Go Integrator - Quick Reference Guide (V3.1)
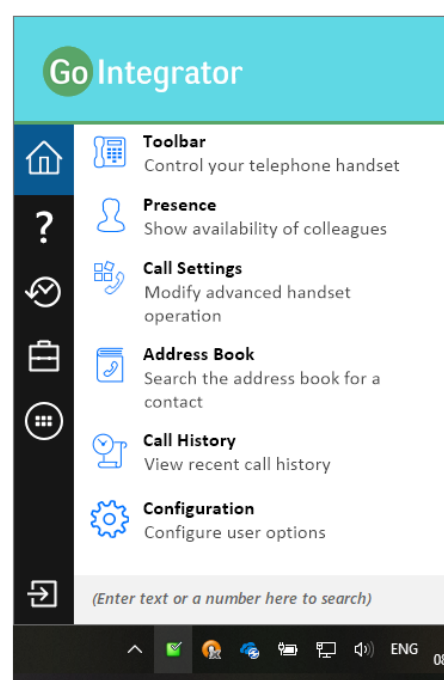
CONTENTS

INTRODUCTION

This quick reference guide contains some useful information to help you get started with Go Integrator.
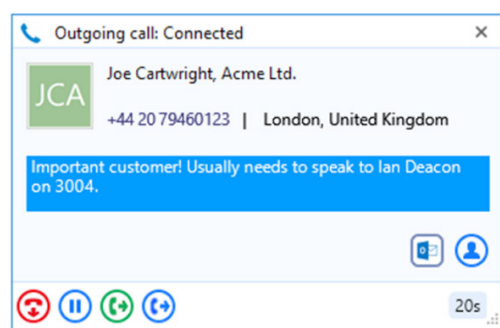
SYSTEM TRAY MENU

Go Integrator runs in the system tray.

The System Tray Menu is accessed by right-clicking on the Go Integrator Client icon, which is a green square (or red if you're on a call or yellow if a call is on hold).

PREVIEW WINDOW

The Preview Window is displayed whenever an inbound or outbound call is ringing.

The Preview Window automatically disappears shortly after the call has connected, but can be re-displayed at any time during the call by hovering over the system tray icon. It has been specifically designed to be as unobtrusive as possible, but without taking up a large proportion of your screen or obscuring the screens of other running applications.

It displays the caller (or called party) details, which are obtained from the Personal Phone List (PPL), Broadworks Directories or Integrated Application/s.

CALL CONTROLS

The following call controls are available through the Preview Window.

|		
(icon)	**Answer**	When a call is ringing, you can choose to answer the call by clicking the "Answer" button or deflecting it (transfer it without answering it) to another extension.
(icon)	**Deflect**	
(icon)	**Hang Up**	End the call.
(icon)	**Hold**	Pause the call. The caller will hear hold music if available.
(icon)	**Consult**	Place the current call on hold pending a transfer, and makes a concurrent call to the selected extension.
(icon)	**Transfer**	Transfers the call immediately to the selected extension (remember to say goodbye first!)
(icon)	**Show Contact**	Shows the caller's full contact details, as obtained from the Personal Phone List (PPL)
(icon)	**Add Contact**	Add the caller to the PPL and fill-in their details during the call.
(icon)	**Pop Contact**	Shows the caller's full contact details from the CRM or other integrated application. The icon will be that of the application (example shown here for Outlook).

PREVIEW WINDOW (STACKING)

If there's more than one active call, the Preview Windows for those calls are automatically stacked to reduce the overall size of the display. Clicking on the header of any window will bring it to the front
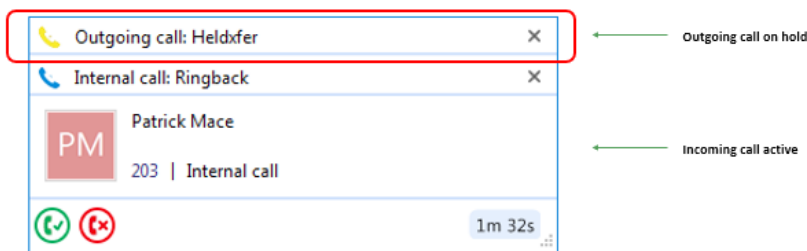
TOOLBAR

The Toolbar can be accessed either from the "Toolbar" option on the System Tray menu.
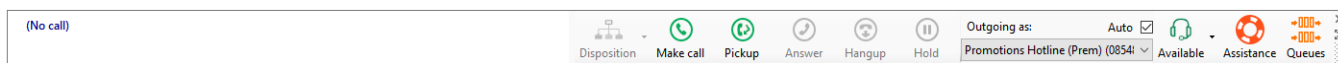
The Toolbar is a dockable user interface for Go Integrator. It allows many of the core features to be accessed plus it provides a range of Call Center Agent features. The toolbar can be used in a docked or undocked presentation.

PERSONAL PHONE LIST (PPL)

You can create, edit and delete details of your regularly used contacts in the PPL.

You can add new contacts while on a call, or afterwards via call history.

BROADWORKS DIRECTORIES

Go Integrator also searches the Enterprise, Enterprise Common, Group and Group Common directories (according to user privileges).
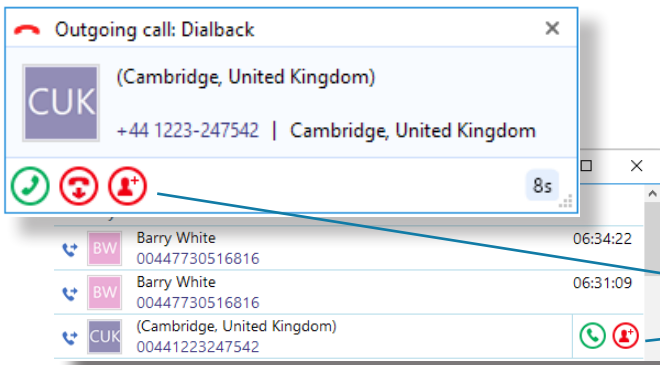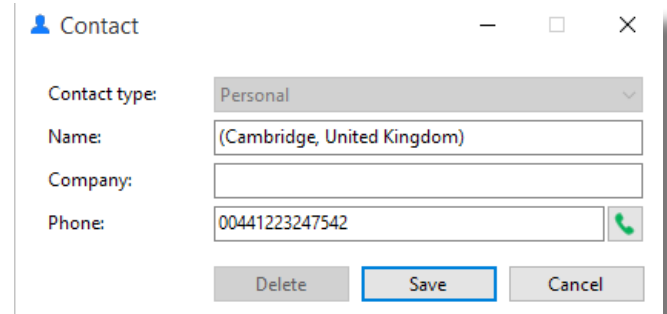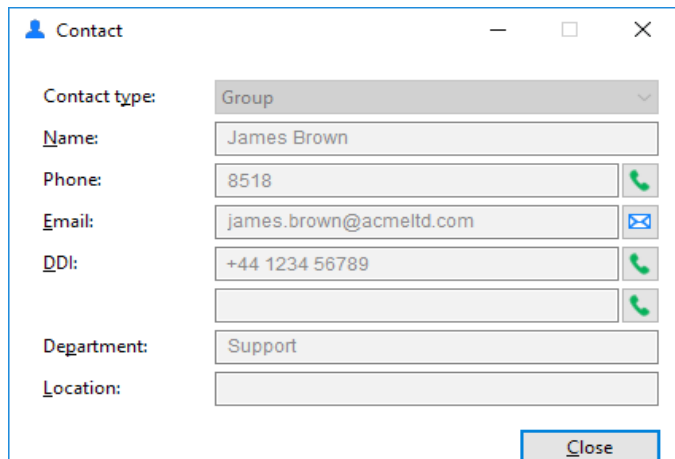

Whenever a call is made or received, a name lookup will be made against these directories, and if a match is found, the contact's detailed can be popped.

ADDRESS BOOK SEARCHING

The address book search feature in Go Integrator can be used to search the PPL and Broadworks directories.
If configured to do so, the "Lite" and "DB" versions of Go Integrator can also search Outlook, Lotus Notes and Google Contacts, and the "DB" version can also search for contacts in any integrated CRM or application.
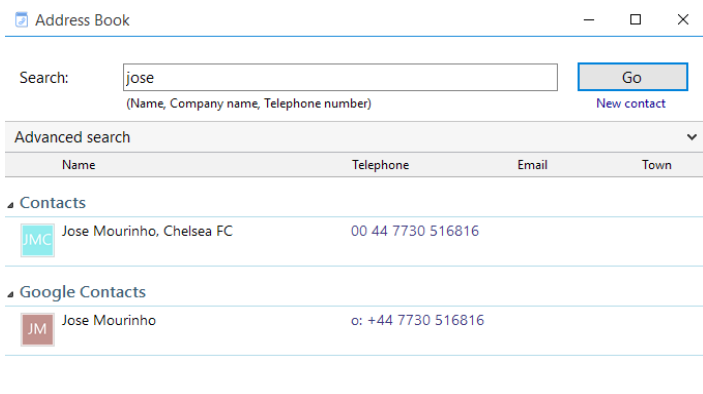
In this example, we're searching for contacts with a name of "jose", and the search has included Google Contacts.

CALL CONTROL WITHIN THE ADDRESS BOOK SEARCH

The "consult" and "transfer" call controls can be used against any contact in the address book.

With a call already connected, click on the contact's number in the search results to put the original call on hold and make the consult call.

PRESENCE

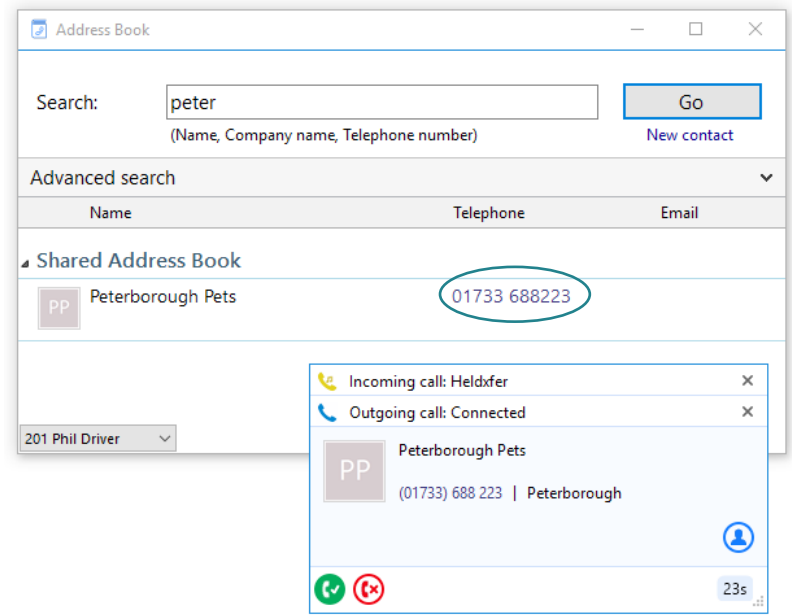The Presence window allows you to check the status of your colleagues' extensions, including when they have DND or Forwarding set.

The content of the display can be controlled to define and limit which user extensions are displayed. It is generally not advisable to monitor more than 50 extensions from within the Presence display (this can be controlled using the "Customised" view in the Presence window).

Coloured strips indicate DND and Forwarding (when set).
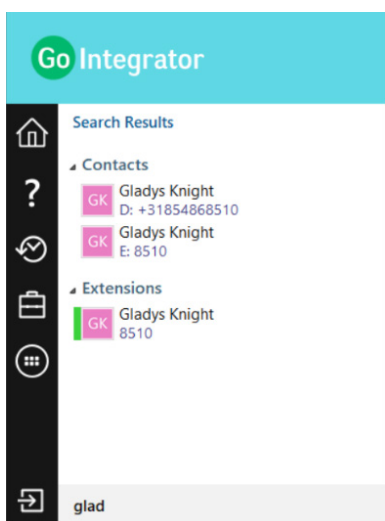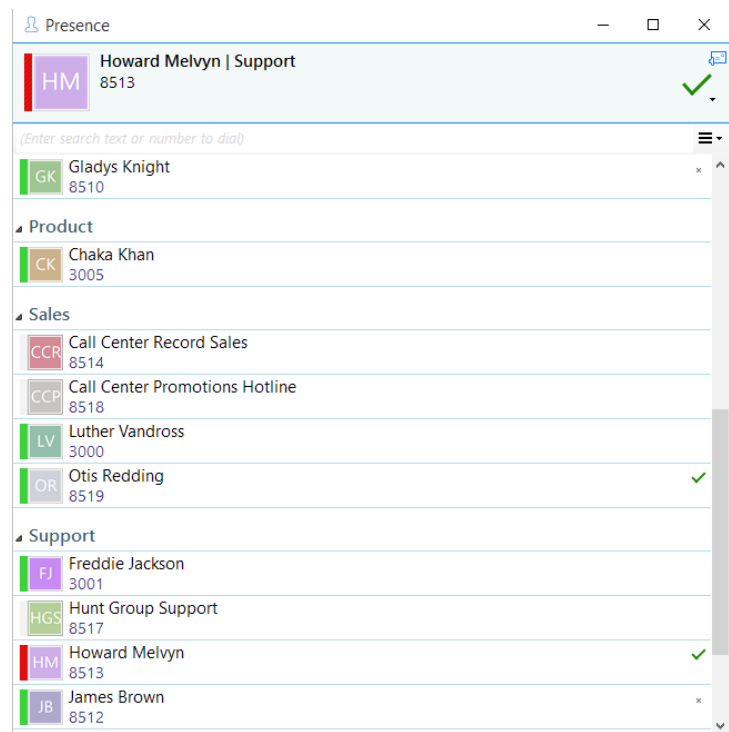
Extension status can also be checked from the system tray menu. Searching from here is a great way to check the status of colleagues not saved in your Presence window if the Customised view is used.

CALL CONTROL (WITHIN PRESENCE)

You can make calls to, or consult with, or transfer calls to, any of the listed extensions, directly from the Presence screen.

PRESENCE (DOCKING)

On Windows 8 and 10 systems, the Presence window can be "docked" to the right or left-hand side of your primary monitor.

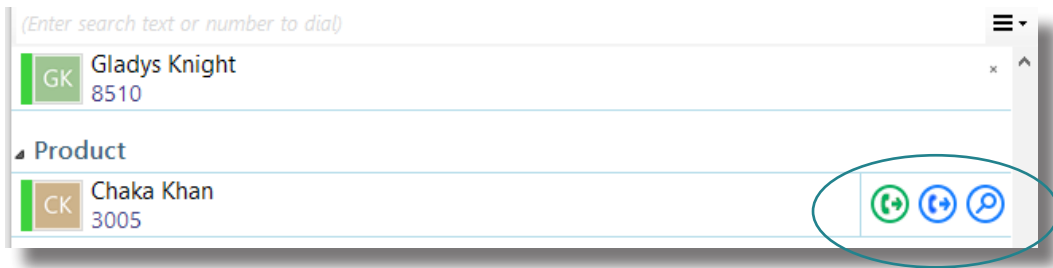The docking is controlled by setting the width of the Presence window while it is normalised, and then clicking the maximise button. The docking will take place automatically.

With the Presence window docked, all other running applications that are maximised will fill the remaining part of your primary monitor, up to the edge of the docked Presence window.
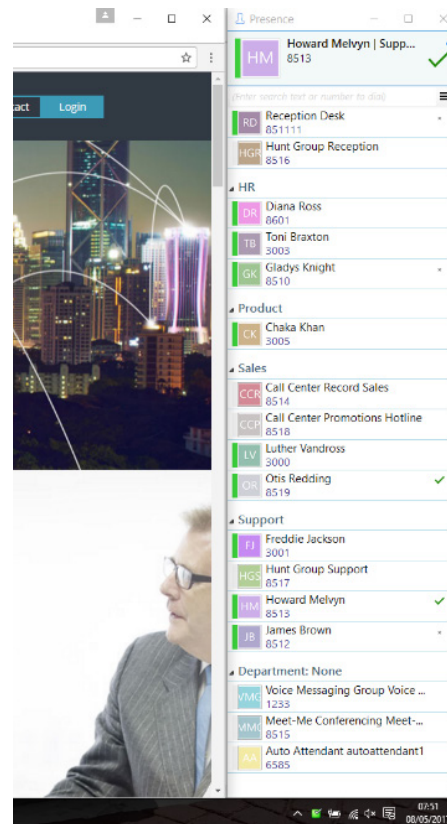
DIALLING OPTIONS

Go Integrator offers a wide range of click-to-dial features to speed up the outbound calling process, both in locating the number to dial, and in the actual dialling process itself. The following features are described below: Quick Dial, Recent Calls, Call History, Clipboard Dialling and Webpage Dialling.

QUICK DIAL

In the "quick dial" entry box at the bottom of the System Tray menu, you can type the phone number and hit Return to dial the number.
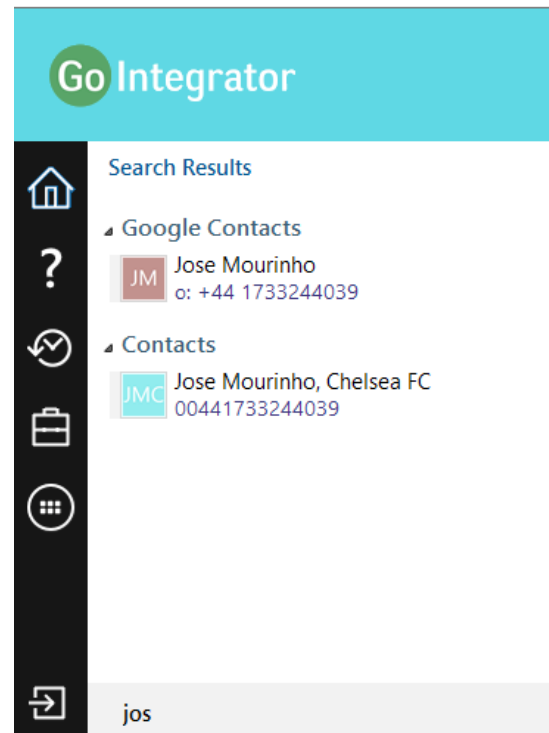
As shown here, you can also type a contact's name (either full or partial) to initiate a search in the PPL, BroadWorks directories and any integrated applications.

If any matches are found, the search results are displayed directly within the System Tray pop-up, and you can click a displayed number to dial it.

RECENT CALLS

The "recent calls" option displays a list of your most recent incoming and outgoing calls. Click any of the items in the list to quickly re-dial.

This is particularly useful for reducing the time spent locating and dialling numbers, especially when contacts are regularly dialled and then re-dialled in a short space of time.
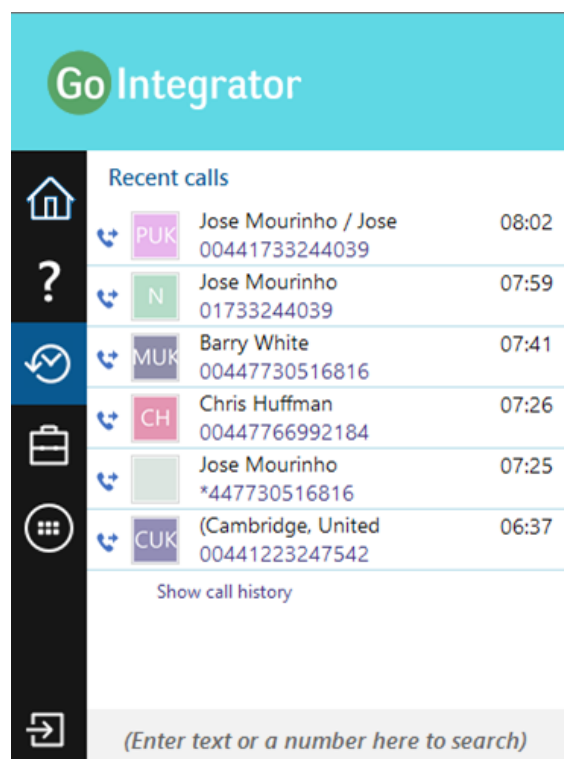
CALL HISTORY

The "call history" option displays a list of your most recent inbound and outbound calls, and it also displays your missed calls - ensuring that you never miss that important incoming call. A customisation option allows these call logs to be pulled from the BroadWorks platform.
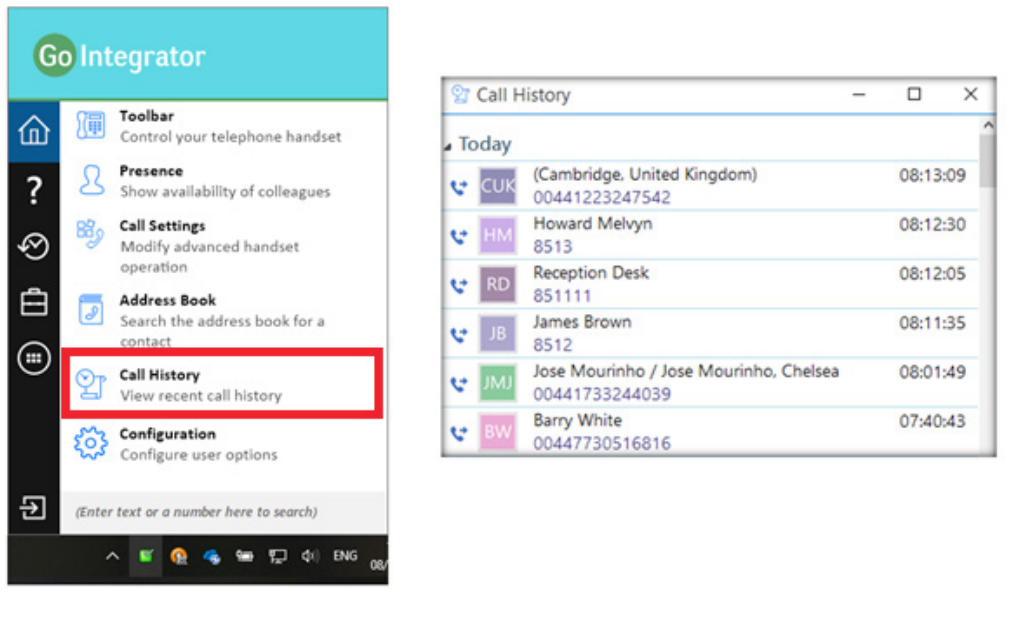

CLIPBOARD DIALLING

If you copy into the Windows clipboard what appears to be a phone number, a discrete pop-up is automatically displayed from the system tray offering you the option to dial that number. Just click the number to dial it.
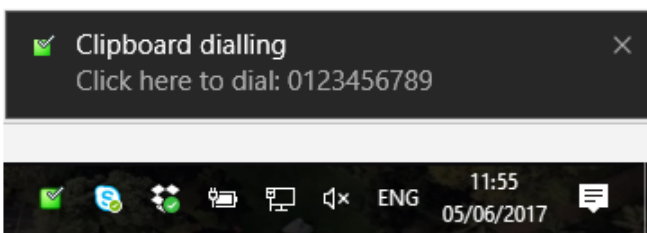
The minimum and maximum length of a potential number, and the possible prefix digit, can be set so that Go Integrator can more accurately identify valid telephone numbers.

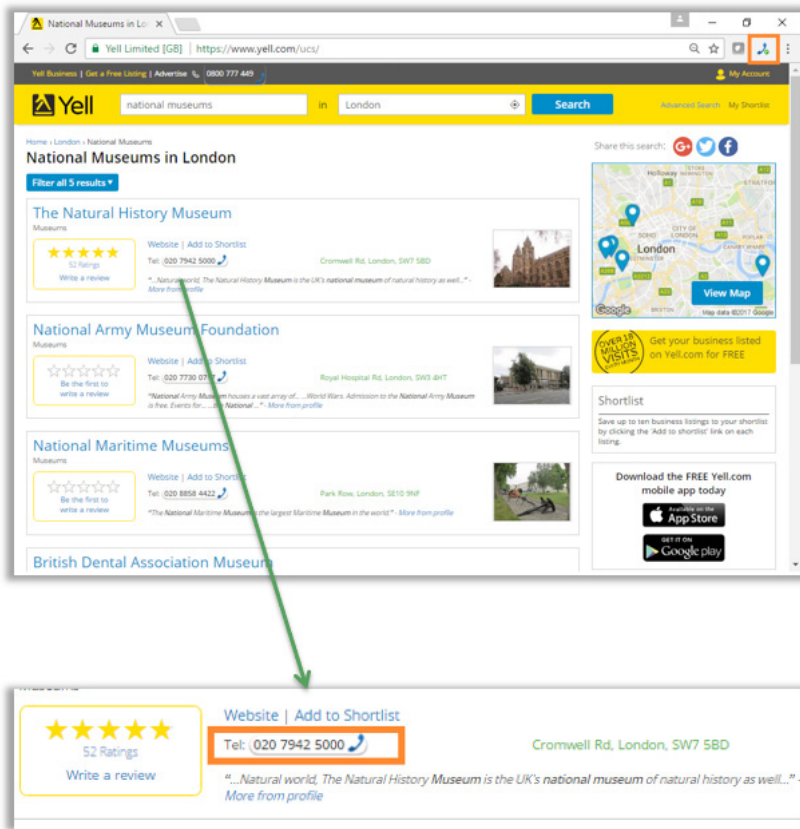## WEB PAGE DIALLING

Go Integrator can also recognise telephone numbers in web pages, and will convert them to hyperlinks so that you can click-to-dial directly from the web page.

FOCUS DIALLING

Focus dialling offers a similar click-to-dial capability within applications. Once enabled, it will automatically detect fields that contain dial-able numbers and presents a click-to-dial icon to the right of the field.

If the field contains more than one potential telephone number, a drop-down is displayed when you hover over the icon, allowing you to select which number to dial.
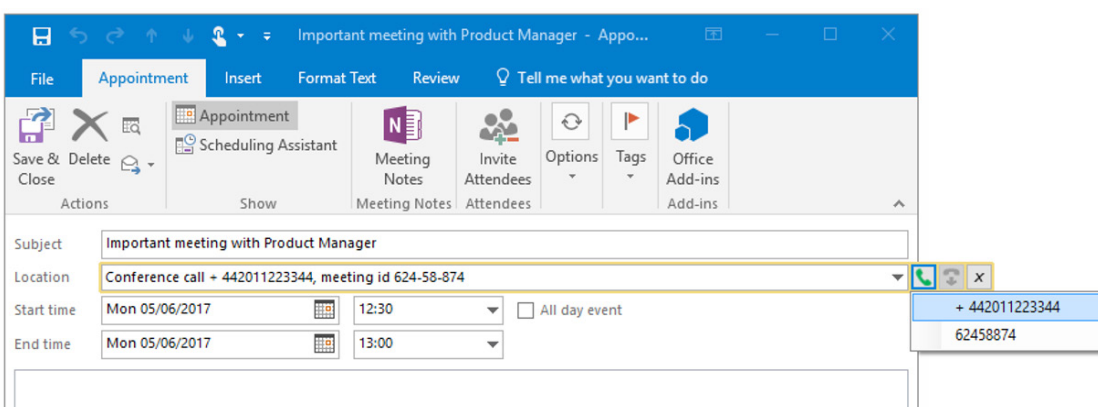
DIALLING CONFIGURATION

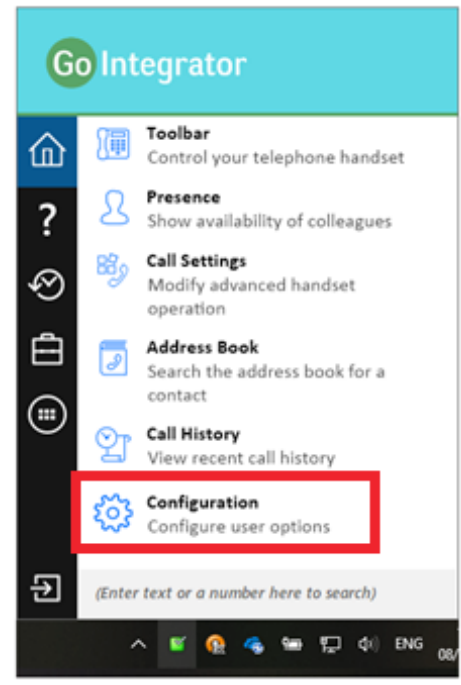All the quick dialling options described above can be enabled or disabled in the "dialling" section of your Go Integrator PC client.

The configuration is accessed through the System Tray menu.

CRM INTEGRATION

Go Integrator provides integration to a wide range of different CRM and Contact orientated business applications. Integration provides a range of set integration features from the list below. Up to four Add-ins can be concurrently configured.

Caller Preview
Displays the caller's name in the Call Preview window when a match is found between the caller's number and the contact information stored in the integrated application(s).

Contact Popping
Instantly open the caller's contact record in the integrated application by clicking the application's icon in the Caller Preview window.

Contact Searching
Enables you to concurrently search all configured integrations and pop the contact record or click to dial from the results.

Activity Logging
Manually or Automatically create a history (Activity) log of a call received within the CRM and add notes.

To set up an integration just select the "(Add new)" from the Configuration page and select an Application and click Set. To get help on setting up the integration just click on the blue help circle.
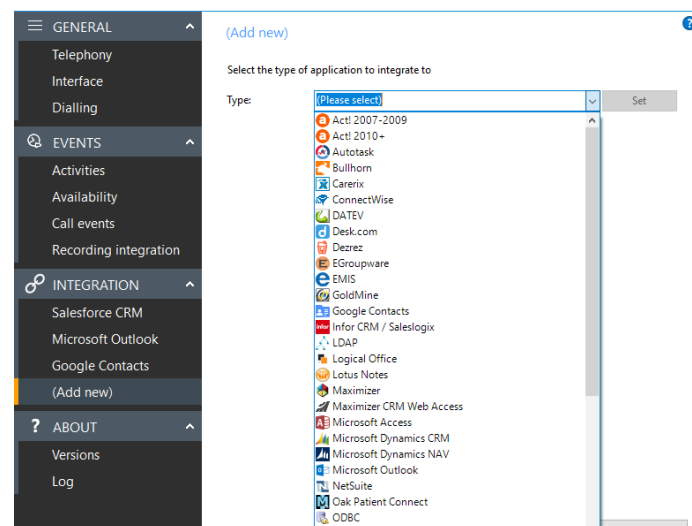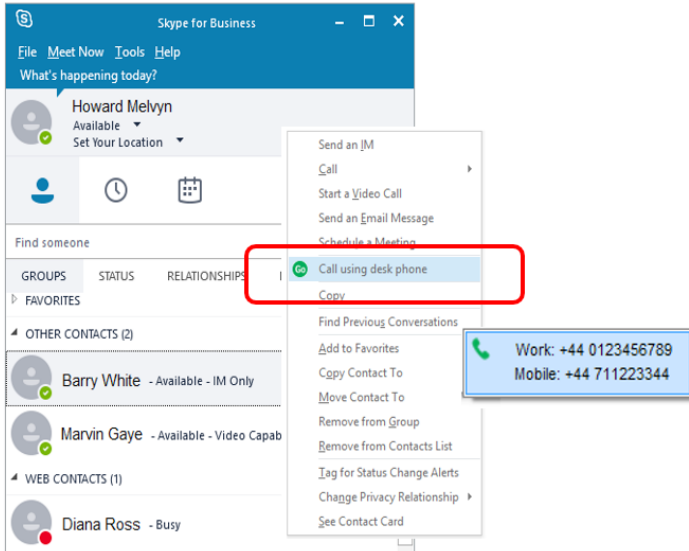

Always check the Go Integrator web-site to get the latest information on integrations.

SKYPE FOR BUSINESS

Go Integrator includes several features for Skype for Business.

Call using Desk phone
If the Skype for Business client is running on your PC, you can make calls on your handset directly from the Skype client, without needing to use Go Integrator.

Skype Status Update
If the "Update Skype for Business state when on a call" option is enabled in your Go Integrator client configuration, your Skype status will be updated to reflect your Go Integrator call status – such as "in a call" when the handset is busy, or "dnd" when you have do not disturb switched on.

CALL SETTINGS

You can manage your call settings through the System Tray menu.

You can configure and modify your settings for Call Forwarding, Anywhere, Remote Office, DND / Hide Number, In Office, CommPilot Express and Outgoing As.

The various tabs on the Call Settings page in the configuration are only displayed for the services that are assigned to you.