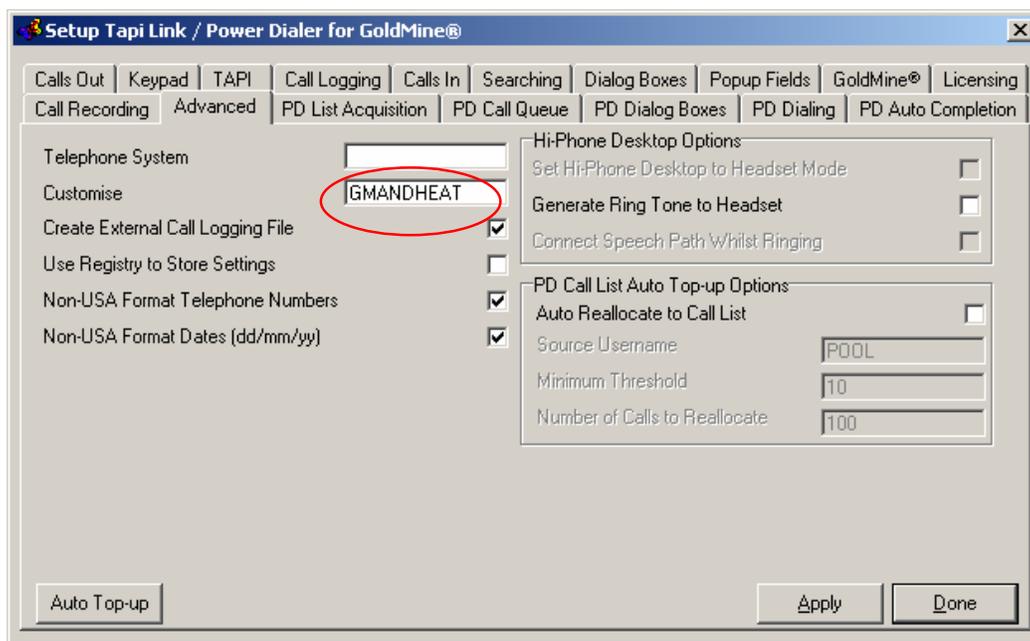


Manual Addendum For Integrating Tapi Link for GoldMine® with PowerDesk or HEAT® (Together)

These instructions relate to the use of HEAT® using GoldMine® customer data.

Firstly, follow the basic instructions in the main Tapi Link for GoldMine® Configuration Guide.

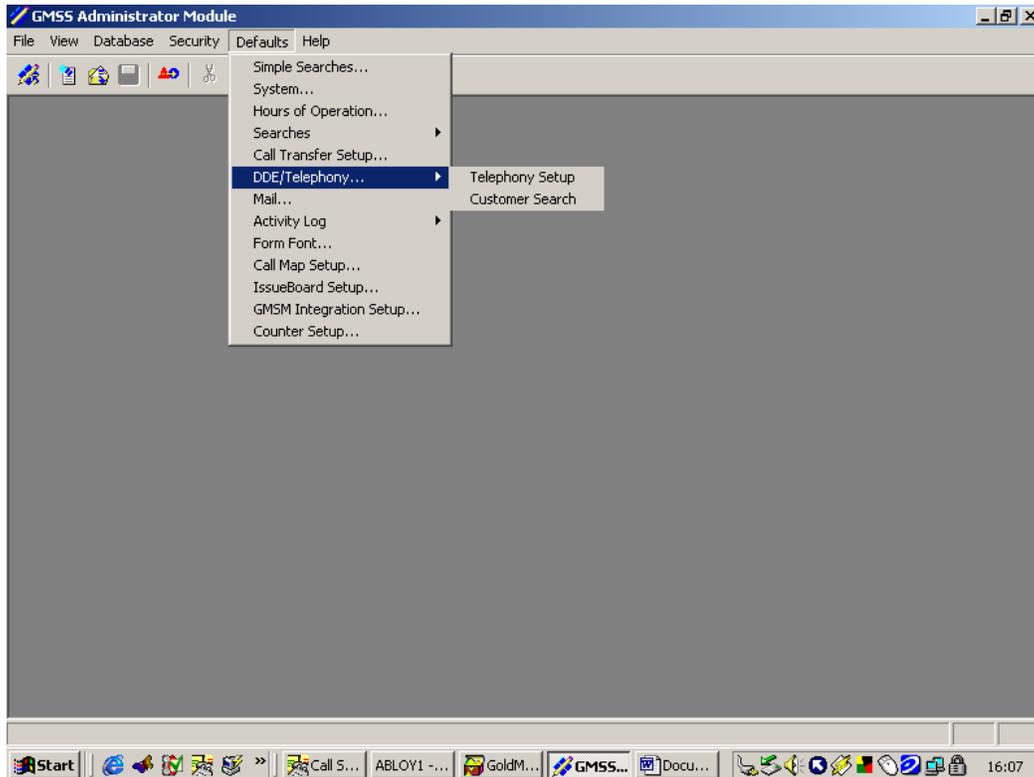
Then enter GMANDHEAT in the **Customise** field on the **Advanced** tab:



Click on the **Apply** button and then the **Done** button.

HEAT* currently uses a DDE interface for integrating with Telephony products. Although there is an API, DDE is the only way to do a screen pop. The screen pop will bring up in HEAT* a call record or Customer Profile record.

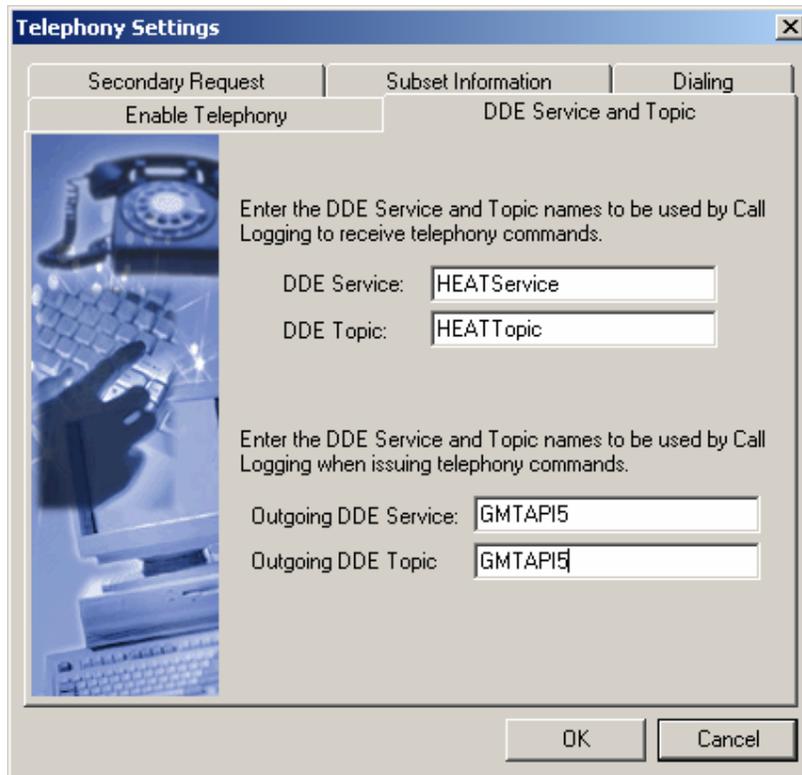
Before you can start using the telephony DDE or the additional DDE commands it is necessary to set up the telephony integration properties in the HEAT* Administrator module. Under the **Defaults** menu there is a **DDE/Telephony...** menu with a **Telephony Setup** and **Customer Search** options.



In the Telephony Setup on the **Enable Telephony** tab is where the Telephony Integration is Enabled. After this is enabled, the field for **Telephony Application Name** is active for the name of the telephony program to be entered.



The Telephony setup allows the personalizing of several settings. On the **DDE Service and Topic** tab it is possible to name the DDE Service and Topic names as well as define the DDE Service and Topic names used by Call Logging to call the Telephony software.



The image shows a screenshot of the 'Telephony Settings' dialog box. The title bar reads 'Telephony Settings' with a close button. There are three tabs: 'Secondary Request', 'Subset Information', and 'Dialing'. The 'DDE Service and Topic' tab is selected. On the left side of the dialog, there is a vertical image showing a hand using a computer mouse on a keyboard. The main area of the dialog contains the following text and input fields:

Enable Telephony

DDE Service and Topic

Enter the DDE Service and Topic names to be used by Call Logging to receive telephony commands.

DDE Service:

DDE Topic:

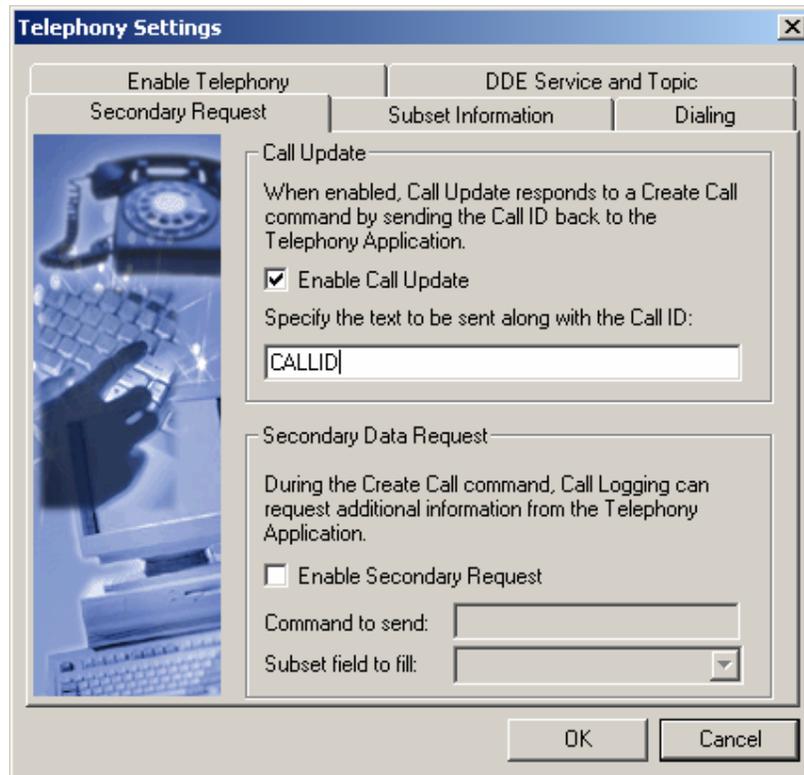
Enter the DDE Service and Topic names to be used by Call Logging when issuing telephony commands.

Outgoing DDE Service:

Outgoing DDE Topic:

At the bottom right, there are 'OK' and 'Cancel' buttons.

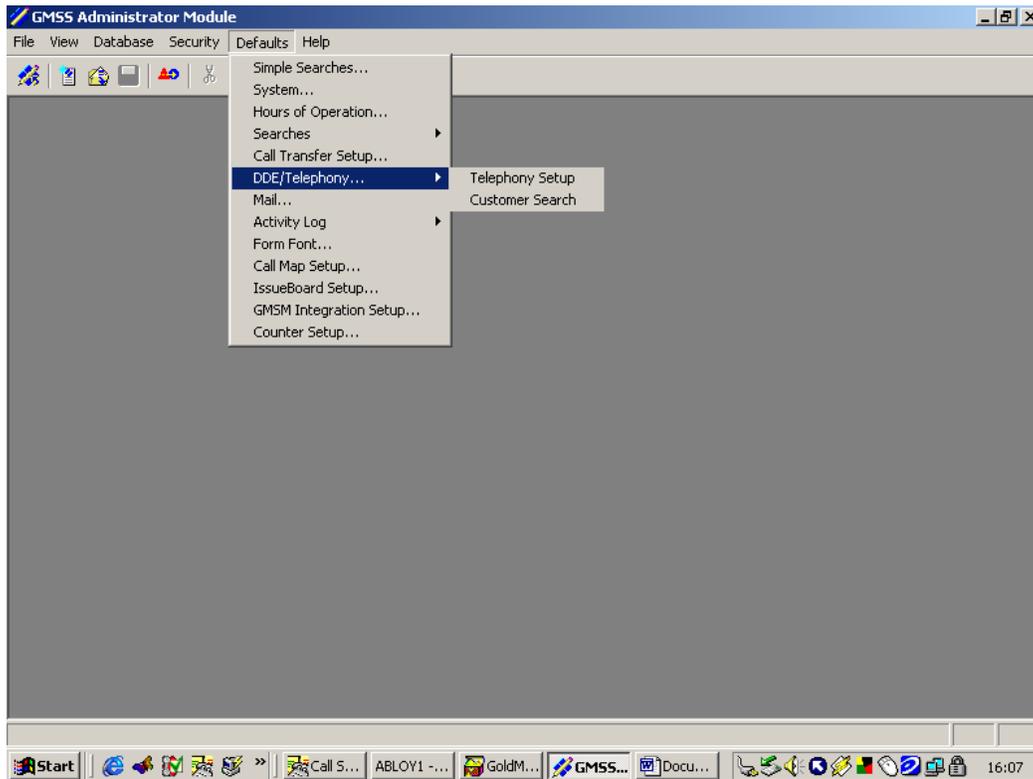
The **Secondary Request** tab allows you to return to the telephony program the call ID by checking the **Enable Call Update**. By filling in the text box it is possible to send back additional information this will require a outgoing DDE service and topic to be defined on the DDE service and topic tab.



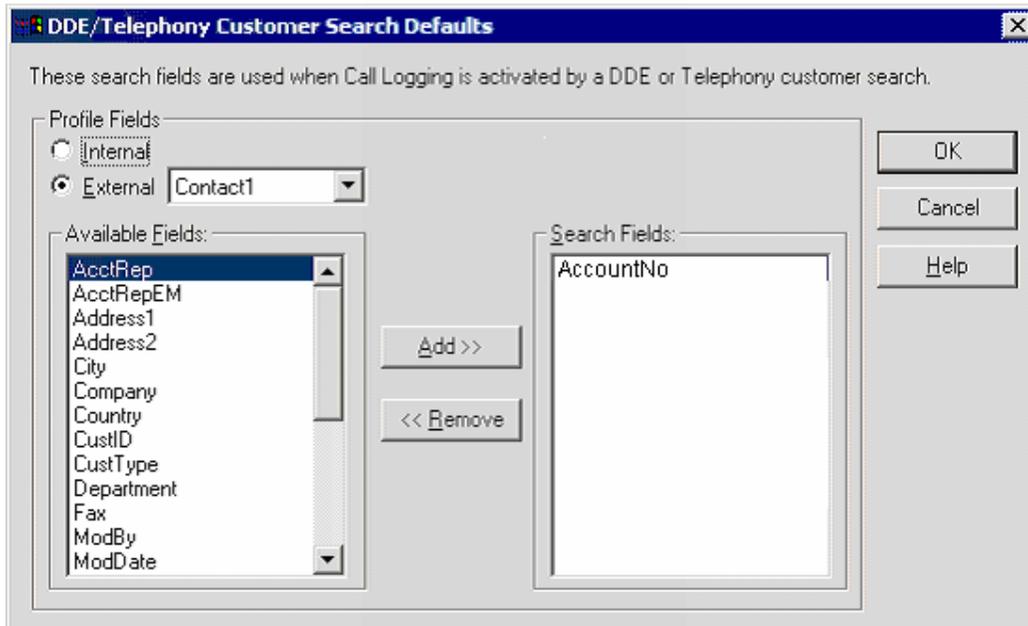
The last tab is to define the command sent to the Telephony software when the “Dial using Telephony” option is used inside Call Logging.



Under the **Defaults** menu there is a **DDE/Telephony...** menu with a Telephony Setup and Customer Search options.



In the **Customer Search**, is where the Search defaults are activated, which currently in HEAT® defaults to a search which will need to be corrected prior to using the Telephony DDE. Remove any values in the search fields box and add one single field from Contact1: ACCOUNTNO
(This is the only field that you will want to search with the data passed to Call Logging by the Telephony Software.)



Finally, **Exit** and then **Restart** Tapi Link.
(right-click on the icon in the system tray and select Exit TL / PD for GoldMine®.)

