

CyPhone CRM Integration Profile

Goldmine

1.1. GoldMine

When CyPhone is integrated with GoldMine, it provides services such as popping a contact record on an incoming call, allowing dialling of contact numbers within GoldMine and so forth.

To add a GoldMine profile click on GoldMine tab page and then click the add button and enter in the name of the profile.

GoldMine® Integration Profile

Profile Name

Incoming Calls

- Screen Pop Existing Number
- Use New Contact Window
- New number 'Lookup Contact'
- 'Complete Scheduled Call'
- 'Complete Unscheduled Call'
- Auto-Restore when Minimized
- Ignore Internal Calls

Outgoing Calls

- Screen Pop Existing Number
- Use New Contact Window
- New number 'Lookup Contact'
- 'Complete Scheduled Call'
- 'Complete Unscheduled Call'

GoldMine® fields to search

- Phone 1
- Phone 2
- Phone 3
- Additional Contacts

GoldMine® History Settings

	Log	Code	Result	Callback
Unanswered Incoming	<input type="checkbox"/>	<input type="text" value="UNC"/>	<input type="text" value="UNC"/>	<input type="checkbox"/>
Unanswered Internal	<input type="checkbox"/>	<input type="text" value="UNT"/>	<input type="text" value="UNT"/>	<input type="checkbox"/>
Incoming	<input checked="" type="checkbox"/>	<input type="text" value="INC"/>	<input type="text" value="INC"/>	
Outgoing	<input checked="" type="checkbox"/>	<input type="text" value="OUT"/>	<input type="text" value="OUT"/>	
Internal	<input type="checkbox"/>	<input type="text" value="INT"/>	<input type="text" value="INT"/>	

Miscellaneous

- Lookup Incoming Number (DNIS)
- Start GoldMine® Timer

OK Cancel

1.1.1. Incoming Calls

The Incoming Calls section of the dialog group's options associated with GoldMine behaviour in the case of incoming calls. The options are:

Screen Pop Existing Number – If the number of the caller is known, this will cause GoldMine to display their contact record.

Use New Contact Windows – A new contact window will be opened when a screen pop occurs, rather than the existing record being changed.

New Number Lookup Contact - In the case that the number of an incoming call is not found in the contact database, a Lookup Contact window to be displayed.

Complete Scheduled Call – When an incoming call results in an identified contact, a complete schedule call item is opened, linked to the contact.

Complete Unscheduled Call – When an incoming call results in an identified contact, a completed unscheduled call item is created, linked to the contact.

Auto-Restore When Minimised – This option will restore the CyPhone client when an incoming call is received and minimised when the call ends.

Ignore Internal Calls – GoldMine will not pop the contact of a call that is on an internal extension.

1.1.2. Outgoing Calls

The Outgoing Calls section of the dialog group's options associated with GoldMine behaviour in the case of outgoing calls. The options are:

Screen Pop Existing Number – If the contact's number is found in the GoldMine database, the contact record is displayed by GoldMine.

Use New Contact Window – A new contact window will be opened when a screen pop occurs, rather than the existing record being changed.


New Number Lookup Contact - In the case that the number of an outgoing call is not found in the contact database, a Lookup Contact window to be displayed.

Completed Scheduled Call – Completes a pending action for the contact.

Complete Unscheduled Call – Creates a new unscheduled call action for the contact.

1.1.3. GoldMine Fields to Search

This specifies the phone number fields in GoldMine CyPhone will search for a contact's number.

 **Note:** Additional contacts may only be searched if an SQL version of GoldMine is installed.

1.1.4. Miscellaneous

This displays other options available to set for CyPhone with GoldMine.


Lookup Incoming Number (DNIS) – This option tells CyPhone to use the number the caller dialled rather than the callers own number, for the GoldMine searches on incoming calls.

Start GoldMine Timer – CyPhone will start the timer in GoldMine when a call begins.

1.1.5. GoldMine History Settings

The GoldMine History Settings groups together options describing what information on call history should be **automatically** logged into GoldMine.

For each row the Log checkbox determines if calls of that type should be logged. The Code box determines which history code that the event is given, and the Result box describes the result that the history item is given. If the Callback check box is checked, a pending call action is automatically created.

 **Note:** Unanswered incoming calls and callbacks should only be selected if an incoming call rings on one CyPhone agents extension only. Otherwise the agents who did not answer the call will receive a missed call record and a call back scheduled if selected.