

# Horizon

## Integrator GoldMine Add-in Guide



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# Introduction

## FrontRange GoldMine 5.5 – 9.2 Add-in Guide

This document will guide you through configuration and basic use of Horizon Integrator's GoldMine Add-in. It is expected that you are already familiar with the Address Book, Call History and Preview window, and the basic concepts of integration and screen popping using the Add-ins. See the full user guide for these topics.

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

Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the full user guide or consult your Horizon administrator.

Information you will need:

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

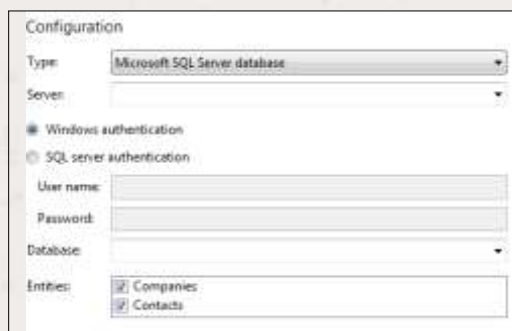


**Instructions on where to find this information are given below if required**



# Configuration

Right-click Integrator's tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up. In the 'Integration' area, click the '(Add new)' button, select 'GoldMine' from the 'Type' dropdown box and then click the 'Set' button.

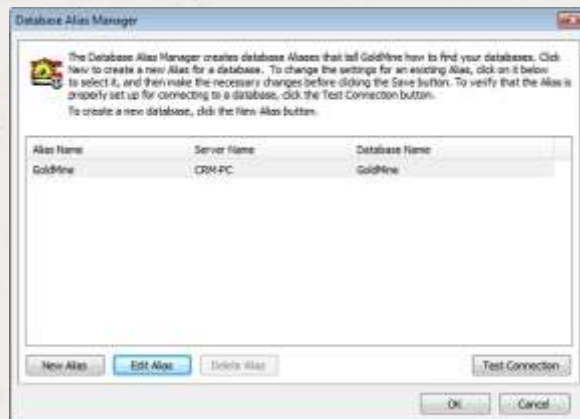


On the 'Configuration' group, you need to enter the details of your GoldMine database. There are three different kinds of database that apply to GoldMine; Microsoft SQL, dBASE and Firebird. SQL is by far the most popular so the chances are you'll need to select 'Microsoft SQL Server database' in the 'Configuration' group's 'Type' dropdown box. Obviously, if you use one of the other formats then select the appropriate one; which is used largely depends on the size and age of your database.

To gather the required information about your database, go into GoldMine, open the 'Tools' menu, then 'Databases' and click 'Alias Manager...'. .



The 'Database Alias Manager' window opens and displays the aliases that have already been setup for GoldMine. If you have more than one and you're not sure which is the correct one, ask your system administrator. Select the appropriate alias and click the 'Edit Alias' button to view the alias's details.



Make a note of what is shown in the 'Edit Alias' window for the 'Host' and 'Database' fields. You can also confirm the type of database used by looking at the 'Server Type' dropdown box.



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

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

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

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

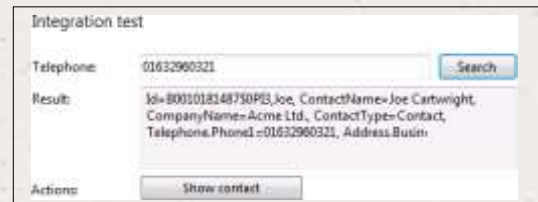


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# Testing

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

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



The screenshot shows a web-based 'Integration test' interface. It includes a 'Telephone' input field with the value '01632960321' and a 'Search' button. Below this, the 'Result' section displays a JSON-like string: 'Id=B001018148750P3, Joe, ContactName=Joe Cartwright, CompanyName=Acme Ltd., ContactType=Contact, Telephone.Phone1=01632960321, Address.Busin'. At the bottom, there is an 'Actions' section with a 'Show contact' button.

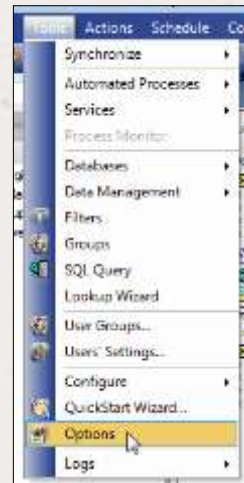
Integration test	
Telephone:	01632960321 <input type="button" value="Search"/>
Result:	<code>Id=B001018148750P3, Joe, ContactName=Joe Cartwright, CompanyName=Acme Ltd., ContactType=Contact, Telephone.Phone1=01632960321, Address.Busin</code>
Actions:	<input type="button" value="Show contact"/>

# Dialling configuration

To dial out from within GoldMine, you need to make sure the settings in GoldMine are set correctly.

To do so, open the 'Tools' menu in GoldMine and click 'Options', then select the 'Telephony' tab on the 'Options' screen.

In the 'Modem Settings' group, select the 'UC Tapi Driver' option in the 'TAPI Line' dropdown box.

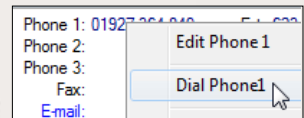


In the 'Dial Number Formatting' group, tick the 'Dial numbers as entered' option.

In the 'SoftPhone (SIP Client)' group, make sure that the 'Use SoftPhone by default' option is NOT ticked.

Click 'OK' to save the settings.

Now, to dial a number stored in GoldMine, right-click on it in the contact record screen and then left-click the dial option on the pop up menu.



# Functionality



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

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



Calls can be deflected to another extension before answering them by clicking the 'Deflect' button, entering the extension number and clicking 'Deflect' again.



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



To speak to a colleague during an active call, click the 'Consult' button, enter the extension number and click 'Consult' again; the active call is automatically held. To end the call to your colleague and resume the held call, click 'Cancel'.



To transfer a call to another extension, click the 'Transfer' button, enter the extension number and click 'Transfer' again.