




Goldmine Integration


Automatic Screen Popping:

This will setup the Goldmine to automatically screen pop on a ringing or answered call

Right click the  icon and select Settings the Application Settings, you will the need to:


1. Select the Application Support tab.
2. Click the Add button
3. The choose screen pop
4. From the Application drop down box select Goldmine
5. You will then need to select how the screen pop will activate
 - a. Call Direction – This will determine whether an Inbound only, Outbound Only or both Inbound and Outbound calls will screen pop. Generally Inbound is the best selection
 - b. Call Type – This will determine whether External, Internal or both External and Internal calls will screen pop. Generally External is the best selection
 - c. Call ringing – This will mean that the screen pop will activate whilst the users phone is ringing
 - d. Call answered - This will mean that the screen pop will activate once the user answers the call
6. Goldmine Settings - select the Goldmine version from the drop down box
7. Goldmine Fields – select what fields will be searched for the screen pop to activate or select All Telephone Fields
8. Once completed click Save
9. Then click Save again

Manual Screen Popping:


This will allow the user to have a button to click manually if they do not want the screen pop to be automated. When the user receives an incoming call the banner will display and the user will need to click the button  on the banner as per below.



To setup the button:

1. Right click the  icon and select Settings...
2. Under Banner Buttons make sure Custom is selected
3. The click the Custom Button Icon to add the Button Settings
4. Enter the Button Text as Goldmine
5. Select the Action tab
6. From the drop down box select Screen Pop Application
7. From the Application drop down box select Goldmine
8. Goldmine Settings - select the Goldmine version from the drop down box
9. Goldmine Fields – select what fields will be searched for the screen pop to activate or select All Telephone Fields
10. Once completed click Save
11. Then click Save again

Goldmine Dialling:

To dial from Goldmine users can highlight the number they require from one of the phone fields then double click the Phone Manager banner icon 

Alternatively the dial options can be utilised in Goldmine. Firstly the Xarios TAPI must be setup in Windows. Once this is setup the Goldmine TAPI options must be enabled:

1. Select Prefernces from the left Hand Side or from the Edit menu select Preferences




2. Select the Telephony tab
3. Then in the TAPI line drop down box make sure the Xarios option is selected
4. Under the Dial Number Formatting options make sure that the 'Let TAPI format the Phone Numbers' option is selected
5. Make sure the Hang Up time is set to 0 and not 30
6. Click OK to save the settings

To then use the dial options in Goldmine, open the contact you want to call. Select Contact from the menu at the top then Dial Phone then select the Phone field to dial.

Goldmine Call Data Records:

If you want Goldmine to store records in the history of a contact for the calls made and received:

Right click the  icon and select Settings the Application Settings, you will then need to:

1. Select the Application Support tab.
2. Click the Add button
3. Then choose Call Data record
4. From the Application drop down box select Goldmine
5. You will then need to select when the call data record will be recorded
 - a. Call Direction – This will determine whether an Inbound only, Outbound Only or both Inbound and Outbound calls will be recorded in the history. Generally Both is the best selection.
 - b. Call Type – This will determine whether External, Internal or both External and Internal calls will be recorded in the history. Generally External is the best selection
6. Goldmine Settings - select the Goldmine version from the drop down box