

The SoftPhone (SIP Client) in GoldMine 6.7

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Note: These settings should be configured by the GoldMine administrator for each GoldMine user with the assistance of the SIP Proxy administrator.

Prerequisites

GoldMine does not include the SIP Proxy Server that needs to be configured for the SoftPhone to work. Based on open Internet Protocol (IP) data networking standards, including Session Initiation Protocol (SIP), the SIP Proxy Server is the configuration and control element for a business telephone and multimedia communications system. It supports most of the common features found in an enterprise private branch exchange (PBX). At its core, the proxy server processes SIP requests and responses and provides the primary capabilities for call session management, including SIP proxy or redirect functionality, registrar and location services. Once a SIP Proxy Server is configured by an administrator and is fully functioning, GoldMine then can be configured to make and receive calls through the SIP Proxy Server.

(Visit www.frontrange.com to learn about FrontRange Solutions' SIP/VoIP product, FrontRange Contact Center.)

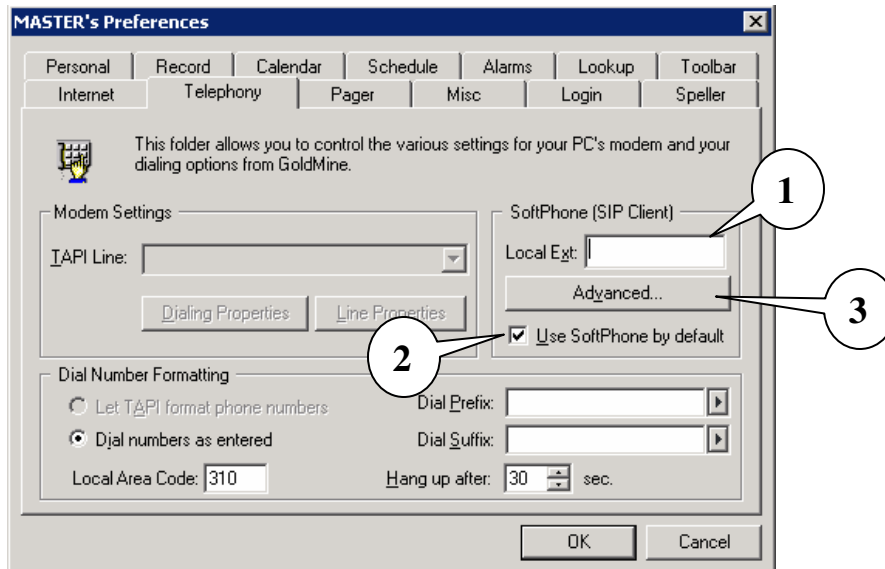
Removal of SoftPhone option from users' Contact>Dial phone menu

If a SIP Proxy Server is not being used in the environment, we suggest removing the “Launch SoftPhone” and “Stop SoftPhone” options from the *Contact>>Dial Phone* menu in GoldMine. This will avoid confusion with the user wanting to make a call through this new feature when it is not possible due to a SIP Proxy Server not being present.

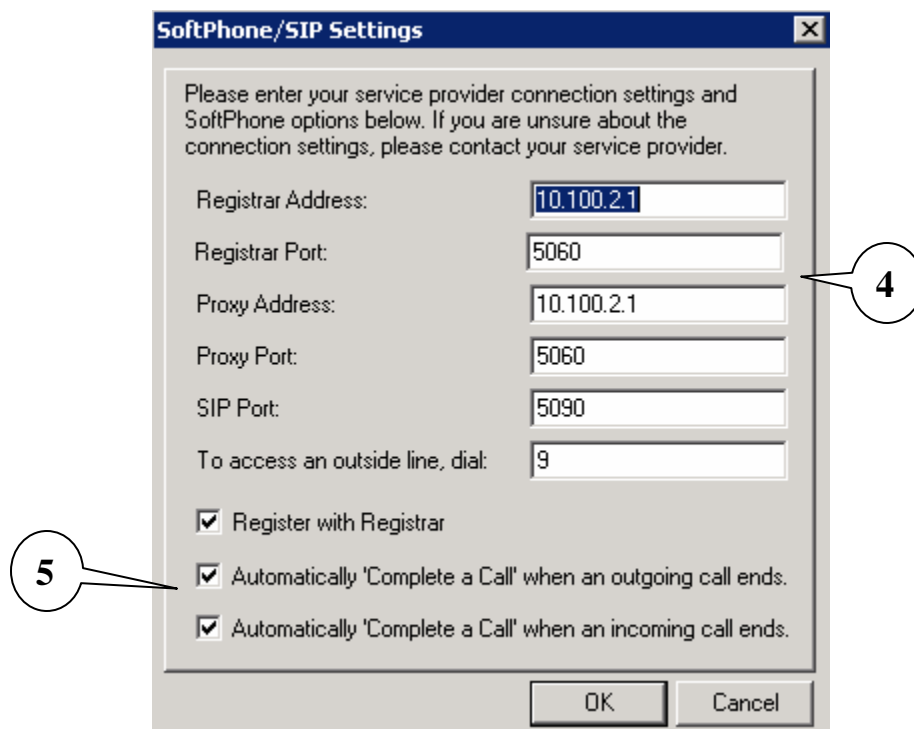
1. **File>>Configure>>User Settings**; select a user and click **Properties**.
2. Click **Menu**
3. Expand the *Contact* entry, then expand the *Dial Phone* entry.
4. Click on the green push pin icon next to *Launch SoftPhone* and *Stop SoftPhone* so that they turn red.
5. Click OK.
6. Repeat for each user.

Setting the Telephony Preferences

The *Telephony* tab in users' preferences is used to establish the settings needed for the SoftPhone. Individual users may access this via *Edit>>Preferences*. Alternately, an administrator can establish these settings for the user via *File>>Configure>>User Settings*; select the user to configure and select *Preferences*.



1. Enter the local extension assigned to this user.
2. If desired, the option to use the SoftPhone by default can be selected.
3. To access the SoftPhone/SIP Settings, select the **Advanced** button.



4. Your SIP Proxy administrator will advise you of any needed changes or entries for these settings.
5. You may choose to automatically complete a call when outgoing and/or incoming calls end by selecting the appropriate checkbox.

Where are the settings for the SoftPhone stored?

The settings are specific to the user and are written to the [SoftPhone] section of the username.ini file.

The image shows a comparison between the configuration in a text file and a graphical user interface. On the left, a text file snippet shows the [SoftPhone] section with the following settings:

```
[SoftPhone]
Extension=1017
UseByDefault=1
PrimaryRegistrarName=10.100.2.1
PrimaryProxyName=10.100.2.1
ContactDialingPrefix=9
PrimaryRegistrarPort=5060
PrimaryProxyPort=5060
SipPort=5090
Register=1
CreateHistOut=1
CreateHistIn=1
```

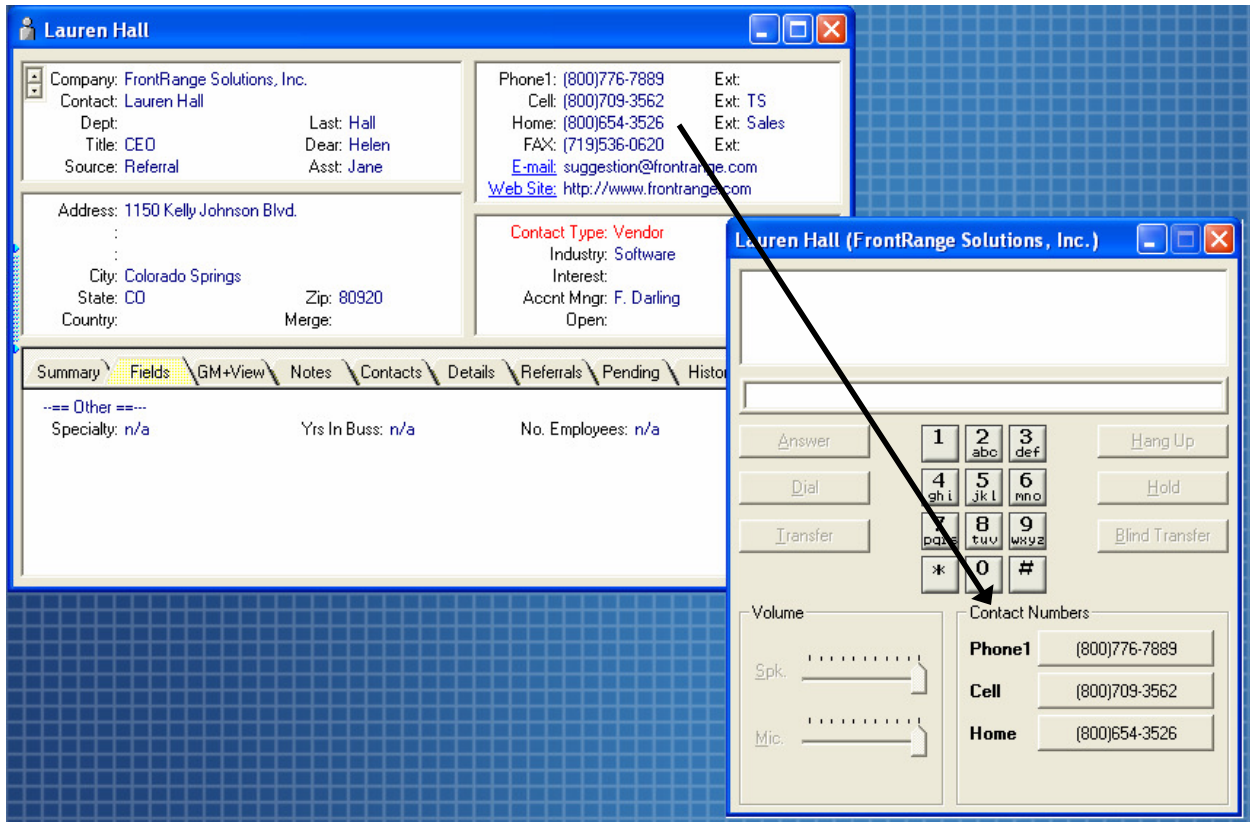
On the right, two GUI windows are shown. The top window, titled "SoftPhone (SIP Client)", has a "Local Ext:" field containing "1017" and a checked checkbox for "Use SoftPhone by default". The bottom window shows various configuration fields: "Registrar Address" (10.100.2.1), "Registrar Port" (5060), "Proxy Address" (10.100.2.1), "Proxy Port" (5060), "SIP Port" (5090), and "To access an outside line, dial:" (9). It also has three checked checkboxes: "Register with Registrar", "Automatically 'Complete a Call' when an outgoing call ends.", and "Automatically 'Complete a Call' when an incoming call ends.". Arrows point from the GUI fields to the corresponding lines in the text file.

Using the SoftPhone

The SoftPhone can be used to:

- Place outbound calls utilizing the phone numbers in the contact's record
- Answer incoming calls
- Place a call on hold
- Transfer calls using either a warm transfer or a blind transfer

1. Launch the SoftPhone using **Contact>>Dial Phone>>Launch SoftPhone**



2. GoldMine reads the Phone1, Phone2, and Phone3 fields and pulls those numbers into the *Contact Numbers* section. As shown above, if the local labels of the phone fields have been changed, the new labels will be reflected in the SoftPhone.
3. Clicking on a number in the contact numbers section will dial the number.
4. Once a call is placed or received, the speaker volume and the microphone volume can be adjusted.
5. If the options to automatically 'Complete a call' when an outgoing call or incoming call ends were checked, the corresponding Complete window will open so a history record can be written to the database. This accomplishes the same thing as if you were to go to Complete>>Unscheduled Call>>Outing/Incoming Call.