

How to configure caller recognition and screen-pop for:

Goldmine

Supported versions: 6.0

Contact replication method: Text export

Screen pop method: Keystroke emulation

Prerequisites

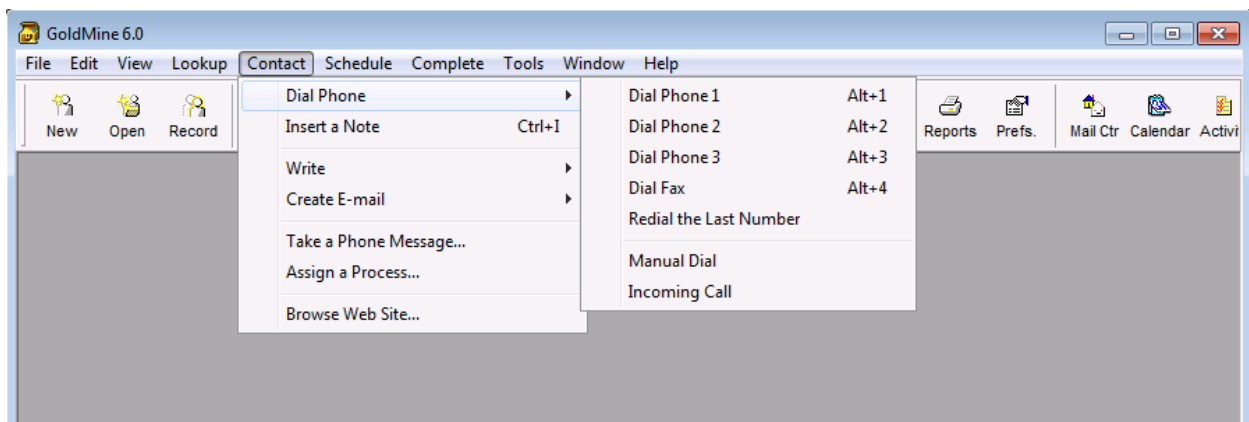
The simplest method for replication of your Goldmine Contacts is by file export. This can be achieved with the following steps:

1. Choose the menu Tools->Import/Export Wizard->Export Contact Records...
2. Choose export to 'ASCII file'
3. Select the Contacts and Associated fields to export
4. Export the Contacts to file

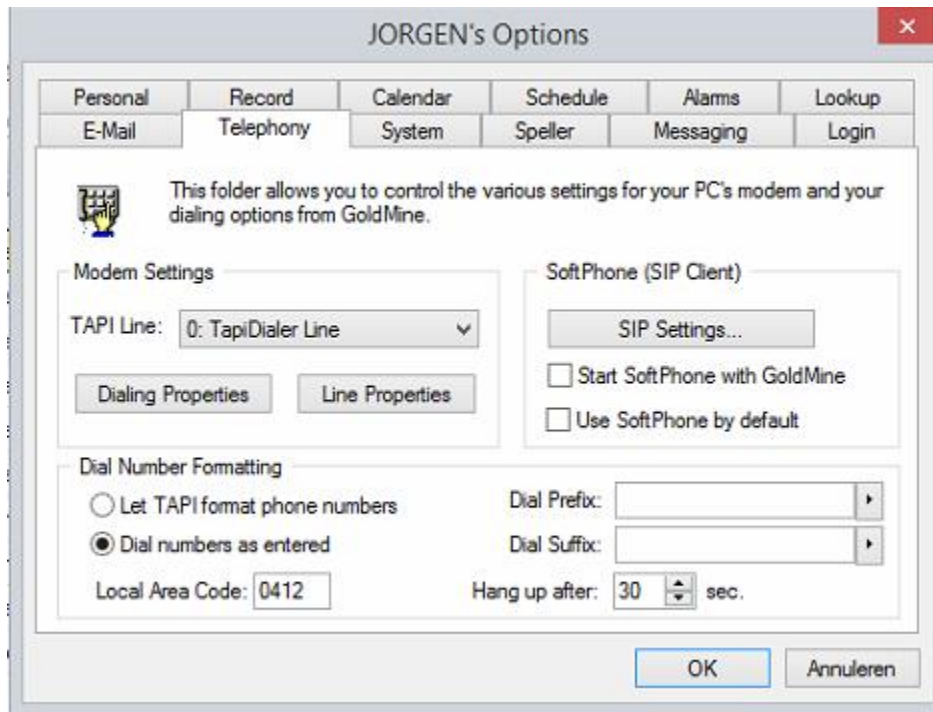
With step 3 it is required you at least select the 'ACCOUNTNO' field and all relevant fields containing phone numbers such as 'PHONE1', 'PHONE2' and 'PHONE3'. Additional fields can be shown in the notification balloon with an incoming call.

Notes

Goldmine offers a number of places where a call to contact can be initiated, such as from the pull down menu shown in the screenshot below.

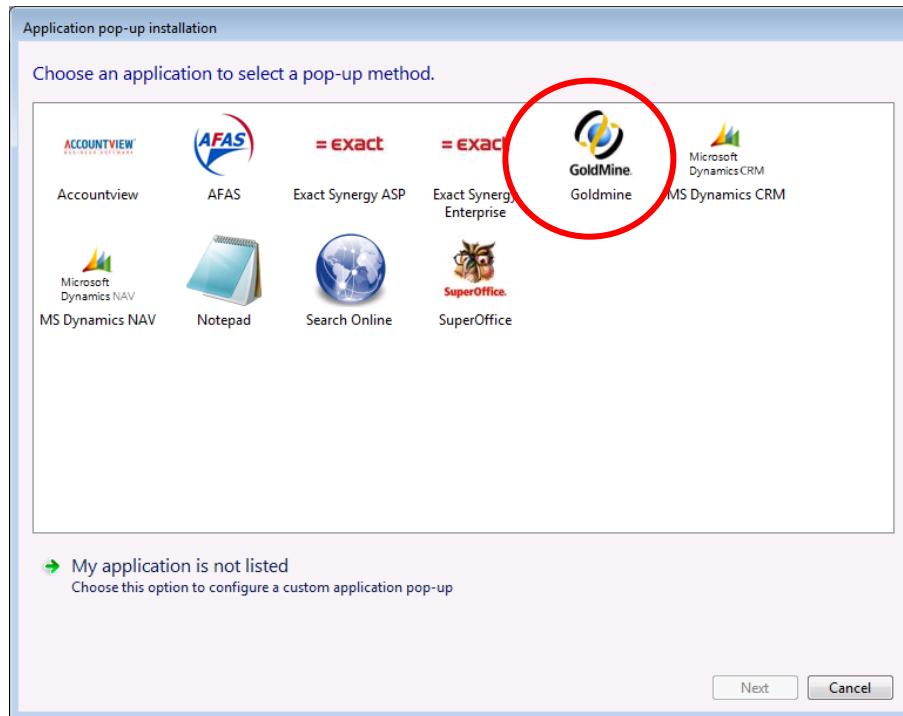


To enable these dialing methods choose the menu Edit->Preferences and on the modem page sheet select 'TapiDialer Line' as shown below. Please note that both SoftPhone related tickboxes are unchecked.

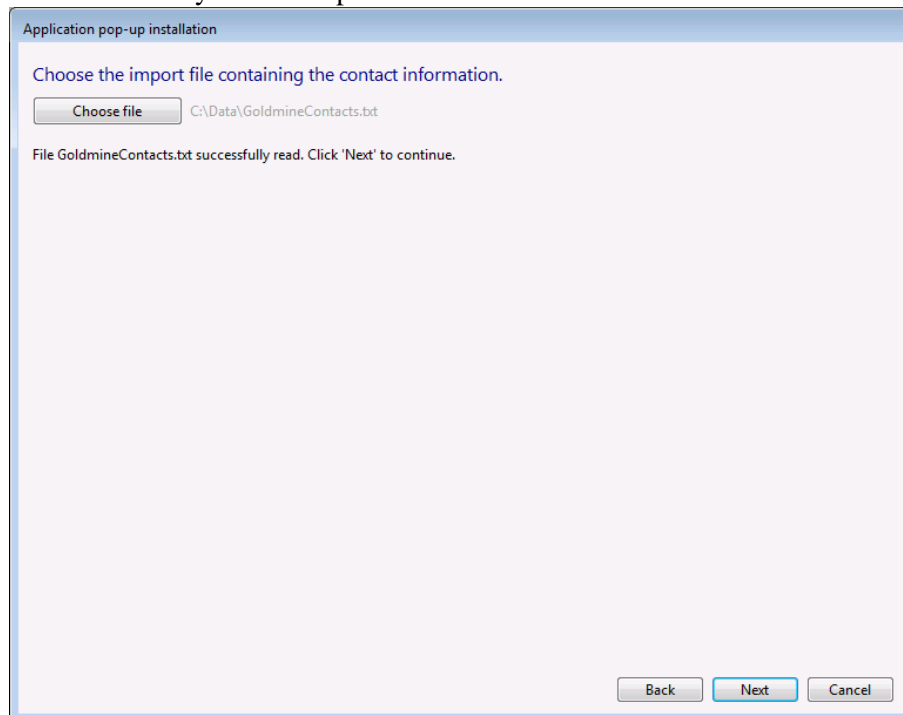


Configuration steps (7)

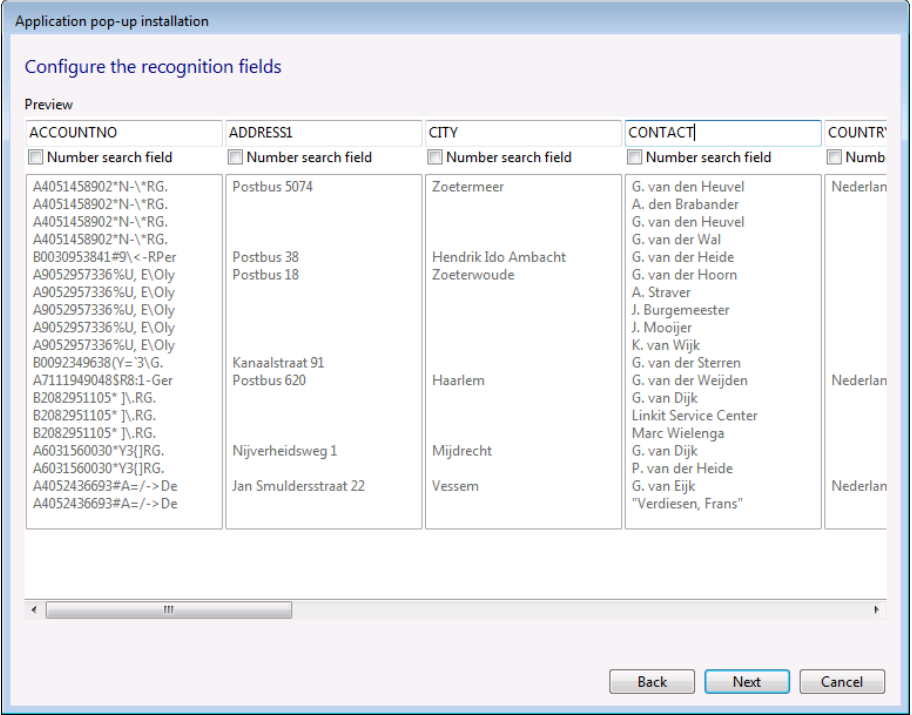
- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'GoldMine', as shown below.



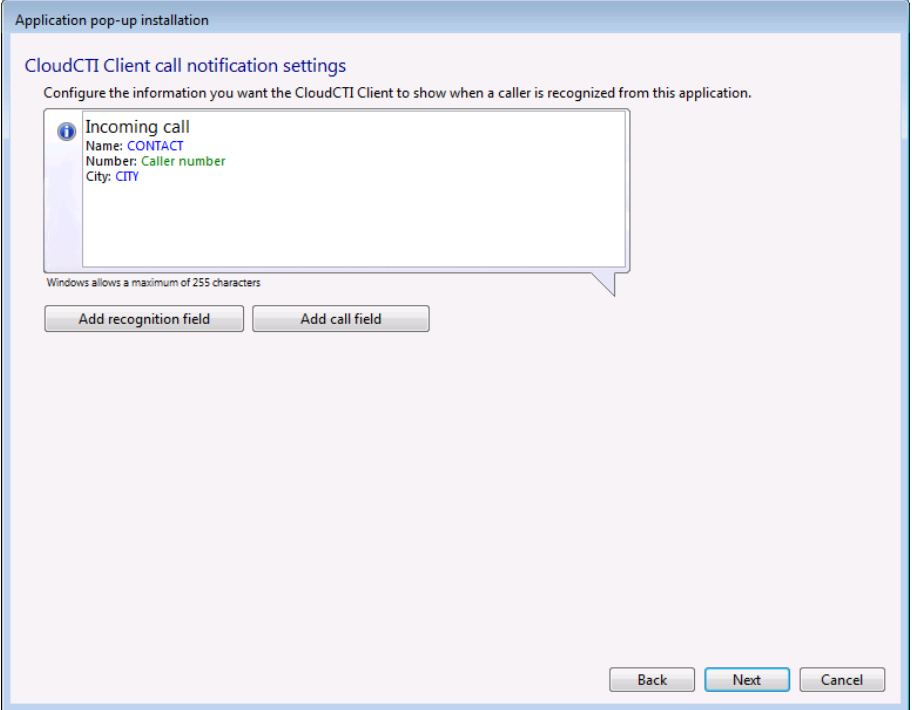
- 2) Choose the file you have exported from GoldMine.



3) Check the imported table analysis. The CTI Wizard automatically detected phone number columns. The content of these columns will be indexed for matching the phone number of an incoming call. Click 'next' to continue.



4) Choose which fields to display in the call notification on an incoming call.



5) If the number of a caller is recognized, the balloon can be clicked to launch a script which displays the corresponding contact card. The script first brings the GoldMine window to the foreground. In

this step you can configure the parameters with which the script selects the window. Click 'next' if the default settings are correct.

Application pop-up installation

How can the script find the application?

Provide search criteria to find the application.

Search all running applications, and match on (a part of) the application path

gmw6.exe

Start the application if it is not active (full path required)

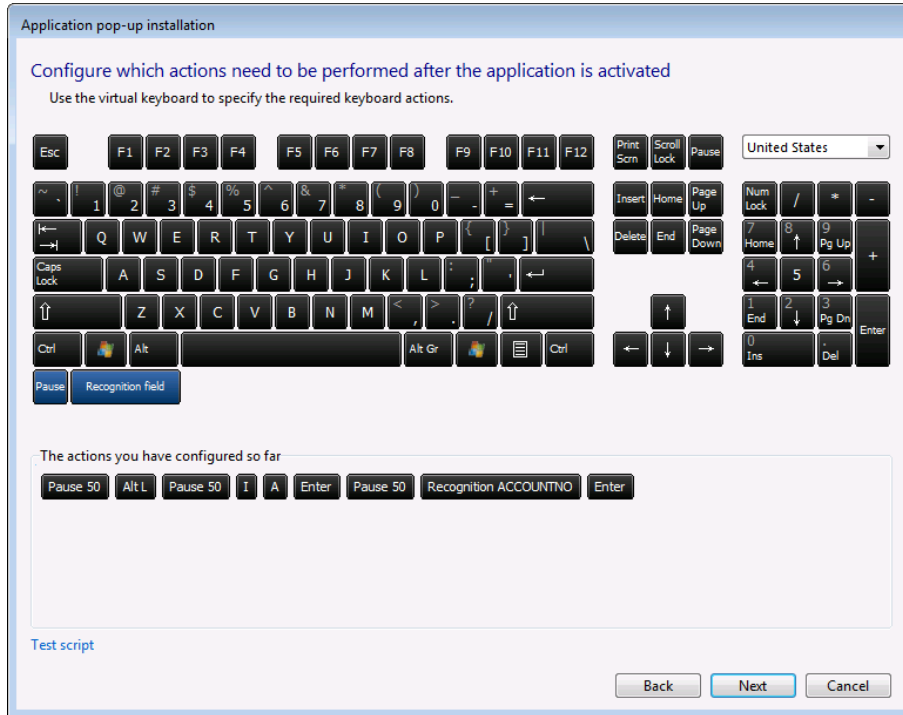
Search all running applications, and match on (a part of) the visible application name

GoldMine

Choose from a list of active applications

Back Next Cancel

- 6) After the script brought the GoldMine window to the foreground, it emulates the keystrokes with which a contact can be searched using the account code. By default, it selects the item 'Indexed Fields...' from the 'Lookup' pull down menu and the subitem 'Accounts' after which it proceeds to enter the account code. Click the 'Test script' link on this page to assert the default keys work correctly on your system. The test script should pop the first contact of the export file you selected with step 2.



- 7) Check the configuration summary and click finish to add the recognition from GoldMine.

