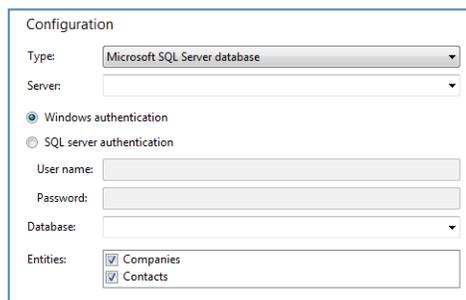


GoldMine Addin Guide

This document will guide you through configuration of the GoldMine addin. It is expected that you are already familiar with the Address Book and Preview window, and the basic concepts of integration and screen popping using the addins. See the User Guide for these topics.

Configuration

Right-click the 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.



The screenshot shows the 'Configuration' dialog box. It has a 'Type' dropdown menu set to 'Microsoft SQL Server database'. Below it is a 'Server' dropdown menu. There are two radio buttons for authentication: 'Windows authentication' (selected) and 'SQL server authentication'. Under 'Windows authentication', there are input fields for 'User name', 'Password', and 'Database'. At the bottom, there is a list of 'Entities' with checkboxes for 'Companies' and 'Contacts', both of which are checked.

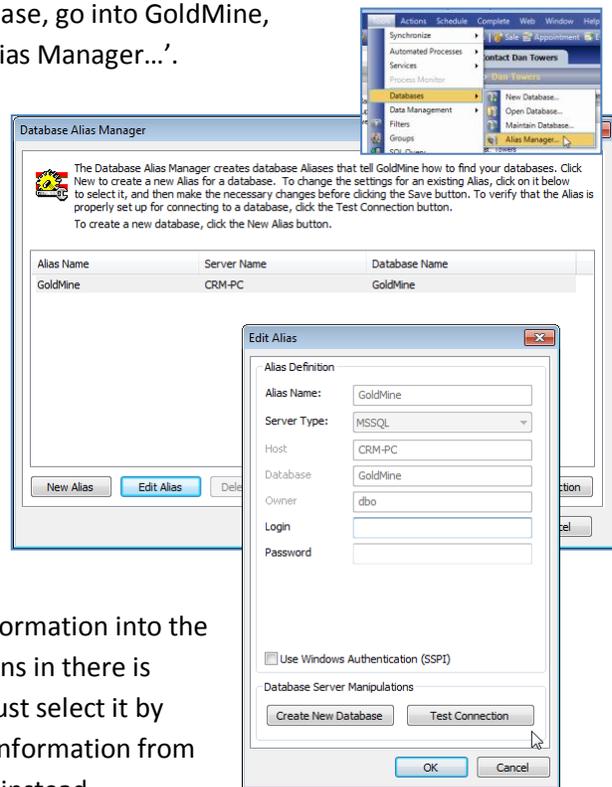
On the 'Configuration' group, you need to enter the details of your GoldMine database. There are three different kinds of database that apply to GoldMine; Microsoft SQL, dBASE and Firebird. SQL is by far the most popular so the chances are you'll need to select 'Microsoft SQL Server database' in the '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.

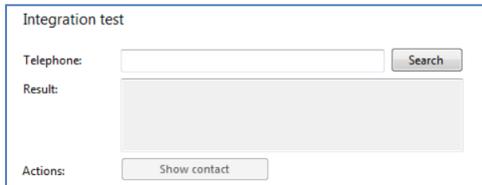
Back on the 'Configuration' group, type the 'Host' information into the 'Server' dropdown box or, if one of the existing options in there is exactly the same as the 'Host' information, you can just select it by clicking on it. Also, do the same with the 'Database' information from GoldMine but put it 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 modules you want to be used by ticking the corresponding boxes in the 'Entities' section.

Testing



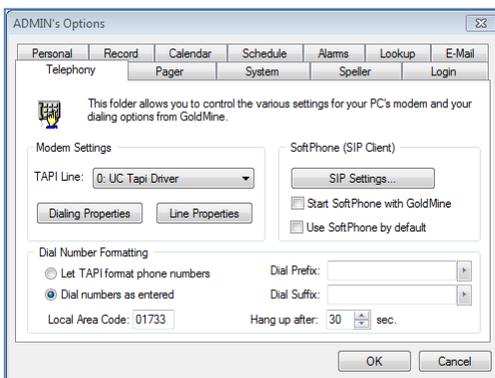
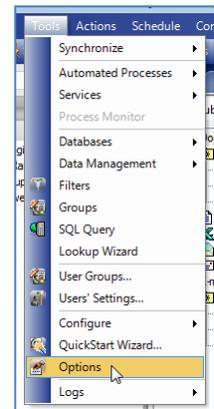
To test if the configuration worked, enter a phone number from your GoldMine account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

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.

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.

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.

