Computer Telephony Integration Application Bulletin



Goldmine 95 Installation Guidelines

► Getting Started

- 1. Install the Toshiba TAPI Service Provider by inserting Disk #1 in the floppy drive and use Windows, Run... and enter A:\SETUP. Follow the instructions provided by the Install Wizard. (See Chapter 13 of the *Strata DK Installation and Maintenance Manual.*)
- 2. Install Goldmine 95 by following the installation instructions in the Goldmine 95 User Guide.

► Enabling the Interface

To provide a full desktop dialing and screen-pop interface between the Toshiba StrataLink and Goldmine 95:

In the directory where Goldmine is installed (default is "C:\Goldmine"), add the following two lines with a text editor or word processor to each of the INI files. The INI files are named after each user. For example, user "Jerry" would have a USER.INI file named "JERRY.INI".

```
[Modem]
DDEDial=Dial,STRATLNK,[Dial,"%s",""]
```

➤ If the phone setup uses a trunk access code to dial outside the Strata DK system, then the trunk access code can be included, as shown below, using Dial 9 as the access code.

```
[Modem]
DDEDial=Dial,STRATLNK,[Dial,"9,%s",""]
```

- **Note** A comma was added as a pause to ensure dial tone is returned prior to dialing. This is not needed if Dial 9 accesses LCR.
- ➤ If the user wants all calls to be placed using a specific line, for example, a telemarketing application in which the user is assigned a specific line for all their calls, then the following string can be used to assign that line to a specific button on the phone:

```
[Modem]
DDEDial=Dial,STRATLNK,[Dial,"%s","x"]
```

Note "X" is the number, starting with zero, of the button (counting from the lower left of the keystrip).

Changing or adding actions in StrataLink

The actions available from the selection menu have been tested to work with the Goldmine 95 software. When you change or add new actions, make sure that you fully understand Goldmine's DDE capabilities, because they are made at your own risk. Toshiba Technical Support only supports the predefined actions.

Action Name: Pop GoldMine Type: App Name: DDE Execute App Topic: DK Cancel Apply CALLERID("%I","%N","2")]	Add/Edit Action	×
Type: App Topic: DATA DDE Execute Image: DDE Execute String: DDE Execute String: Image: DK Cancel Apply Show Test Parame Image: DE Execute String:	Action Name: Pop GoldMine	DDE Execute:
DDE Execute DK Cancel Apply CALLERID("%I","%N","2")]		App Topic: DATA
[CALLERID("&I","&N","2")]	DDE Execute	DDE Execute String:
Show Lest Falans	Show <u>T</u> est Params	[CALLERID("&","&N","2")]

The DDE execute string, [CALLERID("&I","&N","2")], can be changed to control how the screens work in Goldmine when a call arrives. The most common option in the third parameter is defined as "2," in the example above. This setting displays only the current record of the current call. Goldmine has four available options for this string which are:

- "0" Displays an incoming call dialog box as the call arrives. Additional actions are needed to find the additional records in Goldmine.
- "1" Displays a new record on the screen in addition to any open records currently displayed.
- "2" Displays only the current record of the call being processed at the moment.
- "4" Displays a list of all contact records when a specific contact cannot be found. You can also select an existing record, update the record, or make an additional entry to the record.

► Adding screen-pops in StrataLink

Normally, StrataLink needs a Caller ID number to process calls. Using the Caller ID number to delay an action is the preferred method if the user is talking on another line. The action "pop the next record" occurs if the current call is terminated or placed on hold.

Note A time delay can be used, if needed, for your application and for selected line buttons.

Trigge	r Rules	×
lf (Cal	Ringing} with Caller Connected), then {f	, then {Pop GoldMine} p GoldMine}
	<u>0</u> K	Add Rule Edit Rule Delete Rule
		253

The two Trigger Rules shown on the prior page enable a screen-pop for two situations: when a call arrives and the user is not busy on another call {Call Ringing}; and, when a call is connected {Call Connected}. The user can handle multiple calls.



Beneficial Options Available in Goldmine 95

Goldmine has many capabilities for customizing the application for the user. The following is not intended to provide a complete description of these capabilities and the installer should rely upon the Goldmine manuals for specific details.

Dialing All Numbers as 10-digit Numbers

Your application may have to dial all calls using the complete 10-digit number. Goldmine uses the Dialing Preferences of Windows 95 to determine the home area code, and it automatically strips these digits from the dialed number before dialing. To resolve this issue two methods are available:

Change the area code in Windows Dialing Preferences to an unused area code such as 711. With this adjustment, Goldmine can send all numbers as 10 digits. This could create a problem if other programs, such as a fax application, use the same setting. In this case the area code would have to be entered correctly.

- Create prefixes and suffixes to customize the dialing of your numbers by using the PREDIAL.INI file in Goldmine. Details can be found in the Goldmine Reference Manual under Customizing Goldmine.
- Create a plan to dial all 10 digits when the Windows Dialing Preferences area code is preset by using a text editor to edit the PREDIAL.INI file. For our example we are using area code 210. Input the following parameter into the PREDIAL.INI file:

[Prefix] 210=1-210

Goldmine prefixes the dialed number with 1-210 on any call in which Windows Dialing Preferences has stripped the home area code. The contact record retains the 210 area code.

Creating a Custom Tool Bar for Dialing

Goldmine allows you to add functions to the File Menu on the Main Menu Bar in Windows. To add these customized functions, you have to add the new item to your USER.INI file. The DDE interface between StrataLink and Goldmine is used to create functions that provide these additional controls of your Strata DK calls.

Note The "USER.INI" file name is the user name of the last person who logged on. For example, JERRY.INI, for the user Jerry.

In the example below, you can see how the new functions for handling calls are added. Type these lines in the [FileMenu] section of your USER.INI file using a text editor if it exists. If it does not, you have to add the section by typing [FileMenu], and add the new functions below the [FileMenu] line.

[FileMenu]

Opt1=Hangup,STRATLNK,[Hangup]	Disconnect the current call.
<pre>Opt2=Answer,STRATLNK,[AnswerCall()]</pre>	Answer any ringing line.
Opt3=ACD Calls,STRATLNK,[Answer,4]	Answer only the specified line. In this case, the calls on the ACD Button.

You can define the icons on the Windows tool bar to include Goldmine functions, and place the icons on the tool bar using the "drag and drop" feature or the insert item feature.

Defining a tool bar icon

- 1. Right-click on an empty space on any tool bar, and a pop-up menu is displayed. From the pop-up menu, select Record Macro.
- 2. Click on the File Menu, then select Hangup, Answer, or ACD Calls.
- 3. Click the Stop Recording macro button (square icon) and place the icon on a tool bar. Repeat the steps for each icon to be defined.

Placing icons on the tool bar

- 1. Right-click on any blank space on the tool bar, then select Insert Item.
- 2. Choose the icon to be inserted on the toolbar.
- 3. Right-click and hold down the mouse button while dragging the icon onto the tool bar.

Repeat this process for adding icons. Any icon can be moved using this same right-click and drag process.

The following Goldmine Main Window is an example of the customized tool bars which have all of the standard icons for accessing Phone1, Phone2, Phone3, Fax, Start Timer, Incoming Call Timer, Insert a Note, and the three icons defined on the prior page.



All macro icons are identified by the numerical graphic on its button, but when the mouse is held over the button, a description of the macro and the functions of the button appear in a bubble.