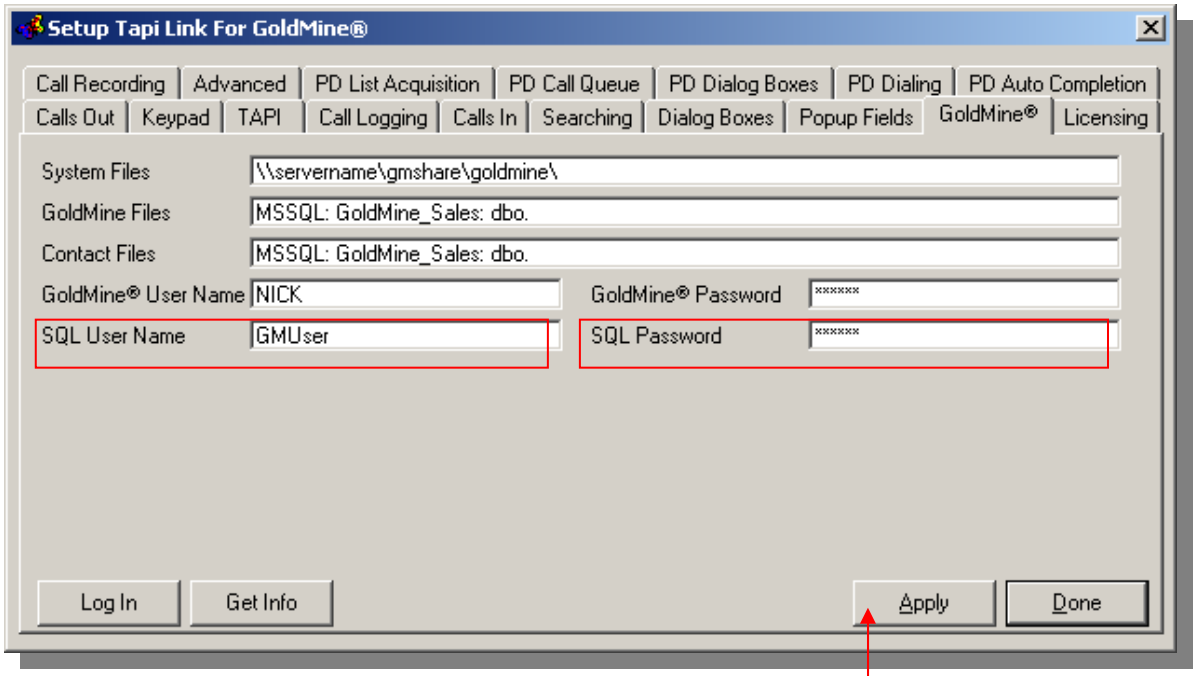


Enter the password and click on **OK**.

Please note that the examples provided here are for the purposes of illustration only. The precise details displayed in these fields on your particular machine will vary significantly to the examples shown here.

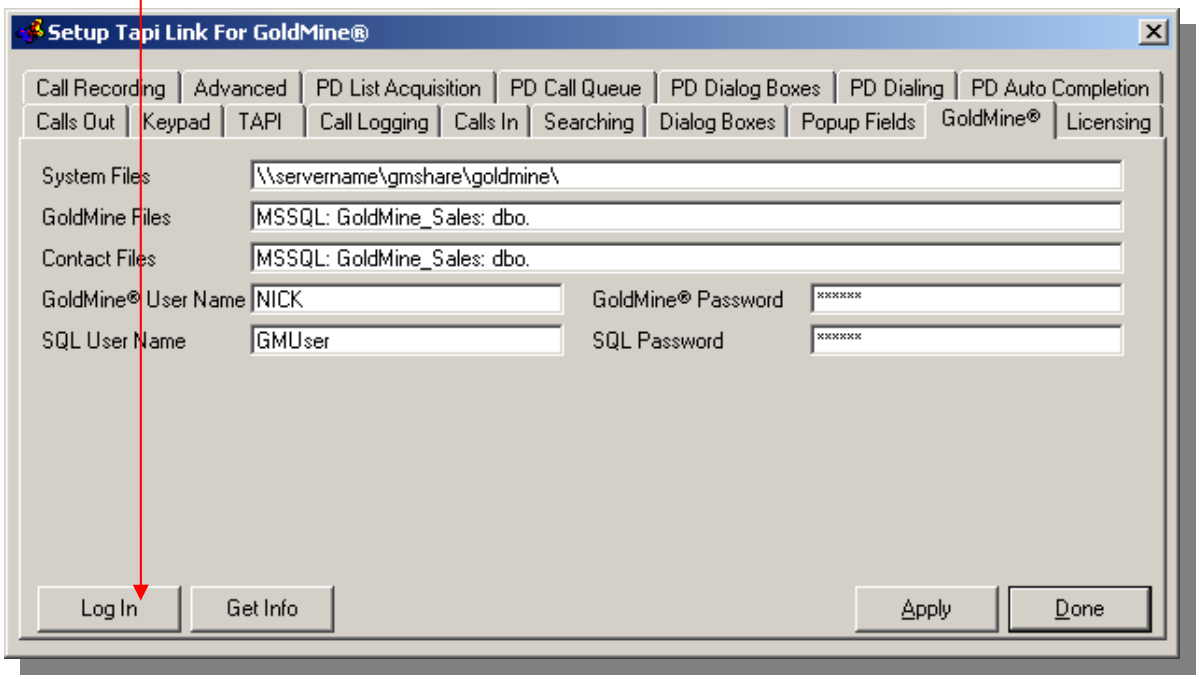
continued . . . .

If appropriate, *manually* enter your **SQL User Name** and your **SQL Password** in the appropriate fields:



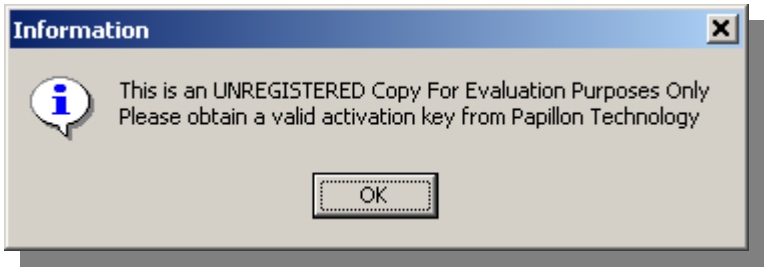
To save your changes, click on the **Apply** button.

Click on the **Log In** button in order to test the configuration settings:



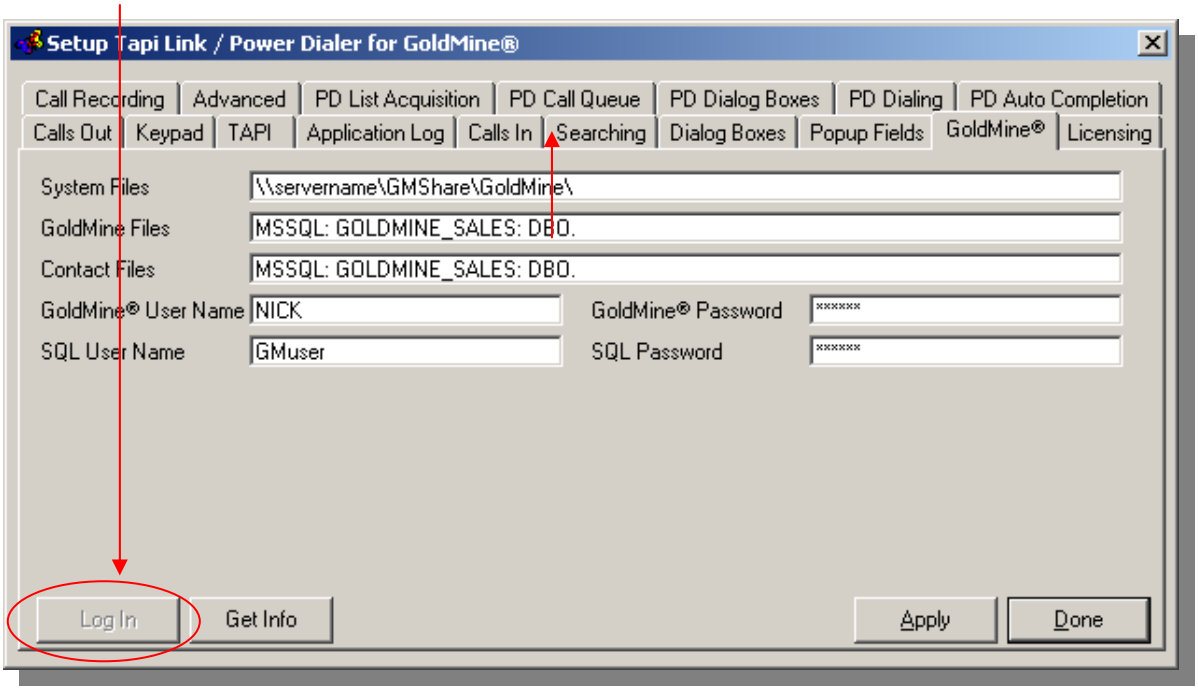
continued . . .

A dialog box may appear, advising that Tapi Link is unregistered:

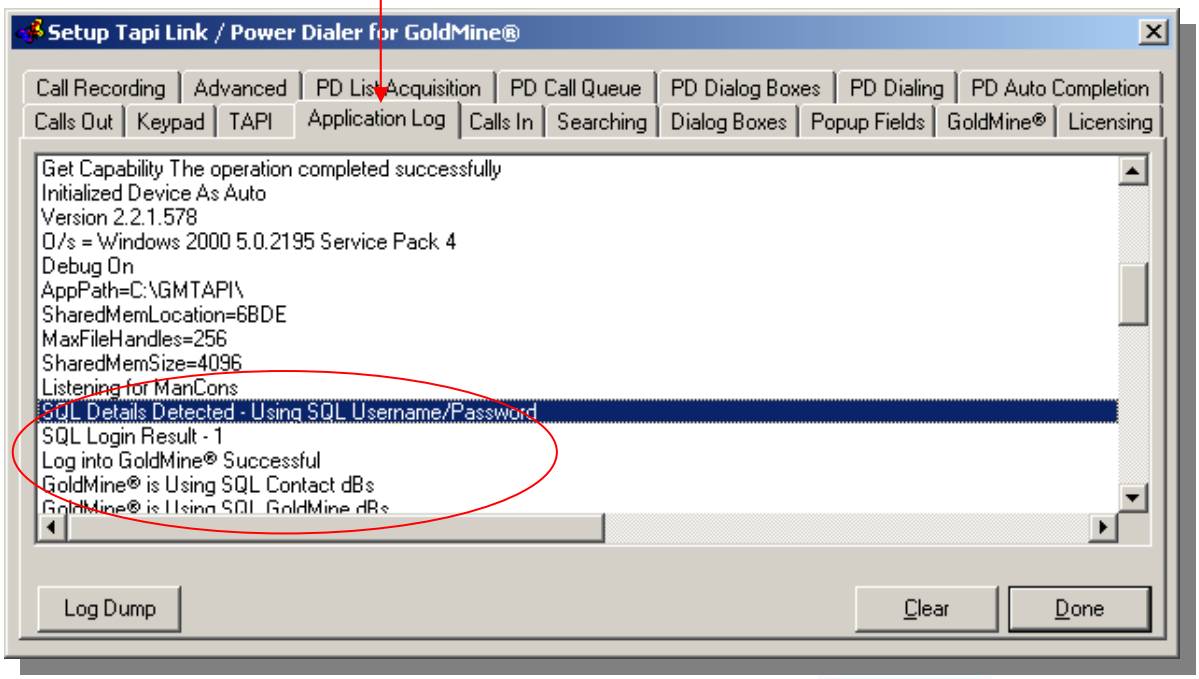


This is perfectly normal. Click on the **OK** button to proceed.

If the **Log In** button on the **Goldmine®** tab becomes 'greyed-out' and unavailable, as indicated below, it indicates that you have *successfully* logged-in with a properly validated activation key.

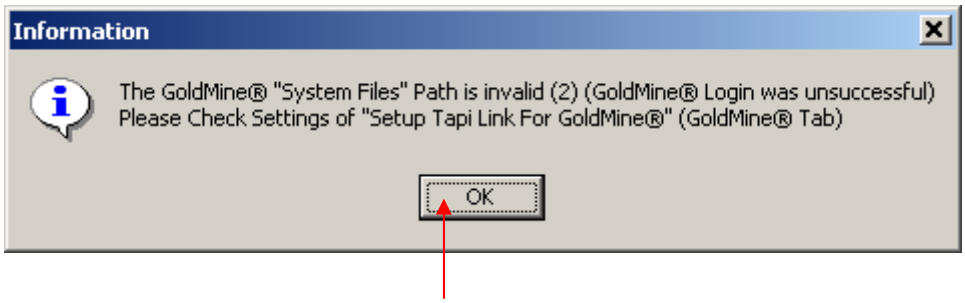


Information detailed in the **Application Log** tab will also confirm that you have *successfully* logged-in with a properly validated activation key:

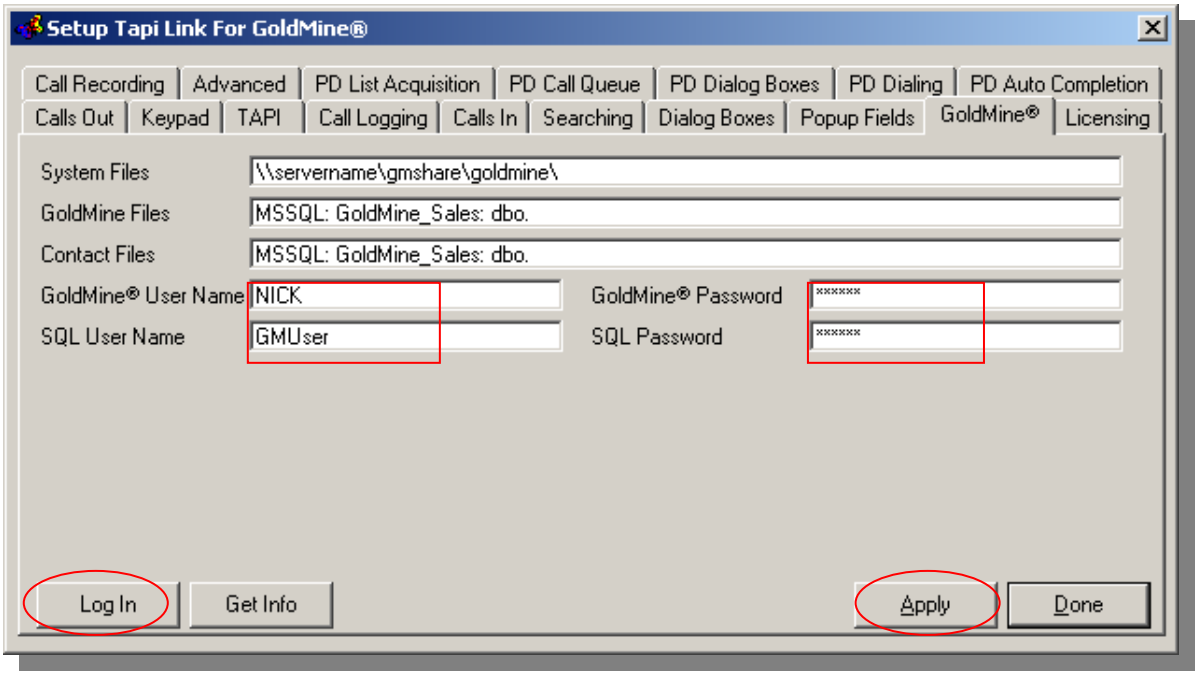


(If the fourth tab is labeled **Call Logging** and not **Application Log** – please refer to the section entitled 'Toggling between Event Logs'.)

If, however, the following dialog box appears, advising that the GoldMine® Login was unsuccessful:



Click on the **OK** button, then re-check that the correct **Goldmine® User Name** and **Goldmine® Password** (and also, if applicable, the correct **SQL User Name** and **SQL Password**) have been properly entered in the appropriate areas indicated below:



Where (for security purposes) characters are represented by asterisks, delete the existing entry and, *ensuring the Caps Lock button on your keyboard is OFF*, re-enter your **GoldMine® Password** and **SQL Password** to ensure they are perfectly correct.

1. You must then click on the **Apply** button.

2. Then click on the **Log In** button once again.

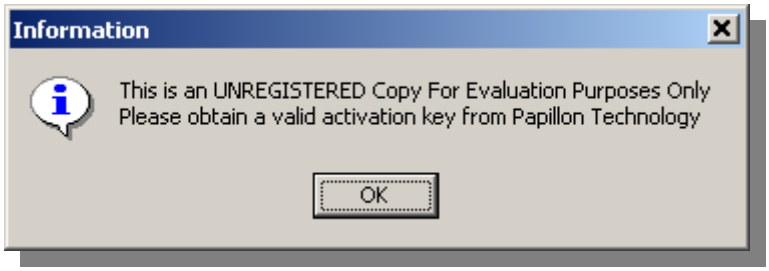
Once a successful log-in has been achieved the **LogIn** button will become 'greyed-out' and inaccessible as follows.

4. Activating Tapi Link

This section can be disregarded if you have previously and successfully installed Tapi Link for Goldmine® using the Quick Start Wizard. (The Quick Start Wizard runs automatically, *the very first time only* that you launch the application, and asks a series of questions such as the product serial numbers, and your user password etc. in order to setup a basic configuration.) This section is generally only of use if you have issues with activation, or are increasing the number of licensed users.

(Before you can proceed with the activation of Tapi Link you must have successfully completed either the Quick Start Wizard - which automatically starts when Tapi Link is run for the first time – or alternatively, the preceding section entitled 'Integrating Tapi Link with GoldMine®')

The Tapi Link serial number must be input when the application is run for the first time. Otherwise, the application will run with only limited functionality; in which case you will observe an advisory window informing you of the unregistered evaluation status:

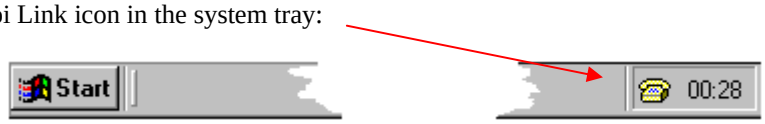


To obtain your activation key which will enable the full functionality of the application, please contact the Papillon Technology by telephone on 01922 560487 (+44 1992 560487) or from the US on +1 (614) 559-2270 Fax: 01992 560489 (+44 1992 560489) or email support@papillontechnology.com with the following information:

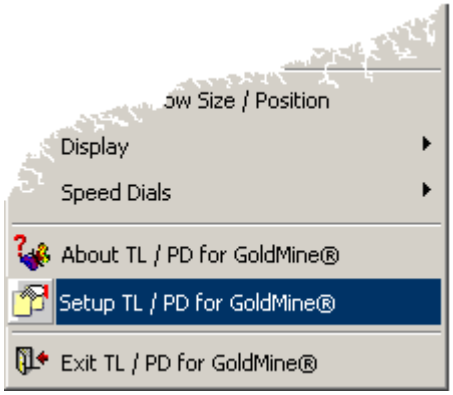
1. Your GoldMine® serial number.
2. The Tapi Link serial number as provided by Papillon Technology.
3. The e-mail address of the System Administrator.
4. The name of the proposed registered user.

(Please note - this activation key will only function with the licensed copy of GoldMine® for which it was purchased.)

Once you have obtained your activation key from Papillon Technology, proceed as follows:
Right-click on the Tapi Link icon in the system tray:



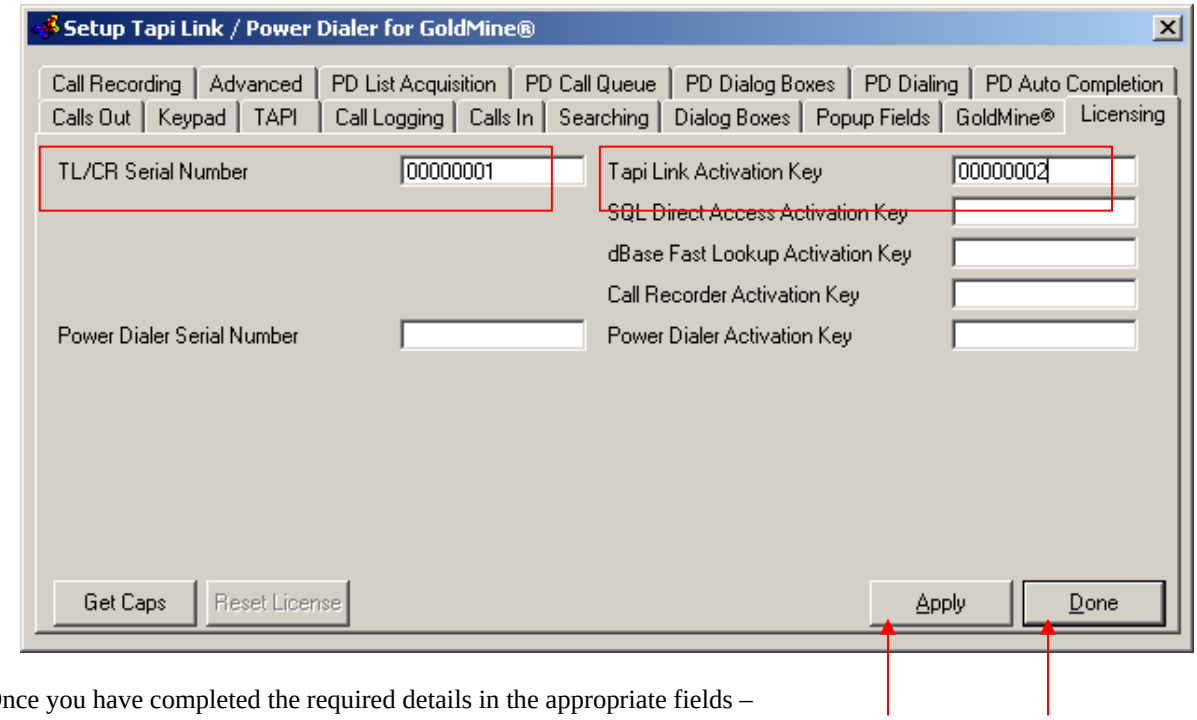
From the context menu select **Setup TL / PD for GoldMine®**.



From the resulting Setup window select the **Licensing** tab:

In the **TL/CR Serial Number** section - enter the *serial number* as provided by Papillon Technology.

In the **Tapi Link Activation Key** section - enter the *activation key* as provided by Papillon Technology.



Once you have completed the required details in the appropriate fields – click on the **Apply** button, then click on the **Done** button to complete the process.

GoldMine® 7, 8, and 9 users
There are some minor differences in the visual interface of this software if you are using GoldMine® 7, 8, or 9. For example, since there is no Borland Database Engine in later GoldMine® versions the Licensing tab is simplified and will appear differently to the software versions of this product running with GoldMine® 6.x or earlier. These visual differences do not affect the functionality of the product.

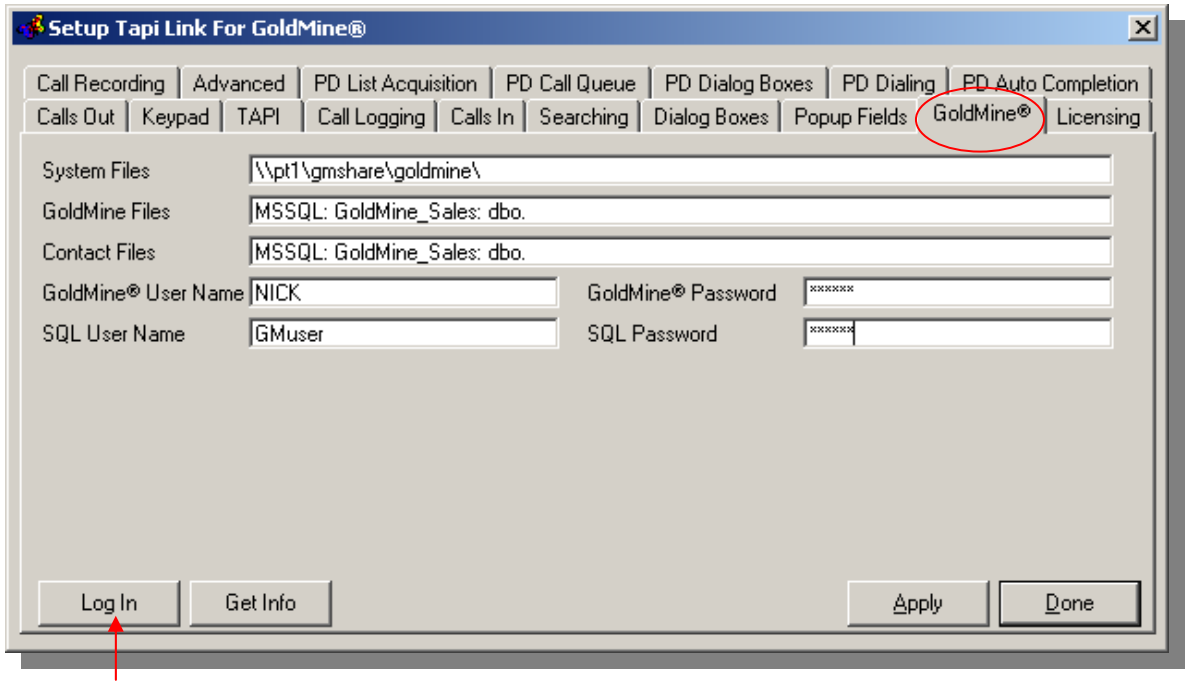
Do NOT proceed here if you are using any of the following features:
SQL Direct Access, dBase Fast Lookup, Call Recording.
Instead, proceed directly to the next section entitled 'Activating SQL Direct Access, dBase Fast Lookup, and Call Recording'.

If you are NOT using any of the following features:
SQL Direct Access, dBase Fast Lookup, Call Recording,

- proceed as follows . . ..

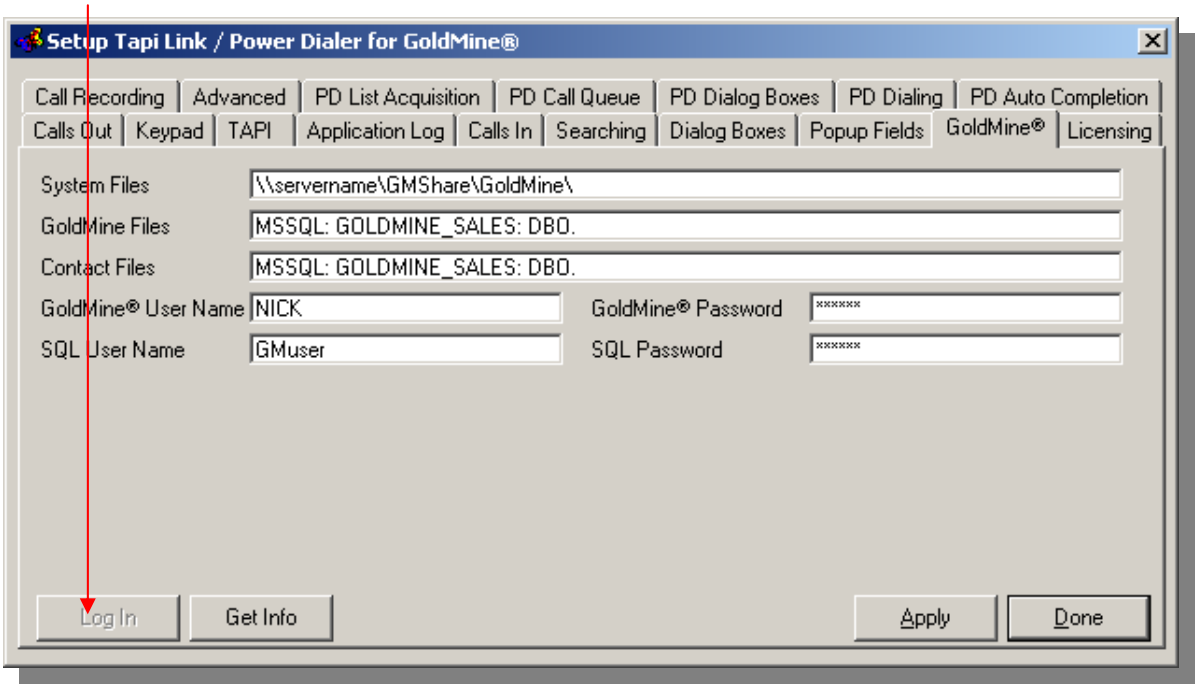
continued . . .

Select the **GoldMine®** tab:



Click on the **Log In** button.

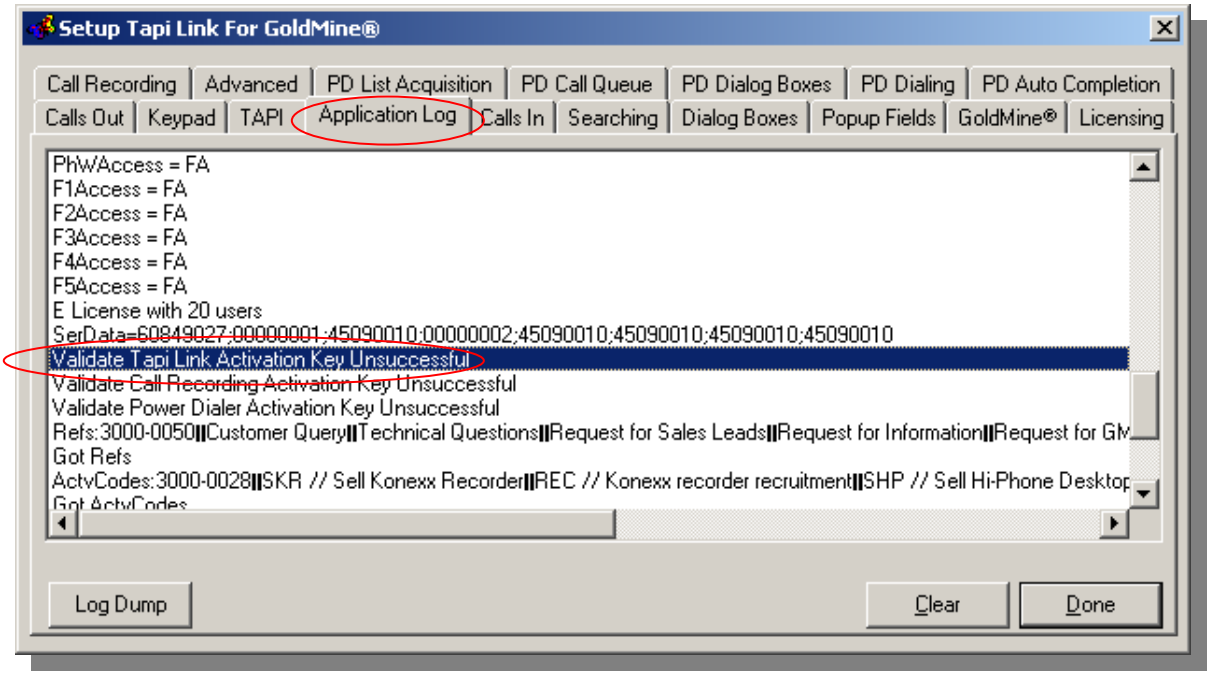
The **Log In** button should now become 'greyed-out' as indicated below.



If so, this indicates that you have *successfully* logged-in with a properly validated activation key.

If NOT, then this will be reflected in a corresponding "*Validate Activation Key Unsuccessful*" entry in the **Application Log** tab as follows:

continued . . .



(If the fourth tab is labeled **Call Logging** and not **Application Log** – please refer to the section entitled 'Toggling between Event Logs'.)

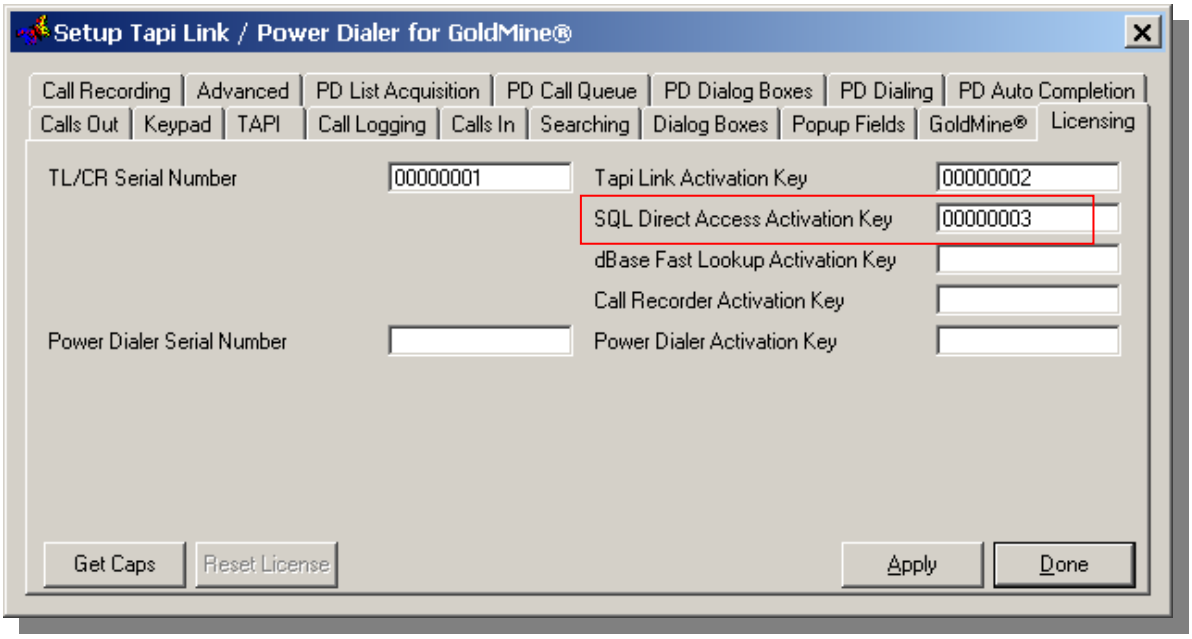
If this is the case, check that the correct Tapi Link serial number and activation key have been properly entered in the proper locations on the **Licensing** tab.

If you are perfectly sure that everything is in order and yet you are still unable to correctly validate your activation key – please refer to the section entitled 'Contacting Technical Support' at the end of this guide and follow the recommendations therein.

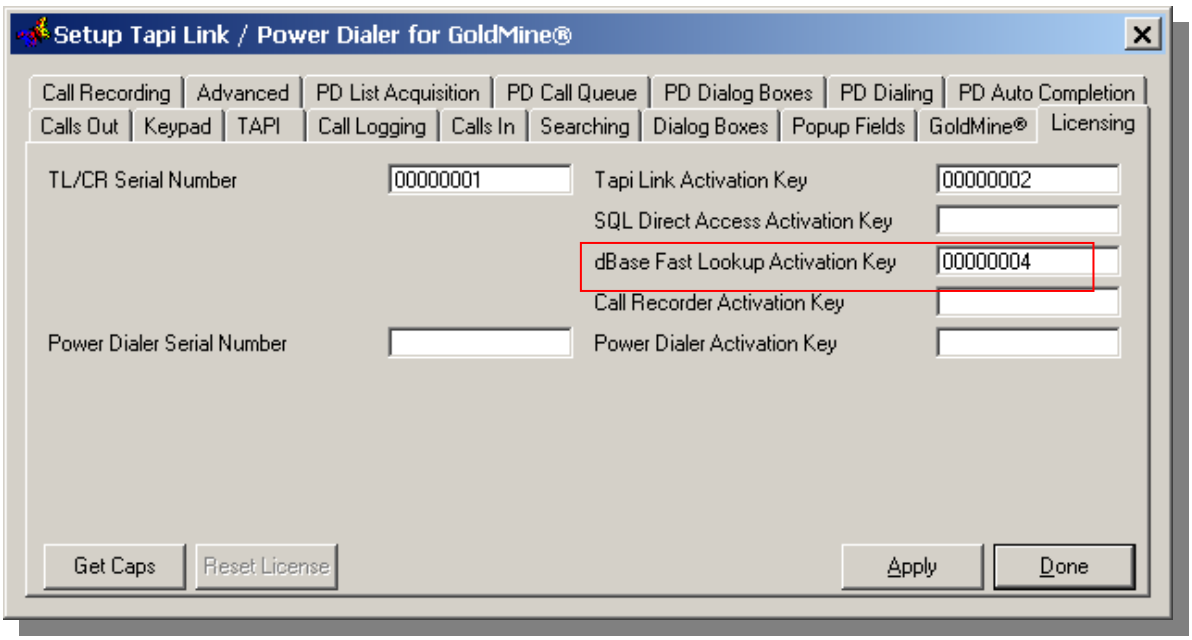
5. Activating SQL Direct Access, dBase Fast Lookup, and Call Recording

With the exception of Call Recording activation, this section does not apply to GoldMine® 7, 8, and 9 users. This section can be disregarded if you have previously and successfully installed Tapi Link for Goldmine® using the Quick Start Wizard. (The Quick Start Wizard runs automatically, *the very first time only* that you launch the application and asks a series of questions such as the product serial numbers, and your user password etc. in order to setup a basic configuration.) This section is generally only of use if you have expanded the feature set of the software e.g. by adding Call Recording features, or have issues with activating individual software elements.

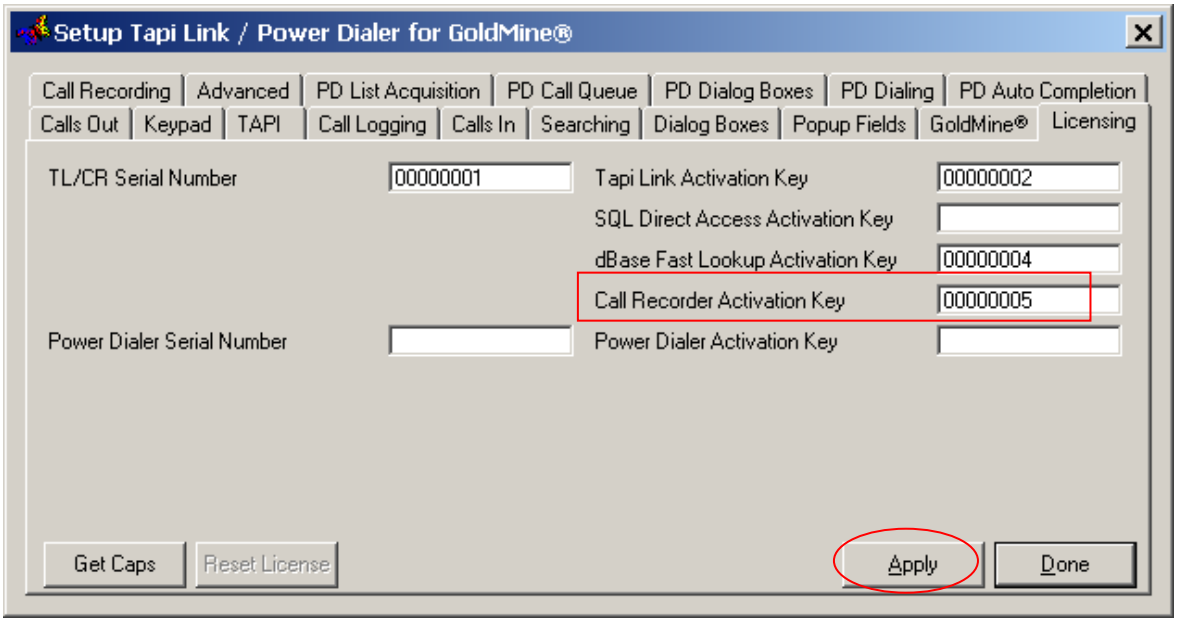
If you propose to use the **SQL Direct Access** facilities you will need to enter the **SQL Direct Access Activation Key** in the appropriate field of the **Licensing** tab:



If you propose to use the **dBase Fast Lookup** facilities instead you will need to enter the **dBase Fast Lookup Activation Key** in the appropriate field of the **Licensing** tab:



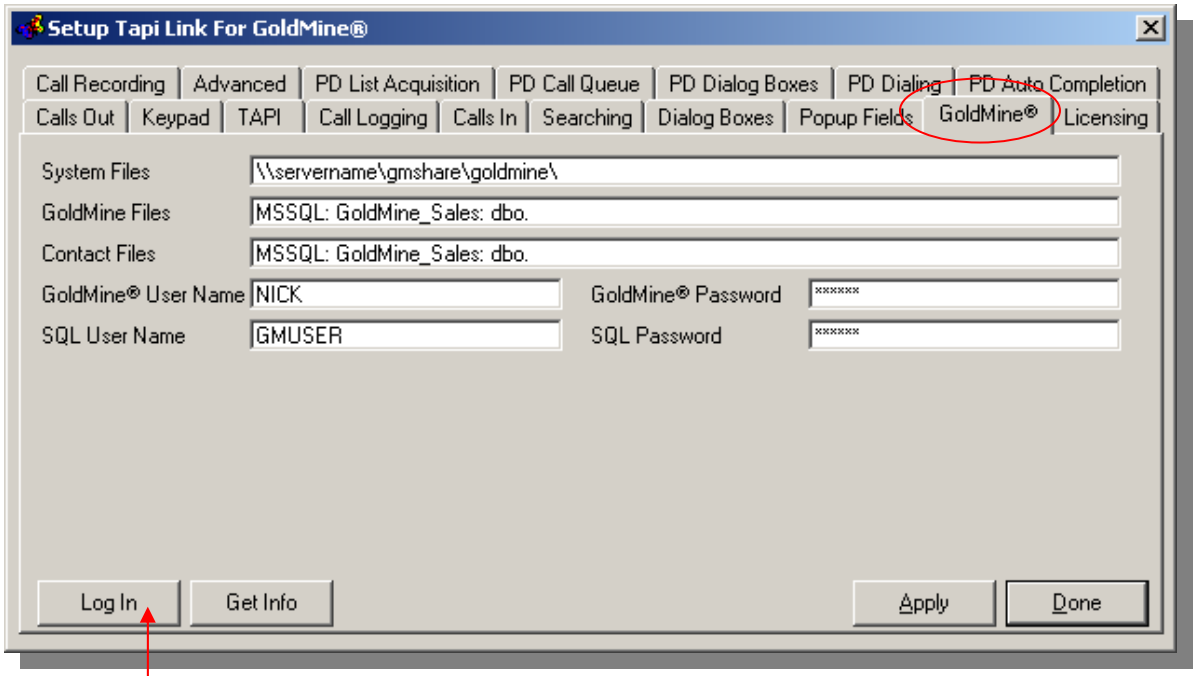
If you propose to use the **Call Recording** facilities you will need to enter the **Call Recorder Activation Key** in the appropriate field of the **Licensing** tab:



Click on the **Apply** button.

*(Disregard the **Get Caps** button. This particular option is only to be used in specific circumstances under instruction from Papillon Technology Technical Support.)*

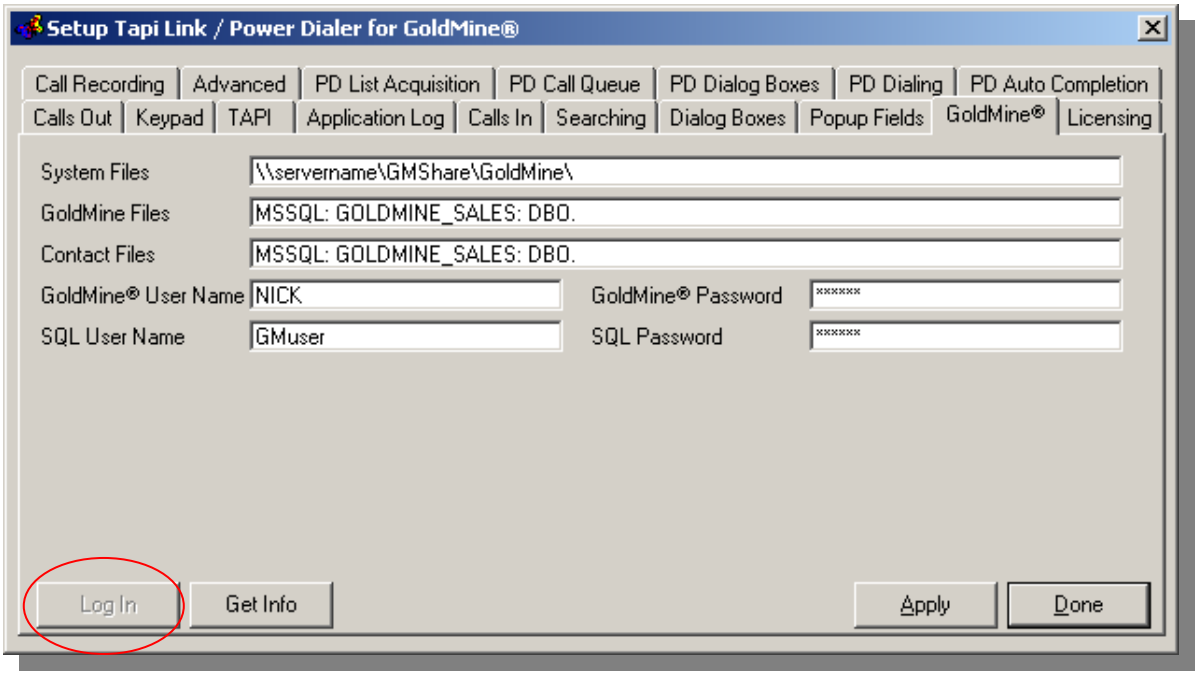
Now select the **GoldMine**® tab:



Click on the **Log In** button.

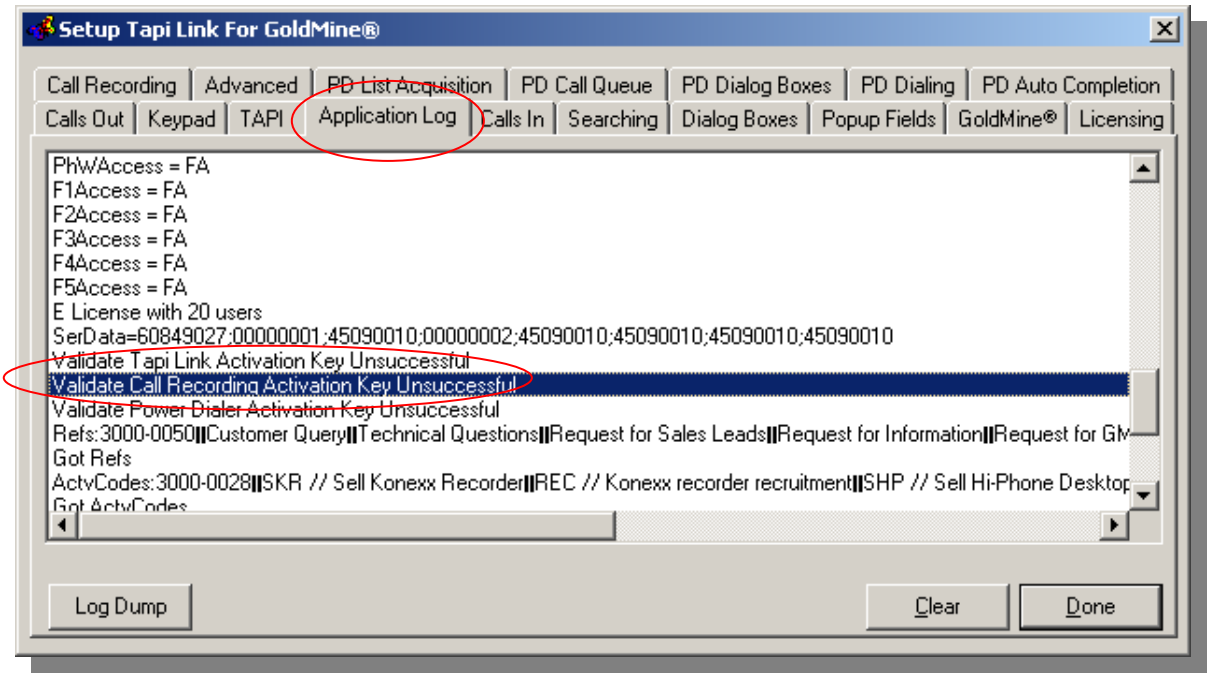
continued . . .

The **Log In** button should now become 'greyed-out' and unavailable as shown below:



If this is the case, it indicates that you have successfully logged-in with a properly validated activation key.
If NOT, then one or more of the following entries will appear in the **Application Log**, for example:
"*Validate SQL Activation Key Unsuccessful*" or "*Validate dBase Fast Lookup Activation Key Unsuccessful*" or "*Validate Call Recording Activation Key Unsuccessful*" - depending on which particular features you have chosen.

An individual example recording an unsuccessful activation is shown below:



If this is the case, check that the **SQL Direct Access, dBase Fast Lookup**, or the **Call Recording Activation Keys** have all been entered correctly and in the proper locations on the **Licensing** tab.
If you are sure that everything is perfectly in order, and yet you are still unable to properly activate either the **SQL Direct Access**, the **dBase Fast Lookup**, or the **Call Recording** facilities, please refer to the instructions in the section entitled 'Contacting Technical Support' at the end of this guide.

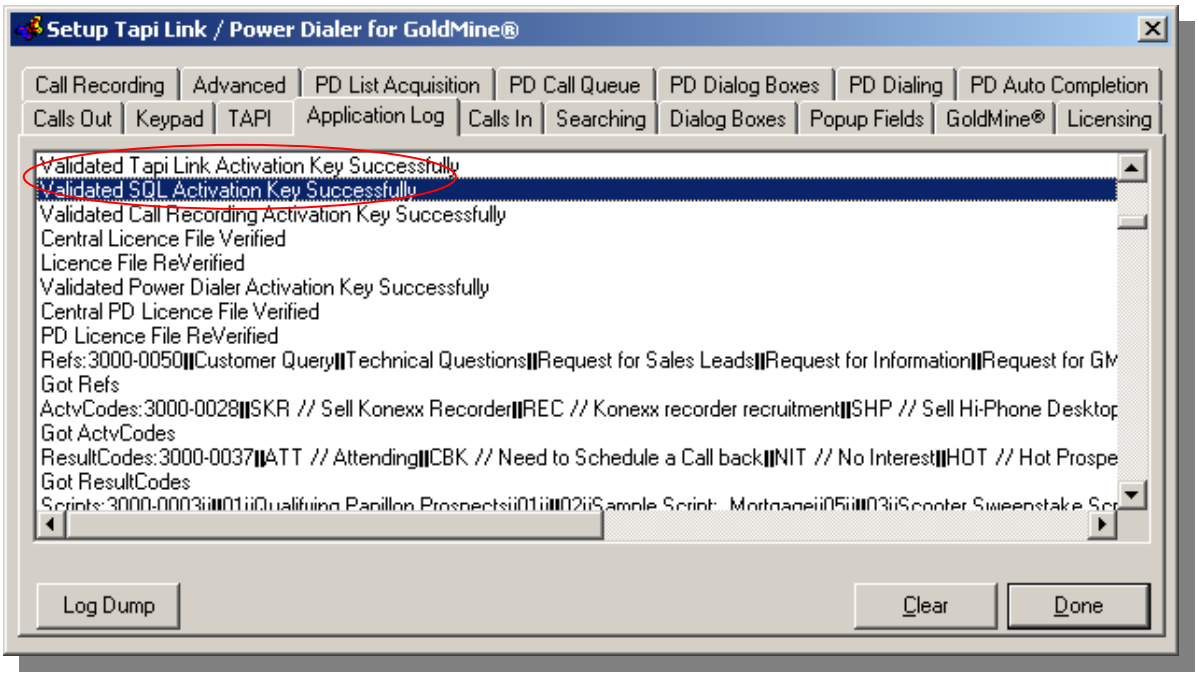
6. The SQL Direct Access facility

This section does not apply to GoldMine® 7, 8, and 9 users - and is generally only of use if you have difficulties activating SQL Direct Access.

This section is for troubleshooting purposes and additional information only, and may be disregarded if you successfully followed the Quick Start Wizard. (The Quick Start Wizard runs automatically, *the very first time only* that you launch the application and asks a series of questions such as the product serial numbers, and your user password etc. in order to setup a basic configuration.)

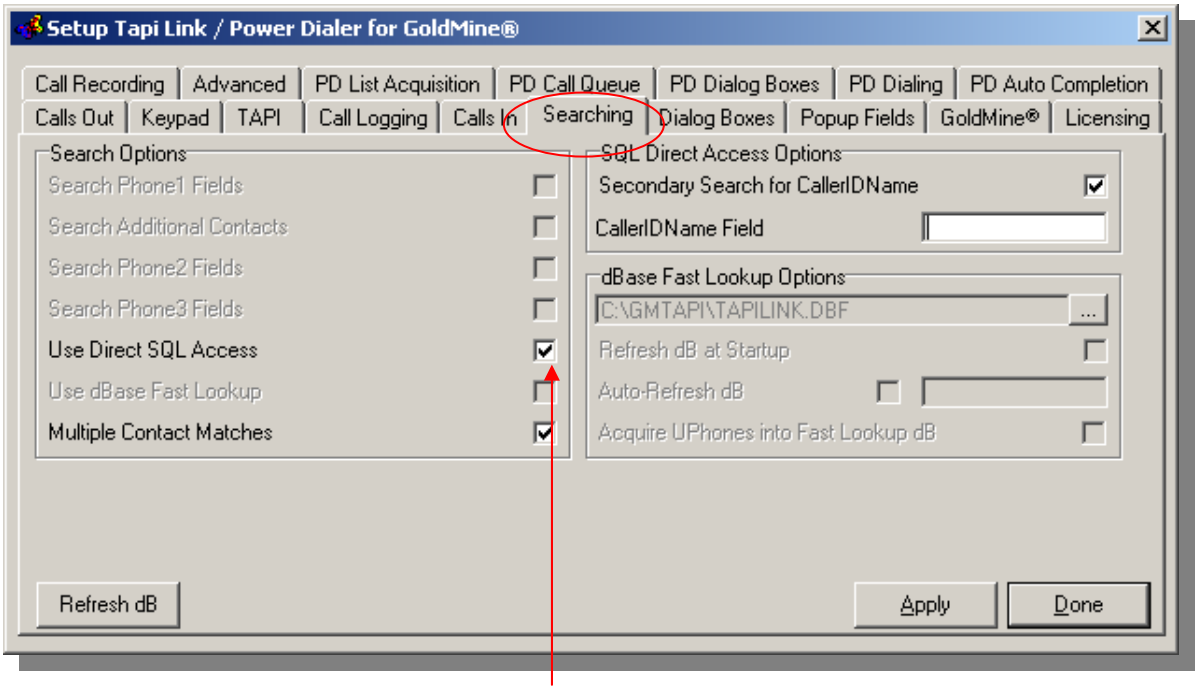
SQL Direct Access is an enhanced mechanism for rapidly locating contact records in GoldMine® from the CLI / Caller ID information provided by incoming callers when the database tables are hosted on Microsoft SQL Server®. This optimized access method is achieved by employing precise SQL queries in order to search and propagate data directly to Tapi Link – thus providing rapid 'Popup' screen displays.

If you have a valid Tapi Link SQL activation key you can proceed with enabling the **SQL Direct Access** facility. (Validation can be verified by selecting the **Application Log** tab and checking for the entry "*Validated SQL Activation Key Successfully*" as shown below.)



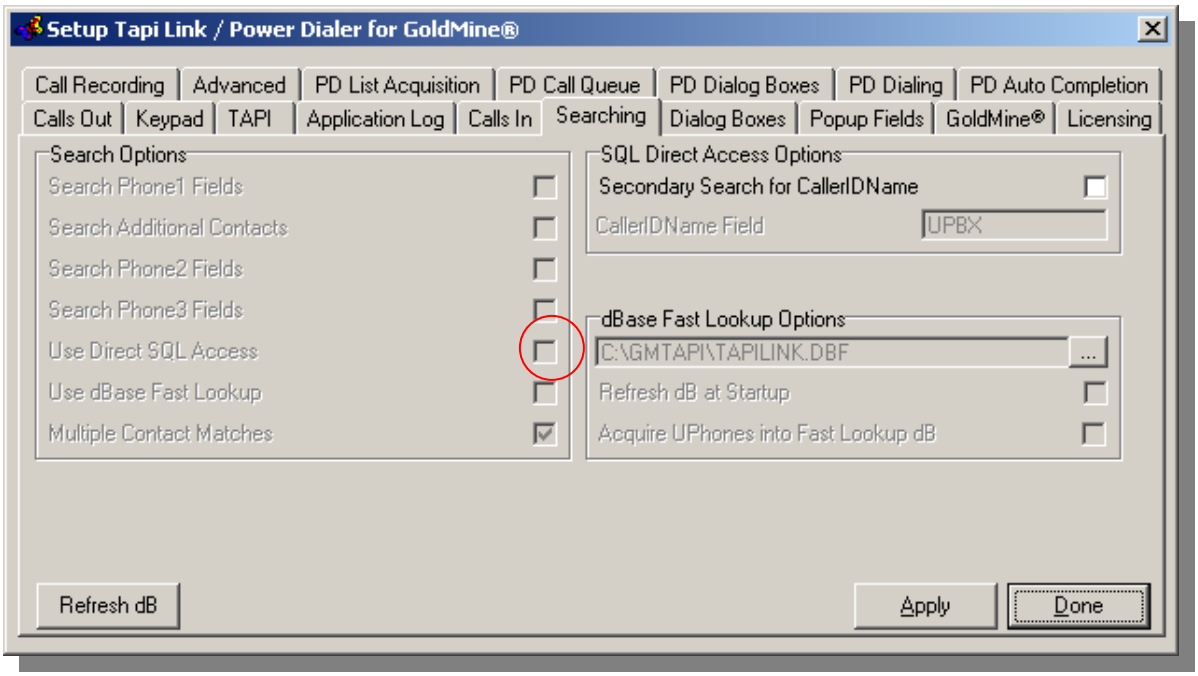
To enable the **SQL Direct Access** facility, select the **Searching** tab:

continued . . .



Check the **Use Direct SQL Access** box.

If, however, the **Use Direct SQL Access** check-box is 'greyed-out' and inaccessible – as shown below:

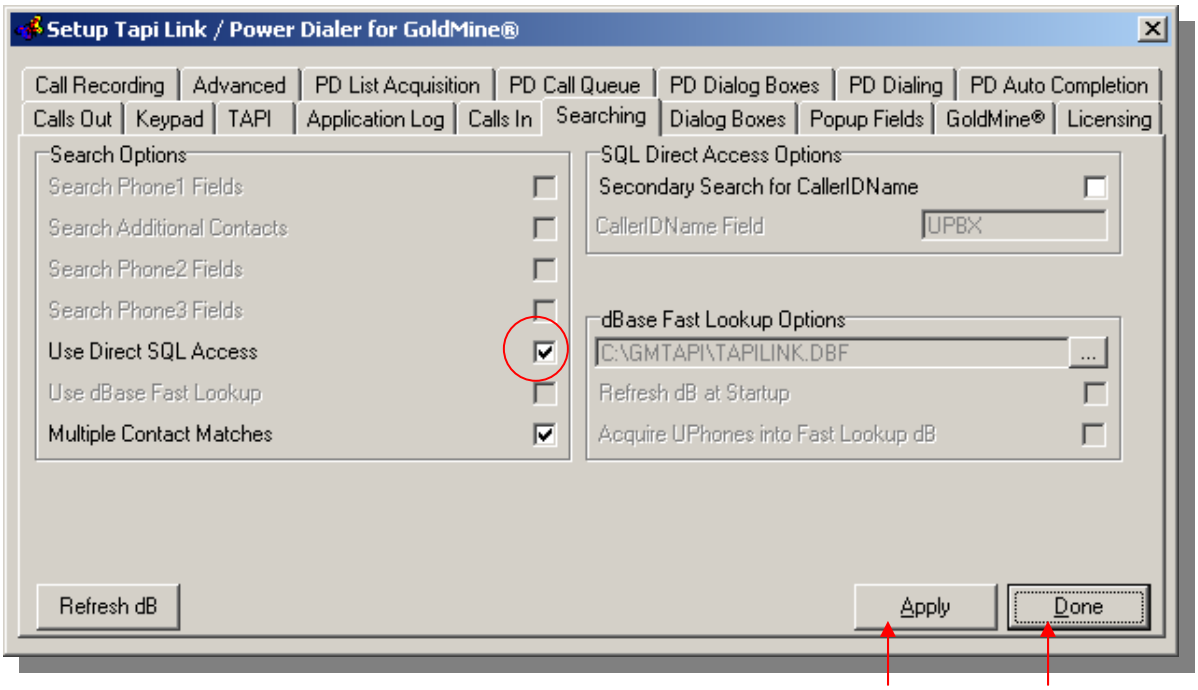


- then you have not enabled the Screen-Popping feature. These two options are inter-dependent, therefore - Select the **Calls In** tab: Check the **Screen Pop Goldmine®** check-box (or refer to section 8 later in this guide),

continued . . .

Then return to the **Searching** tab. The check box should now be available.

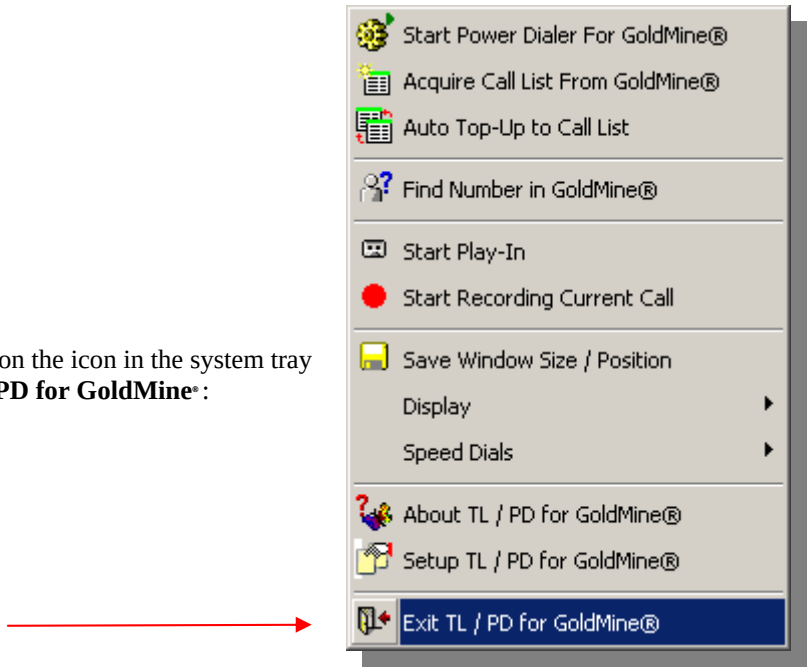
Check the **Use Direct SQL Access** checkbox.



Click on the **Apply** button, then on the **Done** button to dismiss the dialog box.

N.B.
At this point Tapi Link **must** be closed down and restarted again in order to fully initialize the process.

Do so by right-clicking on the icon in the system tray and selecting **Exit TL /PD for GoldMine®**:



Then RESTART Tapi Link from windows - **Start Menu > Programs > Papillon Technology > Tapi Link for GoldMine®**

(There is no need to configure which GoldMine® fields need to be interrogated since the **SQL Direct Access** facility searches through all fields simultaneously.):

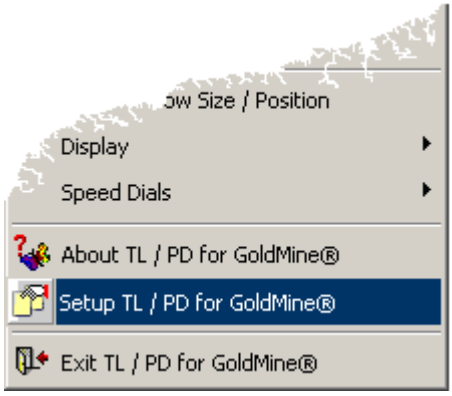
7. Dialing method – enabling the integration with GoldMine®

If you chose to follow the Quick Start Wizard immediately after installing Tapi Link for GoldMine® the following procedure is NOT necessary. You would normally only need to adopt the following procedure if you chose to ignore the Quick Start Wizard, or if a new user is being assigned to an existing installation.

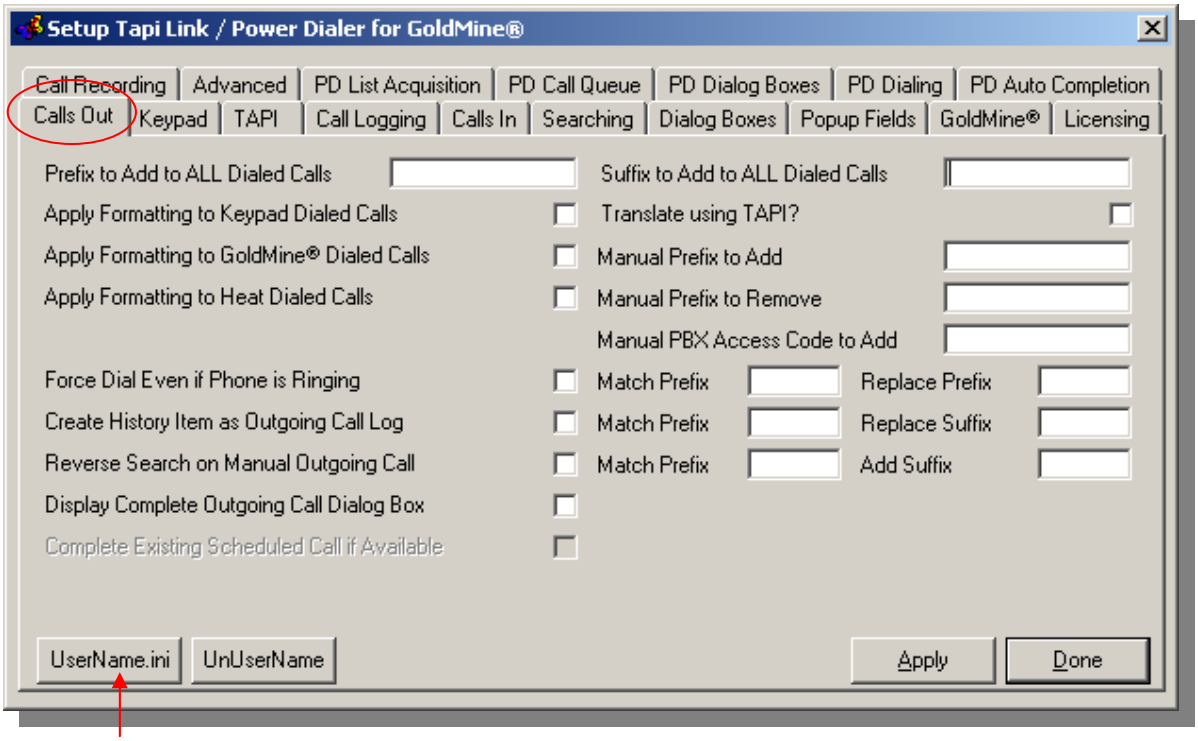
In order to properly integrate the DDE (Dynamic Data Exchange) between Tapi Link and GoldMine® and to modify the dialing method which GoldMine® employs to point to Tapi Link , proceed as follows:

Ensure that GoldMine® is running and that you are logged-in using the appropriate username.
Then right-click on the Tapi Link icon in the system tray:

From the context menu select **Setup TL / PD for GoldMine®**.



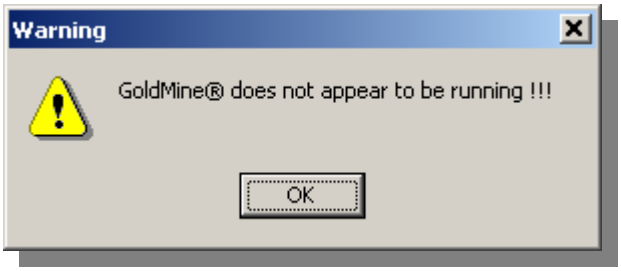
This will summon the **Setup** window, from which you should select the **Calls Out** tab:



Click on the **UserName.ini** button.

continued . .

If the following message appears - then you have omitted to start GoldMine® as previously advised:

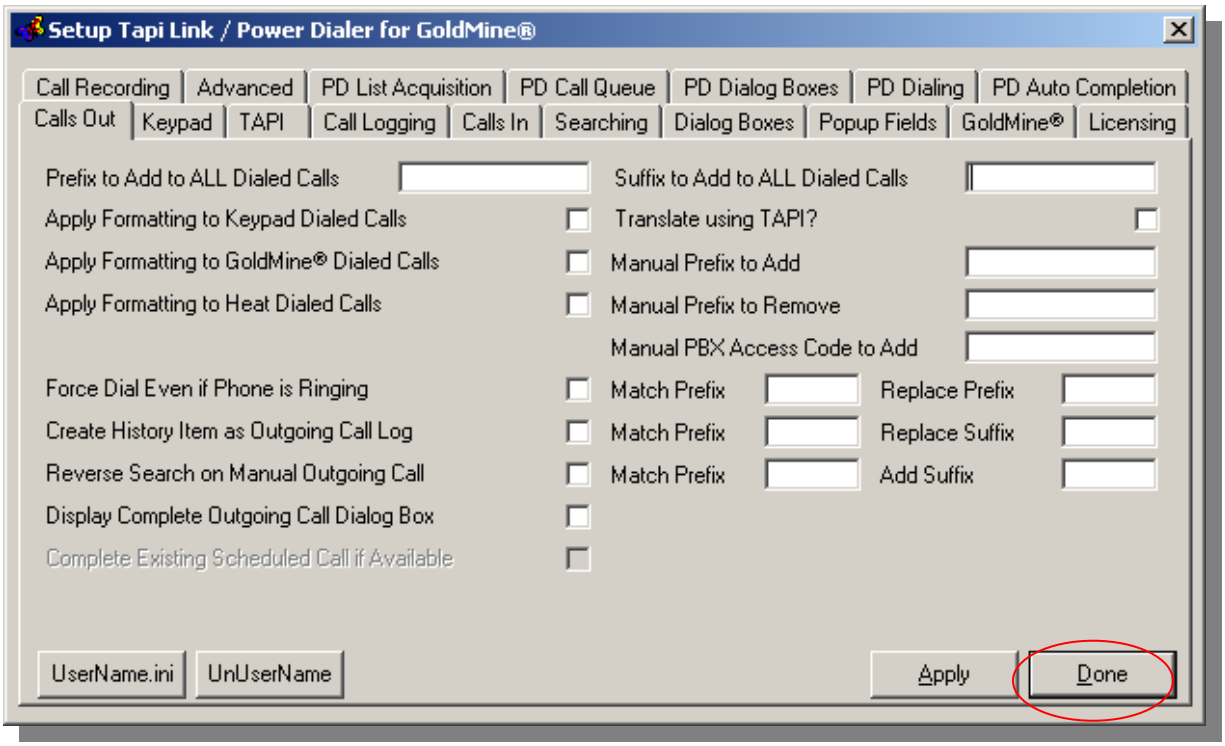


If this is the case, click **OK**, *then start GoldMine® and log in as usual with the relevant users Username and Password, then click on the* **UserName.ini** button *once again.*

If, however, you are properly logged into GoldMine® the following window will be displayed:

(This dialog box explains how to disable the integration between Tapi Link and GoldMine® at a later time, should you wish to do so.) Click on the **OK** button to dismiss the dialog box.

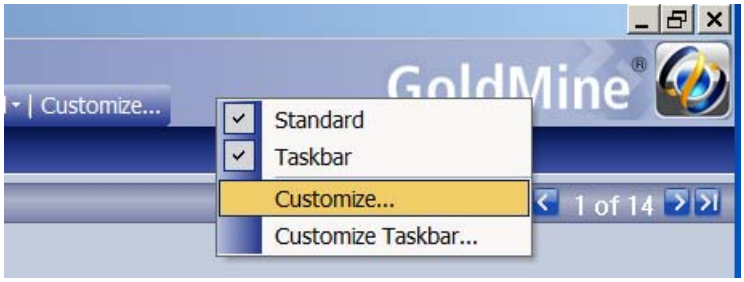
The active window will revert to the original **Calls Out** tab:



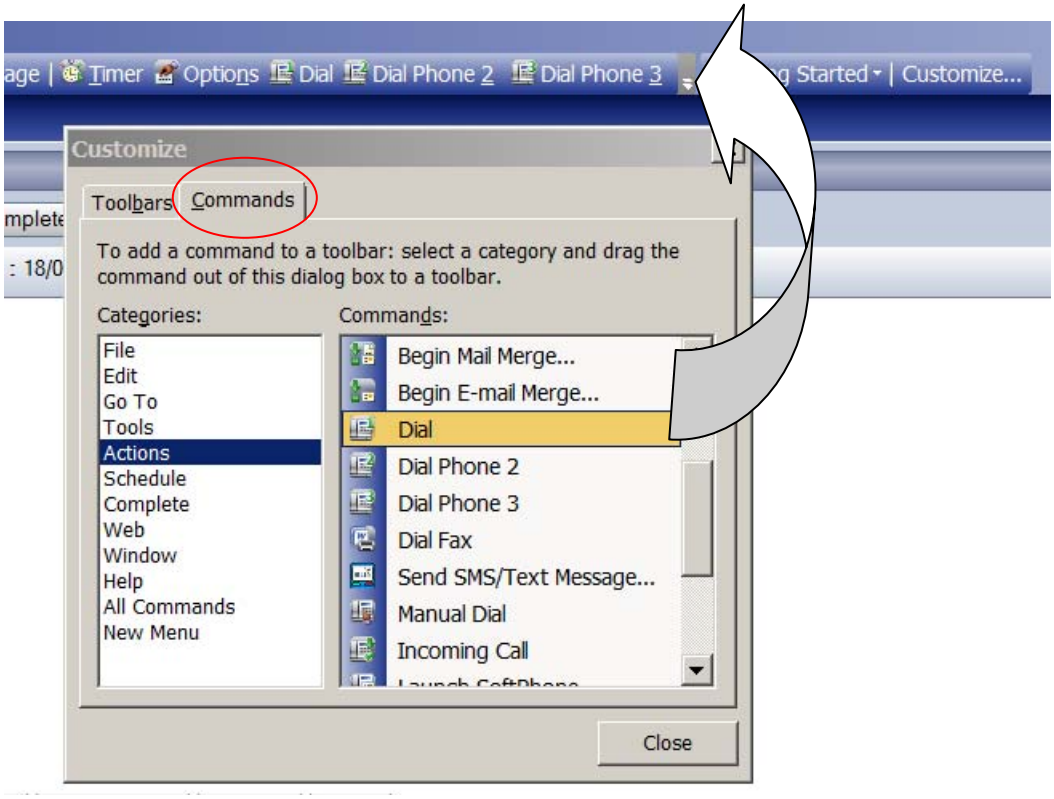
Click on the **Done** button. (It is *not* necessary to click on the Apply button.)
Finally, **EXIT** & **RESTART** GoldMine® in order for the changes to take effect. Tapi Link may remain running.

7. Adding 'Dial' icons to the GoldMine® interface

The method of adding **Dial** icons to the GoldMine® Taskbar or Toolbar will vary with the specific version of GoldMine® you are using. On later versions, right-click on the taskbar and select **Customize**.



Select the **Commands** tab



Drag and drop the required Dial icons from the commands list to the desired area on the toolbar above.

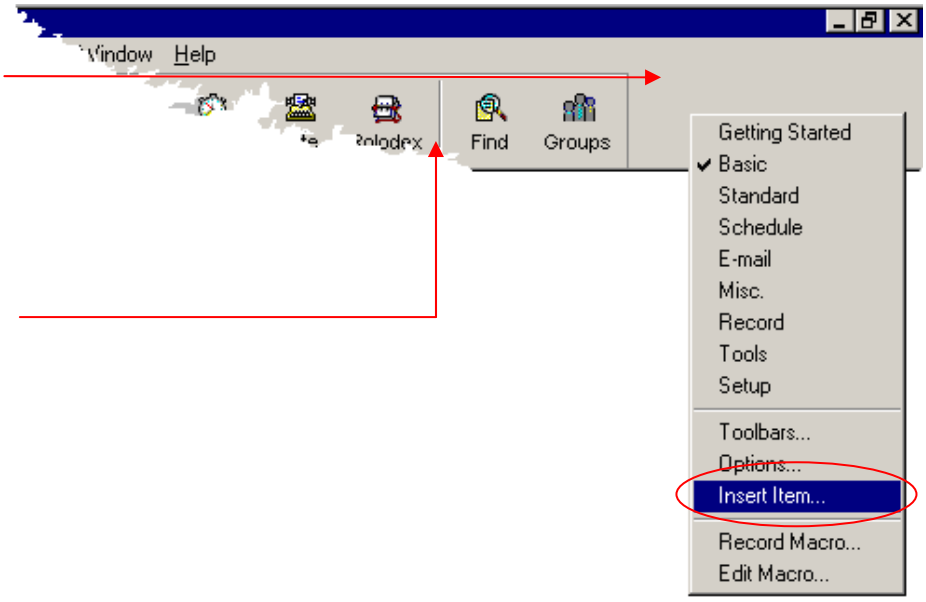
continued . . .

In earlier versions of GoldMine® the method is slightly different -

Right-click on a vacant area of the GoldMine® toolbar:

Or, alternatively, in the absence of any vacant area on the toolbar, right-click on a vertical demarcation line *between* any icon groups:

Either of these actions will produce the drop-down menu illustrated above from which you should select **Insert Item…**

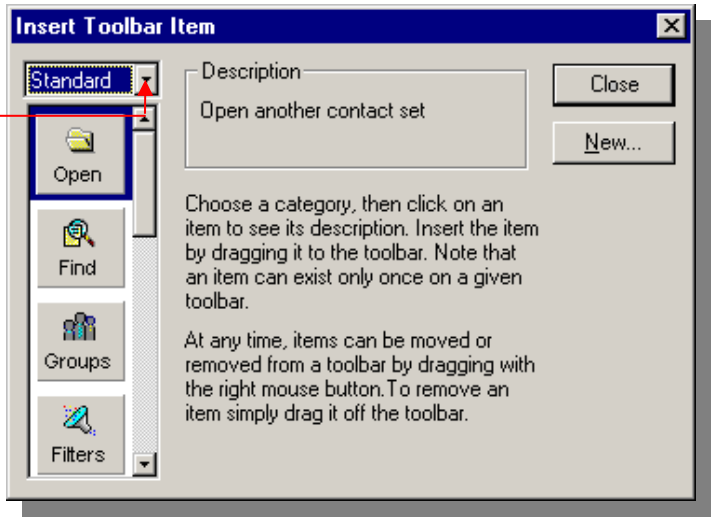


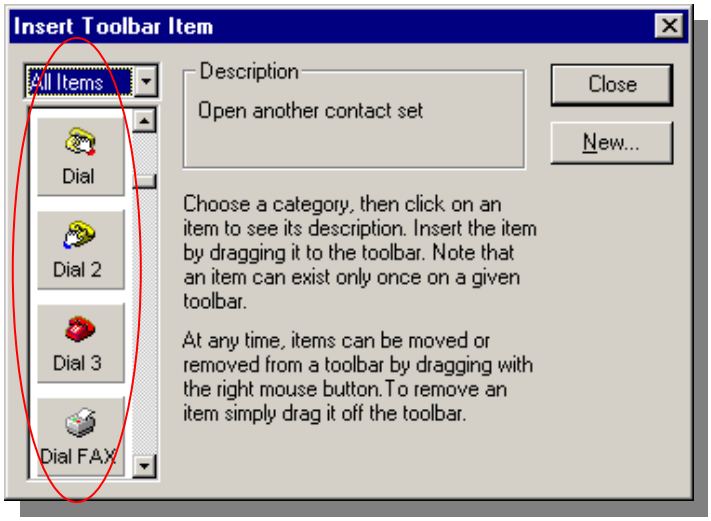
This will summon the **Insert Toolbar Item** dialog box:

Click on the drop-down arrow to reveal a list of icon categories.

Scroll to the bottom of the list of categories and select **All Items**:

This will produce a comprehensive group containing the necessary icons.
Scroll down the list until the **Dial**, **Dial 2**, and **Dial 3** icons appear:





Following the instructions on the dialog box, 'drag and drop' your chosen icons onto the GoldMine® toolbar.

(Note that attempts to drag and drop icons to a vacant area on the toolbar will not be effective. You must select a location *between* existing toolbar icons.)

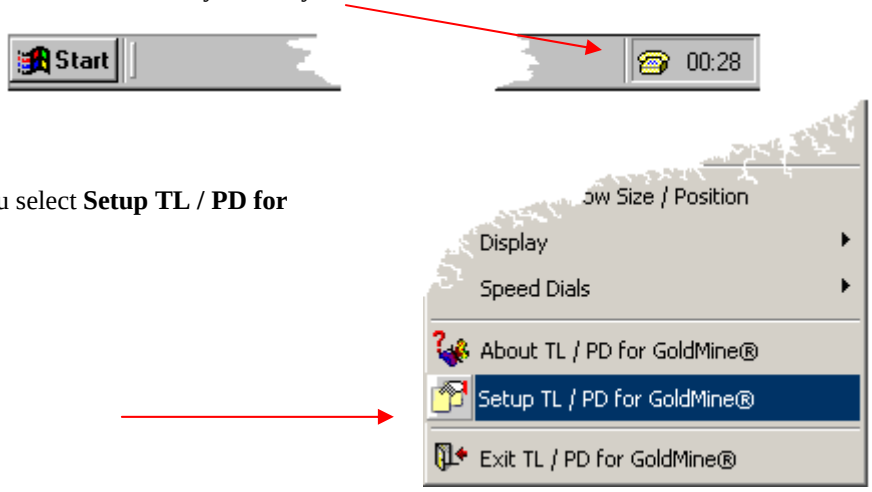
8. Activating the Screen-Popping functionality

If you chose to follow the Quick Start Wizard when installing Tapi Link for GoldMine® for the first time, and chose to activate screen-popping, the following procedure is NOT necessary. You would normally only need to adopt the following procedure if you chose to ignore the Quick Start Wizard, if you are troubleshooting, or if you are re-configuring the installation.

Proceed as follows to configure Tapi Link to present either –

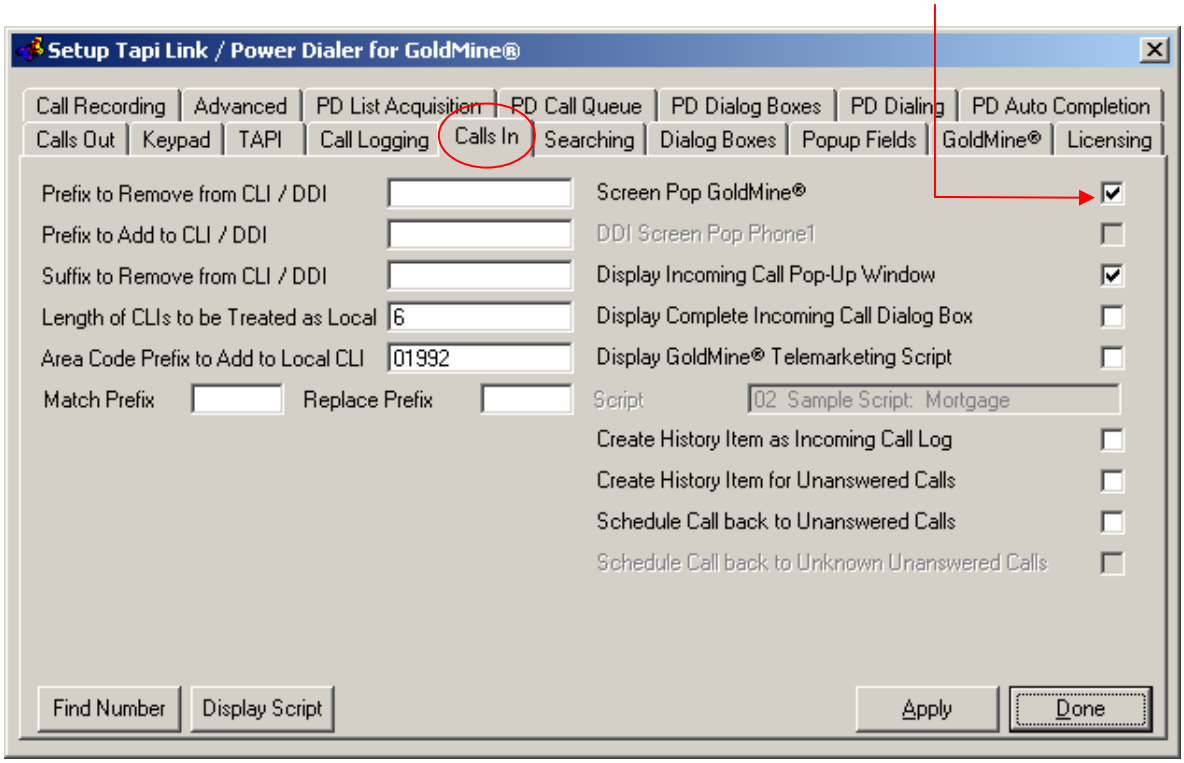
(a) a 'Popup' screen with selected details from the contact record of the calling party, or alternatively
(b) the GoldMine® contact record relating to the caller,

Right-click on the Tapi Link icon in the system tray:



From the context menu select **Setup TL / PD for GoldMine®**.

From the **Setup** window select the **Calls In** tab and check the **Screen Pop GoldMine®** checkbox:



Having selected the **Screen Pop GoldMine®** checkbox, further options will become available for selection.

9. Uninstalling Tapi Link

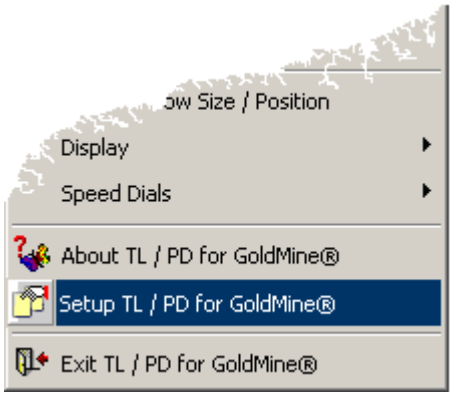
BEFORE PROCEEDING WITH UNINSTALLATION YOU MUST REMOVE THE ASSOCIATION BETWEEN TAPI LINK AND GOLDMINE®

Proceed as follows:

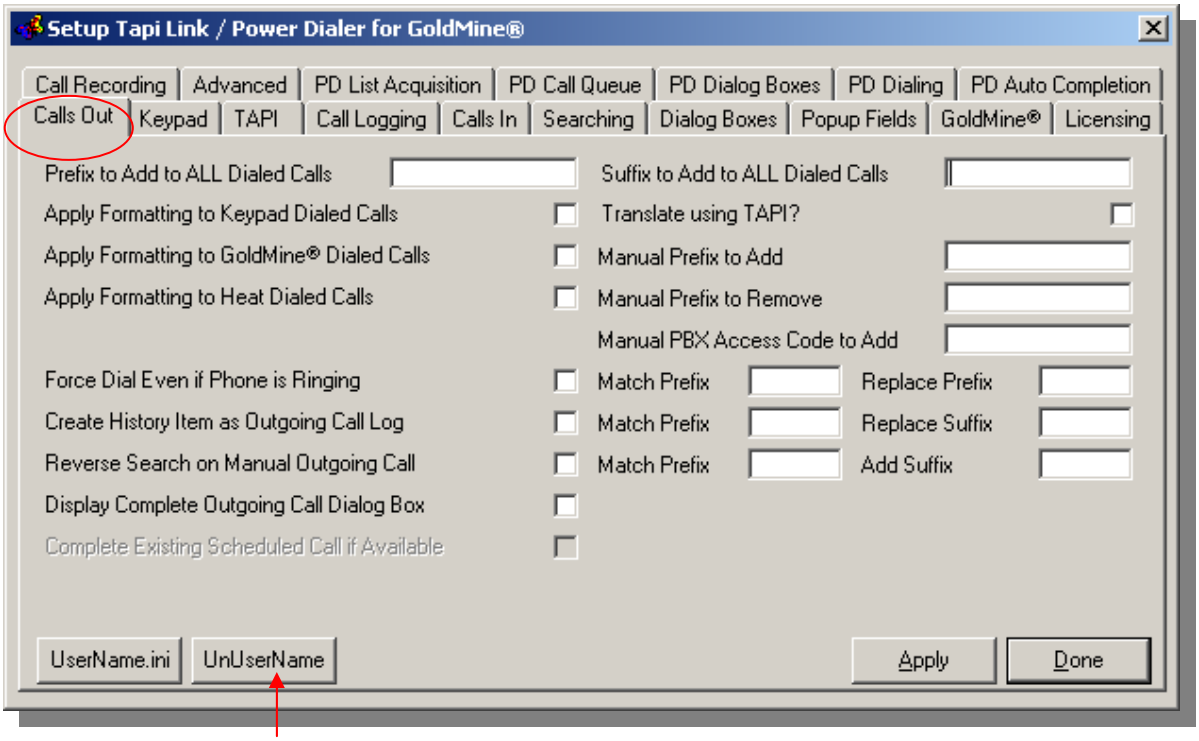
Firstly, ensure that GoldMine® is running (in the background).

Right-click on the Tapi Link icon in the system tray:

From the context menu select **Setup TL / PD for GoldMine®**. (or Setup Tapi Link for GoldMine®)

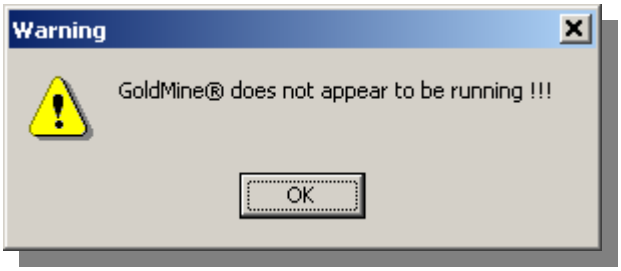


From the setup dialog box - select: the **Calls Out** tab.



Click on the **UnUserName** button.

If the following window appears then you have omitted to start GoldMine® as previously advised:

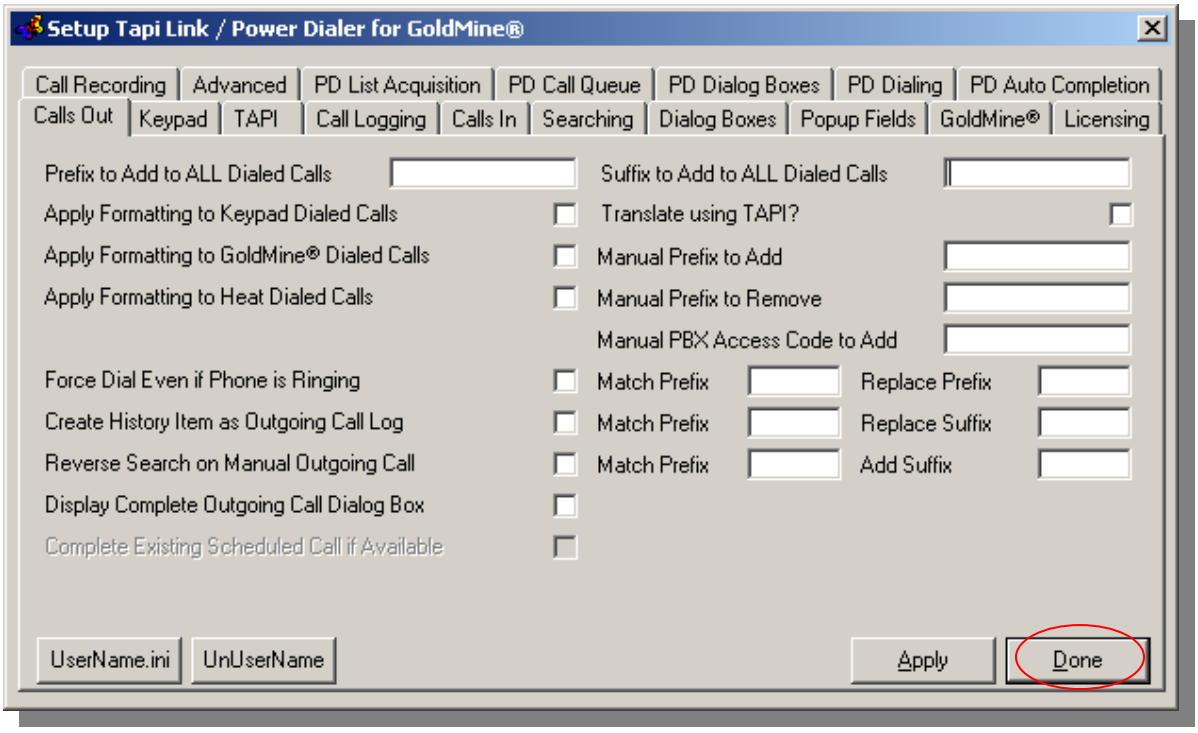


If this is the case, click **OK**, *then start GoldMine® and log in as usual Then click on the* **UnserName.ini** button *once again.*

If, however, you are properly logged into GoldMine® the following window will be displayed:

Click on the **OK** button.

Then exit and restart GoldMine® to allow the changes to take effect.



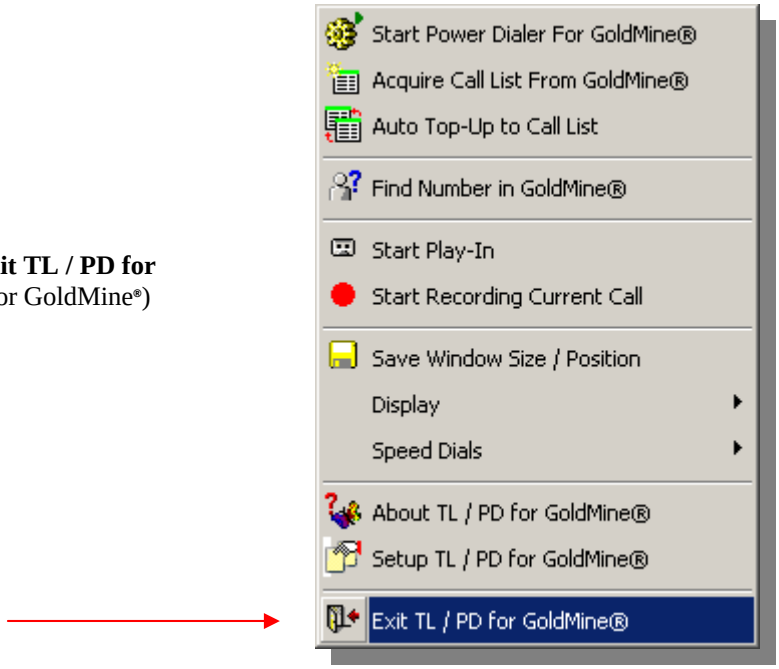
Finally, click on the **Done** button to complete the removal of the link to GoldMine®.
(It is *not* necessary to click on the **Apply** button.)

continued . . .

Next –

Right-click on the Tapi Link icon in the system tray:

From the context menu select **Exit TL / PD for GoldMine®**. (or Exit Tapi Link for GoldMine®)



Finally –

Go to windows **Control Panel**, select **Add/Remove Programs** and then select 'Tapi Link for GoldMine®.

Click on **Remove** to complete the uninstallation of the software.

Troubleshooting Note:
If you have previously attempted to uninstall Tapi Link solely by means of **Add/Remove Programs** in windows Control Panel and without observing the preceding instructions - you will need to reinstall Tapi Link once again. Having done so, you should then follow all of the steps from the very beginning of this section.

Contacting Technical Support

Should you experience any difficulties with this product you are strongly urged in the first instance to consult the contents of this user guide, in particular the FAQs (Frequently Asked Questions) and Troubleshooting and Re-configuration sections (see the contents page). Additional help can be sought in the form of 'Tool Tips' which provide context-sensitive help. (This form of 'fly-by-help' can be summoned by hovering your mouse pointer over the appropriate item or object in question, either within the framework of the Tapi Link Setup dialog boxes or the desktop Keypads.)

However, if you are unable to resolve a particular problem and subsequently find it necessary to contact Papillon Technology for further assistance, the swiftest resolution to any problem you may encounter with this product will be achieved if you ensure that you have an **Application Log** at hand *before* contacting us.

.The **Application Log** records a history of system events relating to this product and will assist in the diagnosis of any problems.

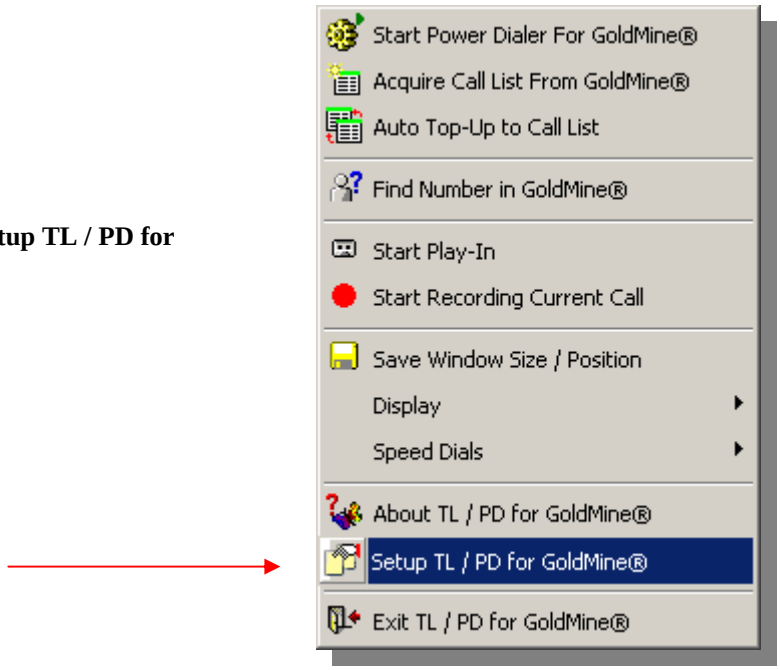
In order to produce an **Application Log** file suitable for transmission to our support personnel, please proceed as follows:

1. Firstly, perform the task which generates any error messages, or recreate the symptoms of the difficulty, so that there will be a contemporaneous recording of the event (or perhaps absence of event) generated within the log file itself.

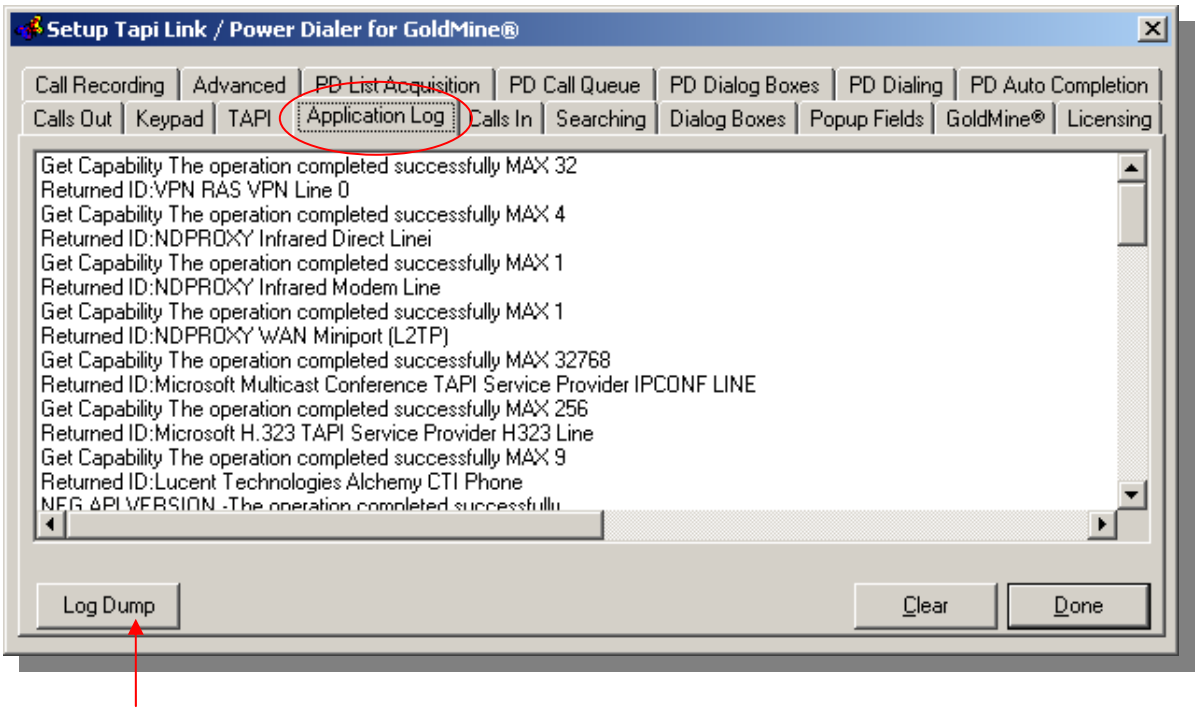
2. Right-click on the Tapi Link icon in the system tray:

continued . . . .

From the context menu select **Setup TL / PD for GoldMine®**.



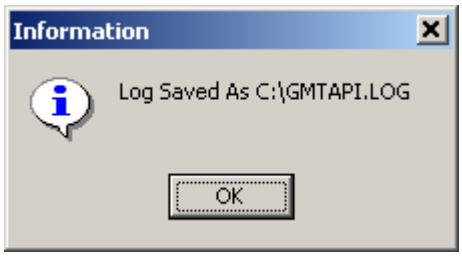
3. Select the **Application Log** tab:



4. Click the **Log Dump** button.

If the fourth tab is labeled **Call Logging** and not **Application Log** – refer to the section entitled 'Toggling between Event Logs' in order to change the information that this tab presents BEFORE clicking on the **Log Dump** button. In order to provide support we require an **Application Log** which details system events. (and NOT a **Calls Log** which merely shows the telephone calls that have been made and received.)

5. This will generate the following **Information** dialog box:



6. Click on the **OK** button

The above dialog box confirms the creation and location of a text file which records the events listed in the **Application Log**. The file is named '**GMTAPI.LOG**' and is located in the root of the C:\ drive.
PLEASE INCLUDE THIS FILE AS AN ATTACHMENT TO ANY EMAIL REQUEST FOR ASSISTANCE. PLEASE DO NOT SEND THE FILE NAMED 'GMCALLS.LOG'

Requests for technical support from Papillon Technology relating to this product can be achieved by the following means:

Via Email to support@papillontechnology.com
By Telephone to +44 (0)1992 560487 or from the US on +1 (614) 559-2270
By Fax to +44 (0)1992 560489
Our Web site : http://www.papillontechnology.com

For further assistance, direct links either for ***email*** purposes or to our ***website*** are also available via the above '**About'** dialog box – which can be summoned by right-clicking on the Tapi Link icon in the task bar system tray and selecting **About TL / PD for GoldMine®**

The latest versions of this user guide and other guides for the range of products from Papillon Technology are available from the following location http://www.papillontechnology.co.uk/download.htm

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the future is calling