

Call Recorder for GoldMine® - Installation Guide

Version No: 2.2.1.658 (for GoldMine® 5.x and 6.x)

Version No: 3.5.1.658 (for GoldMine® 7.x)

Version No: 4.5.1.658 (for GoldMine® PE)

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(This guide relates to the preliminary installation procedures only. For details concerning the more comprehensive configuration and customization routines for this application – see the associated documentation entitled ‘Call Recorder for GoldMine® - Configuration Guide’.)



Call Recorder for GoldMine® - Installation Guide

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Overview

Call Recorder for GoldMine® enables you to record all of your calls automatically, or record individual calls on demand. (There is also an option to record a percentage of calls randomly – this is useful for example for quality control purposes.) For simplicity and ease of use, all recorded calls are assigned a unique filename, stored in a specified folder(s), 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.

Call recordings can be e-mailed as attachments or archived for future reference.

In addition to being replayed via the GoldMine® Links tab – you may choose to replay individual calls of specific users or perhaps, irrespective of users, by time or date etc. *directly from the storage location*. Depending on how the recorded calls are initially stored and also upon how they are subsequently sorted for viewing purposes, you can replay just a special selection of calls which meet your requirements. This is useful for monitoring call quality or for training purposes etc. where you might wish to track calls irrespective of the actual contact record itself.

Call Recorder for GoldMine® will function with almost any digital or analogue telephone handset and is a fraction of the cost of traditional PBX-based call recording technology.

Call Recorder for GoldMine® is part of a range of computer telephony applications designed by Papillon Technology for GoldMine® 5.x, 6.x, 7.x and PE, GoldMine® BCM, GoldMine® Sales and Marketing, and GoldMine® BCM Corporate Edition with both dBase and MS SQL underlying databases.

Papillon Technology is the developer and author of bespoke applications and the following products:

- Tapi Link for GoldMine®
- Call Recorder for GoldMine®
- Power Dialer for GoldMine®
- Managers Console
- Telephone Number Manager for GoldMine®
- Call Reallocator for GoldMine®
- Linked Documents Manager for GoldMine®

We constantly strive to update and improve our products & services and user feedback is always welcomed.

Pre-requisites

- **The ‘Call Recorder 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’.
- **The Call Recorder hardware.**
[Except in circumstances where the Hi-Phone Desktop unit is installed.]
- **An installed and licensed copy of GoldMine 5x, 6.x, 7x or PE / GoldMine BCM / GoldMine Sales & Marketing.**
- **If using an NT or Windows 2000 / XP operating system, you will also require appropriate Administrative rights in order to install and configure software.**
- **A PC which incorporates a sound card.** (Often referred to as a multimedia PC.)
[Except in circumstances where the Hi-Phone Desktop unit is installed.]
- **A digital or analog telephone.**
[Cordless handset varieties are not generally suitable.]

Minimum system requirements

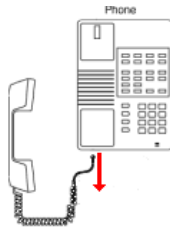
- **A CD-ROM or DVD drive from which to install the CD software.**
If however, you have been provided with this software by another means, for example by download or by e-mail, it will be in the form of a single file installation routine, namely 'Setup.exe'.
- **A Windows '95 / '98 / ME / 2000 / XP / NT' operating system.**
- **32Mb RAM and 256 colors (or more) recommended.**
- **15Mb of free disk space for the installed program files.**
- **Adequate storage space for your telephone recordings – ideally on a server-based share, or alternatively, on the local PC.**
(Storage space requirements are modest. For example, a one minute GSM 6.10 8.000 kHz mono recording occupies approximately 100kb hard disk space.)

Hardware configuration

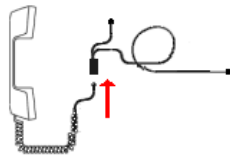
Connecting the Call Recorder hardware

(Images are not to scale)

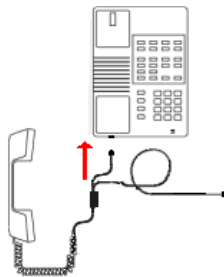
1. Disconnect the telephone handset cord (usually a coiled cable) from the telephone base unit by unplugging the RJ-22 jack from the base unit.



2. Plug the telephone handset cord (usually a coiled cable) into the RJ-22 socket on the Call Recorder unit.



3. Plug the cable running from the Call Recorder unit into the telephone base unit (i.e. insert the cable to the socket where the telephone handset cable was originally connected.)



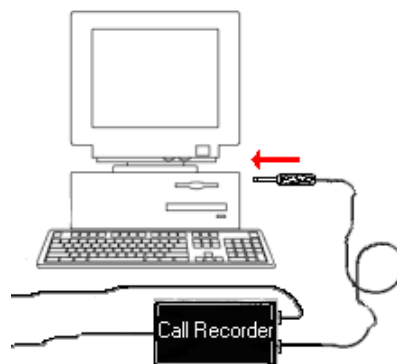
continued

4.

Plug the remaining cable bearing a jack plug into the microphone socket of the sound card on the PC. The microphone socket on the soundcard of the PC is usually labeled MIC or has a microphone symbol as shown below. The socket is often colour-coded pink.



The microphone symbol.



Notes

The switch on the side of the unit marked **PLAY REC** must be set to **REC** in order to create Call Recordings.

If your soundcard has a 'microphone boost' option or a software amplifier – you may need to enable or disable this option in order to optimize performance. (Microphone boost options will often be located in the 'Advanced Microphone' options of Windows' Volume Control.)

Testing Call Recorder for GoldMine

(The following test is not applicable for those using the Hi-Phone Desktop in lieu of the hardware indicated in the preceding section. Users of the Hi-Phone Desktop must test by means of a real telephone call, properly connected at both ends.)

Once you have correctly installed and connected the Call Recorder hardware as detailed in the preceding section, you should test the configuration as follows:

Select Windows® **Sound Recorder** via **Start | Programs | Accessories | Entertainment** | as shown below:



(If the operating system is Windows NT® you should instead select **Sound Recorder** via **Start | Programs | Accessories | Multimedia**.)

This will invoke the **Sound Recorder** application:



Now lift the telephone handset.

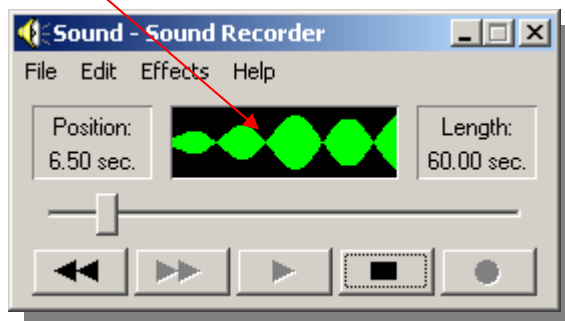
Check to ensure that there is an audible dial tone on the line.
(Leave the handset off-hook whilst you proceed.)

continued . . .



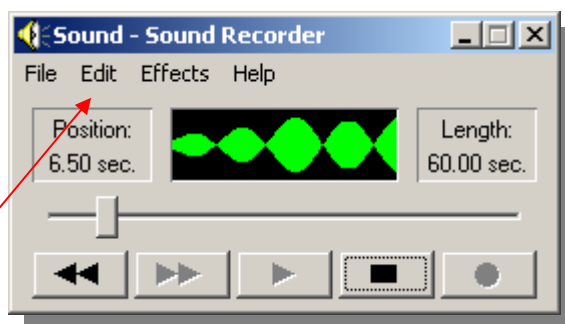
Click on the record button to test.

If there is a dial tone, this should be reflected by activity in the display panel of Windows® Sound Recorder as shown in the following example:



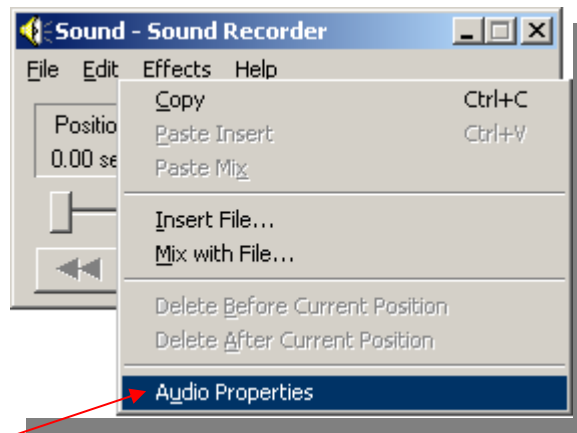
If *not*, check all cables and connections thoroughly.

If a dial tone is audible from the PC speaker[s], or if perhaps any feedback is evident, you will need to adjust Windows® native sound settings. To do so, proceed as follows:



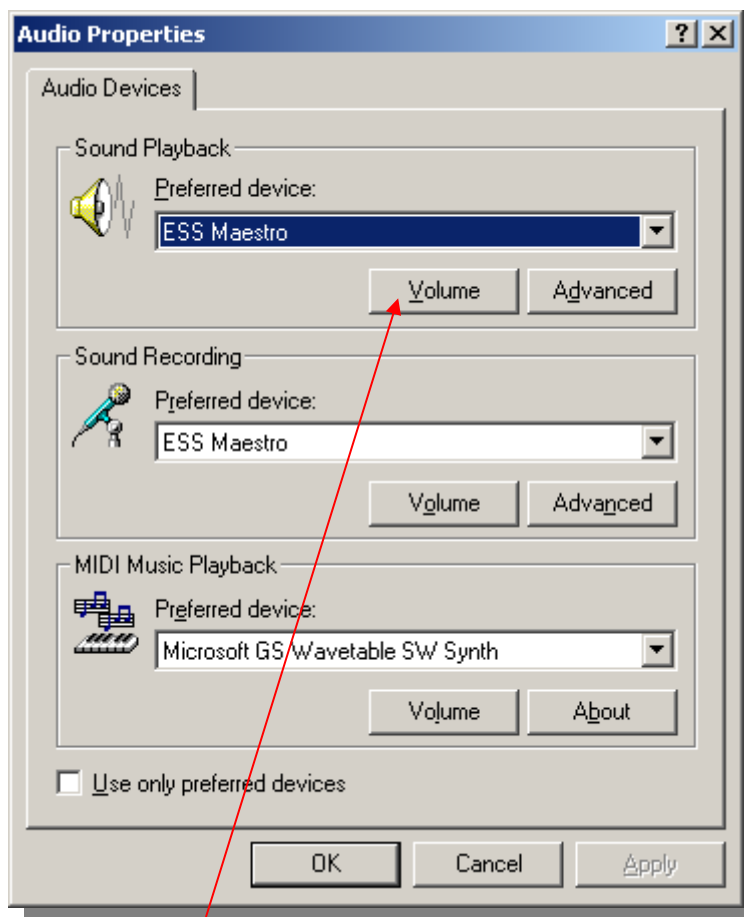
Click on **Edit**.

continued . . .



From the menu select **Audio Properties**.

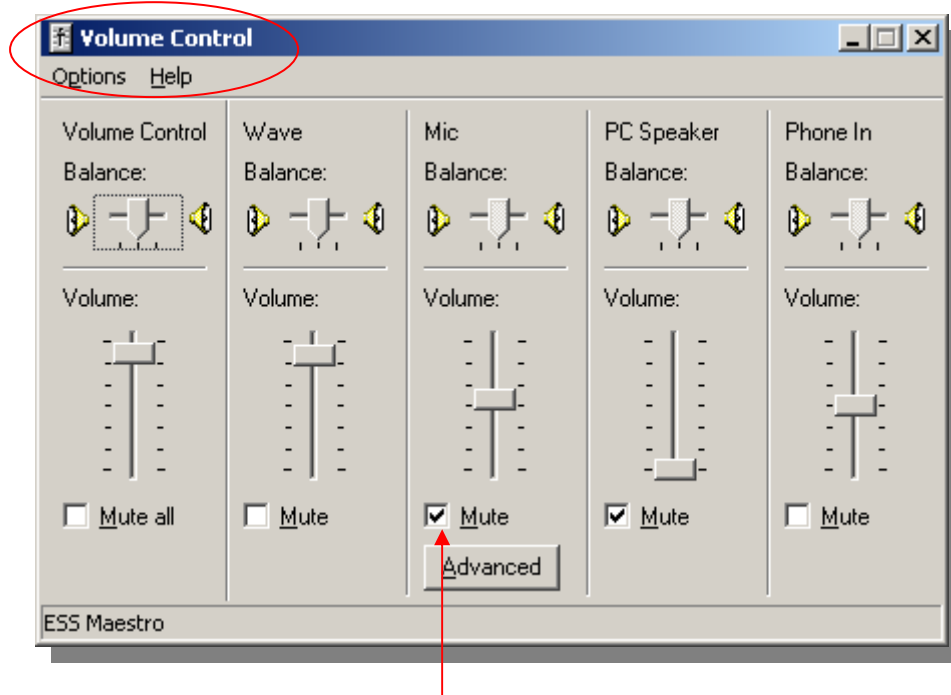
This will summon the following **Audio Properties** window:



Click on the Sound Playback **Volume** button.

continued . . .

The following **Volume Control** panel will appear:



Check the **Mute** box beneath the **Microphone** slider.

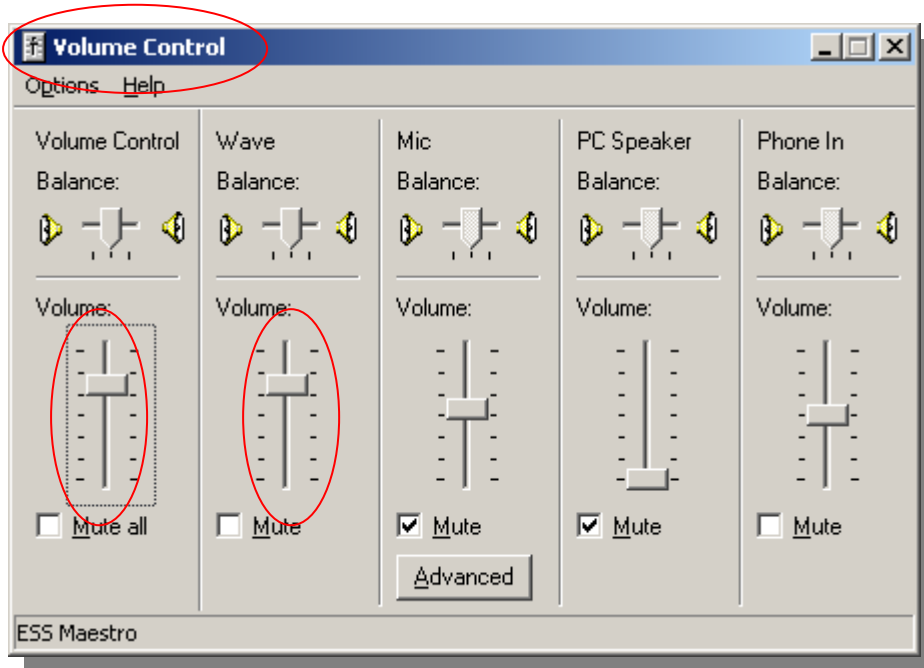
(To summon the above **Volume Control** panel via Windows 9X operating systems - select **Start | Programs | Accessories | Entertainment | Volume Control**.)

Note that there are *two separate consoles* available via the **Volume Control** application – namely the **Playback Control** and the **Recording Control**. The appearance of either of these on your particular machine will vary depending upon the nature of the specific sound card and corresponding soundcard software installed, and also your chosen **Playback Control** and **Recording Control** display options.

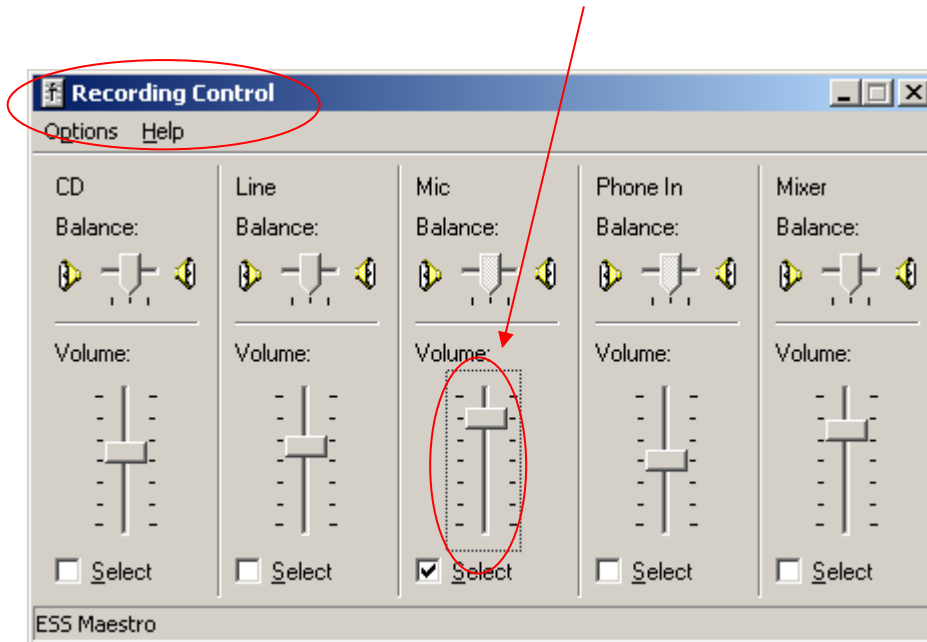
If any of the elements you need to adjust are not visible, click on the **Options** menu and select **Properties** - choose either **Playback Control** and the **Recording Control** and then check the additional elements you require from within the drop-down listings.

continued . . .

If the **PLAYBACK** of the recorded sounds is either too loud or too soft, adjust the volume for **PLAYBACK** of Call Recordings by moving the sliders within the **Volume Control** and the **Wave** sections to a suitable level:

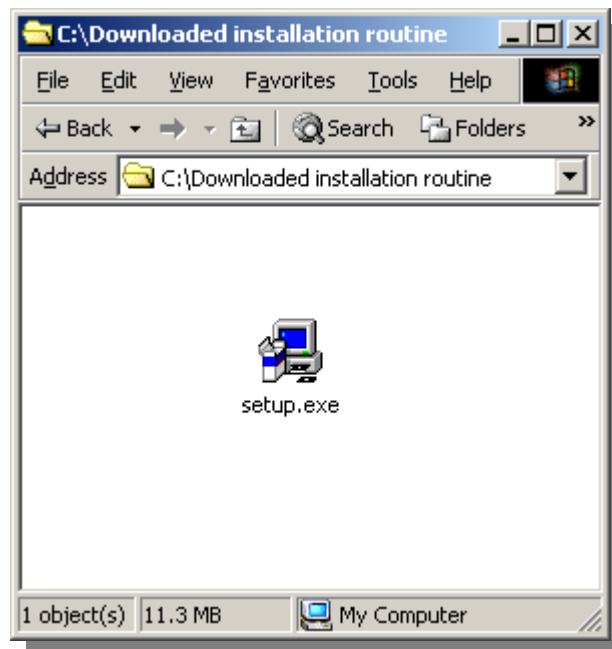


If the **RECORDED** level of Call Recordings is too low or too high - adjust the volume for **RECORDING** within the **Recording Control** console by moving the **Microphone** slider to a suitable level:



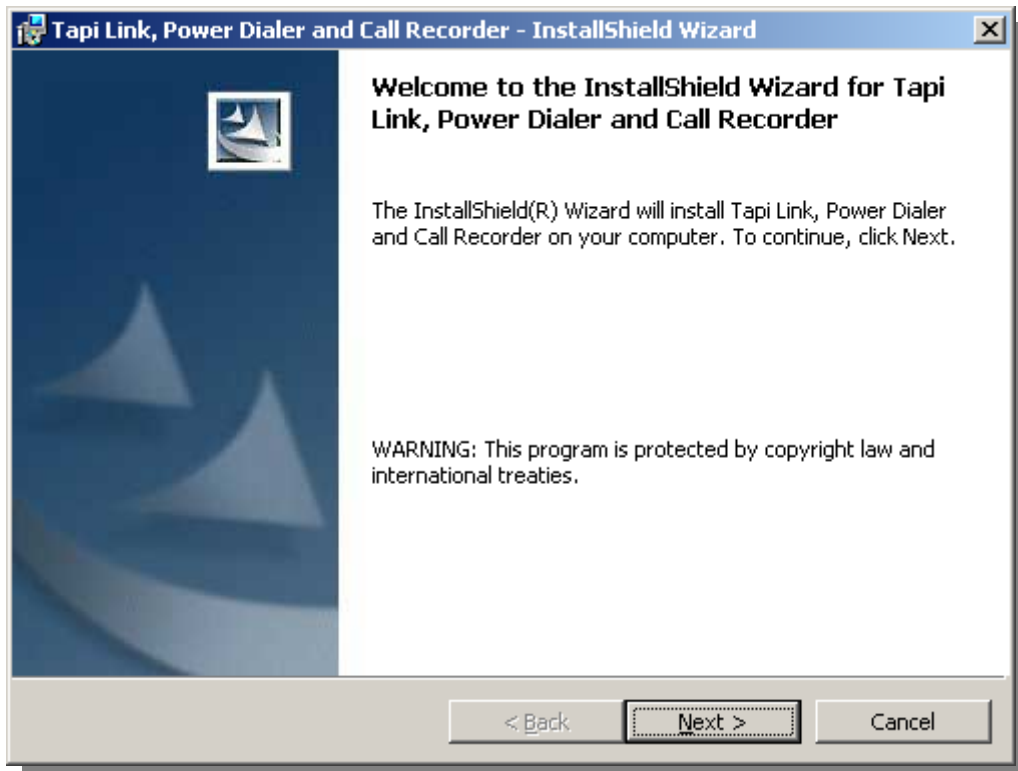
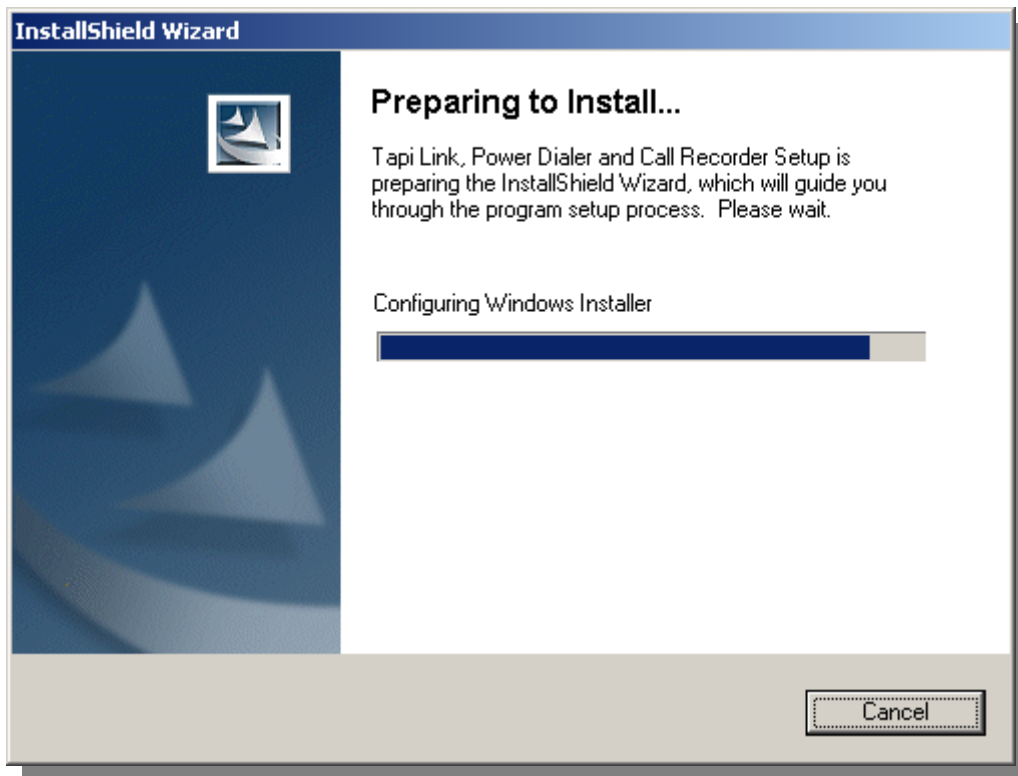
Starting the software installation process

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.
Temporarily disable any anti-virus protection. (This can be re-enabled subsequent to the installation.)
3.
Double-click on the file named setup.exe from within the setup directory.

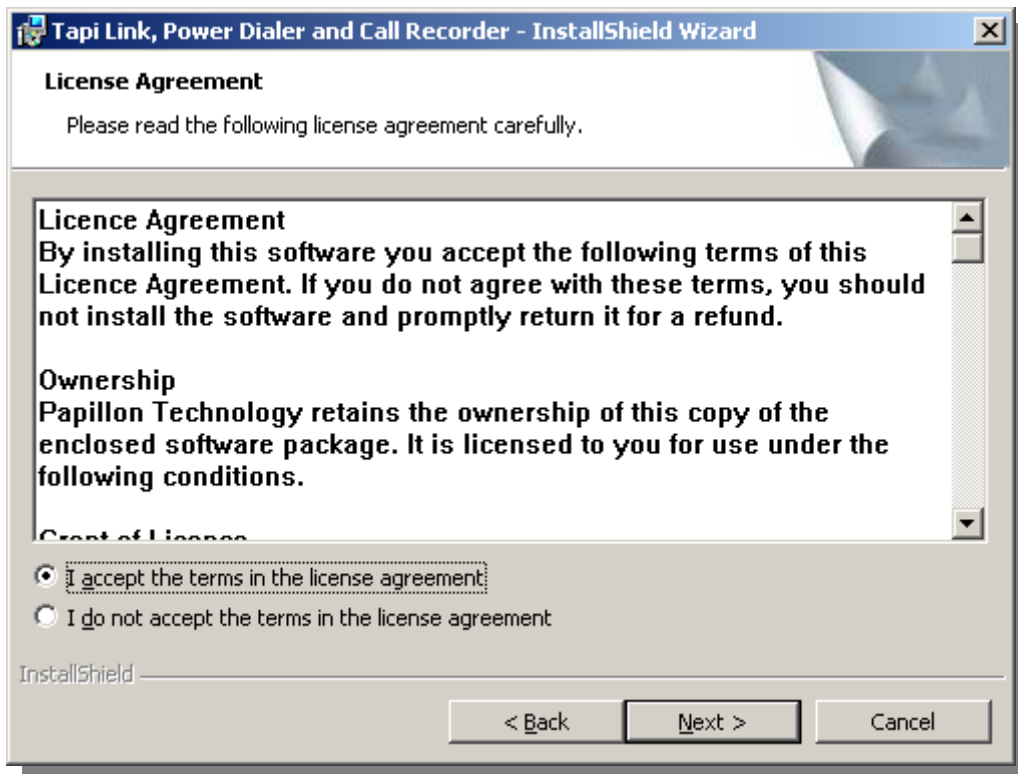


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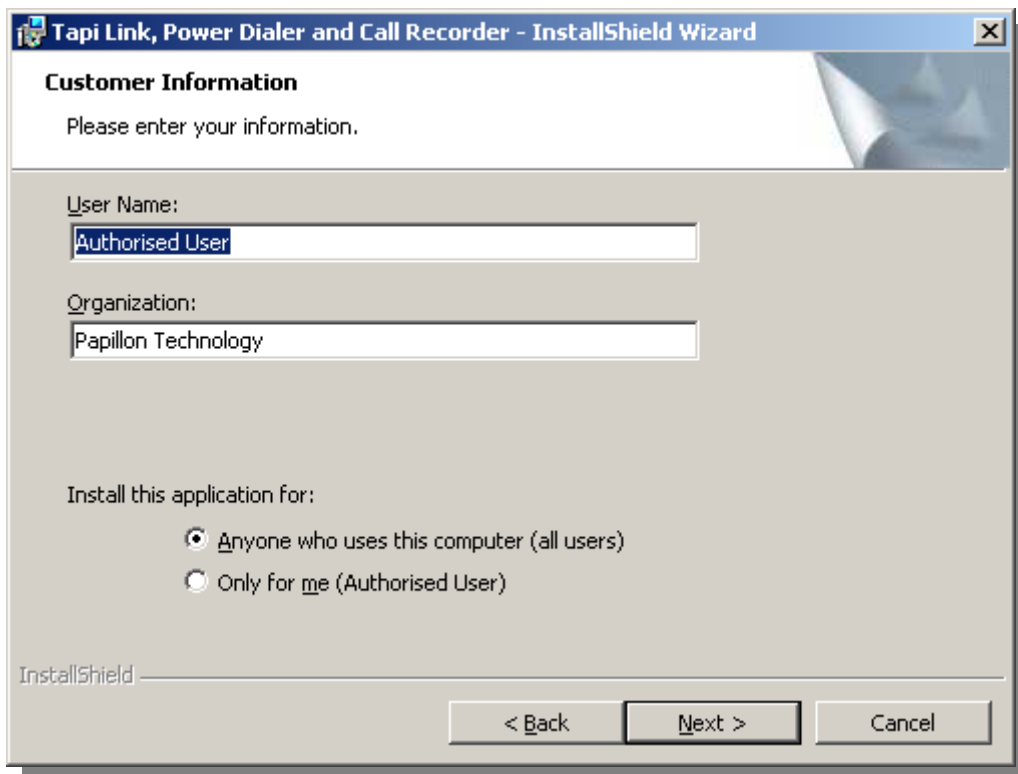
The wizard will prepare to install the software



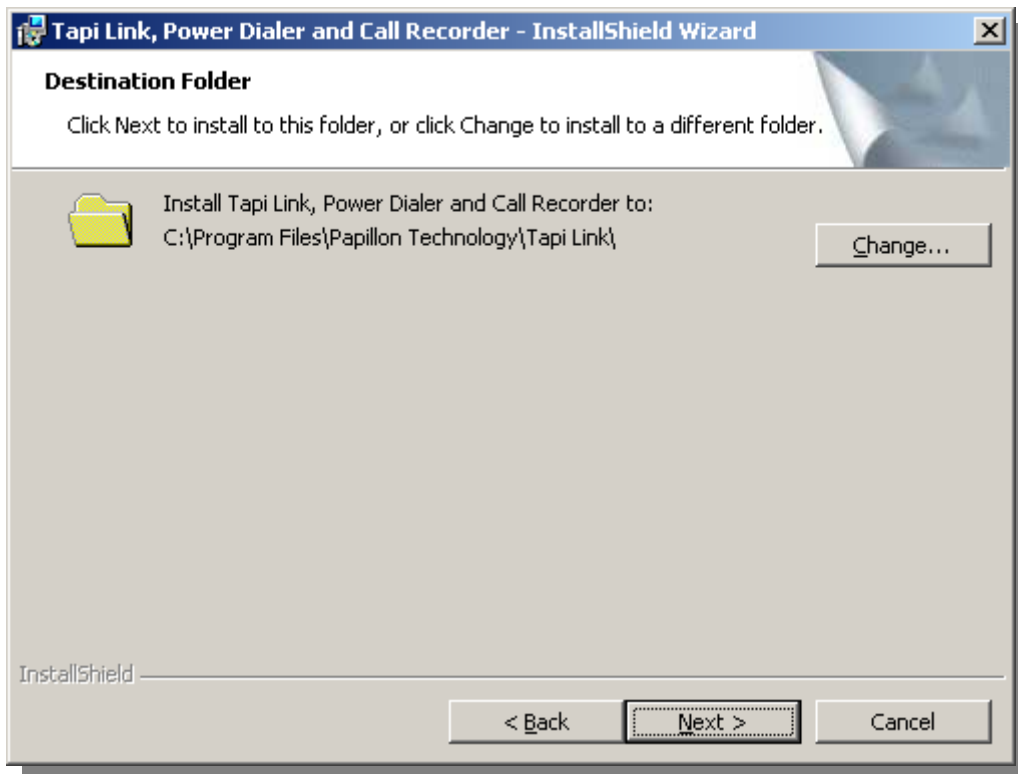
Click on the **Next** button to proceed.



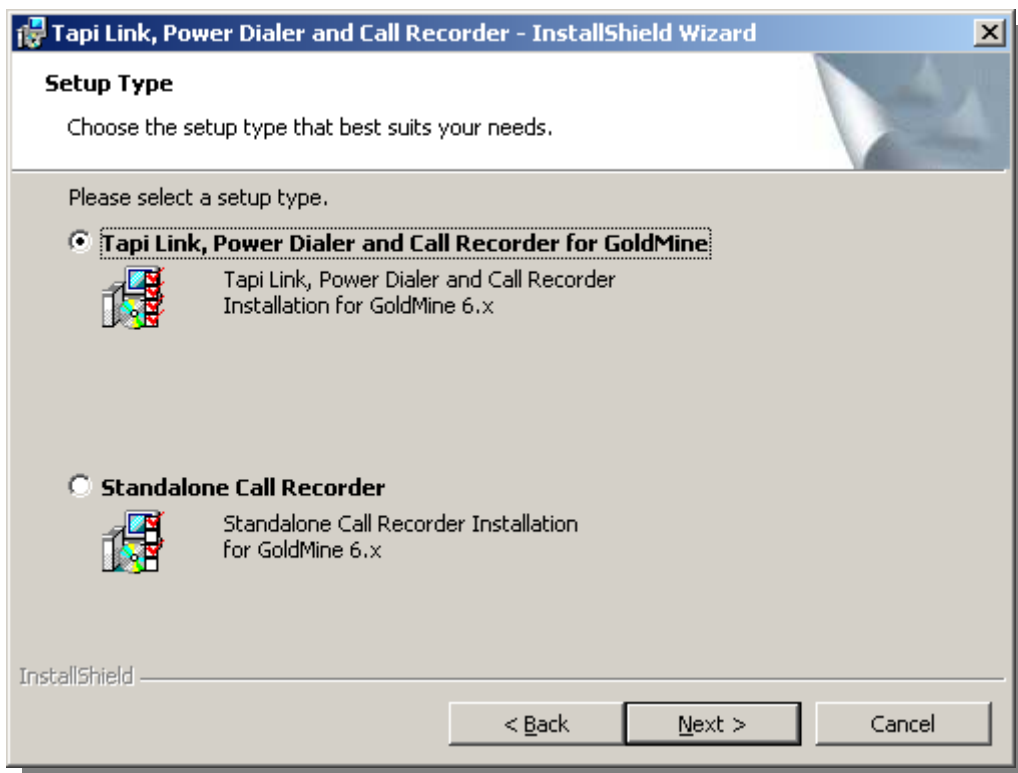
Accept the terms of the Licence Agreement to proceed.



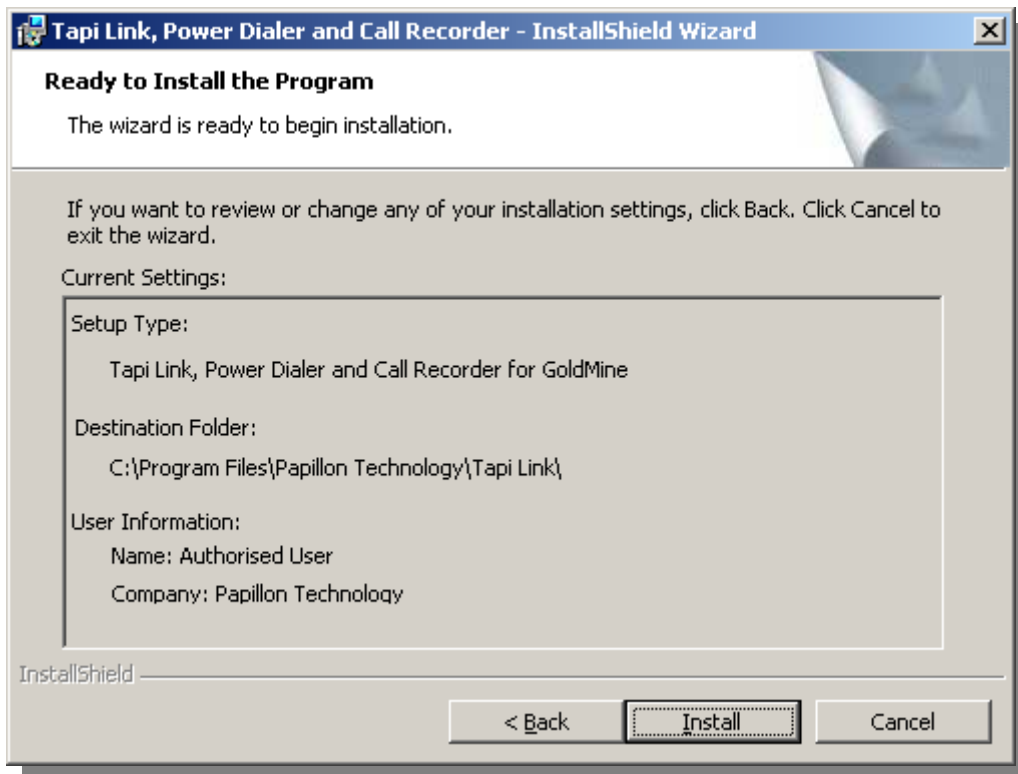
Enter the user name, the name of the organisation, and select whether you wish the program to be available for any logged-on user or solely for this particular user. – then click on the **Next** button



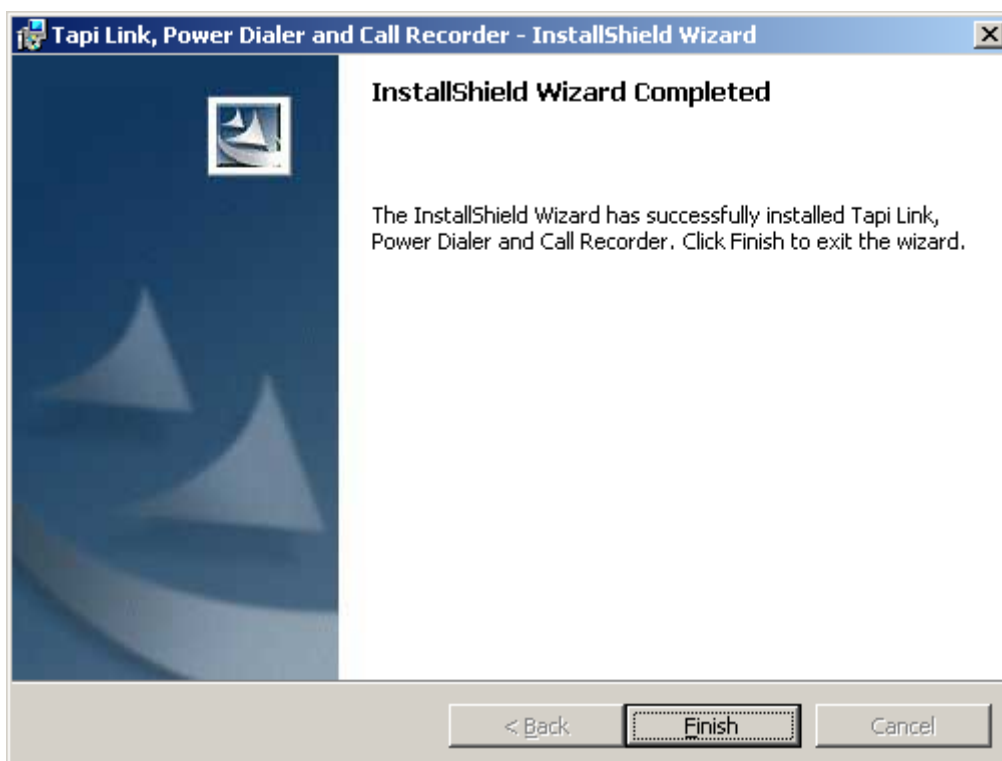
It is recommended that you accept the default location for the program files by clicking on the **Next** button. (For GoldMine® 7.x and GoldMine® PE implementations the subsequent dialog boxes will display “GoldMine® 7.x or 8.x” rather than “GoldMine® 6.x”)



Accept the setup type indicated above and click on the **Next** button. (Only select the Standalone option if you are not using Tapi Link or Power Dialer in conjunction with Call Recorder.)



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.)

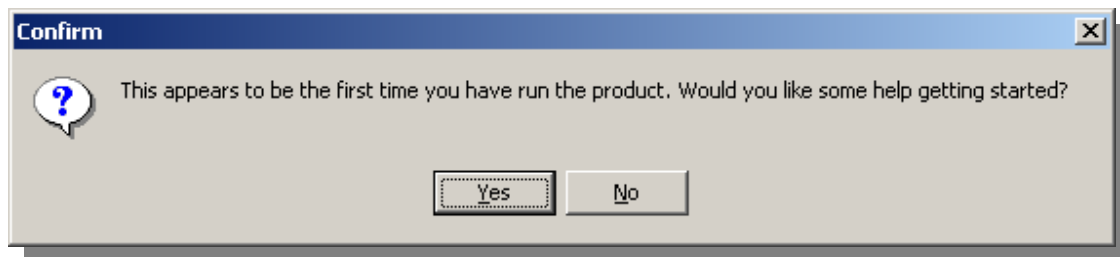


Click on **Finish** to complete the installation.

Running Call Recorder for the first time

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

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 fully licensed version of Call Recorder for GoldMine® proceed to the section entitled *'The Quick Start Wizard – for licensed products'*.

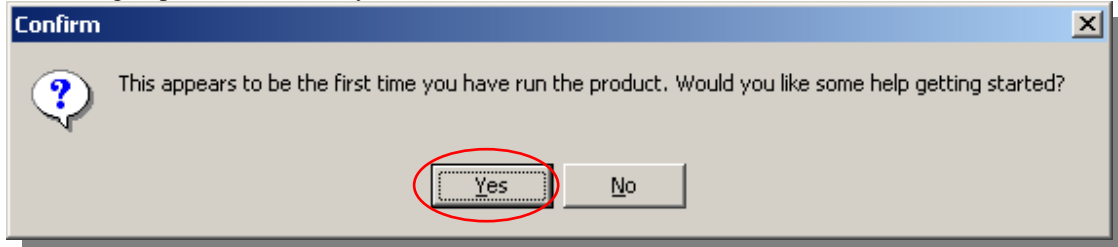
If you are using an evaluation version of Call Recorder for GoldMine® proceed to the section entitled *'The Quick Start Wizard – for evaluation products'*.

The Quick Start Wizard – for evaluation products

(This section is for evaluation products only. If you are using a fully licensed version of Tapi Link proceed instead to the section entitled *'The Quick Start Wizard – for licensed products'*.)

1.

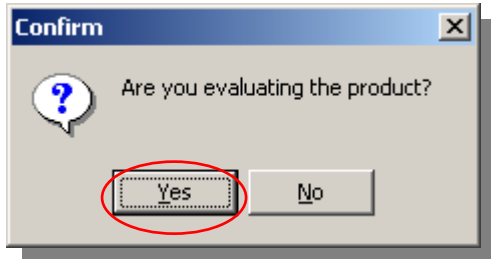
On starting Tapi Link for the very first time a **Quick Start Wizard** will launch:



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).

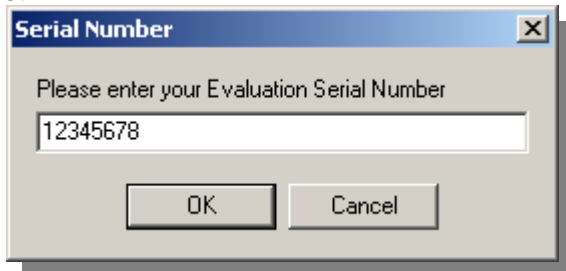
If you click **YES** - you will be guided through a series of simple questions, as follows:

2.



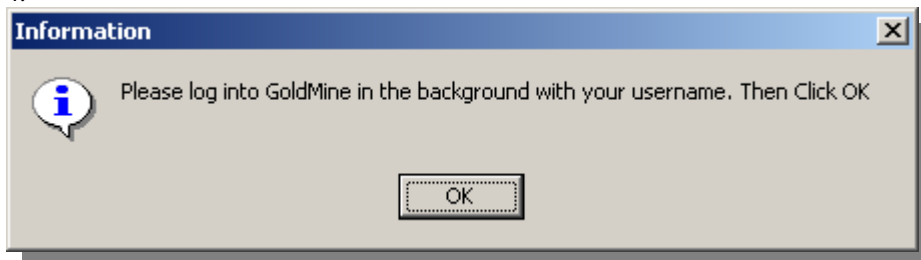
Click on **YES**.

3.



Enter the evaluation serial number provided to you by Papillon Technology, then click on **OK**.

4.



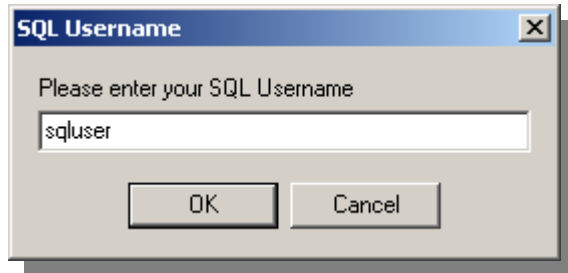
Log into GoldMine® with the relevant users Username and Password and then click on **OK**.

5.



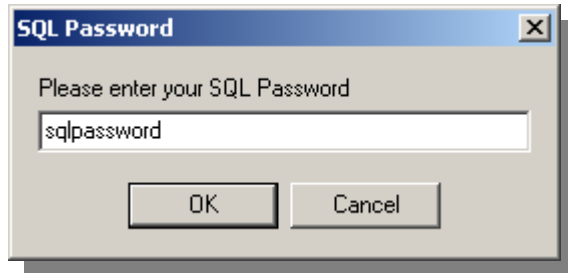
Enter the individual users own GoldMine® password and click on **OK**.

6.



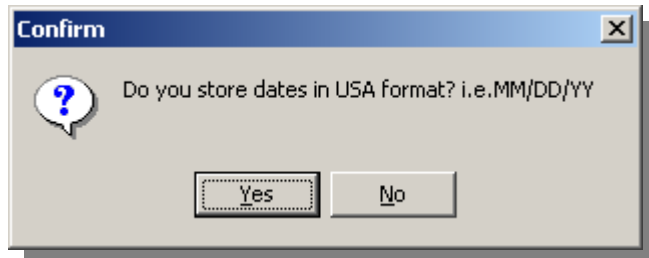
If you are using the SQL version of GoldMine® enter the SQL username and then click on **OK**.
If you are using a dBase version of GoldMine® click on the **Cancel** button.

7.



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.

8.

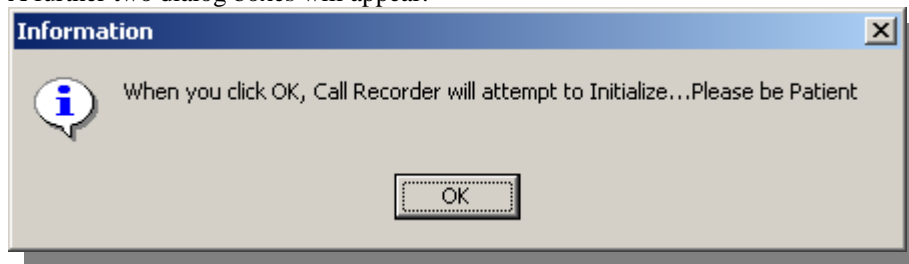


Answer the above question according to your particular locality.

continued . . .

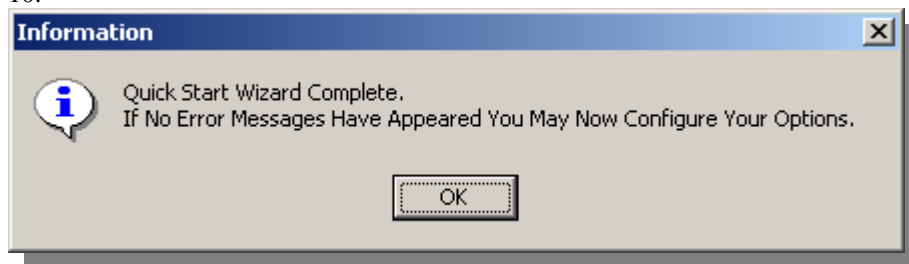
9.

A further two dialog boxes will appear:



Click on **OK**.

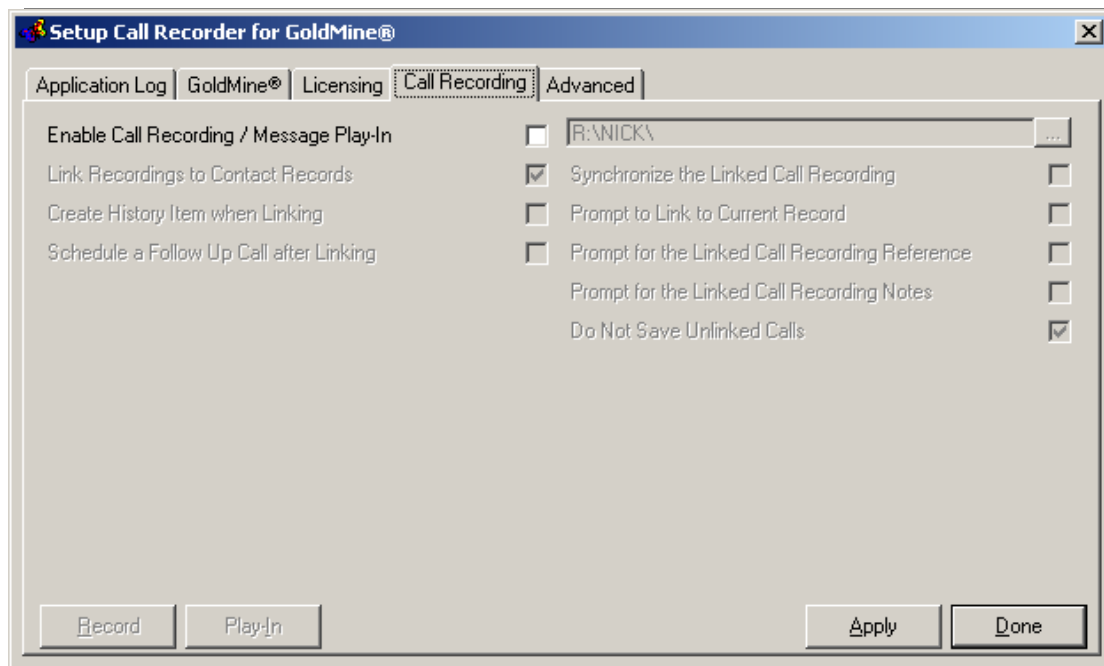
10.



Click on **OK**.

11.

The **Call Recorder Setup** dialog box will appear:



This completes the installation and basic configuration of an evaluation version of Call Recorder for GoldMine.

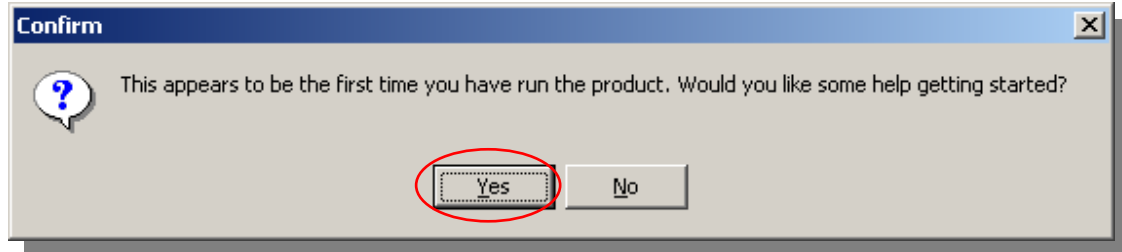
You may now amend or add to any of the previous choices you made during the **Quick Start Wizard** through the **Setup** interface above, or proceed forward through this guide for further details on the basic installation and configuration of Call Recorder for GoldMine.

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

The Quick Start Wizard – for licensed products

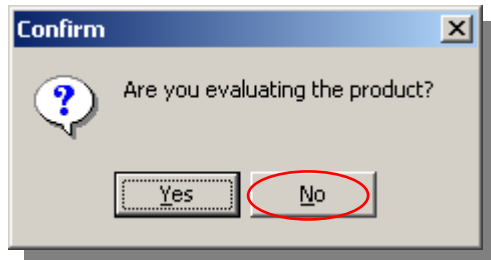
(This section is for licensed products only. If you are using an evaluation version of Call Recorder refer instead to the section entitled 'The Quick Start Wizard – for evaluation products'.)

1.



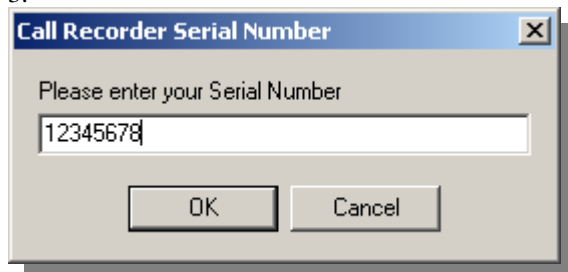
Click on the **YES** button.

2.



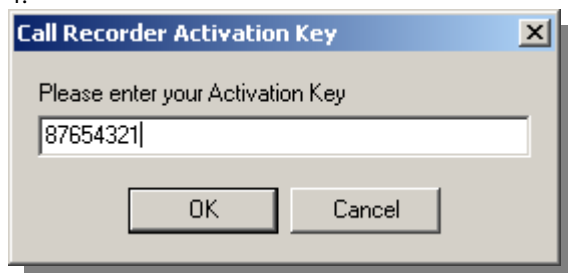
You have the licensed the product - therefore click on the **NO** button.

3.



Enter the Call Recorder serial number and click on **OK**.

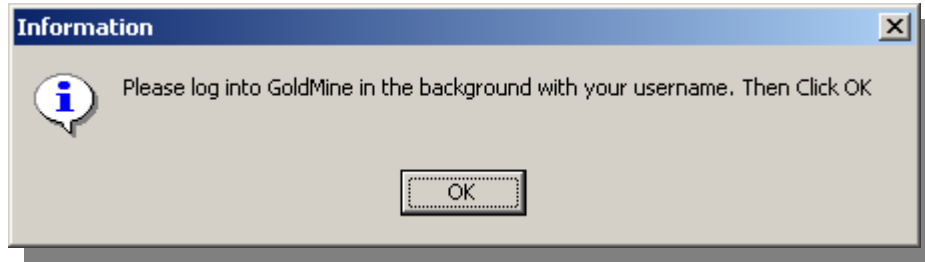
4.



Enter the Call Recorder activation key and click on **OK**.

continued . . .

5.



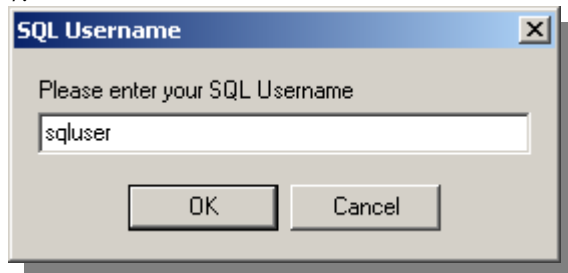
Log into GoldMine® using the relevant users Username and Password and then click on OK.

6.



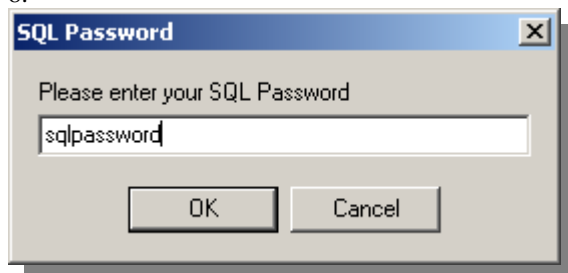
Enter the relevant users GoldMine® password and click on the **OK** button.

7.



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

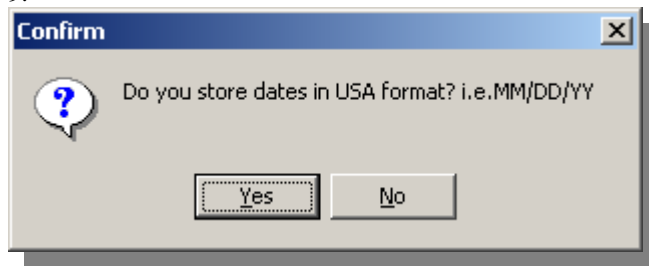
8.



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

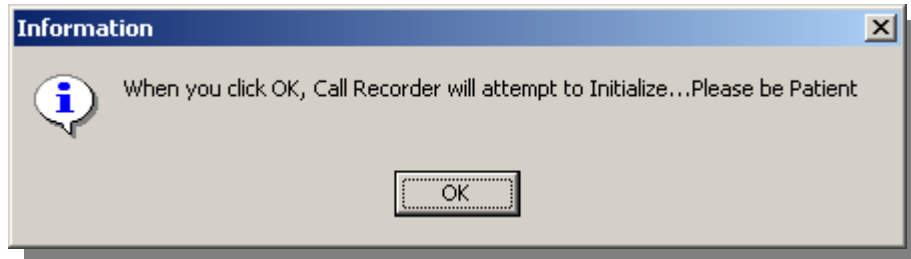
continued . . .

9.



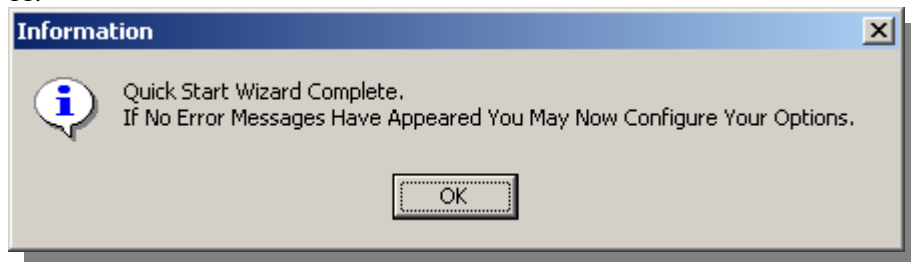
Answer the question according to your particular locality.

10.



Click on **OK**.

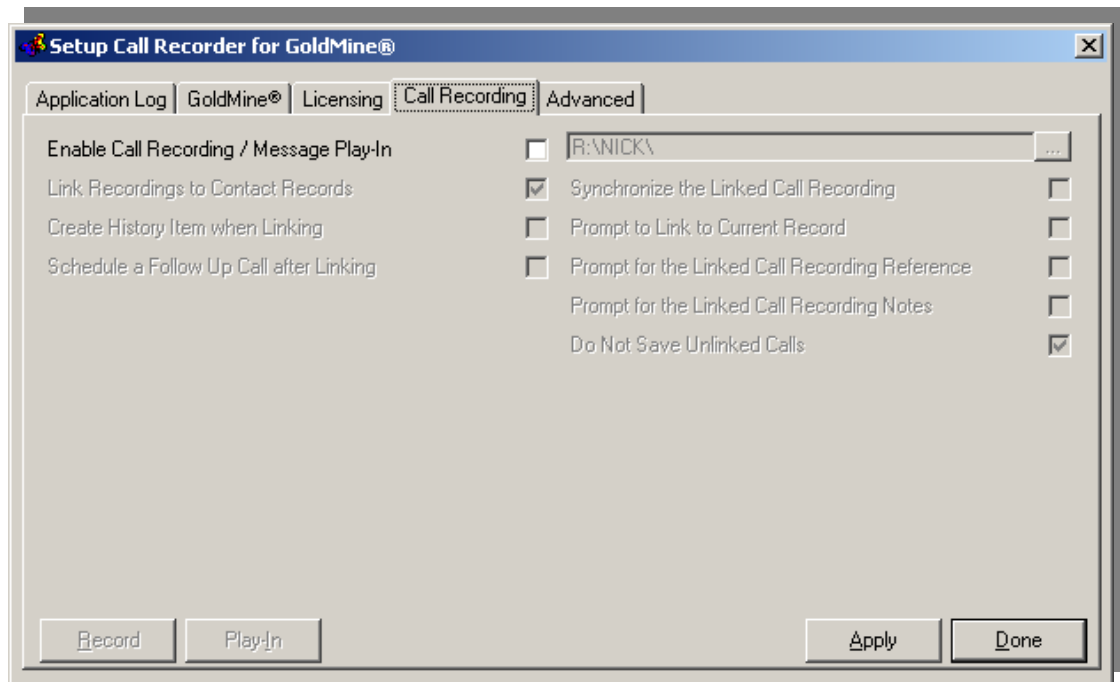
11.



Click on **OK**.

continued

12.



This completes the installation and basic configuration of a licensed version of Call Recorder 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 Call Recorder for GoldMine®.

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

Contacting Technical Support

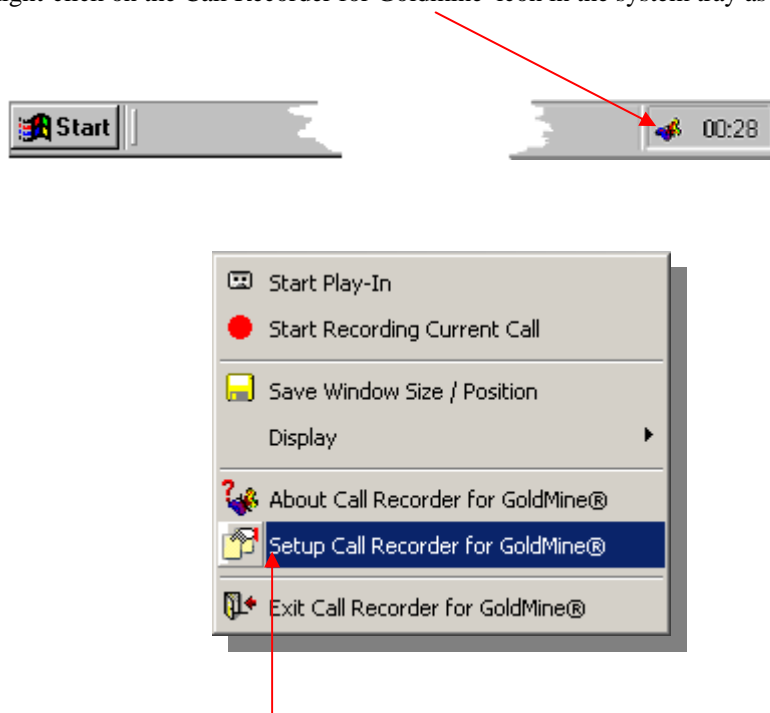
In the first instance you are strongly urged to consult the contents of this installation guide for assistance should you experience any difficulties with this product. Additional help can be sought in the form of 'Tool Tips' which provide context-sensitive help. (This form of 'fly-by-help' can be summoned by hovering your mouse pointer over the appropriate item or object in question, within the framework of the Call Recorder for GoldMine® dialog boxes.)

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 *before* 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 Call Recorder software. (This can be obtained by right-clicking on the Call Recorder icon in the task bar system tray and selecting **About TL /PD for GoldMine®** or **About Call Recorder for GoldMine®**.)
- C. A copy of the **Application Log**. (This log records a brief history of system events relating to this product.)

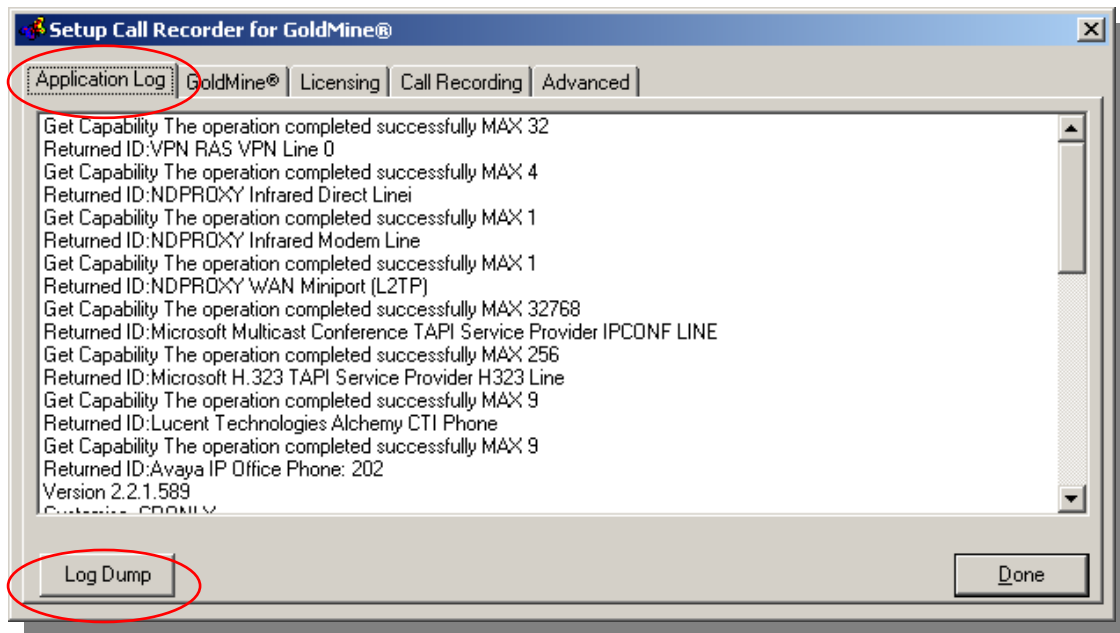
In order to produce an application log file suitable for transmission to our support personnel, please proceed as follows:

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 absence of event) generated within the log file itself.
2. Right-click on the Call Recorder for Goldmine® icon in the system tray as shown below:



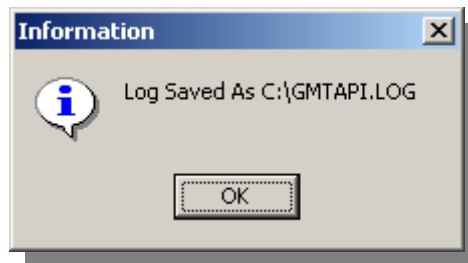
3. From the context menu select **Setup Call Recorder For GoldMine®**.

4. Select the tab marked **Application Log**:



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

6. This will generate the following dialog box:



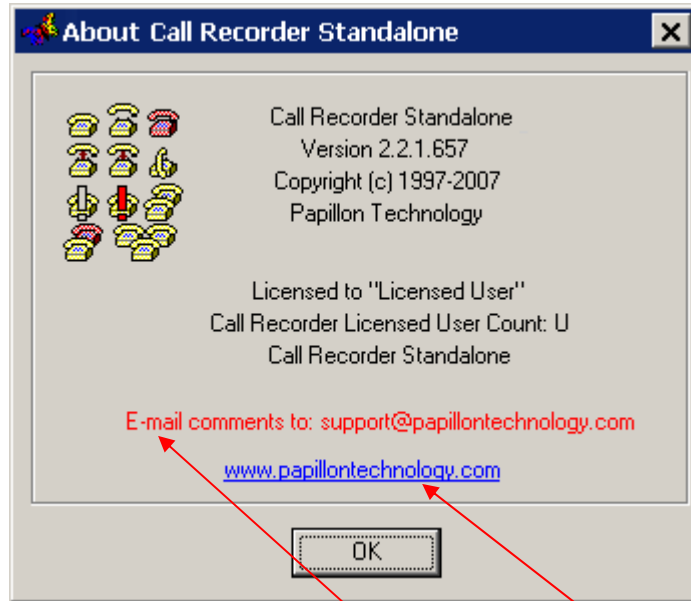
7. Click on the **OK** button

The above dialog box confirms the creation of, and the location of a text file which records the events listed in the Call Recorder application log. (i.e. the file is named "GMTAPI.LOG" and is located in the root directory of the C:\ drive.)

This file can be viewed in Notepad® or any other word-processing application, and is suitable for transmission, for example, by fax or as an e-mail attachment to accompany any request for assistance.)

Requests for technical support from Papillon Technology relating to this product can be made by the following means:

Via Email to support@papillontechnology.com
By Telephone to +44 (0)1992 560487 or 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 Call Recorder icon in the task bar system tray and selecting **About Call Recorder for GoldMine**.

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