Tapi Link For GoldMine® - Installation Guide

Version No: 2.2.1.668 (for GoldMine® 5.x and 6.x)
Version No: 3.5.1.668 (for GoldMine® 7.x)
Version No: 4.5.1.668 (for GoldMine® 8.x)
Version No: 5.5.1.668 (for GoldMine® 9.x)

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(This guide relates to the preliminary installation procedures only. For details concerning the more comprehensive configuration and customization of this application – see the associated documentation entitled 'Tapi Link for GoldMine® - Configuration Guide')

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Contents

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GoldMine
Tapi Link For GoldMine® - Installation Guide

Overview

Once installed, Tapi Link becomes an integral part of GoldMine* and enables users to dial directly from within GoldMine* and to present calling party contact details over any windows* application when the phone is ringing.

It searches not only the main telephone number (Phone 1) but any other telephone number associated with that record (i.e. Phone 2, and Phone 3) as well as all numbers listed under the Additional Contacts tab, and user-defined telephone fields This process is entirely automatic - which means that it doesn't matter whether your contact is calling from their office, their mobile phone, or even their home office. If their telephone number is listed on the GoldMine* record - Tapi Link will present the callers information on-screen.

You can select up to five fields from your caller's GoldMine* record to appear with an incoming call, or alternatively to have the relevant GoldMine* record displayed automatically - before you answer the telephone, thus improving both your response times and the levels of service you provide to your clients. In addition, the Call Logging feature provides automatic logging of incoming and outgoing calls – with the benefit of a quick 'Call Back' function and an option to jump directly from your call list to the relevant contact records in GoldMine*.

Many other features including integrated scripting, statistical call data, and automatic presentation of call completion dialog boxes are also included. (When used in conjunction with the Managers Console**, Tapi Link can also automatically schedule follow-up activities and populate specified fields within GoldMine* simply by clicking a 'Speed Button' on the Call Completion dialog boxes.)

The Call Recording feature is an optional enhancement that allows you to record all of your calls automatically, or to select individual calls and then record 'on demand' (and if you wish, also to randomly record calls for quality control purposes). For simplicity and ease of use, all recorded calls are assigned a unique reference number and can be automatically linked to, and replayed from, the Links tab of the customers GoldMine* contact record.
Optional settings allow you to add descriptive references for recorded calls which appear on the links tab, add descriptive notes to the link, create a history item for the call, and also to schedule follow up actions as a result of the call.

A large database or a large number of users can adversely affect some third party CTi products. However, Tapi Link for GoldMine* supports First and Third party solutions, as well as multiple interfaces, and is specifically optimised for GoldMine* and Microsoft* SQL server environments. The benefits of having a SQL server 'back end' to the customer database is the speed at which it searches through multiple telephone numbers stored against each contact. Sites without SQL server will benefit from the dBase Fast Lookup feature built into Tapi Link for GoldMine*.

Tapi Link for GoldMine* can be extensively configured to suit each individual users needs. e.g. each user in an organisation may have entirely different settings tailored to suit their own particular requirements in terms of the screen-popping, dialling, and call recording features.

Tapi Link for GoldMine* communicates with your telephony device using the Microsoft* TAPI interface, ensuring a reliable and easy-to-use solution based on established industry standards. Tapi Link is designed to work with DDI's, hunt groups and supports Supervised and Unsupervised Call Transfer, and Call Conferencing. (This is dependent on the specification of your switchboard. Papillon Technology can advise on any configuration changes necessary to the PBX or the interface in order for solutions to function optimally.)

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Pre-requisites

- **The 'Tapi Link for GoldMine·' CD-ROM.**
  If however, you have been provided with this software by another means, for example by download or by e-mail, it will be in the form of a single file installation routine, namely 'Setup.exe'.

- **An installed and licensed copy of GoldMine· 5, 6, 7, 8, or 9 / GoldMine BCM / GoldMine Front Office· Sales & Marketing.**

- **If using an Windows NT· / 2000· / XP· / Vista· / Windows 7· operating system, you will also require appropriate Administrative rights in order to install and configure software.**

- **A TAPI compliant telephone system or handset, and a telephony service provider driver.**
  The Tapi provider's driver software should have been installed and tested using Microsoft· Phone Dialer prior to running Tapi Link For GoldMine· - via *Start Menu | Programs | Accessories | Communications | Phone Dialer* if you are using Windows 95/98/ME/2000·, or via *Start Menu | Programs | Accessories | Phone Dialer* if you are using Windows NT·.

- **Unrestricted user-level access to -**
  Windows Control Panel
  The GoldMine· Edit > Preferences menu or > Tools menu – depending on the version.
  The GoldMine· Contact > Dial Phone menu
  The GoldMine· Tools > BDE Administrator (if appropriate to your version of GoldMine·)

Further possible requirements depending on the GoldMine· version installed, the nature of usage, and the working environment (but particularly if deploying in a Terminal Services environment) are as follows:

Full access rights to the Registry Editor.

Full access rights for individual users to their local C:\ root directory.

Full access rights for individual users to their local installation path, by default:
C:\Program Files\Papillon Technology\Tapi Link

Full access rights for individual users to their local path:
C:\Documents and Settings\ ~ *relevant username* ~ \Application Data

Full access rights for individual users to the registry section:
HKEY_CURRENT_USER\Software\Papillon Technology\

Full access rights for individual users to the registry section:
HKEY_LOCAL_MACHINE\SOFTWARE\Borland\

Minimum system requirements

- **A CD-ROM or DVD drive from which to install the CD software.**
  If however, you have been provided with this software by another means, for example by download or by e-mail, it will be in the form of a single file installation routine, namely 'Setup.exe'.

- **A Windows 95®/ 98®/ 2000® / XP® / Vista® / Windows 7®, or alternatively, a Windows NT® operating system with NT Service Pack 4 or higher.****

- **32Mb RAM and 256 colors (or more) recommended.**

- **20Mb of free disk space for the installed program files.**

- **Internet Explorer 5.0® or later, (or alternatively; a COM update.)**

- **Tapi version 2.1 or later (which is already installed on the above-mentioned operating systems - *with the exception of *Windows 95® and **Windows NT4.0® prior to Service Pack 3*).**

* Users of Windows 95® machines will need to ensure that Tapi version 2.1 or greater is installed.

** Users of NT® 4.0 machines earlier than Service Pack 3 will need to ensure that Tapi version 2.1 or greater is installed.

GoldMine® 7, 8, and 9 users

There are some minor differences in the visual interface of the software if you are using GoldMine® 7, 8, or 9. For example, (since there is no Borland Database Engine in the 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.

Starting the installation process

In a regular 'client-server' environment Tapi Link is installed only on the particular workstations at which you require the functionality – i.e. not on the server .
(Citrix/Terminal Services environments are quite different, and will require guidance and assistance to properly manage the implementation. Contact Papillon Technology for further details.)

1.
Observe the details covered in the previous sections entitled Pre-requisites and Minimum system requirements.
Log in as Administrator (unless you are using Windows 9x or Windows ME)

2.
Close all programs currently running on the computer. Disable any anti-virus protection.

3.
Double-click on the file named setup.exe from within the setup directory.
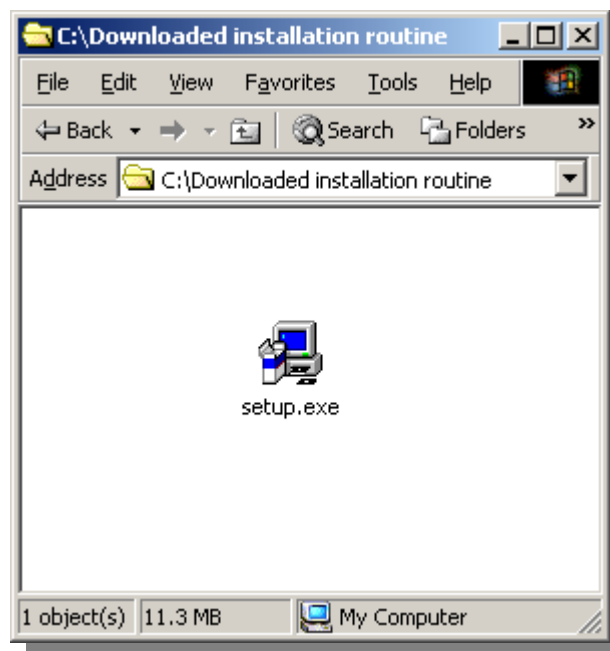
The wizard will prepare to install the software …….
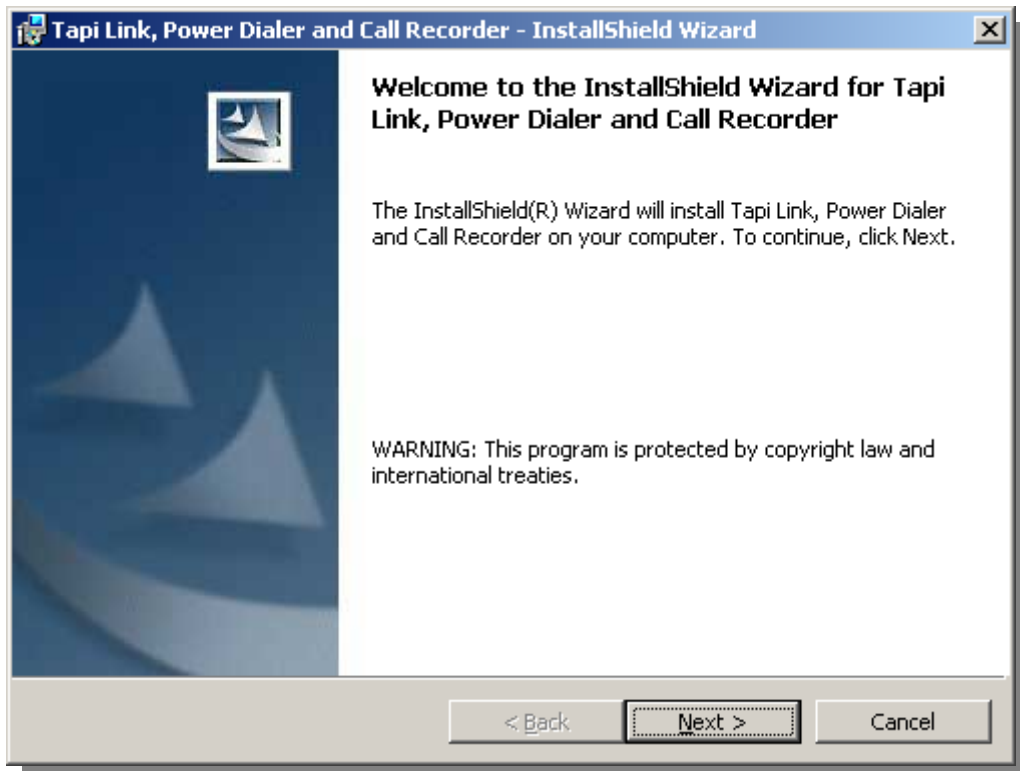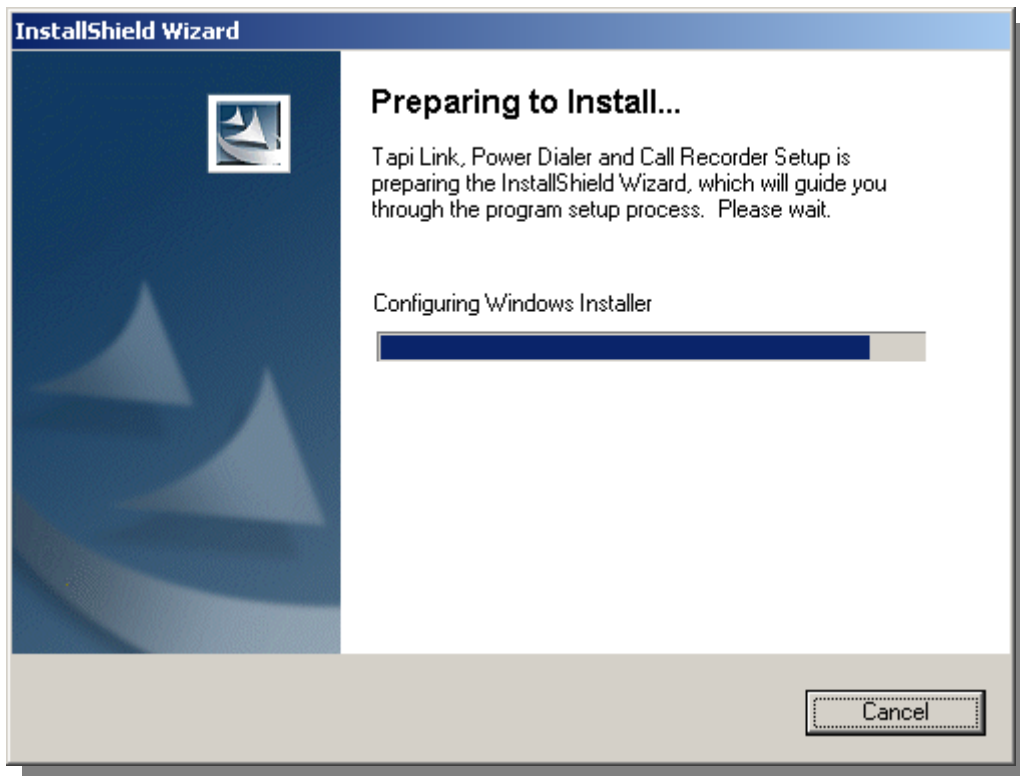
Click on the **Next** button to proceed.
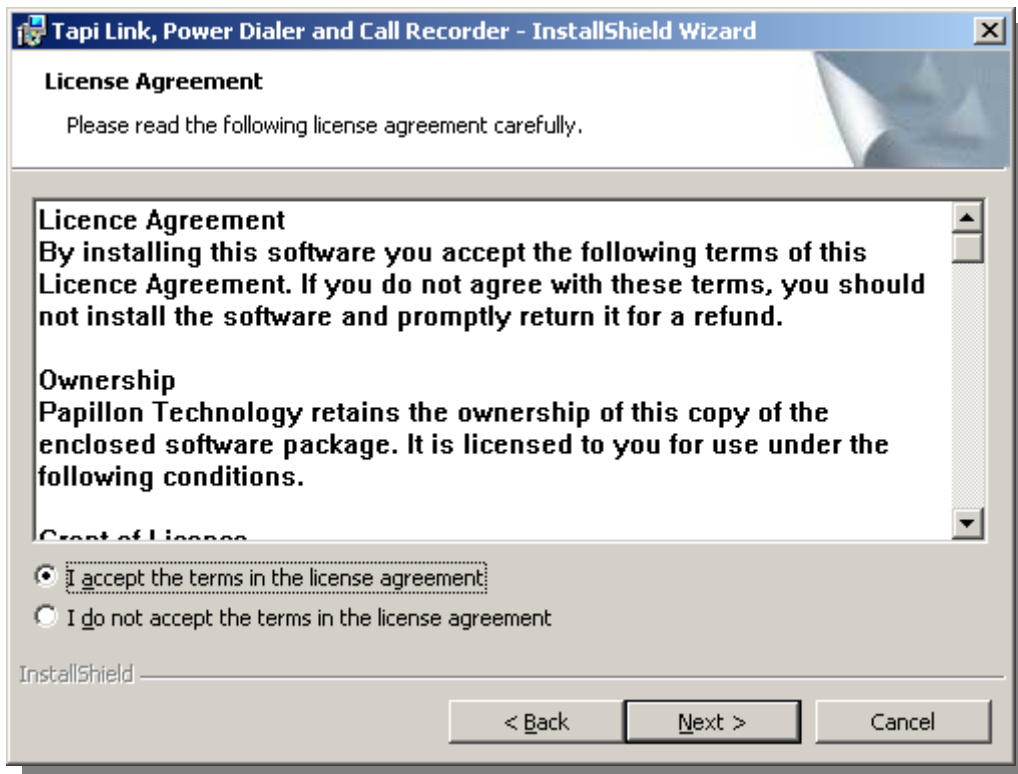
Accept the terms of the Licence Agreement to proceed.
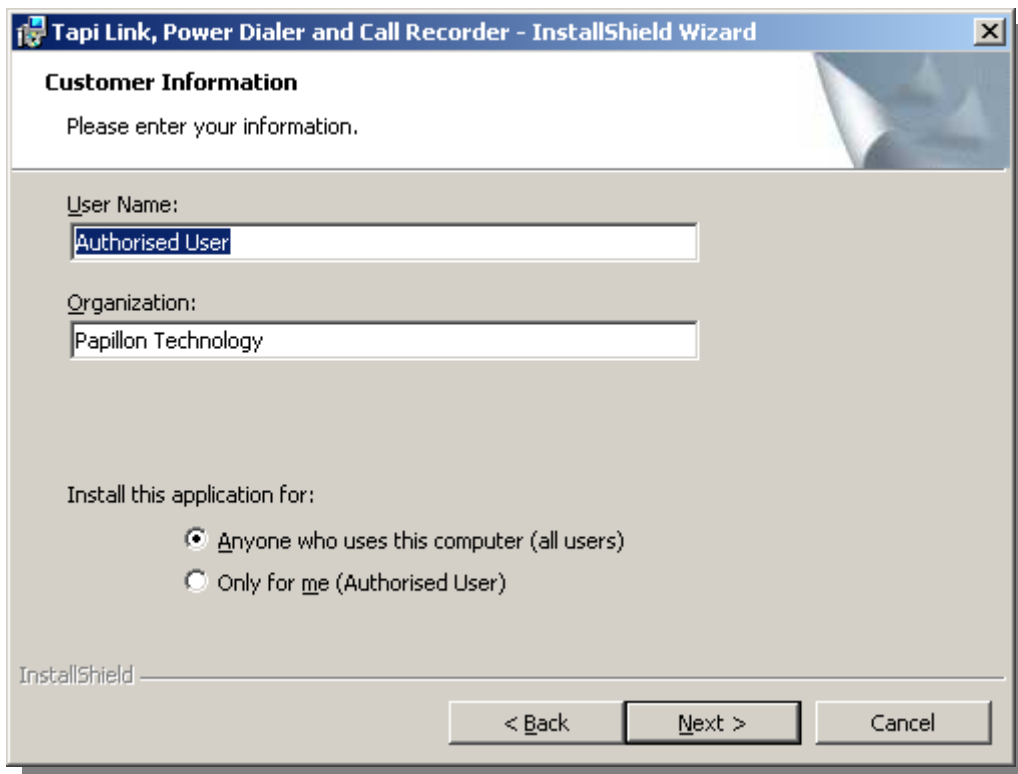
Enter the user name, the name of the organisation, and select whether you wish the program to be available for any logged-on user or solely for this particular user. – then click on the **Next** button
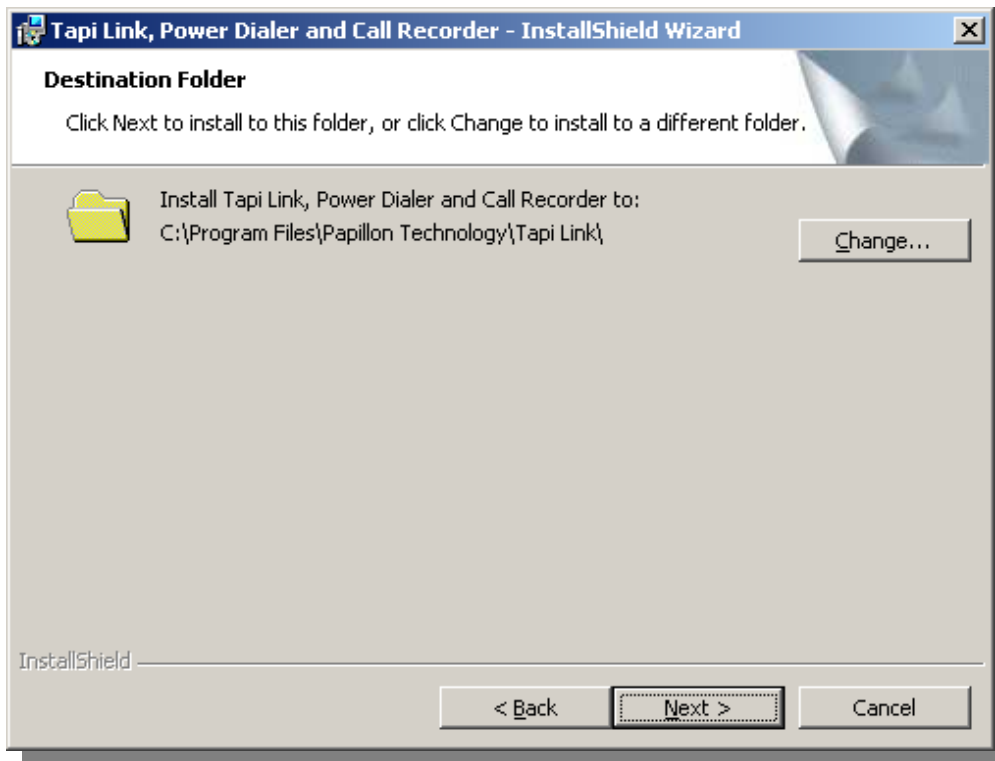
It is recommended that you accept the default location for the program files by clicking on the **Next** button. However, if you wish to alter this, click on the Change button instead.
(For other versions of GoldMine® the dialog boxes will display the appropriate GoldMine® version rather than "GoldMine® Premium Edition" as shown in the following example.)
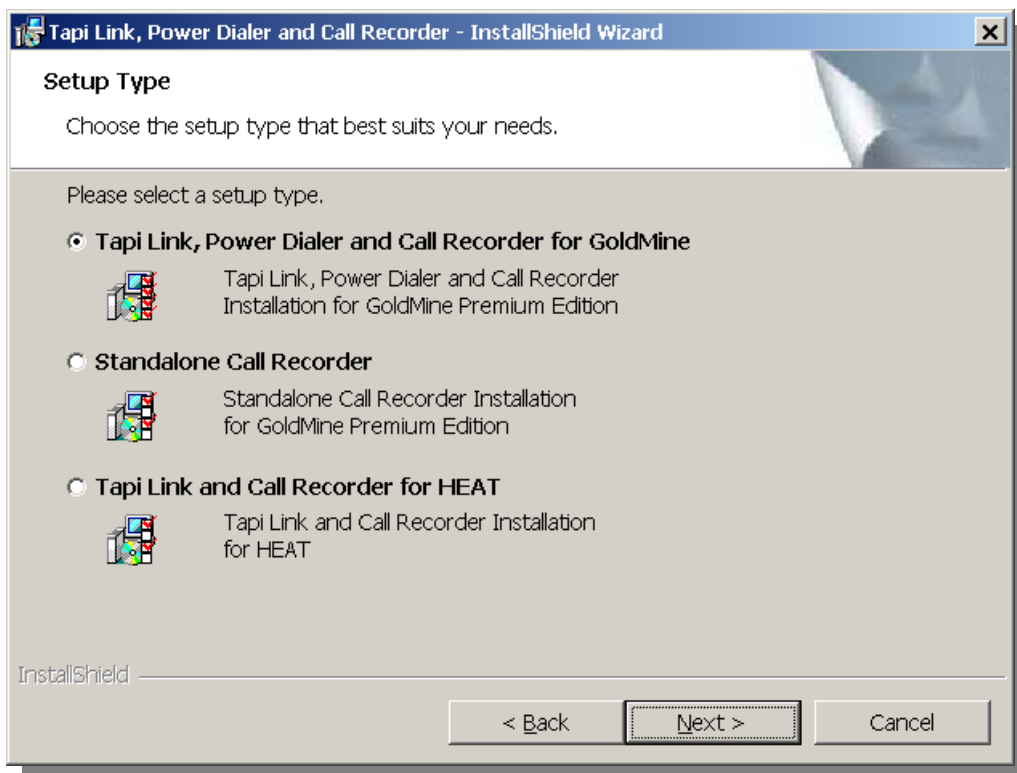
Accept the setup type indicated above and click on the **Next** button.
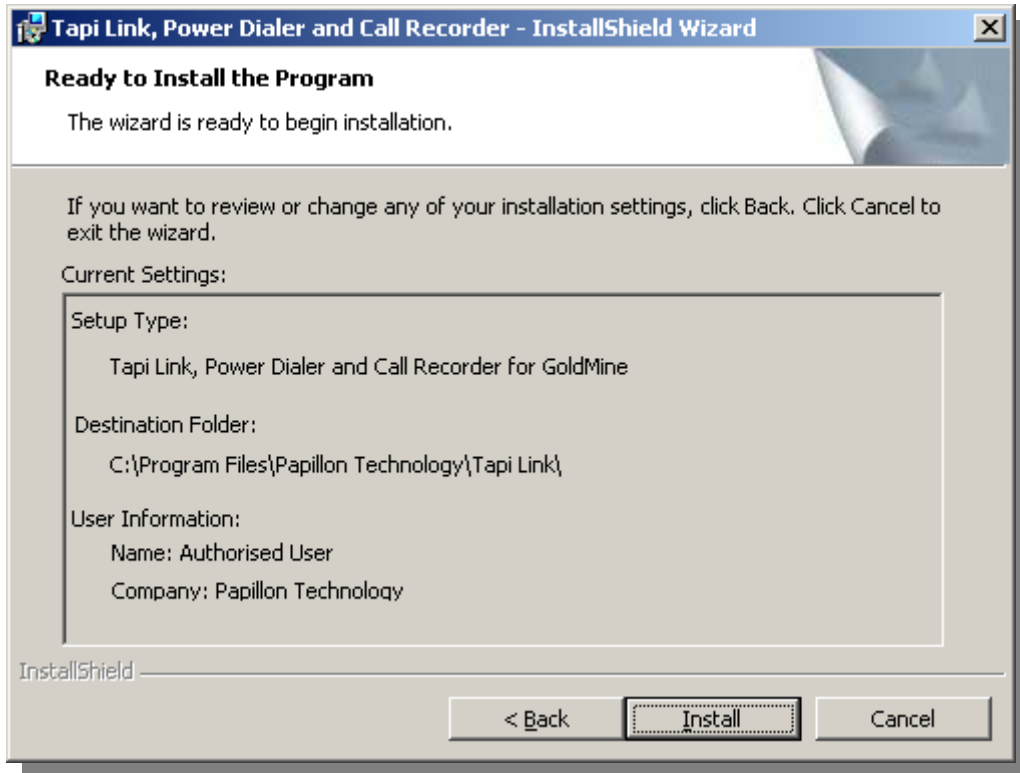
This screen confirms your choices up to this point in the installation process.
Click on the **Install** button to proceed. (Click on the Back button to make any alterations.)
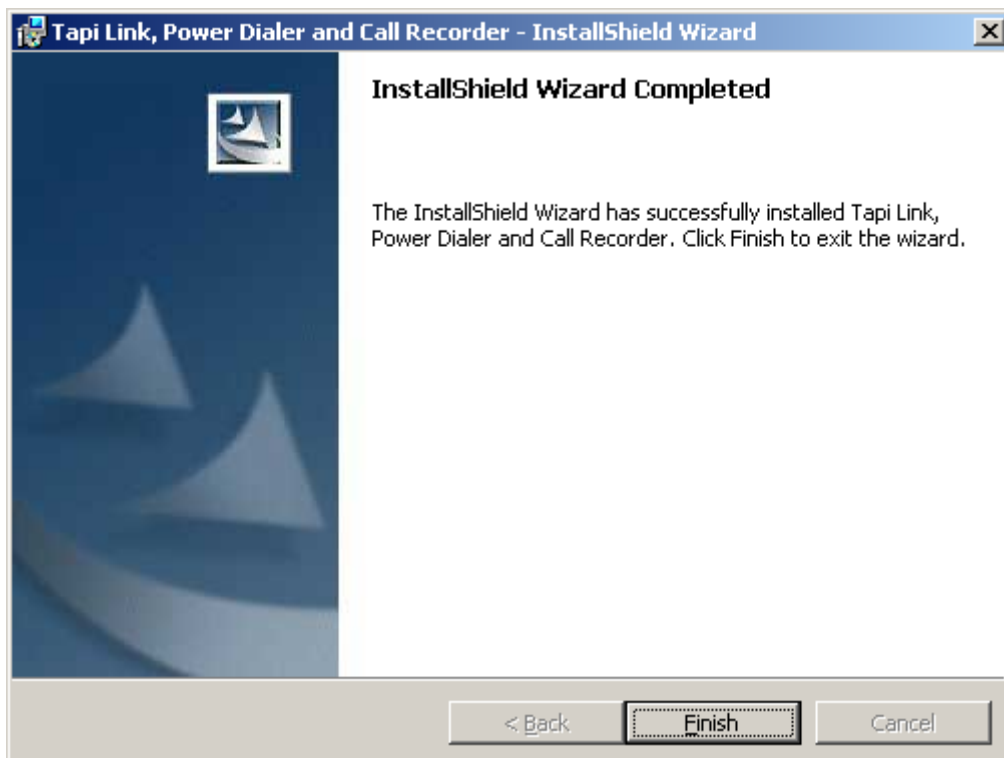
Click on **Finish** to complete the installation.

Running Tapi Link for the first time

After completing the initial installation, the very first time you launch Tapi Link you will be invited to proceed with the basic configuration of the product . This is normally achieved by following the **Quick Start Wizard**.

(After configuration, Tapi Link will launch automatically whenever you log into windows.)

The **Quick Start Wizard** is not found in any menu item or shortcut - the wizard appears only when you answer **YES** to the following question:
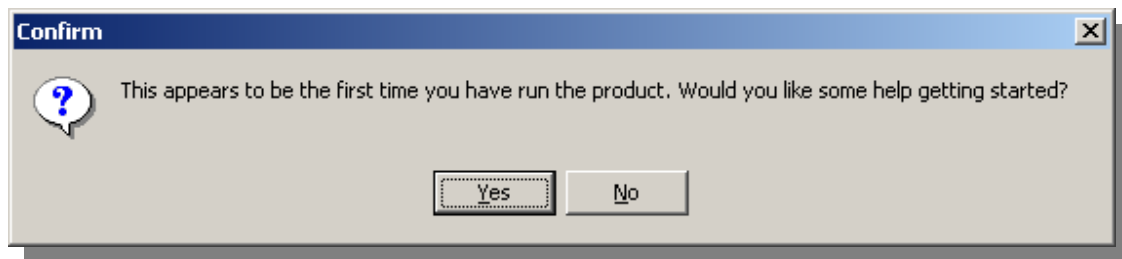
If you are using a <u>fully licensed version</u> of Tapi Link proceed to the section entitled
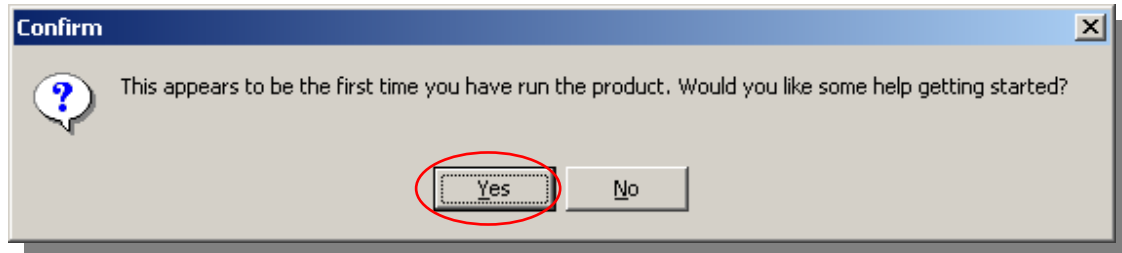***The Quick Start Wizard – for licensed products***

If you are using an <u>evaluation version</u> of Tapi Link proceed to the section entitled
The Quick Start Wizard – for evaluation products

.

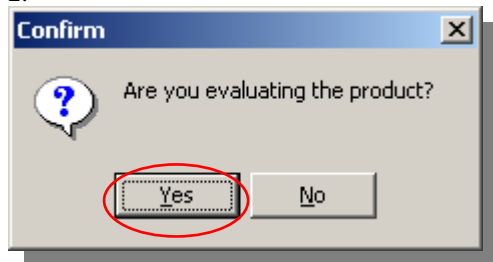# The Quick Start Wizard – for evaluation products

1.
On starting Tapi Link for the very first time a **Quick Start Wizard** will launch:

Ensure that you have to hand all the relevant product serial numbers, the GoldMine® Username and Password, and the SQL Username and Password (if any).
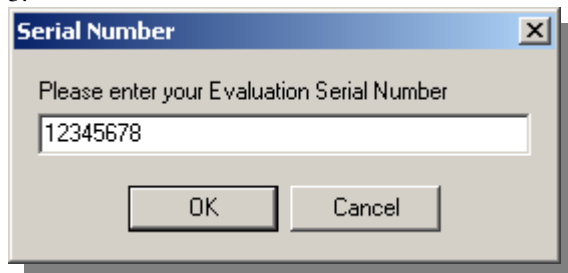If you click **YES -** you will be guided through a series of simple questions, as follows:
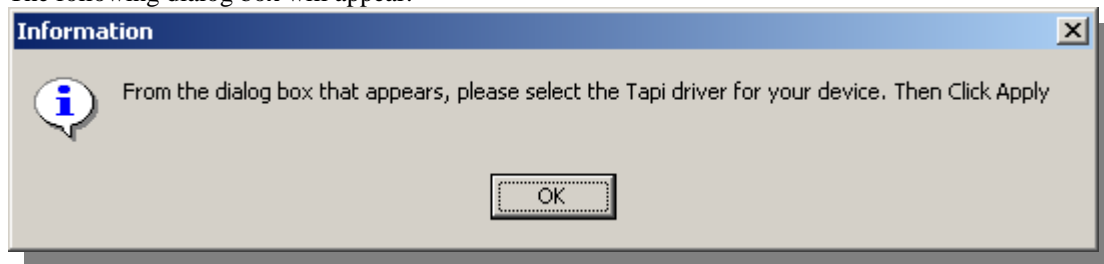
2.

Click on **YES**.

3.

There will be a default number already entered in the dialog box.
However, enter instead the specific evaluation serial number provided to you by Papillon Technology, then click on OK.
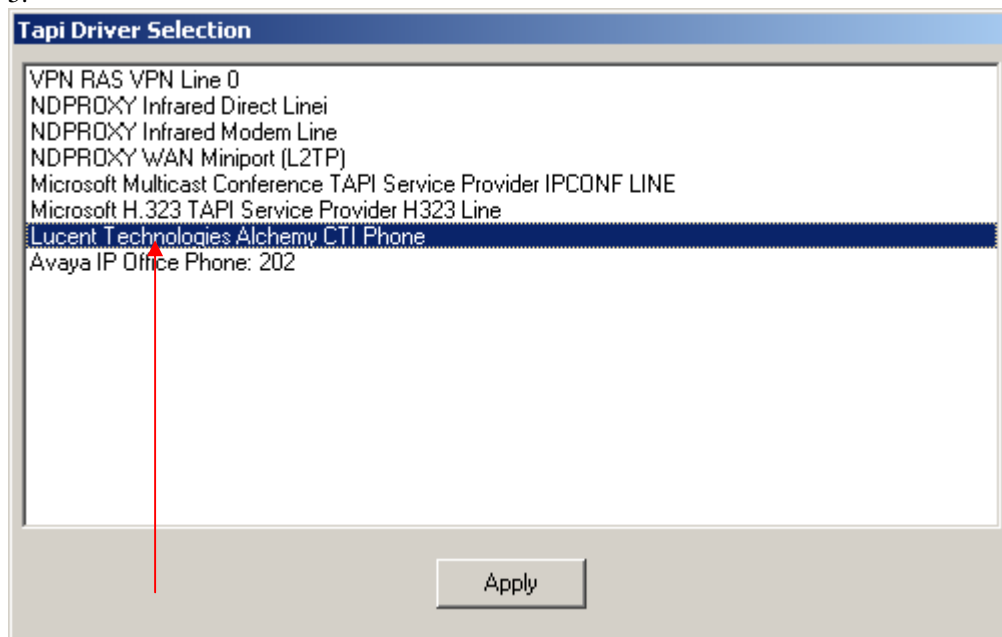
continued . . .

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4.

The following dialog box will appear:

Click on **OK**.

5.

Select the relevant TAPI device for your own system and then click on the **Apply** button.
(The above is merely an example. This setup window 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. You must select the specific device which normally should have been pre-installed and which relates to your own particular system.)

6.
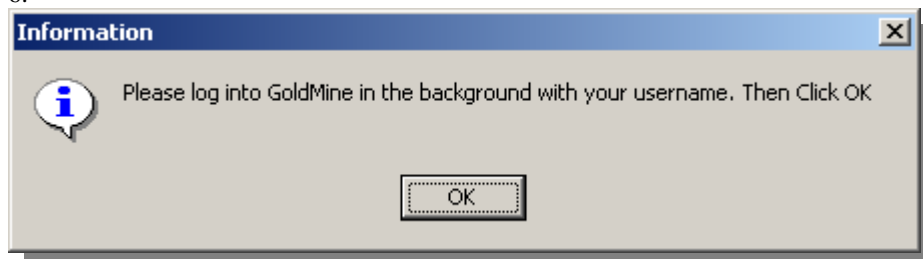
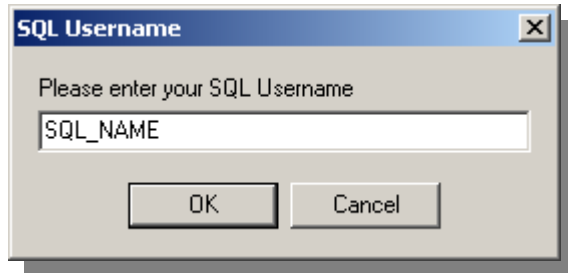Log into GoldMine® with the relevant users Username and Password and then click on **OK**.

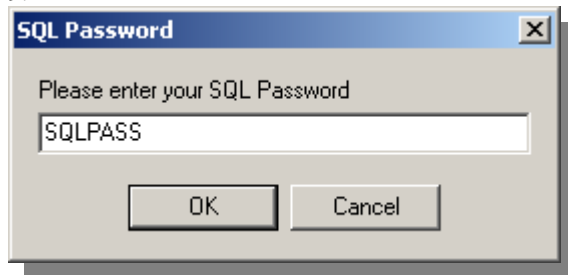**Tapi Link For GoldMine® - Installation Guide**

7.

Enter the underlined individual users own GoldMine® password and click on **OK**.
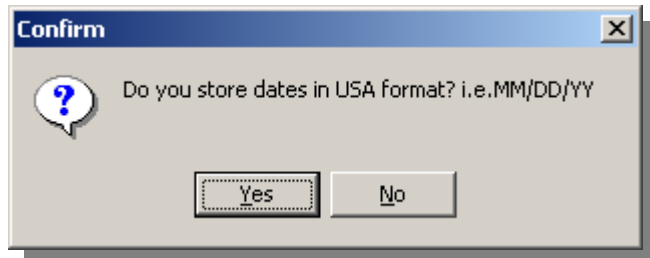

8.

If you are using the SQL version of GoldMine® enter the SQL username and then click on **OK**.
If you are using a dBase version of GoldMine® click on the **Cancel** button.

9.

If you are using the SQL version of GoldMine® enter the SQL password (if any) and then click on **OK**.
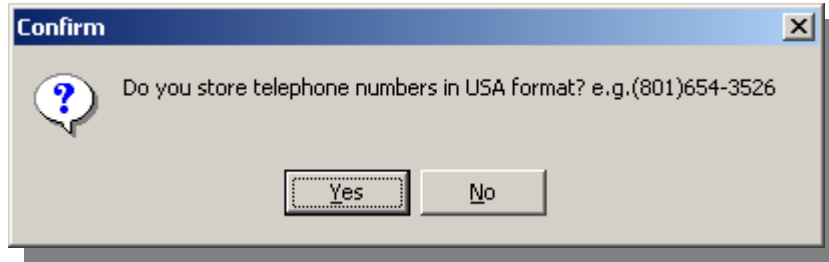If you are using a dBase version of GoldMine® click on the **Cancel** button.

10.

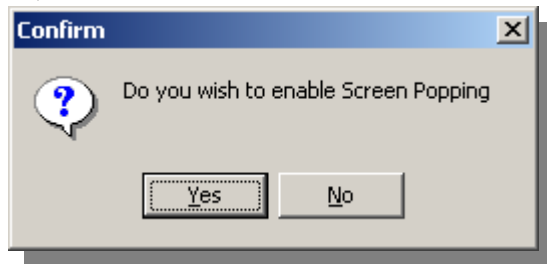Answer the above question according to your particular locality.

continued . . . .

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11.

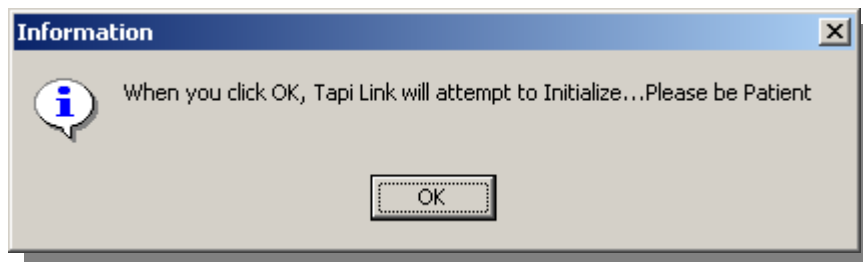Answer the above question according to your particular locality.

12.

This is a matter for personal choice – although the answer you provide here would normally be YES. (You can still enable or disable this feature at any later time.)
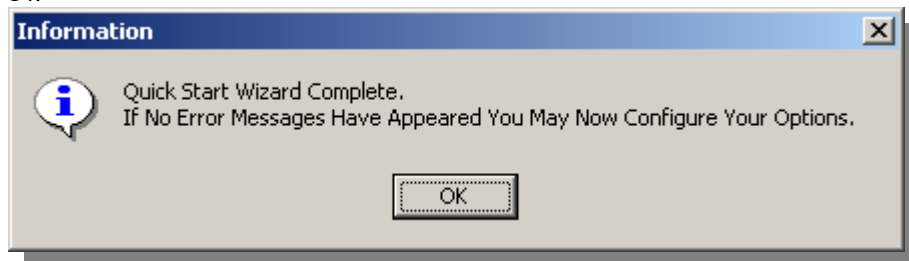

13.
A further two dialog boxes will appear:
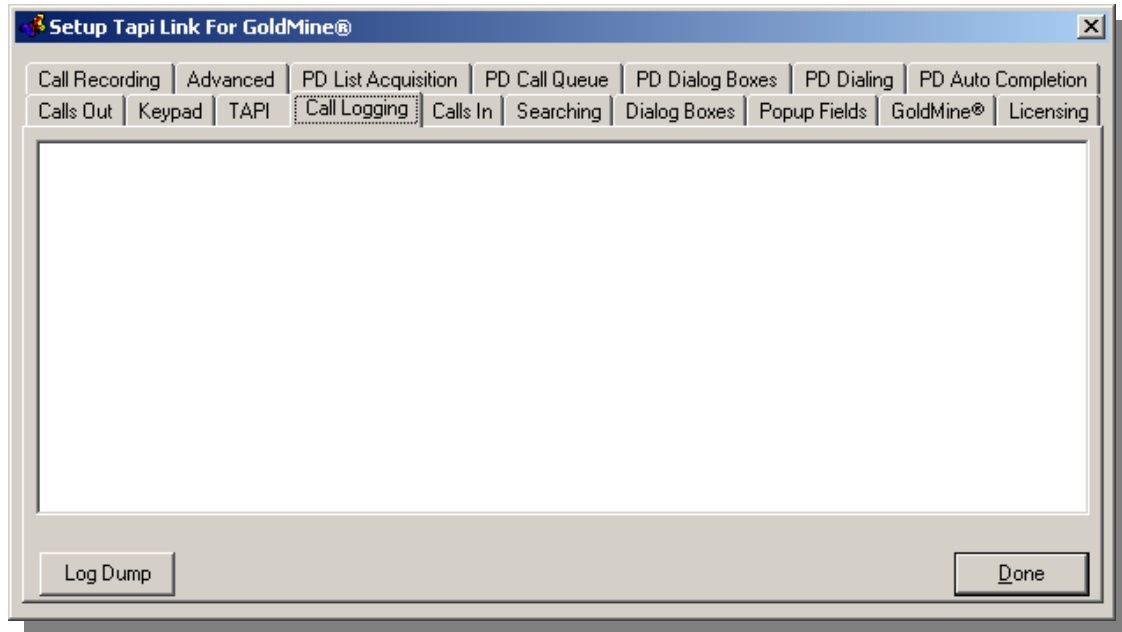

Click on **OK**.

14.

Click on **OK**.

continued . . . .

15.
The **Tapi Link Setup** dialog box will appear:

This completes the installation and basic configuration of an evaluation version of Tapi Link for GoldMine*.

You may now amend or add to any of the previous choices you made during the **Quick Start Wizard** through the **Setup** interface above, or proceed forward through this guide for further details on the basic installation and configuration of Tapi Link for GoldMine*.
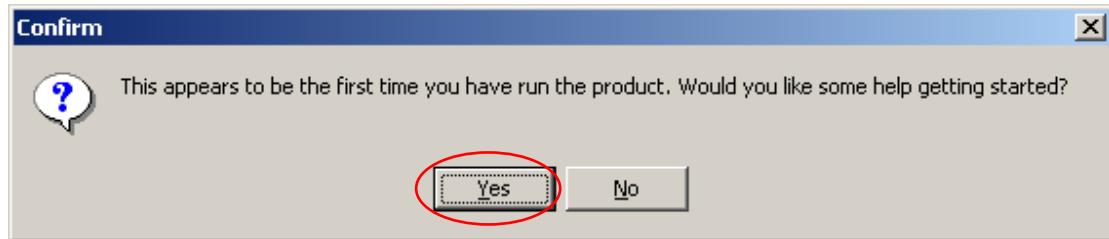
For more comprehensive details of configuration and usage of the product – see the associated document 'Tapi Link for GoldMine* - Configuration Guide' - a shortcut to this document can be found in the windows Programs Menu – **Papillon Technology** > **Tapi Link for GoldMine*** menu item.
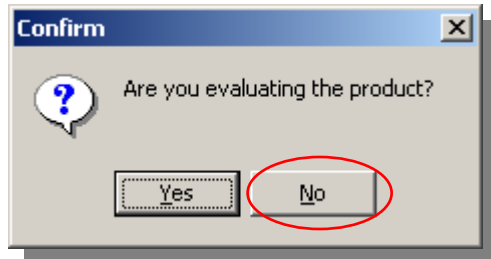
The Quick Start Wizard – for licensed products

(If you are using an evaluation version of Tapi Link refer instead to the section entitled *'The Quick Start Wizard – for evaluation products'*.)

1.

Confirm

? This appears to be the first time you have run the product. Would you like some help getting started?

[Yes]   No

Click on the **YES** button.

2.

Confirm

? Are you evaluating the product?

Yes   [No]

You have the licensed the product - therefore click on the **NO** button.

3.
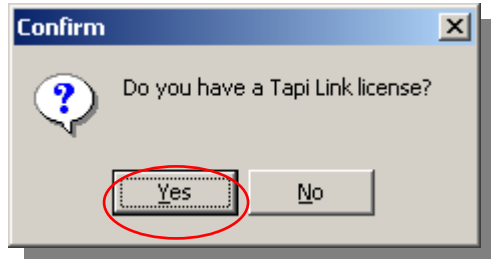
Confirm
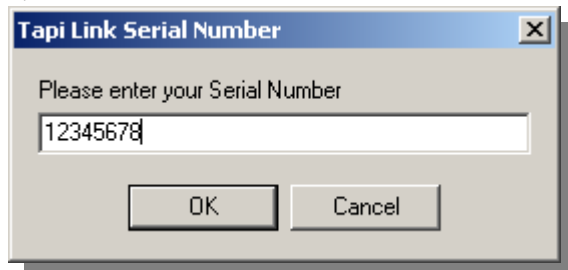
? Do you have a Tapi Link license?

[Yes]   No

Click on the **YES** button.

4.

Tapi Link Serial Number

Please enter your Serial Number

12345678

OK   Cancel

There will be a default number already entered in the dialog box.
However, enter instead the specific licence serial number provided to you by Papillon Technology, then click on OK.

5.

Tapi Link Activation Key

Please enter your Activation Key

87654321

[OK]   [Cancel]

Enter the Tapi Link for GoldMine·activation key and click **OK**.

6.

SQL Direct Access/dBase Fast Lookup Acti...

Please enter your Activation Key
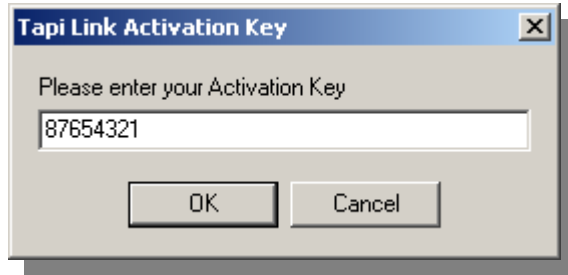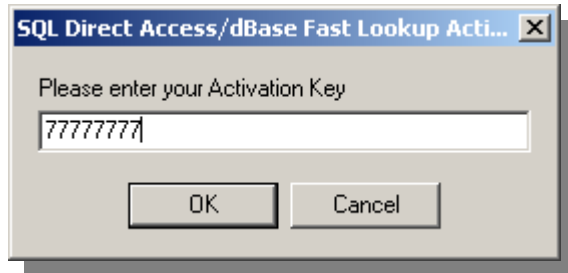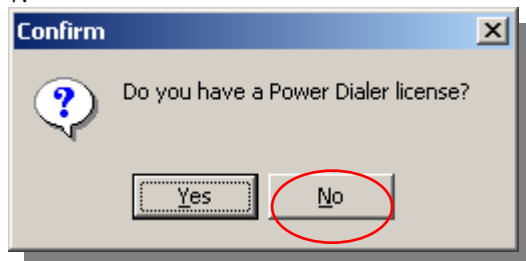
77777777

[OK]   [Cancel]

Enter the SQL Direct Access or dBase Fast Lookup activation key and click **OK**.
(This particular step will only appear when installing in conjunction with GoldMine· versions 6.x and earlier, not with GoldMine· 7, 8, or 9.)

7.

Confirm

? Do you have a Power Dialer license?

[Yes]   [No]

Click on the **NO** button if you have purchased only a Tapi Link for GoldMine·licence.
(Click on the **YES** button if you have also purchased a Power Dialer for GoldMine·licence.)

8.
The following screen will only appear if you have answered YES to the previous question.
If you answered NO proceed directly to item 10.

Power Dialer Serial Number

Please enter your Serial Number

12345678

[OK]   [Cancel]
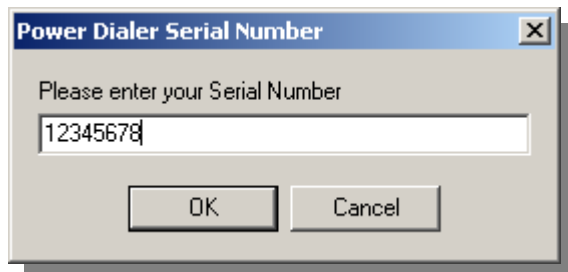
Delete the default number which appears, and enter instead the Power Dialer serial number.
Then click on the **OK** button.

18

9.

Power Dialer Activation Key

Please enter your Activation Key

87654321

OK   Cancel

Enter the Power Dialer <u>activation key</u> and click on the **OK** button.

10.

Confirm

? Do you have a Call Recorder license?
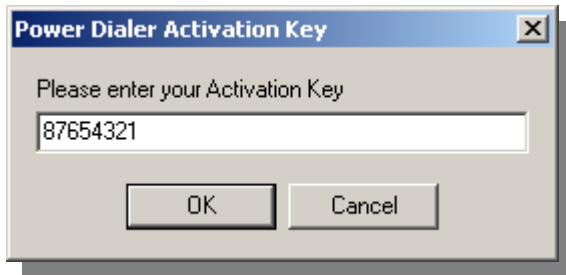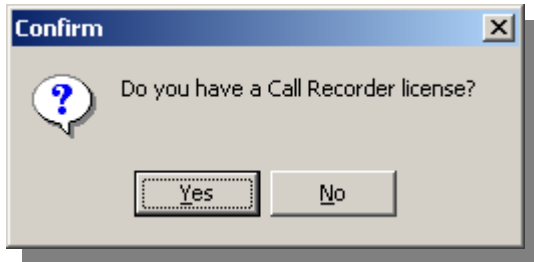
Yes   No

If you have also purchased a Call Recorder for GoldMine® licence click on the **YES** button.
If you have not purchased a Call Recorder for GoldMine® licence click on the **NO** button.

11.
This screen will only appear if you have answered YES to the previous question.
If you answered NO – proceed directly to item 12.

Call Recorder Activation Key

Please enter your Activation Key

88888888

OK   Cancel
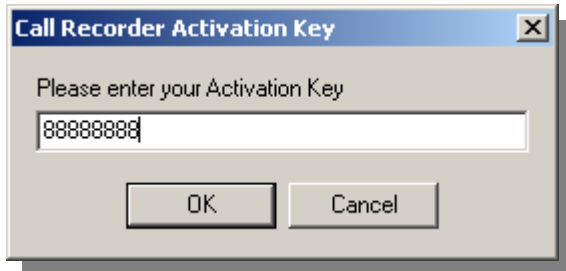
If applicable, enter the Call Recorder <u>activation key</u> and click **OK**.

12.

Information

i From the dialog box that appears, please select the Tapi driver for your device. Then Click Apply

OK
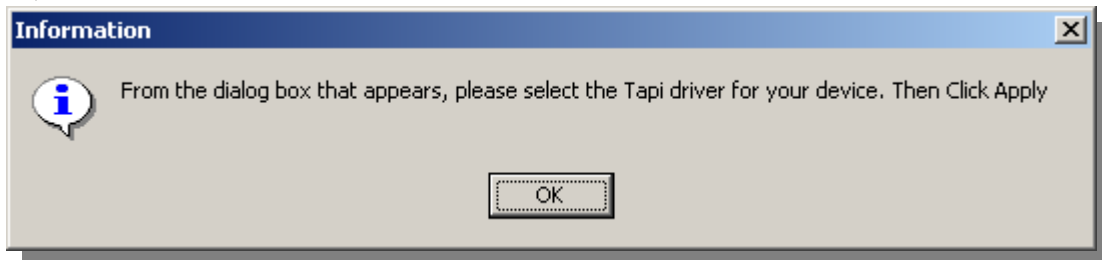
Click on the **OK** button.

continued . . .

13.

Select the relevant TAPI device for your own system and click on the **Apply** button.
(The above is merely an example. This setup window displays all devices installed on the computer related to telephony. These may include ISDN terminal adapters, modems and VPN adapters as well as voice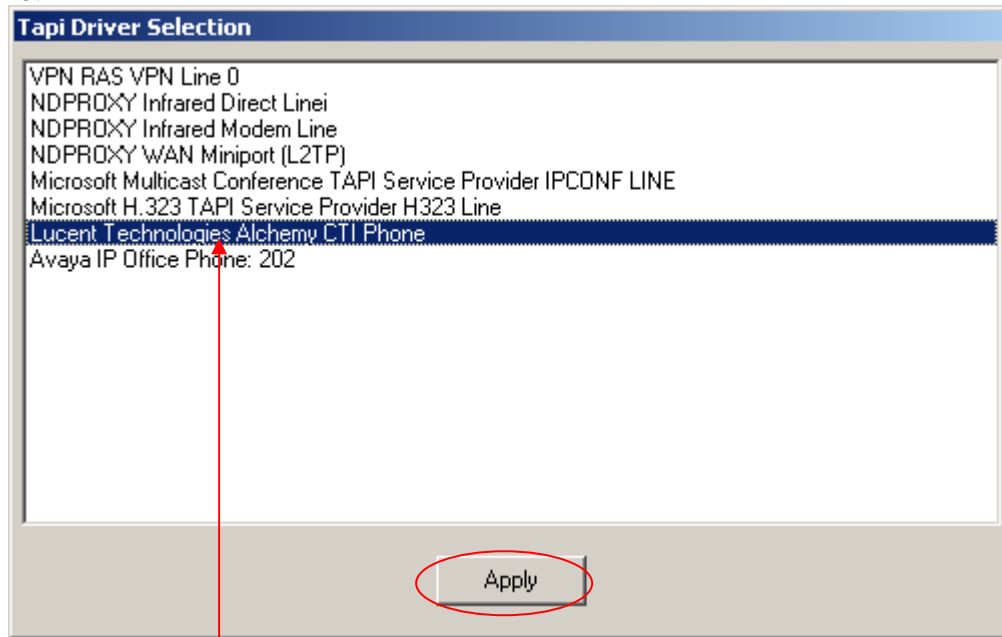-only devices. You must select the specific device which should have been pre-installed and which relates to your own system.)

14.
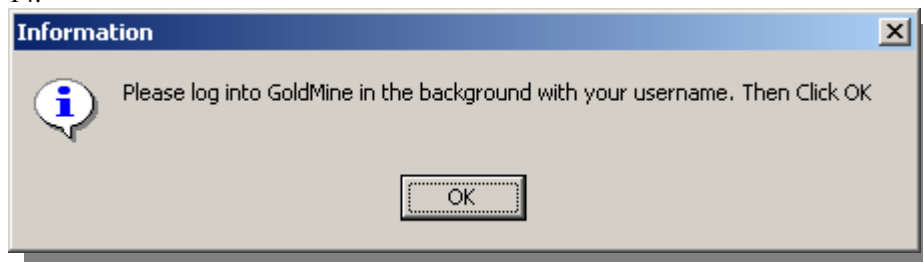
Log into GoldMine₄ using the relevant users Username and Password and then click on OK.

15.

Enter the relevant users GoldMine® password and click on the **OK** button.

continued . . . .

16.
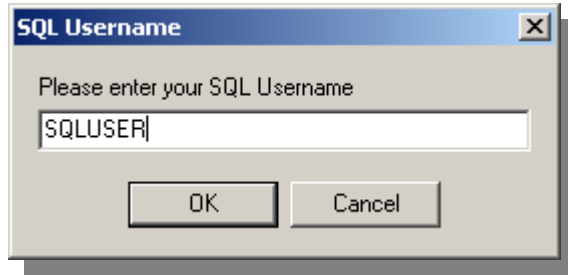
If you are using a **dBase version** of GoldMine® click on the **Cancel** button.
If you are using the **SQL version** of GoldMine® (GoldMine® 7, 8, or 9) enter the SQL username and then click on **OK**.

17.

If you are using a **dBase version** of GoldMine® click on the **Cancel** button.
If you are using the **SQL version** of GoldMine® (GoldMine® 7, 8, or 9) enter the SQL password (if any) and click **OK**.

18.

Answer the question according to your particular locality.

19.

Answer the question according to your particular locality.

continued . . . .

20.

Information

When you click OK, Tapi Link will attempt to Initialize...Please be Patient

OK
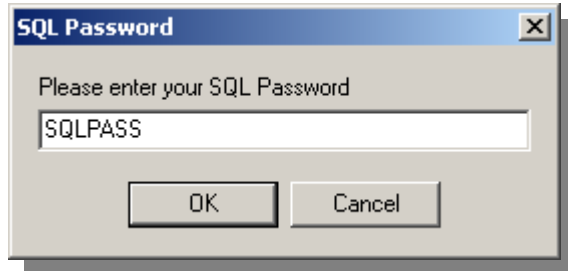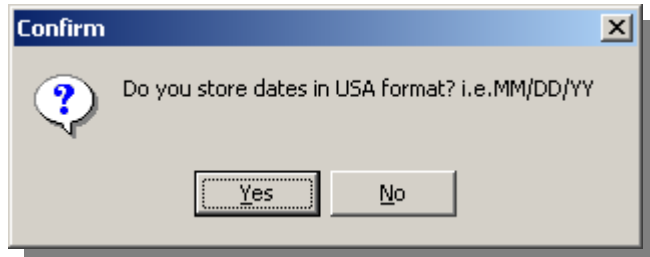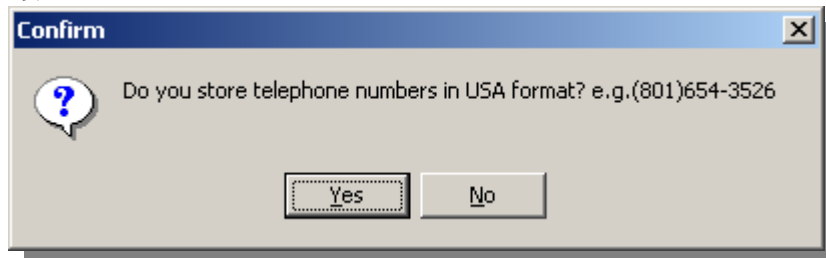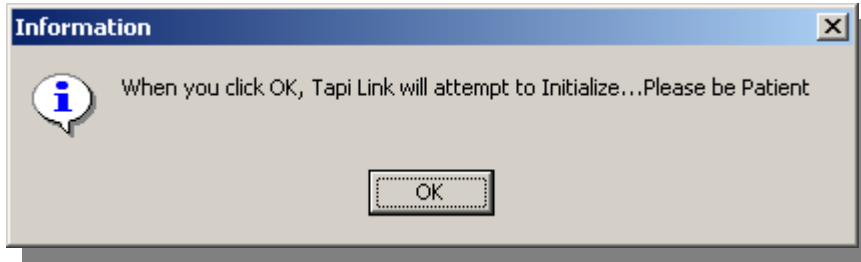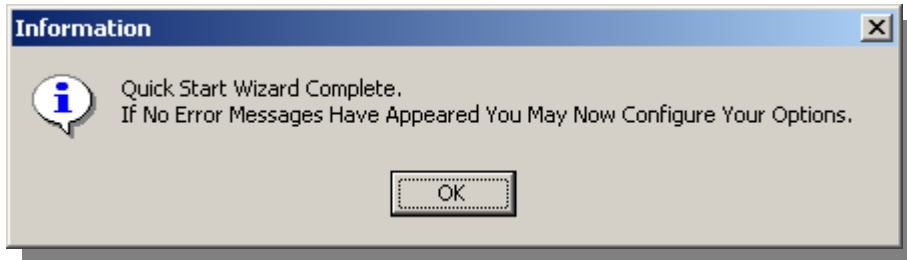
Click on the **OK** button.

21.

Information

Quick Start Wizard Complete.
If No Error Messages Have Appeared You May Now Configure Your Options.

OK

Click on the **OK** button.

22.

Setup Power Dialer for GoldMine®

| Call Recording | Advanced | PD List Acquisition | PD Call Queue | PD Dialog Boxes | PD Dialing | PD Auto Completion |

| Calls Out | Keypad | TAPI | Call Logging | Calls In | Searching | Dialog Boxes | Popup Fields | GoldMine® | Licensing |

Log Dump   Done
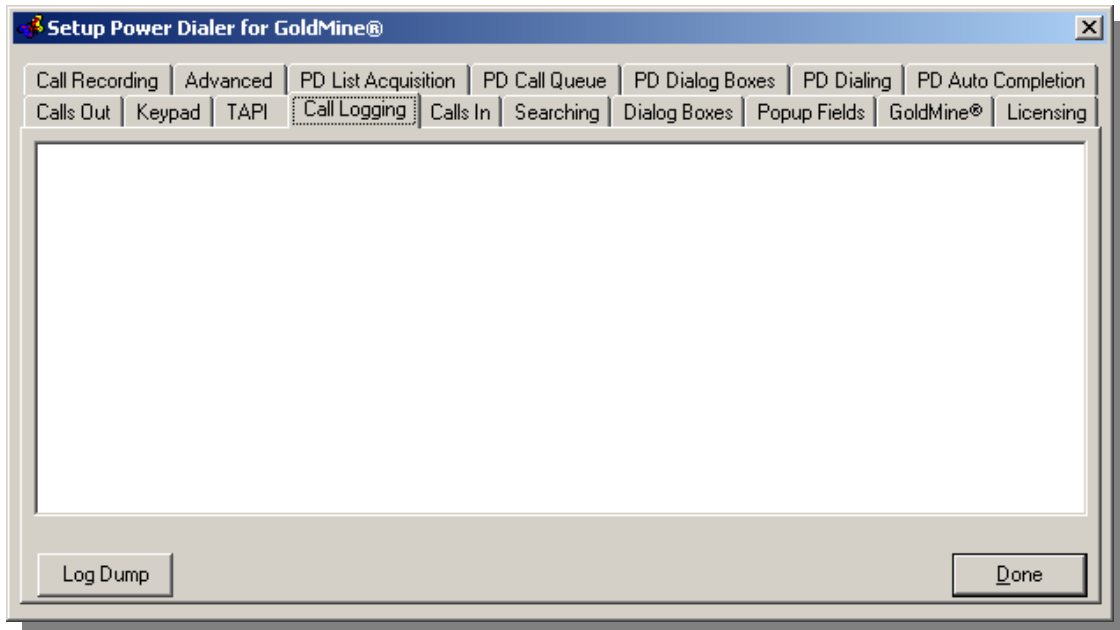
This completes the installation and basic configuration of a licensed version of Tapi Link for GoldMine®.

You may now amend or add to any of the previous choices you made during the **Quick Start Wizard** through the **Setup** interface above, or proceed forward through this guide for further details on the basic installation and configuration of Tapi Link for GoldMine®.

For more comprehensive details of configuration and usage of the product – see the associated document 'Tapi Link for GoldMine® - Configuration Guide' - a shortcut to this document can be found in the windows Programs Menu item – **Papillon Technology** > **Tapi Link for GoldMine®**.

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Contacting Technical Support

Should you experience any difficulties with this product, in the first instance you are strongly urged to consult the contents of this user guide for assistance and more importantly, the associated document entitled '**Tapi Link for GoldMine• - Configuration Guide**' - which can be found in the windows **Programs** menu item > **Papillon Technology**.
The '**Tapi Link for GoldMine• - Configuration Guide**' contains a helpful Troubleshooting section and also an extensive FAQs (Frequently Asked Questions) chapter.
Additional information is also provided 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 for GoldMine• 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 the following information at hand <u>before</u> contacting us:

A. The version number of your GoldMine• software. (This can be obtained by accessing the **Help** menu in GoldMine• and selecting the **About** item.)

B. The version number of your Tapi Link software. (This can be obtained by right-clicking on the Tapi Link icon in the task bar system tray and selecting **About Tapi Link For GoldMine•**.

C. A contemporaneous copy of the Tapi Link Application Log. (This log records a brief history of system events relating to this product.)

In order to produce an **Application Log** file for transmission to our support personnel, please proceed as follows:

1. Firstly, perform the task which generates any error messages, or otherwise 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 for Goldmine• icon in the system tray as shown below:
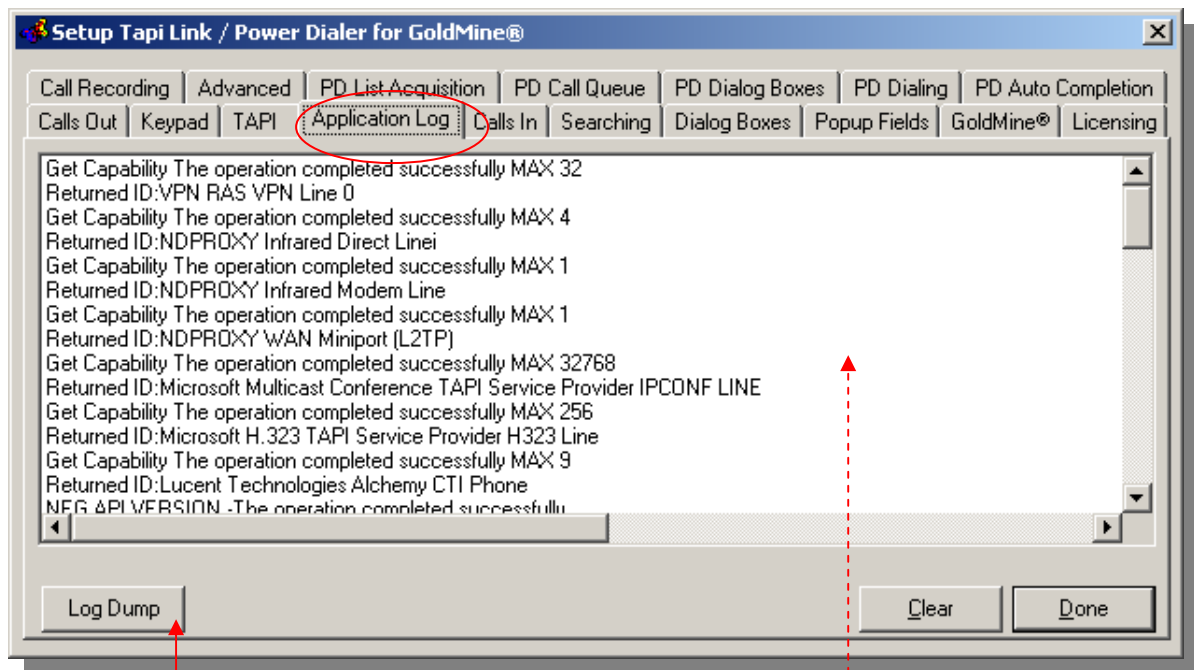

continued . . .

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The following context-menu window will appear:

Select **Setup Tapi Link for GoldMine®**
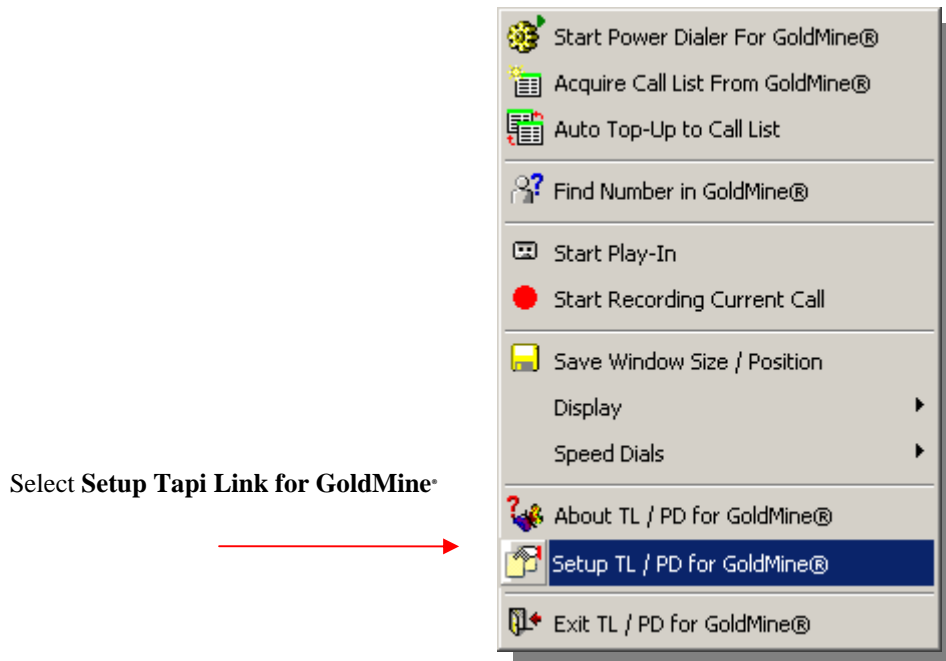
3. Select the tab marked **Application Log**:

4. Click the button marked **Log Dump** as shown above.

(If the fourth tab is labeled **Call Logging** and not **Application Log** – *right*-click within the dialog box and select **Application Log** from the context-menu. Alternatively, refer to the section entitled '*Toggling between Event Logs*' in the associated document 'Tapi Link for GoldMine® – Configuration Guide' which can be found in the Programs menu.)

5. This will generate the following dialog box:
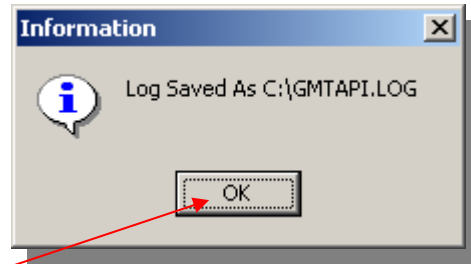
6. Click on the **OK** button.

The above dialog box confirms the creation of, and the location of a text file which records the events listed in the Tapi Link application log. (i.e. in this example, the file is named "GMTAPI.LOG" and is located in the root of the C:\ drive.)
This file can be viewed in Notepad® or any other word-processing application, and is suitable for transmission as an e-mail attachment to accompany any request for assistance.)
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 from the US on +1 (614) 559-2270
By Fax to   +44 (0)1992 560489
Our Web site :   http://www.papillontechnology.com
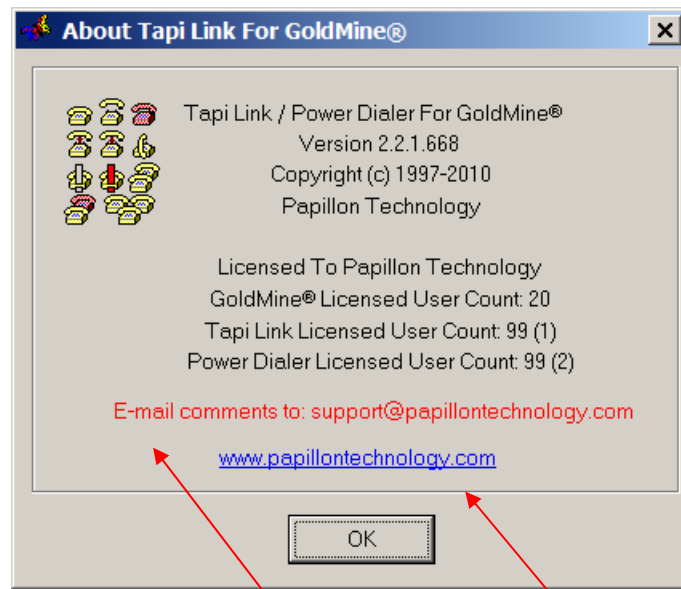
For further assistance, direct links either for *email* purposes, or to our *website* are also available via the above '**About**' dialog box – which can be summoned by right-clicking on the Tapi Link icon in the task bar system tray and selecting **About Tapi Link For GoldMine**®.

Legal Information

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