

CRM Connector

for **PC**

User Guide



MOMENTUM

Go Integrator
Powered by MondaGo



v4.7x+ 25Q2e

FEATURES BY LICENSE LEVEL

The Go Integrator | CRM Connector v4.x+ (powered by MondaGO) is offered at various license levels. Contact your Service Provider for more information. The following table shows which features are available in each license level and any limitations for feature availability in the Solo, Team, and Unite versions for PC:

Go Integrator			
Feature	Solo	Team	Unite
Click-to-dial	✓	✓	✓
Presence / BLF	✓	✓	✓
Address book	✓	✓	✓
Call history	✓	✓	✓
Recent calls	✓	✓	✓
Missed calls notification	✓	✓	✓
Call control (will vary by device type)	✓	✓	✓
Preview window	✓	✓	✓
Call Toolbar*	✓	✓	✓
Busylight support*	✓	✓	✓
AppBar*	✓	✓	✓
Call settings*	✓	✓	✓
Softphone*(Citrix and Terminal Services Not supported)	✗	✗	✗
Preferred device (Multi-device support)	✓	✓	✓
Custom events	✗	✓	✓
Client API	✗	✗	✓
Agent Features*	✗	✗	✓
CRM integrations (MS Outlook / Google Contacts only)	✓	✓	✓
CRM integrations (All others)	✗	✗	✓
SmartBusy for Zoom and GoToMeeting*	✗	✓	✓
SmartBusy for Microsoft Teams	✗	✓	✓
* Only available in Go Integrator v4.x+ for Windows client			
# Require MS Teams direct routing (or similar)			
## Calendar based "Out of Office" state is a Microsoft Graph API Beta feature.			
Microsoft Teams <i>BETA</i>			
	Solo	Team	Unite
Microsoft Teams-Search and Call, Teams Adapter	✓	✓	✓
Microsoft Teams-Show, Add, Pop CRM contact for call ringing / answered using Microsoft Teams#	✓	✓	✓
Microsoft Teams-Select Microsoft Teams as preferred dialing device#	✗	✓	✓
Microsoft Teams-Open Microsoft Teams chat from Cara Presence	✗	✓	✓
Microsoft Teams-Show photo / avatar in Cara Presence	✗	✓	✓
Microsoft Teams-Publishing "In a call" status to Teams	✗	✓	✓
Microsoft Teams-Show peers Microsoft Teams availability## (Beta)	✗	✓	✓
* Only available in Go Integrator v4.x+ for Windows client			
# Require MS Teams direct routing (or similar)			
## Calendar based "Out of Office" state is a Microsoft Graph API Beta feature.			

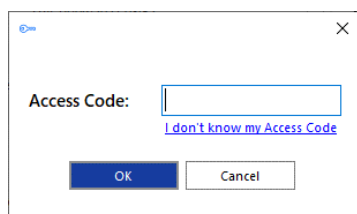
INSTALLATION

The Go Integrator | CRM Connector software is supplied by your Service Provider as a self-contained Internet download package. It includes everything needed to install a copy of Go Integrator | CRM Connector to your PC and walk through the wizard to get started. Before you install, please ensure the following are in place:

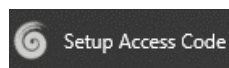
- A suitable computer for installation of the client software and viable license for a Go Integrator product. (Please check with the Service Provider to ensure minimum PC requirements and licensing requirements are met)
- A valid new v4x license ordered, the Access Code, and your user login credentials for Go Integrator as supplied by your Service Provider. Contact your Service Provider for assistance.

Access Code

After completing the software installation process, Go Integrator | CRM Connector will present the Access Code input dialog. A valid access code, supplied by your service provider, is required to proceed to user login. The Access Code is only required on first launch of the Go Integrator | CRM Connector v4.x+ client.



A shortcut is also placed in the Windows Start Menu program list to open or return to the Access Code setup step if necessary.



Tip: Type **Setup Access Code** in the start Search bar to locate it.

Mass Deployment

Go Integrator | CRM Connector can be installed to the users' desktops in silent mode by System Administrators using the command format: IntegratorInstaller-4.2.0.2050.exe /quiet

After silent installation, the Setup Access Code shortcut is created but Go Integrator | CRM Connector will not automatically start up or offer the sign in page, however the users can find the app in the Start menu.

Upgrading from v3 Client

If you had the v3.x Go Integrator | CRM Connector client installed, the v4.x installation wizard can offer to import the current configuration data from the Go Integrator | CRM Connector v3 client in the Configuration > Versions view. Data that can be imported from v3 to v4.x includes:

- User's login credentials.
- Presence window Favorites.
- CRM integrations (including 'controlled' integrations but excluding Outlook Contacts).

NOTE: v3 users cannot attempt to upgrade to v4.x prior to new license purchase and receipt of the new Access code from the Service Provider. Attempting to do so prior to completing these prerequisite steps will disable v3.

Refer to the Welcome and Login section for more details and instructions.

WELCOME AND LOGIN

In the User login window:

1. Enter a valid username and password, as supplied by your service provider.
2. Click the **Log In** button.
 - Optional: Select **Auto login** to skip the user login page on subsequent start-up of the Go Integrator | CRM Connector software client.
 - Optional: Select **Advanced** to review and select from more connection options.

Access Code: **Reset**

Options: ☒ Use proxy
☐ Ignore invalid certificates

Log in **Cancel** **Advanced**

4.2.0.2050

Welcome to Go Integrator Cara. Please log in with your username and password.

User:

Password:

☒ Auto login

Log in **Cancel** **Advanced**

4.2.0.2050

Advanced Login Options

Access Code Reset

To modify the Access Code while in Configuration, click **Reset** and enter the new Access Code you received from the Service Provider.

Access Code: **Reset**

NOTE: this should only be performed on the guidance of your service provider.

Options

NOTE: The Use proxy and Ignore invalid certificates settings should only be enabled for use if required for your system and if you are instructed to enable either of these by your service provider:

Options: ☒ Use proxy
☒ Ignore invalid certificates

First Login Wizard

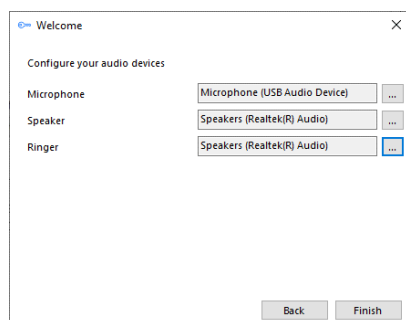
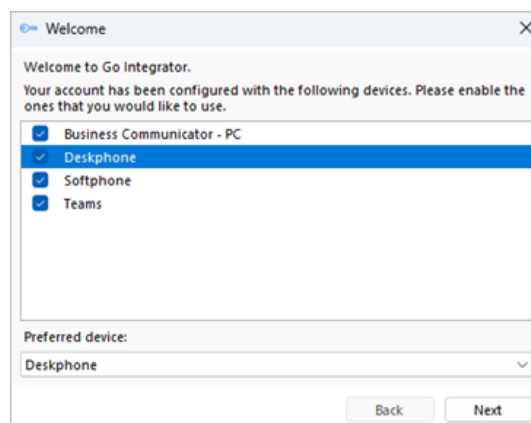
At the first login after installation, a list of the available telephony devices for your user account will be displayed.

1. Click to place a check in the box adjacent to a listed device to enable for use. At least one device must be selected and if multiple devices are enabled, a **Preferred device** can be chosen from the drop-down list, as well.
2. Click Next.

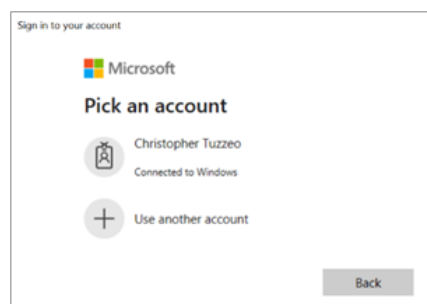
The selection can be amended after initial login by going to Configuration > Devices.

NOTE: The Primary device must be selected for Contacts to be displayed or searched in the Presence window.

If the "Softphone" device is available and is selected, the PC audio device configuration settings will be displayed – choose the appropriate audio devices for microphone, speaker, and ringer.



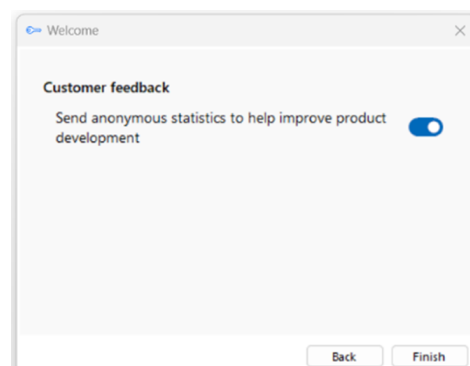
If "Teams" is selected, the Microsoft Teams user account will request Teams login confirmation.



NOTE: additional configuration is required within the **Microsoft Teams Administration portal**.

Customer Feedback

Send data into the software development team to help improve the product evolution.

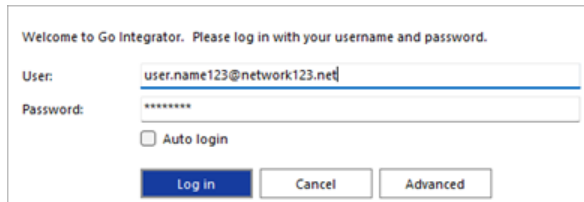


Importing Data From Go Integrator | CRM Connector v3 Client

If enabled, Go Integrator | CRM Connector can offer to import configuration data from the previous installation of the Go Integrator | CRM Connector v3 client. Data that can be imported includes:

- User login credentials.
- Presence window Favorites.
- CRM integrations (including 'controlled' integrations but excluding Outlook Contacts).
- Dialing Settings

Prerequisites: It is important to get with your Service Provider to order the correct v4x license and get the Access Code before you attempt to upgrade from within your v3 instance.



Welcome to Go Integrator. Please log in with your username and password.

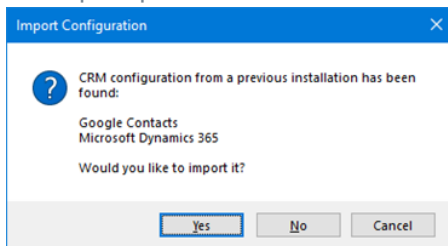
User:

Password:

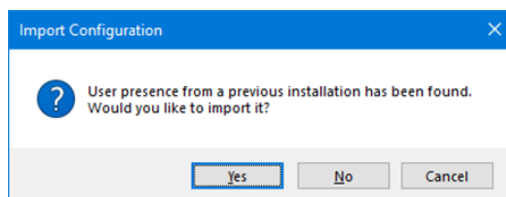
☐ Auto login

Note: Integrations that have a 'Plus' version in Go Integrator | CRM Connector will still be imported as a V3 integration only, so will need to be configured again manually as a 'Plus' integration if the 'Add Contact' feature is required. On startup, user login credentials will be automatically populated.

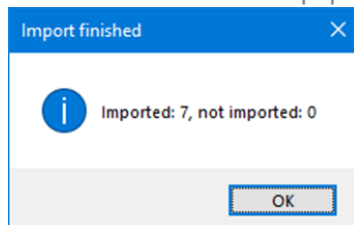
1. Click **Yes** to import the CRM integrations discovered from the v3 installation to the new Go Integrator when prompted to confirm.



2. Click **Yes** when the Presence Window offers to import presence settings as Favorites

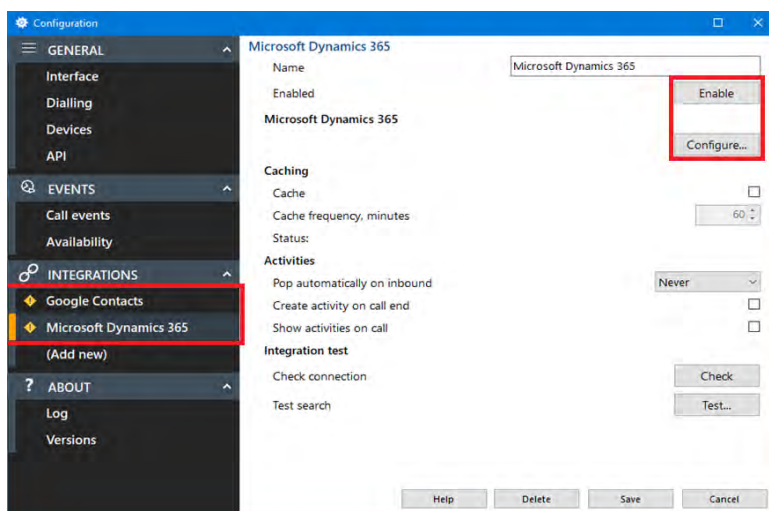


3. Click on **OK** when in the pop-up message confirming the quantity imported displays.

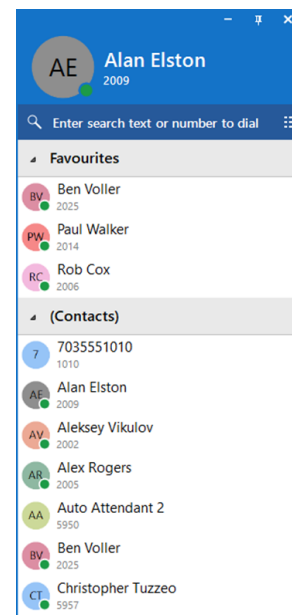


4. The CRM integrations will initially be 'disabled' and need to be 'enabled' and 'authorized' to complete the process.

Note: The import of data from v3 to v4x takes place during first login steps for v4x, right after the access code for the new license is entered and may take some time to complete.



The 'Presence Window' will display the imported contacts as 'Favorites' but will also display the complete User contact list in line with Large Directory Mode settings.



OPERATING MODES

Go Integrator | CRM Connector v4.x can operate in either of two modes: Tray menu or AppBar mode. The default is Tray menu mode (AppBar position is set to "none").

The features and functions are almost identical with only slight differences between the two modes.

The mode is user-configurable via [Configuration > Interface > AppBar mode](#) after login.

Tray Menu

In the default Tray menu mode, Go Integrator | CRM Connector runs as a system tray program, displayed as a colored circle icon within the system tray. The icon color represents the current user status: e.g., green for ready or available status.

To open the Tray menu to access tools and settings, right-click the Go Integrator icon found in the system tray.

Icon Definitions



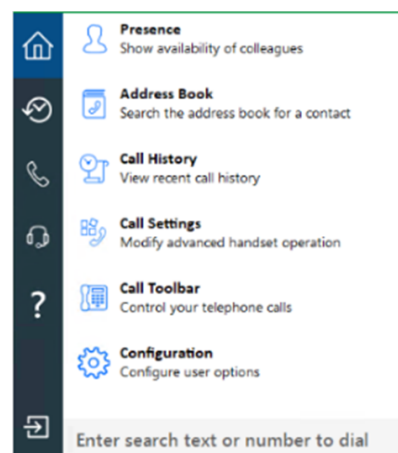
- Home: Return to main Tray mode menu



- Recent calls: Summarized call history



- Preferred Device: Select the preferred device used to make and receive calls





- Call Center: If enabled, Telephone system Call Center tools



- Help: Search and open relevant topics in online help



- Exit: Change password, Log out (shut down), or Exit.

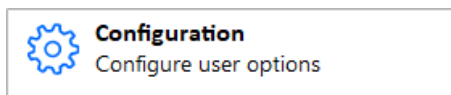
To keep the Tray Icon visible, drag and drop the icon to the taskbar:



AppBar

If preferred, most Go Integrator | CRM Connector app license types can also operate as a native docked Windows tool bar which is called AppBar mode. To Enable AppBar Mode:

1. Right-click on the system tray icon.
2. Select Configuration to begin making the change.













3. Select the **Interface** configuration page to view the Position setting.

Position – choose the desired position (Left or Right side of screen) for the AppBar.
None = Tray mode (default).







4. Click **Save** to update the setting and start using AppBar mode. The AppBar is displayed as docked to the side of the Windows desktop the user selected.

The features and functions of AppBar mode are similar, but not identical, to Tray menu mode:

-  - Status Indicator: represents the current user status: E.g., green for ready/available
-  - Search: Address book search - enter characters to search by name
-  - Presence: Co-workers User list generated from the telephone system
-  - Calls: Call History, Free-type dial entry bar and Preferred Device selection
-  - Call settings: Telephone system user telephony settings - DND, Forwarding, etc.
-  - Call Center: If enabled, Telephone system Call Center tools
-  - Call Toolbar: Dockable call control toolbar with optional Call Center functions
-  - Help: Search and open relevant topics in online help
-  - Configuration: App client configuration settings
-  - Exit: Change password, Log out, or Exit the application

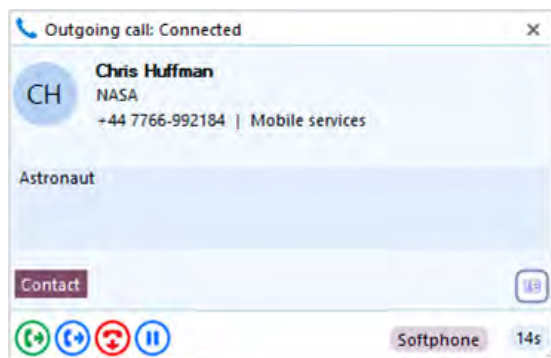
Status Indicator Icon

In either Tray menu mode or AppBar mode, the icon color displayed represents the status of your user extension availability.

-  - Green: User is ready/available
-  - Red: User is busy (flashing indicates the phone is ringing)
-  - Amber: User is away (flashing indicates a current call is On hold)
-  - DND/No Entry sign: User is set to Do Not Disturb

PREVIEW WINDOW

The **Preview** window presents an unobtrusive pop-up notification and information summary when a call is made or received. It also offers call control and additional tools for actions such as open contact data or write to activity log, depending on user, device, and CRM integration configuration:



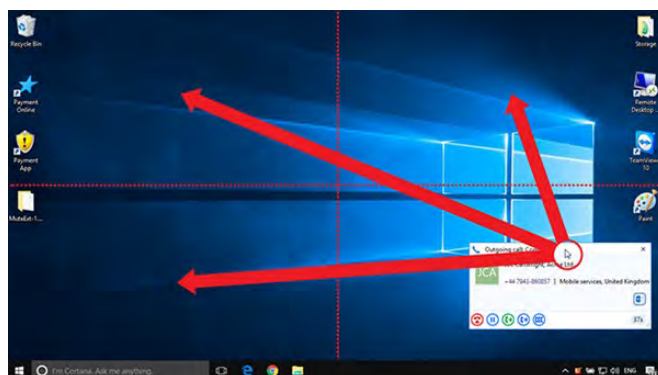
The Preview window is hidden after 10 seconds by default (this can be changed in *Configuration > Interface*). Hover the cursor over the status indicator icon to display the Preview window again.

Positioning

The preview window can be re-positioned to snap to any quarter of the screen.

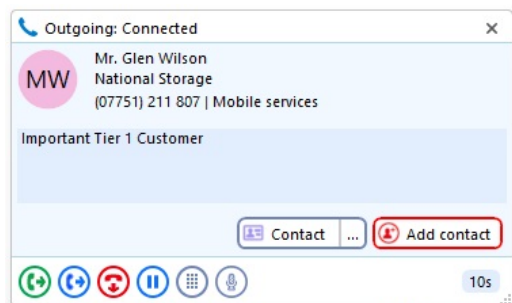
You may drag the preview window by the header and drop into the desired quadrant on your desktop and that is where it will display until you reposition it.

*Note: The preview window will snap to a fixed position in one quarter of the screen.



Preview Information

The Preview window can display contact name, company name, telephone number and location (if available) along with additional notes, all retrieved from any integrated address book or business CRM integration. Additionally, the Preview window displays the connected device name in use and the duration of the call.



The Preview window provides both call control action buttons as well as contact or CRM integration action buttons.

Call Control and Actions

The following actions and controls are available from the Preview window when a call is in progress but depending on the device in use and the address book or business CRM integrations available:



Answer /
Deflect

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.



Hang Up

End the call



Hold / Resume

Pause/Resume the call - the caller will hear hold music if available

Note: The hold button is not utilized for transferring calls.

Place the current call on hold and transfer the call to another extension



Consult



Transfer

Blind transfer to another extension without introduction



Complete
Transfer

Connect the original call to the transfer destination recipient and disconnect



Cancel Transfer

Cancel the call to the transfer recipient and return to the original call



Call Pickup

Answer call ringing at another member of your pickup group



Send Digits

Softphone only: send DTMF during connected call



Show Contact

Shows the full contact details, obtained from the Netsapiens directory



Add Contact

Add the caller to the shared address book or integrated CRM business applications



Open / Pop
Contact

Open the full contact details within an integrated CRM business application.

The icon shown will relate to the CRM application (e.g. Google, Salesforce).



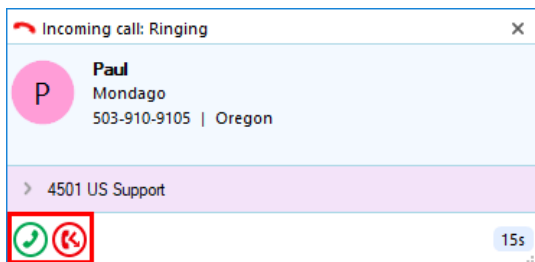
Create / Show
Call Task





Creates and opens a call activity (call log) in an integrated CRM business application.

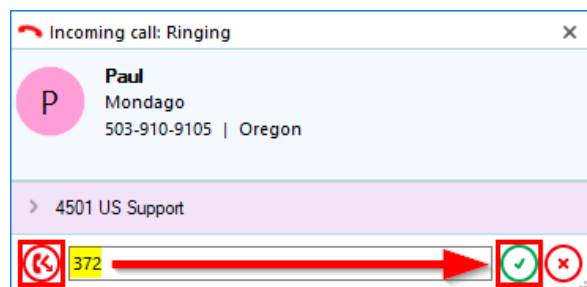
The icon shown will relate to the CRM application (e.g. Salesforce, Dynamics) and also the type of entry: Contact, Account or Lead.

Answer and Deflect

An incoming call can be answered or deflected, depending on the device type in use.






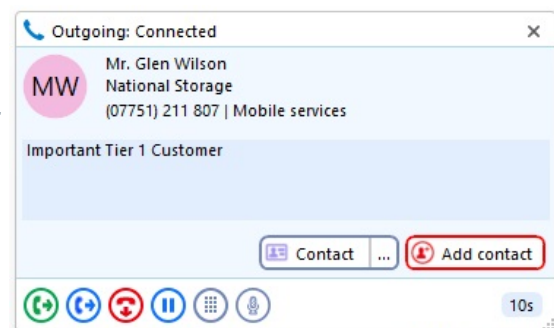
1.  Click the Answer button to connect the incoming call to your preferred device.
 2.  Click the Deflect button to enter the destination to redirect the call to without answering
 3. After the Deflect button is clicked, the number entry box appears.
 4. Enter the extension or external telephone number to deflect the call to and then click  to deflect the call.
- OR click cancel 



Hold and Hangup

A connected call can be held, transferred, or disconnected, depending on the device type in use.

1.  Click the Pause button to place the current connected call on hold.
(the caller hears hold music if enabled in telephony system).
2.  Click the Play button to retrieve the held call:
3.  Click the Hangup button to end the call and disconnect the other party.



Transfer

Calls can be transferred with either a "consult" introduction to the transfer target destination, or "blind" without any introduction.

Blind Transfer

To transfer the call without an introduction:

1. Click the Transfer button
2. Enter the transfer target telephone number into the dial entry box:

3. Click the Confirm button to transfer the call to the target recipient
4. Or click the Cancel button to return to the call without transferring

Consult Transfer

To transfer the call with an introduction:

1. Click the Consult button
2. Enter the transfer target telephone number into the dial entry box
3. Click the Confirm button to place the current call on hold and call the target recipient
4. Or click the cancel button to return to the call without transferring

The Preview window now shows the original call in HeldXfer state and a new, overlapping Preview window for the outbound transfer destination.

The Preview window header can be clicked to switch the display between the two parties (this does not switch the call between the connected parties, only the display window).

5. Click the Complete Transfer button to connect the two parties and disconnect from the call
Or click the Cancel Transfer button to disconnect the outbound call and return to the original call without transferring:

Conference Calls

During an active call:

1. Click the Conference button
2. Enter the telephone number and Confirm to dial the new party.
3. Once connected, click Conference again to start the 3-way call

A Preview window is displayed for each connected party.

Call controls like hold, transfers and hang-up are provided.

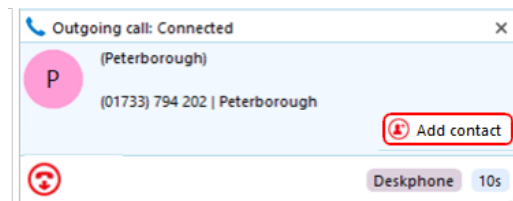
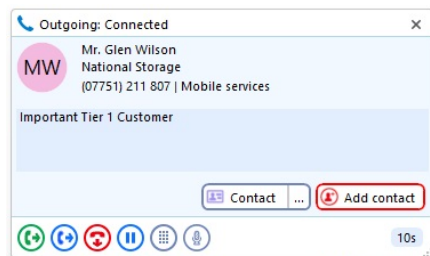
To remove a party from the call, select their Preview Window and click the Hangup button. Or, to transfer a party from the conference call to another destination, select their preview window and use the preferred transfer process described previously.

Outgoing Calls

The Preview window appears for both inbound and outbound calls. Initially the call status will be Dialing.

The other information and icons displayed will depend on whether the telephone number is already found within any address books or integrated CRM applications and which device is used to make the outgoing call.

Once answered and "Connected", the Preview window will offer call handling buttons, dependent on the device used to make the outgoing call.



Note: The outgoing call process will vary with the preferred device type selected – a dial back call may need to be answered first on the selected device before the outgoing call is made.

Show Contact



Show Contact opens the contact within the integrated CRM application or address book.

If the contact is found in the telephone system directory, a data entry window is displayed with action buttons:



Click to dial the selected telephone number displayed.

If the contact is found in the user's Personal directory, the option to Edit/Save or Delete is also presented.

Add Contact



When the call Preview window displays a call that is not yet found in any integrated address book (or is found in some but not all integrated address books) the Add Contact icon is displayed. This offers a quick method to insert the contact details into multiple locations.

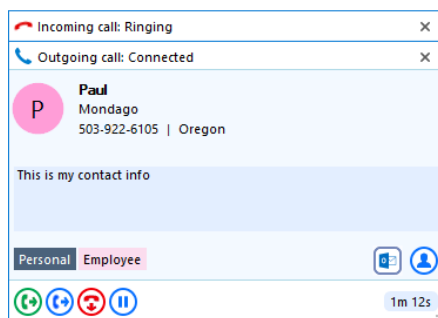
Entry not found in any address book

Entry found in all address books except PPL

Select which integrated address book **Type** to add the contact into and either **Save** or **Save and Edit** to also open the contact within the selected address book. The stored details are then used to add to the next selected address book **Type** to quickly duplicate the contact record into multiple locations.

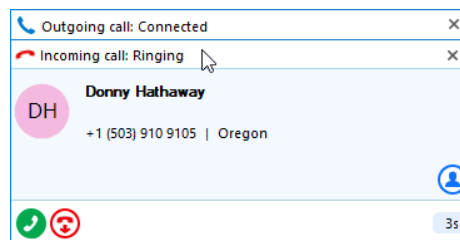
Multiple Calls

When multiple parties or calls are in progress, the Preview window will *stack* each call with the currently active call initially at the front in full view.



Clicking on the **window header** will bring an inactive Preview window to the front and into view.

Note: Selecting another Preview window does not affect the connected call.



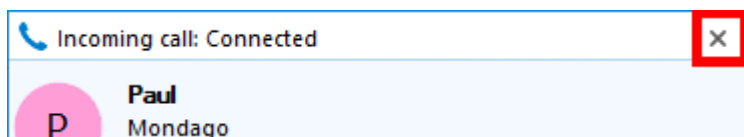
Missed Calls Notification

If a call is presented but the caller abandons before being answered, the Missed Call notification window is displayed and remains on screen until acknowledged or actioned.

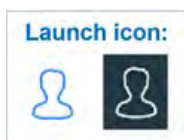


Close Window


Select "x" to close the preview window. Note: Closing the preview window does not end the call



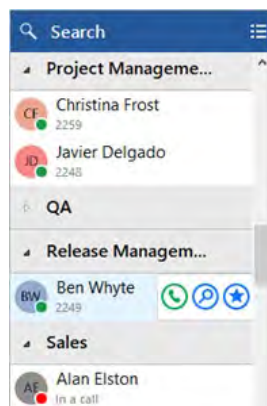
PRESENCE



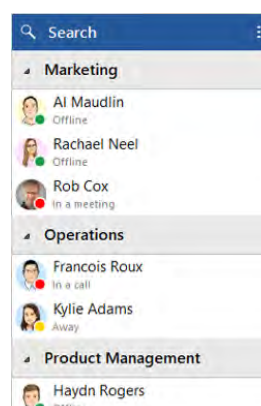
The Presence window provides a quick way to check the availability of your co-workers. This is done via their Telephone system extension status (BLF-Busy Lamp Field) or, if enabled, via a blended combination of Telephone system extension and availability status.

In either Tray mode or AppBar mode, the Presence window can be re-sized and docked to the right or left edge of the screen using the dock "pin" icon. 

Example Presence with Telephone system BLF

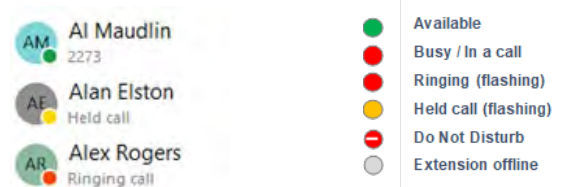


Example Presence with 3rd party/Teams Availability



Extension Status (BLF)

The user extension status is indicated by a mixture of icon color and status text:



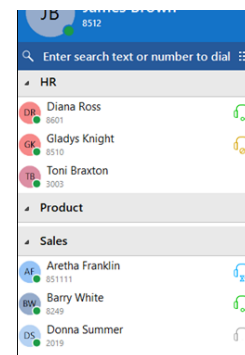
User Availability Status

For Go Integrator | CRM Connector TEAM and UNITE users, co-worker availability can display as a combination of Telephone system extension status and Microsoft Teams user Availability status (if set up/configured to do so), indicated by a mixture of icon color and status text. Note: An active call via the Telephone system extension will take precedence over any Teams Availability status indicators.



Call Center Agent Status

When a Call Center is setup, a user can see the status of Call Center Agents in the Presence Window



Large Directory Mode

The Presence list is typically auto-populated by up to 250 Telephone system extensions or up to 50 Teams users. This threshold value can be specified differently by your service provider to avoid excessive demands on system resources for very large User directories. If your Telephone system User list contains fewer co-workers than this threshold, the Presence window will be automatically populated with contact icons for all co-workers. Above this threshold, the Presence window will not be automatically populated but instead, contacts can be found via the 'Search' facility and added as 'Favorites' to remain visible in the Presence window.

Contact Sorting

Co-workers in the Presence windows can be organized by the Telephone system configured Department, Location or Group, or to display contacts as a single alphabetically ordered list of co-workers, select None.

If preferred, contacts can be sorted by Telephone number instead of Name order



Contact Search

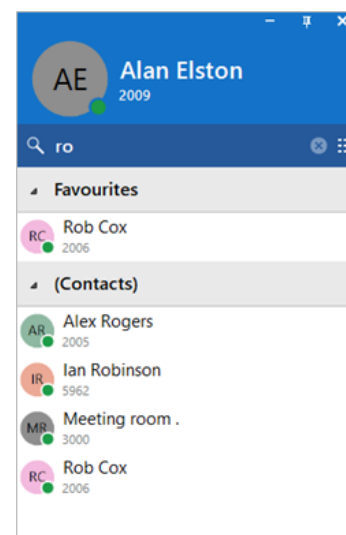
The **Search** bar at the top of the Presence contact list allows users to locate and display contacts in the main presence window that match a search for either First name, Last name, Telephone number or even Teams Availability status (if enabled).

Note: The search includes ALL items found in the Telephone system "Users" directory, whether they are visible in the Presence window co-worker list or not.



Enter 2 or more characters to search the User list.







To cancel the search or start a new search, click the cancel icon



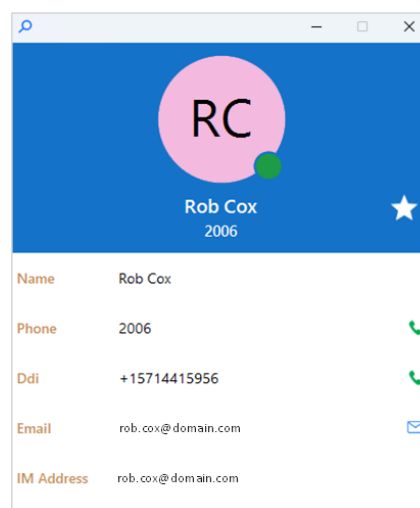
Slide out Menu

Hovering the mouse cursor on a contact will display the slide-out menu offering different actions depending on the current call status:



-  **call the contact**
-  **show user contact details**
-  **add contact to favorites**
-  **Consult transfer (during an active call)**
-  **Blind transfer (during an active call)**
-  **Opens Teams chat message**

The Show User option will open a separate window displaying all contact information available from the Telephone system user directory:



Related Data

**Related Data is not available for all CRM integrations, please see the CRM Viewer for more details.*

Related Data for UNITE or TEAM users provides the ability to quickly locate and present additional data related to the contact from more than one CRM source. This extends to offering pop or drill down features for the additional found data. The Related Data is presented to the user within an expanded window, accessible from a number of locations, including the Preview Window, Toolbar, AppBar, and Tray Menu search. Related Data is useful when 2 or more CRM integrations are combined, like Salesforce and Outlook. In that case, an agent receives an incoming call and the phone number matches to a contact in both CRMs - Related Data presents matching information taken from both CRMs and can show the logged call activity, notes, emails to/from that person, and calendar appointments.

Setup Related Data

If a CRM integration supports Related Data, there will be a check next to Related Data when selecting the new integration.

Example shown here for Salesforce CRM.

1. In the Integration configuration step, go to Activities and set 'Enable Related Data' to enabled.

(Add new)

Integration: Salesforce Set

Features:

- ✓ Address Book search
- ✓ Caller details preview
- ✓ Screen pop
- ✓ Call activity logging
- ✓ Add contact
- ✓ Live mode
- ✓ Cached mode
- ✓ Related data

Activities

Pop automatically on inbound Never

Create activity on call end ☒

Allow manual creation of call activities ☐

Enable related data ☒

2. Use the steps in the in app help guide to set the configuration.
This is available from the Configuration Help section.
3. When done, click Save,
4. Or click the Cancel button to exit without setting up an integration

Salesforce

Name: Salesforce Disable

Enabled: ☒

Client id: 3lrHbKGTggH1gMlf9rN6Qtm

Endpoint: https://login.salesforce.com/services/oauth2/ Authorise

Authorized as: nick hawes

☐ Support encrypted fields (exact matches only)

Get objects

Objects:

- ☒ Accounts
- ☒ Contacts
- ☐ Events
- ☒ Leads

Select an object

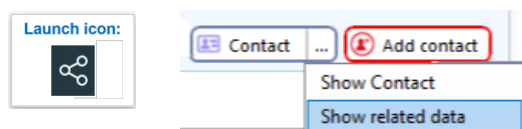
Detail URL

Edit URL

(ID) is replaced with the record id

Help Delete Save Cancel

Once enabled, Related Data becomes available in the following areas:
Preview Window, Call Toolbar, AppBar, Call History, Address Book, Tray Menu and Recent Calls, and the Contact drop-down.



Related Data Form Views

Form in Preview Window

The screenshot displays the CRM interface in a preview window. The window title is "Contact: Mr. Glen Wilson National Storage". The interface is divided into two main sections: "Basic Call Info" and "More Contact Info".

Basic Call Info: Shows the contact name "Mr. Glen Wilson National Storage" with a mobile services number "(07751) 211 807". It includes buttons for "Contact" and "Add contact".

More Contact Info: Lists various contact details:

- Business Phone: 07751211807
- Business Fax: 01733667801
- Email: nha@gmail.com
- Contact ID: 0036M000058TnKKQA1
- Town: Peterborough
- Country: UK
- Postal code: PE2 6LR
- Street: Arena House 5 Commerce Rd
- Contact Description: Important Tier 1 Customer

Activity Log: A tabbed view showing "Yesterday", "03 June 2024", "28 May 2024", "15 May 2024", and "16 April 2024". The "Yesterday" tab is active, showing a case update and two incoming calls.

Annotations:

- "Basic Call Info" and "More Contact Info" are labeled on the left side of the contact details section.
- "Tab Views Refresh | Filter" is labeled on the right side of the activity log tabs.
- "CRM Related Data" and "3 Tabs Available" are labeled on the right side of the activity log content area.

Form in AppBar

The screenshot displays the CRM interface in an AppBar view. The contact details are shown in a vertical sidebar on the left, and the activity log is shown in the main content area.

Contact Details (AppBar):

- Name: Mr. Glen Wilson National Storage
- Mobile services: (07751) 211 807
- Buttons: Contact, Add contact
- Business Phone: 07751211807
- Business Fax: 01733667801
- Email: nha@gmail.com
- Contact ID: 0036M000058TnKKQA1
- Town: Peterborough
- Country: UK
- Postal code: PE2 6LR
- Street: Arena House 5 Commerce Rd
- Contact Description: Important Tier 1 Customer

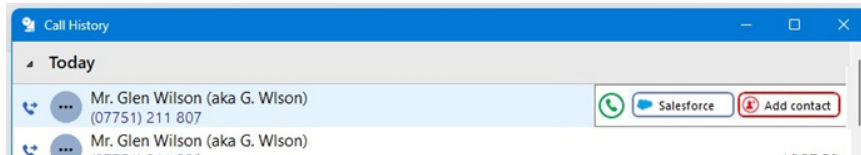
Activity Log (Main Content): A tabbed view showing "Today", "04 June 2024", "28 May 2024", "15 May 2024", and "16 April 2024". The "Today" tab is active, showing an outgoing call and a case update.

Annotations:

- "Pin Window Open/Closed" is labeled on the right side of the contact details sidebar.
- "Open Related Data" is labeled on the right side of the contact details sidebar.
- "Tab Views Refresh | Filter" and "3 Tabs Available" are labeled on the right side of the activity log tabs.

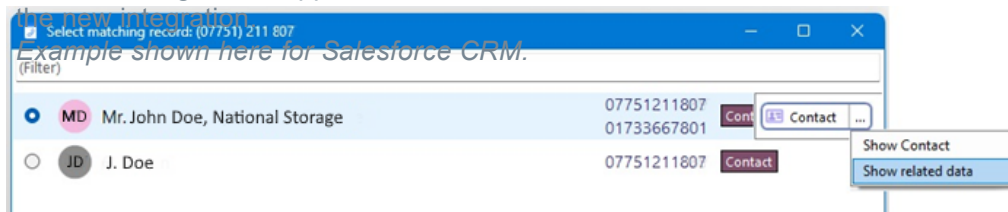
Multiple Data Matches

When multiple matches for the same number are found within the same CRM, the Related Data tool can not display until you have selected the record source from the Select Matching Record pop-up. For example, when the highlighted contact matches to a few known contacts created in Salesforce. The system then displays the Salesforce icon so that you can choose from those multiple matches.



Click on the Salesforce button to launch the Select Matching Record view and choose the correct contact.

If a CRM integration supports Related Data, there will be a check next to Related Data when selecting



Once a choice has been made you will have the ability to access the selected contact's Related Data.

Related Data FAQs

Why is the Related Data icon missing?

Related Data found multiple matches to the same number within the same CRM and you must select a record to view any found information.

or

The CRM integration is not supported for Related Data.

or

The Related Data toggle switch is not set to enabled in settings.

Why is the Activity Tab Blank?

The contact does not have any Related Data tied to Activities

Why is the Related Tab Blank?

The contact does not have any Related Data items, for example a related company, or related open tickets.

Why do no cases display for Contacts?

No Cases exist against the contact you have searched for

or

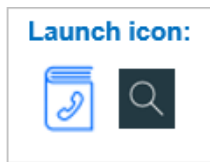
You have not selected Cases in the 'select data types' setting within the CRM configuration.


Why don't Emails display for Contacts?

You have not selected the correct Inbox within the Related Data section of the Outlook CRM configuration.

ADDRESS BOOK SEARCH

In Tray mode, the Address Book window opens as a separate search window.

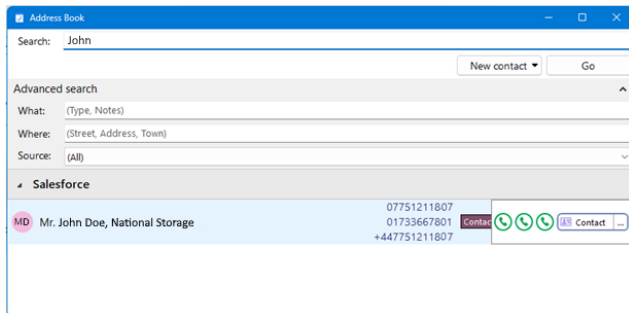


In AppBar mode, the address book search is opened as a pop-out window from the main AppBar and can be docked to keep permanently in view using the pin button .

The behavior is identical with either mode.

Enter a contact name, company name or telephone number to search for, then click "Go".

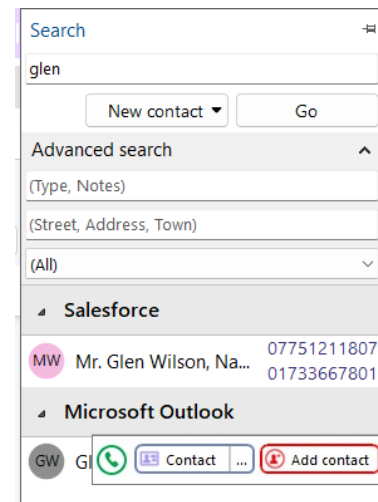
Tray Mode Address Book Search



Matching entries are displayed from any integrated CRM business application, the Telephone system User list and any enabled shared or personal phone list (PPL).

Hovering over the displayed results will present a slide out menu offering click to dial, or click to "Show Contact" (in Edit mode, if authorized).

AppBar Mode Address Book Search

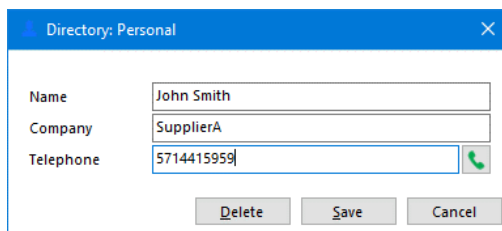


Show Contact



Show Contact opens the contact within the integrated CRM application or address book.

If the contact is found in the telephone system directory, a data entry window is displayed with action buttons:

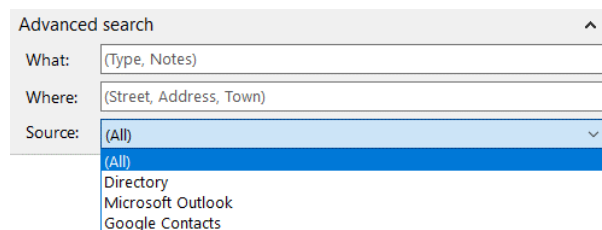


Dial the selected telephone number 

If the contact is found in the user's Personal directory, the option to Edit/Save or Delete is also presented.

Advanced Search

Select the Advanced search option to use more specific filters or search on alternative contact details such as contact notes or address details, if supported by the source address book:



Advanced search

What: (Type, Notes)

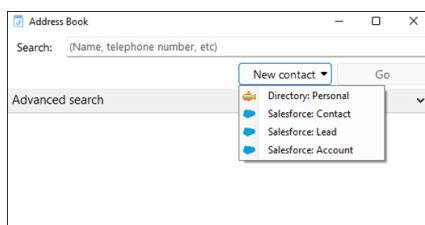
Where: (Street, Address, Town)

Source: (All)

- (All)
- Directory
- Microsoft Outlook
- Google Contacts

New Contact

Select "New contact" to add a new entry to the Personal Phone List (PPL)



Address Book

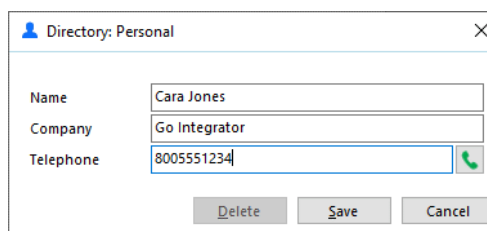
Search: (Name, telephone number, etc)

Advanced search

New contact

- Directory: Personal
- Salesforce: Contact
- Salesforce: Lead
- Salesforce: Account

Fill in the contact details and select Save.



Directory: Personal

Name: Cara Jones

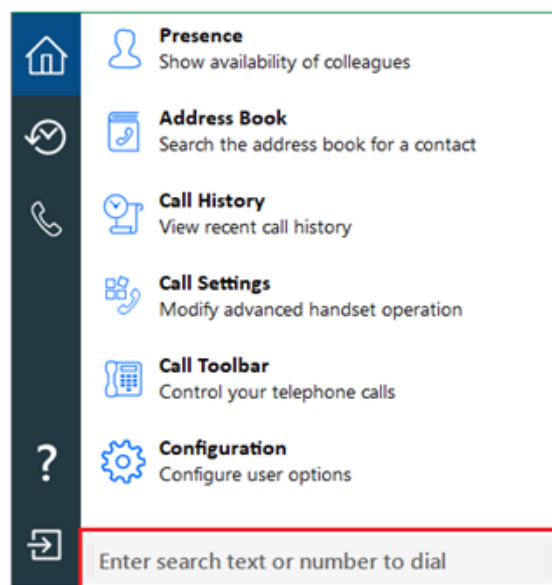
Company: Go Integrator

Telephone: 8005551234

Delete Save Cancel

QUICK DIAL / SEARCH (TRAY MENU)

At any time, other than while searching Help, the Tray menu "Search" bar can be used to **Dial** any number or search for a contact name within any integrated address book.



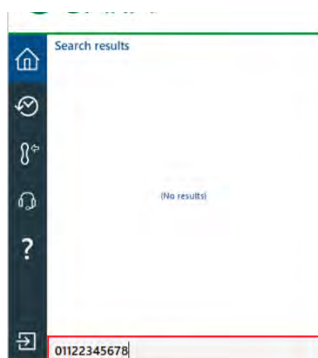
Tray menu options:

- Presence**: Show availability of colleagues
- Address Book**: Search the address book for a contact
- Call History**: View recent call history
- Call Settings**: Modify advanced handset operation
- Call Toolbar**: Control your telephone calls
- Configuration**: Configure user options

Enter search text or number to dial

Quick Dial from Tray Menu

To make a call, simply type the number to dial and press Enter:

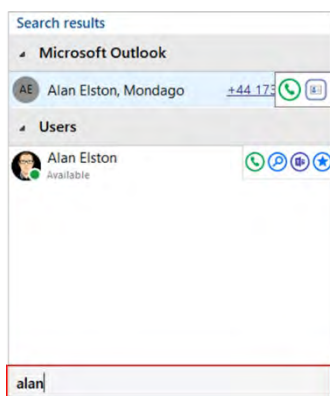


Note: The dialing method is the same regardless of the preferred device type selected: Deskphone, Softphone etc. However, the call process will vary with the preferred device type selected – a "dialback" may need to be answered first by the selected device before the outgoing call is made.

Contact Search from Tray Menu

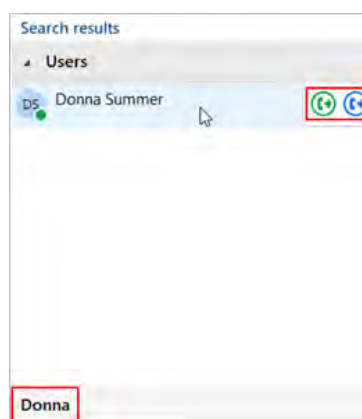
Contacts can be found by entering characters from the contact's name (first, middle, last etc.), company or telephone number.

Any matching contact will be displayed – simply click the number to dial, or hover over the contact and use the slide out toolbar to open the contact within the integrated CRM application.



Matches found within the Users contact list can also display live presence status and, if enabled, Microsoft Teams availability status. Hovering over a User entry will open the slide out toolbar offering the option to call or open the contact. The contact can also be added to favorites and if enabled, start a chat message in Microsoft Teams.

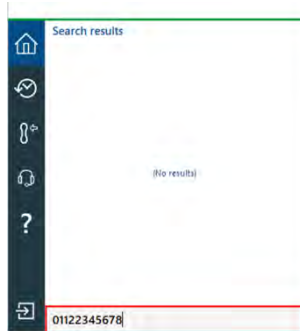
During a connected call, the Dial / Search tool can be used to transfer the call to a contact.



DIALING

Dialing via Tray Menu

In Tray menu mode, simply right-click the Go Integrator | CRM Connector tray menu icon, type the number to dial and hit Enter.



Note: The dialing method is the same regardless of the preferred device type selected (Deskphone, Softphone etc.). However, the call process will vary with the preferred device type selected – a "dialback" may need to be answered first by the selected device before the outgoing call is made.

Dialing via AppBar

In AppBar mode, the Calls page also includes the Dial bar.



Type the required telephone number and hit Enter, or click the **Call** button to make the call:



Note: The dialing method is the same regardless of the preferred device type selected: Deskphone, Softphone etc. However, the call process will vary with the preferred device type selected – a "dialback" may need to be answered first by the selected device before the outgoing call is made - typical for Softphones.

CALL HISTORY

Launch icon:

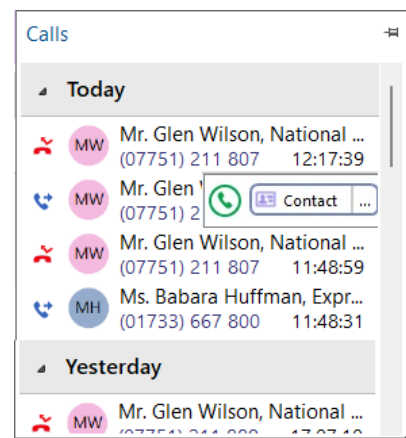


The Call History provides a quick reference for the most recent 60 calls (last 20 incoming calls, last 20 outgoing calls and last 20 missed calls). Any number listed can be called by a single click on the number displayed.

 Outgoing call

 Incoming call (answered)

 Incoming call (missed)



Slide Out Toolbar

Hovering the cursor over an entry displays the slide out toolbar which offers a variety of actions dependent on the current call status and address book information retrieved:



Call / Transfer



Show Contact (icon reflects CRM source)



Add call activity (if available)



Add Contact (if available)

Add Contact



When the call listed is not yet found in any integrated address book (or is found in some but not all integrated address books) the Add Contact icon is displayed and offers a quick method to insert the contact details into multiple locations.

Entry not found in any address book

Entry found in all address books except PPL

Select which integrated address book "Type" to add the contact into and either "Save" or "Save and Edit" to also open the contact within the selected address book. The stored details are then used to add to the next selected address book "Type" to quickly duplicate the contact record into multiple locations.

CALL TOOLBAR

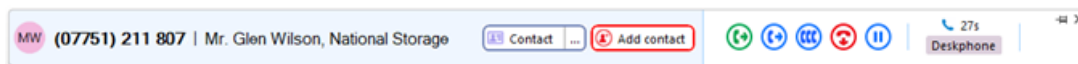
Launch icon:



The Call Toolbar is a user interface that can be docked to the top or bottom of the desktop display and provides quick access to many core features including call handling, call preview information and call center tools. Note: The Call Toolbar feature availability will vary by both Go Integrator | CRM Connector and Telephone system user license type.

Standard features are available with SOLO, TEAM and UNITE user license

Example of standard user Call Toolbar

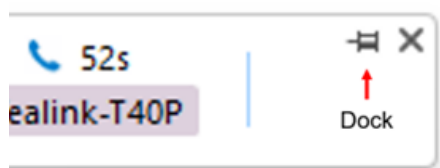


Call Center features are only available with the UNITE user license and Telephone system Call Center features.

Example of Telephone system Call Center and UNITE user



To dock the toolbar, move the bar to the top or bottom of the screen using the "drag" area, then select "dock":

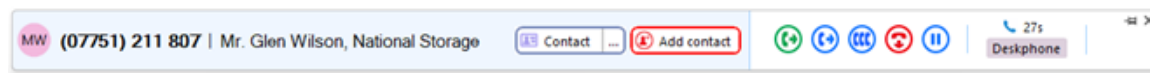


Select "dock" again to reset the toolbar position, if required.

Features

CRM Integration














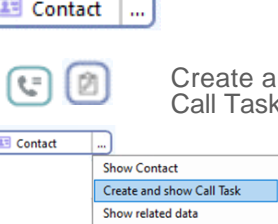

The left-hand window of the toolbar displays call preview information including CRM integrated caller details plus target extension / group / queue name.



Contact popping and Activity logging can also be triggered from within the window via the presented icons, if available with Add Contact displayed if the contact record is not found in all available address books.

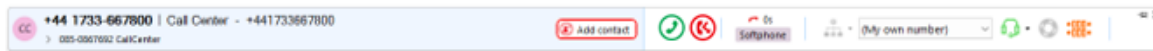
Call Control and Actions

The following actions and controls are available from the Preview window when a call is in progress but depending on the device in use and the address book or business CRM integrations available:

	Answer Deflect	Elect to answer the call by clicking the "Answer" button or deflecting it (transfer it without answering) to another extension.
	Hang Up	End the call
	Hold/Resume	Hold or Pause/Resume the call - the caller will hear hold music if available. Note: The hold button is <i>not</i> utilized for transfers
	Consult Transfer	Place the current call on hold and to inform another extension that you wish to transfer the call
	Blind Transfer	Blind transfer to another extension without introduction
	Complete Transfer	Connect the original call to the transfer destination recipient and disconnect
	Cancel Transfer	Cancel the call to the transfer recipient and return to the original call
	Call Pickup	Answer call ringing at another member of your pickup group
	Send Digits	Softphone only: send DTMF during connected call
	Show Contact	Shows the full contact details, obtained from the Netsapiens directory
	Add Contact	Add the caller to the shared address book or integrated CRM business applications
	Open/Pop Contact	Open the full contact details within an integrated CRM business application. The icon shown will relate to the CRM application (e.g. Google, Salesforce).
	Create and Show Call Task	Creates and opens a call activity (call log) in an integrated CRM business application. The icon shown will relate to the CRM application (e.g. Salesforce, Dynamics) and also the type of entry: Contact, Account or Lead.
	Show Related Data	Opens the Related Data window to quickly locate and present additional data related to the caller. This extends to offering pop or drill down features for the additional found data.
	Send Callback Request Email	When on an active call, this option creates a callback request email message that automatically contains the current caller details. Click to open the default email client and send an email with connected call details included automatically.

Answer and Deflect

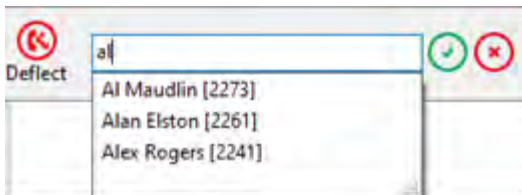
An incoming call can be answered or deflected, depending on the device type in use.



 Click the Answer button to connect the incoming call to your preferred device:

 Click the Deflect button to enter the destination to redirect the call to without answering:

After the Deflect button is clicked, the destination entry box appears.

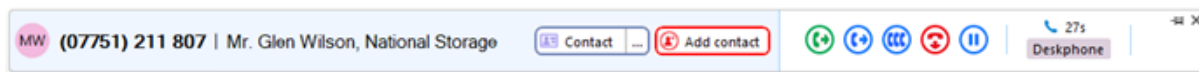


Enter the extension name or number to deflect the call and then click the Confirm Deflect  button

Or click the Cancel  button to cancel the deflection

Hold and Hangup

A connected call can be held, transferred, or disconnected, depending on the device type in use.



 Click the Pause button to place the current connected call on hold (caller hears hold music if enabled in the telephone system).

 Click the Play button to retrieve the held call

 Click the Hangup button to end the call and disconnect the other party

Transfer

Calls can be transferred with either a "consult" introduction to the transfer target destination, or "blind" without any introduction.

Blind Transfer



To transfer the call without an introduction, click the "Transfer" button.

Enter the transfer target telephone number into the dial entry box



Click the "confirm" button to transfer the call to the target recipient:



Or click the cancel button to return to the call without transferring:

Consult Transfer



To transfer the call with an introduction, click the "Consult" button

Enter the transfer target telephone number into the dial entry box



Click the "confirm" button to place the current call on hold and call the target recipient:



Or click the cancel button to return to the call without transferring:

The Call Toolbar now shows the transfer destination with left and right arrow buttons to switch between the two connected calls if required (this does not switch the call between the connected parties, only the display window).



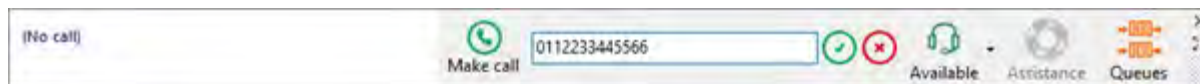
Click the "Complete transfer" button to connect the two parties and disconnect from the call:



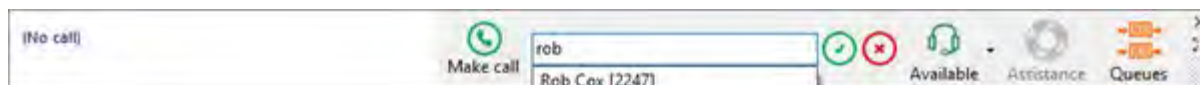
Or click the "Cancel transfer" button to disconnect the outbound call and return to the original call without transferring:

Outgoing Calls

Click the Make Call button to begin an outgoing call then click to confirm the number and begin dialing.



Alternatively, the Telephone system user list can be searched by name if you wish to call a co-worker.



Once answered and "Connected", the Call Toolbar will offer call handling buttons, dependent on the device used to make the outgoing call.



The display window shows the same information for both inbound and outbound calls. The information and icons displayed will depend on whether the telephone number is already found within any address books or integrated CRM applications and which device is used to make the outgoing call.

Note: The outgoing call process will vary with the preferred device type selected – a dialback may need to be answered first by the selected device before the outgoing call is made.

Call Pickup



Calls ringing at another extension can be collected using the directed call pickup service.

Click the Pickup button to begin the call pickup function. Enter the name or number of the extension that is ringing and click the check mark to Confirm, OR Click on the target user name in the list. *The incoming call is answered on the user's selected/defined Preferred Device.*



Show Contact



"Show Contact" will open the contact within the integrated CRM application or address book.


If the contact is in the telephone system directory, a data entry window displays action buttons

Directory: Personal	
Name	John Smith
Company	SupplierA
Telephone	5714415959
<input type="button" value="Delete"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>	

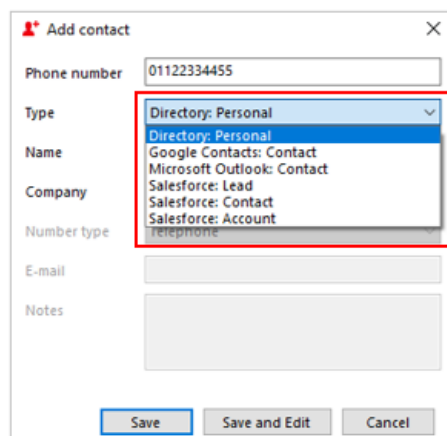
Dial the selected telephone number and click the dial button 

If the contact is found in the Personal directory, the option to Edit/Save or Delete is also presented.

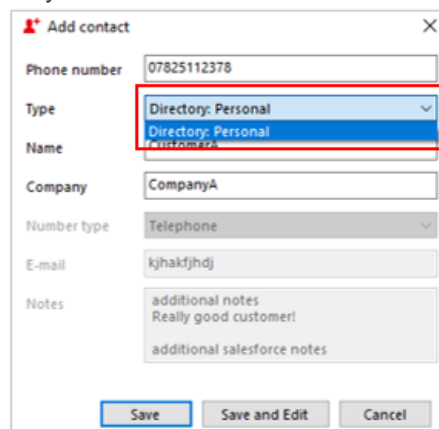
Add Contact

When the Call Toolbar displays a call that is not yet found in any integrated address book (or is found in some but not all integrated address books) the Add Contact icon is displayed. This offers a quick method to insert the contact details into multiple locations. 

Entry not found in any address book



Entry found in all address books except PPL

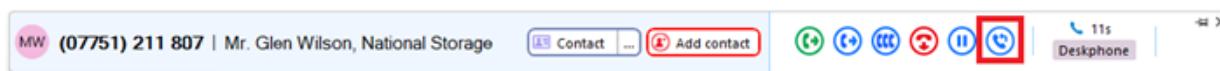


Select which integrated address book "Type" to add the contact into and either "Save" or "Save and Edit" to also open the contact within the selected address book. The stored details are then used to add to the next selected address book "Type" to quickly duplicate the contact record into multiple locations.

Callback Email



If a supported CRM (e.g.; Outlook) is connected, the Callback email button displays during active calls on the Call Toolbar.



Click this button to send an email via the default email client containing the current caller information, including details retrieved from any matching CRM contact integration (if Related Data is in use).

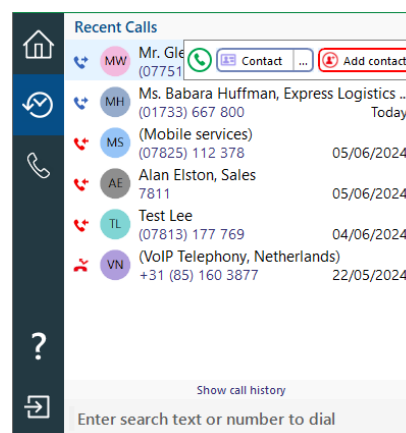
RECENT CALLS (TRAY MENU)

Launch icon:

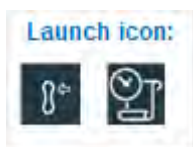


You can:

- Click the displayed number to dial.
- Hover over the contact and use the slide out toolbar to manage the contact information or dial the contact within the integrated CRM and/or Add the number to a directory or integrated CRM contact list.



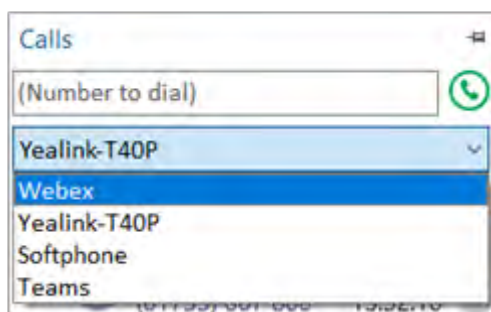
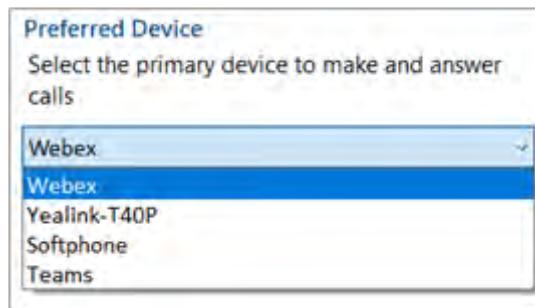
PREFERRED DEVICE



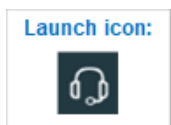
When the Telephone system user has multiple devices configured and available, users can select which will be the Preferred Device used to make and receive calls.

In Tray mode, the Preferred Device icon offers a drop-down menu selection from the devices available.

In AppBar mode, the Preferred Device drop-down menu is displayed within the "Calls" window.



CALL CENTER

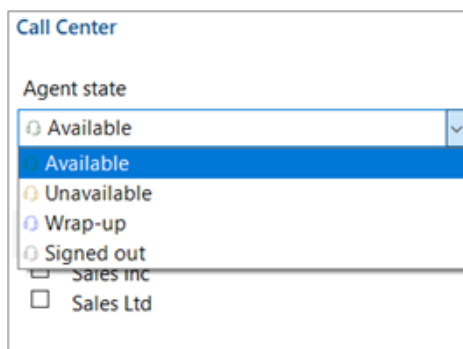
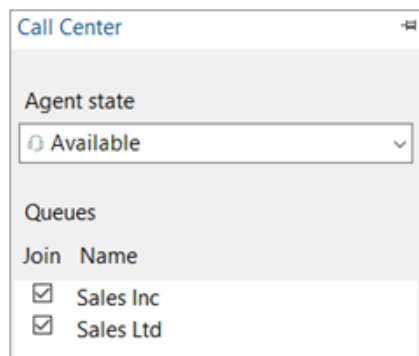


If enabled in the Telephone system user profile, Call Center features are visible and can be controlled from the Tray Menu, AppBar, or Call Toolbar.

Note: Call Center features always requires Go Integrator | CRM Connector UNITE user license.

Tray Menu / AppBar Call Center Settings

Select Queue membership and Agent availability status



Agent states are configurable by your Telephony admin in the Telephone system Call Center settings.

Call Toolbar Call Center Settings

Queue Membership and Queue Information

The Call Toolbar displays the following Call Center queue information:

- Which queue(s) the agent is assigned to (indicated by the check box).
- Number of agents configured within the queue.
- Number of agents currently available to take a call.
- Expected wait time for callers currently in the queue.

MO: +44 7751-211887 | (Mobile services, United Kingdom)

2

Add

10s
SoftPhone

00:01:09

Join	Name	Telephone	Calls in queue	Total agents	Available agents	Wait time
<input checked="" type="checkbox"/>	Payment Enquiries (Basic)	8511	0	5	5	
<input checked="" type="checkbox"/>	Testbed	8518	0	4	2	
<input type="checkbox"/>	Sales Queue (Standard)	8586	0	1	1	

Agents may join or leave a queue using the check box on the left-hand side.

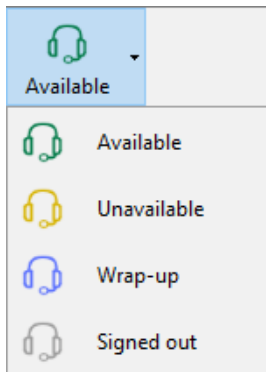
Note: Call queue statistics are provided directly from the Telephone system platform.

Agent Status in Presence Window

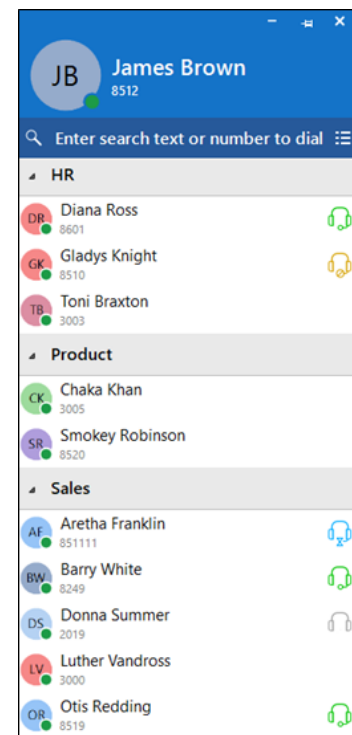
View the status of other Call Center Agents in the Presence Window

Agent Availability

Select agent availability status:



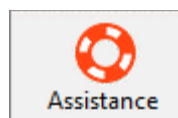
Agents can also see the duration of how long they have been in a certain ACD state for. e.g. Available



Agent states are configurable in Telephone system Call Center settings.

Assistance

Select "Assistance" while in a call to escalate to a supervisor defined in the telephone system.

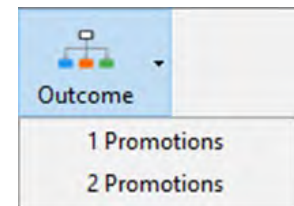


Note: This action simply sends the #83 feature (Star) code.

Call Outcome (Disposition)

An Outcome code can be set while the agent is in a call from a Call Center queue or in "Wrap-up" status.

The Outcome codes are configurable in the telephone system.

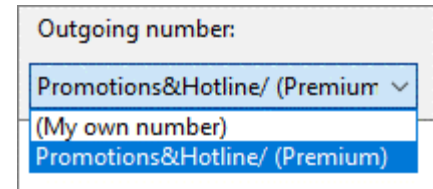


Outgoing Number

Allows the agent to select the outgoing DNIS presented to the called party. This can be set manually by selecting a number from a drop-down list from the toolbar:

[Refer to "Automatic Number Presentation" for further details.](#)

Note: The Outgoing Number feature requires the Telephone system Premium Call Center DNIS service.



Features Available by Call Center Type

Feature/Call Center type	Basic	Standard	Premium
Join queue	Yes	Yes	Yes
Availability	No	Yes	Yes
Queue stats	No	Yes	Yes
Assistance	No	Yes	Yes
Disposition/Outcome codes	No	No	Yes
Outgoing Number	No	No	Yes

Feature Visibility

Toolbar features availability is dependent upon:

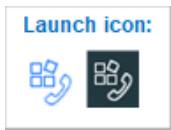
- The user's license type assignment – Call Center features always require UNITE user license.
- The Telephone system Call Center services assigned to the user.
- The queue type associated with the active call.

Protocol Support

Toolbar agent features are available with XSI over both HTTP/S and CTI protocols.

Note: Agent features are not available when using Go Integrator | CRM Connector in UC-One mode.

CALL SETTINGS



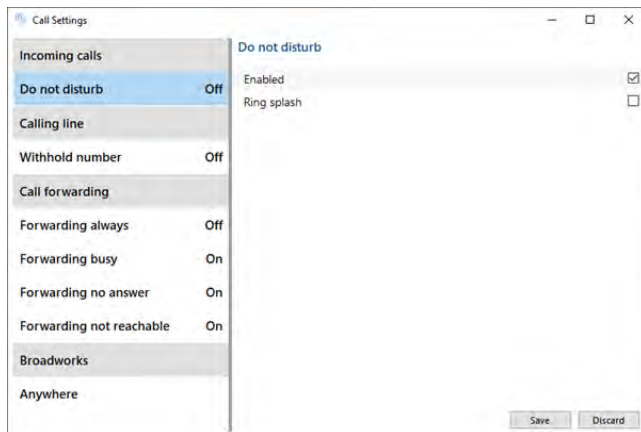
Call Settings provides access to many of the Telephone system user profile call settings, allowing configuration of DND, Forwarding, Line properties and Anywhere profiles.

The Call Settings options available are controlled and limited by the Telephone system's user level settings.

Incoming Calls

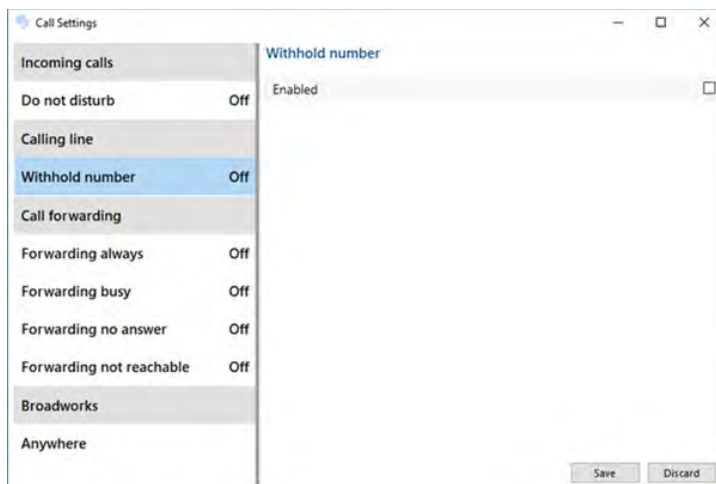
Enable Do not disturb to prevent incoming calls. Optionally, enable 'Ring splash' to briefly show incoming calls before they are redirected.

Tick the required option then 'Save' to apply the setting or 'Discard' to abandon the change.



Calling Line

Enable Withhold number to hide your telephone number when making outgoing calls.



Call Forwarding

Users can manage forwarding options in the Call Settings. Tools are provided based on the selected setting.

The screenshot shows a 'Call Settings' window. On the left is a sidebar with categories: 'Incoming calls', 'Calling line', 'Call forwarding', 'Broadworks', and 'Anywhere'. Under 'Incoming calls' are 'Do not disturb' (Off) and 'Withhold number' (Off). Under 'Calling line' is 'Withhold number' (Off). Under 'Call forwarding' are 'Forwarding always' (Off, highlighted), 'Forwarding busy' (Off), 'Forwarding no answer' (Off), and 'Forwarding not reachable' (Off). Under 'Broadworks' is 'Anywhere'. The main panel is titled 'Forwarding always' and contains 'Enabled' (checked), 'Ring splash' (checked), and a 'Destination' field with the value '01733667800'. At the bottom right are 'Save' and 'Discard' buttons.

Forwarding Always

Enable Forwarding Always to redirect incoming calls immediately to the specified destination phone number (entered).

Ring Splash

Enable Ring Splash while setting Forwarding options to show a notification of the forwarded call.

Forwarding Busy

Enable Forwarding busy to redirect incoming calls to the specified destination when already busy on a call.

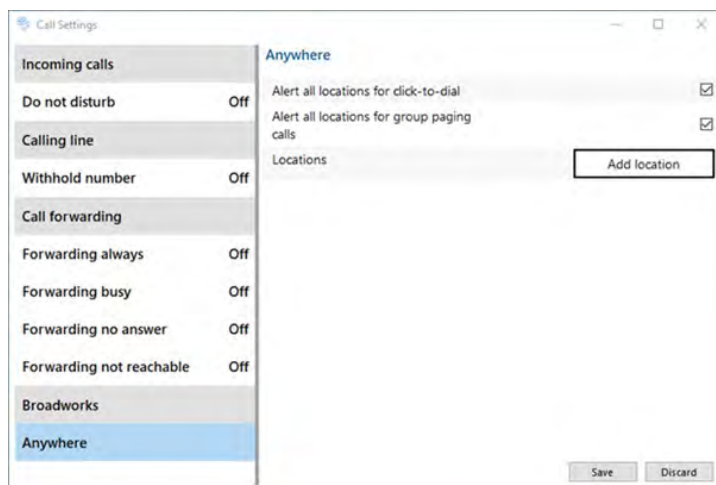
Forwarding No Answer

Enable Forwarding no answer to redirect calls to the specified telephone number (entered) after the selected number of rings (defined).

Forwarding Not Reachable

Enable Forwarding not reachable to redirect incoming calls to the specified telephone number when your device is unavailable for any other reason:

BroadWorks Anywhere



- Enable Anywhere settings to configure external telephone number locations to handle calls.
- Enable Alert all locations for click-to-dial for notifications to appear at all locations.
- Enable Alert all locations for group paging calls for alerts to appear at all locations.

Set External Telephone Number Location for Anywhere

To set up the external telephone number location

1. Select Add location and complete the required information.



- 'Enable' the service and enter the full 10-digit number and description for this location.
 - Select Call control to enable Telephone system based call handling capability when calls are in progress for this location.
 - Select Diversion inhibit to prevent calls from being diverted within the Telephone system, for example, when the external location may take longer to be answered than the normal No Answer period.
 - Select Answer confirm to enable a confirmation message that requires a key press for the call to be answered and connected.
2. Select Save to apply the settings.

NOTE: To make the Anywhere location available to be selected as the Preferred Device, it is necessary to Exit the Go Integrator | CRM Connector client and then restart.

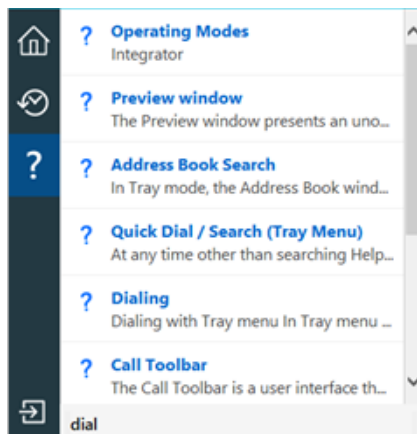
HELP

Launch icon:



The Help function offers a list of topics that are opened in your default web browser

Keywords can be entered into the Search bar to find specific topics – any topics that contain the entered keywords will be displayed.



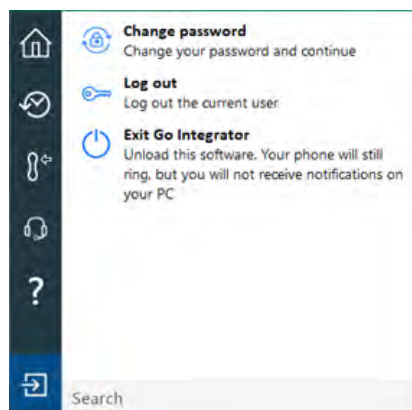
- ? **Tray menu**
Right-click the green Integrator Clie...
- ? **Preview window**
The Preview window presents an inform...
- ? **Toolbar**
The Toolbar is a dockable user interfac...
- ? **Presence**
The Presence window provides a quick ...

EXIT / SESSION

Launch icon:



Use the Exit / Session button to change your password, log in as a different user or Exit and close Go Integrator | CRM Connector.

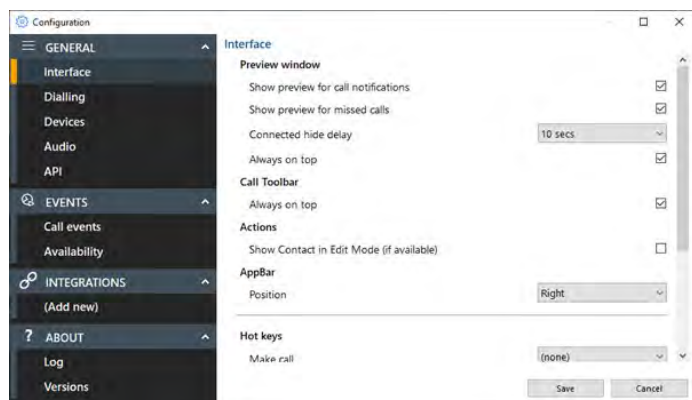


CONFIGURATION



User defined settings are available within "Configuration" and are grouped into relevant areas: General, Events and Integrations with support information available via the "About" section.

Note: The parameters available may also vary depending on centrally managed configuration settings.



Configuration > Interface

The most common user-defined parameters are within the "Interface" settings.

Preview window

Controls the behavior of the Preview Window.



By default, the Preview Window is used to present incoming and outgoing call information and controls.

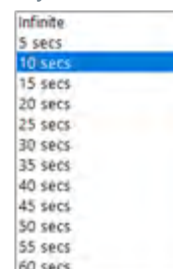
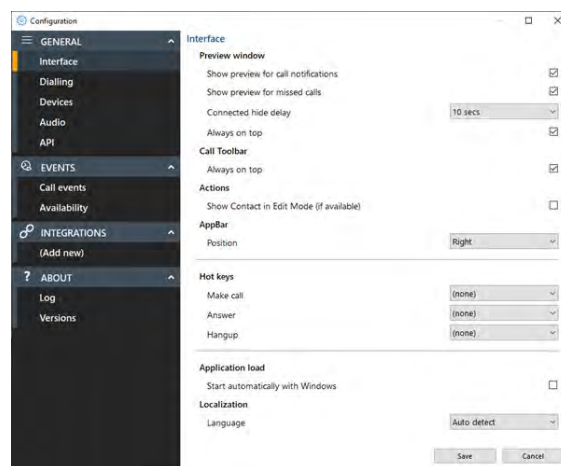
If the Call Toolbar is preferred, then the Preview Window can be disabled (untick the box).

However, the Call Toolbar does not display any missed call information so the Missed Call Notification preview window can be enabled separately to the main preview window.

The main Preview Window is designed to be as unobtrusive as possible, so will automatically hide once a call is answered and in progress. Hovering over the Tray icon or AppBar status icon will bring the Preview Window back into view during a call.

The default hide delay is 10 seconds but can be increased or disabled (set to "infinite") to keep the Preview window permanently in view for the duration of the call.

The Preview Window will display in front of other windows but without taking focus from the current application in use. When "Always on top" is enabled the Preview Window will remain in view whilst continuing to work on the current application.



Call Toolbar

When the Call Toolbar is docked to the top or bottom of the screen, it will be permanently in view.



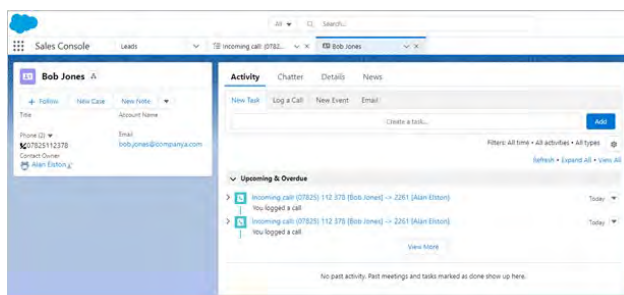
However, if the Call Toolbar is not docked, it can either remain in view in front of the current application in use (default - "Always on top") or can be treated as any other application and remain out of view until selected.

Actions

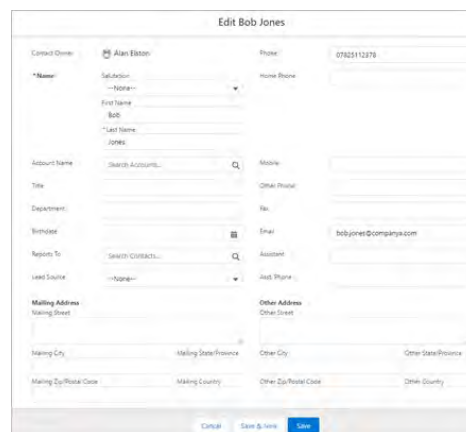
Depending on the address book location, matching contacts are displayed in "standard" mode if opened by clicking the contact icon. With "Show Contact in Edit Mode" enabled, the contact is opened in "edit" mode, if available.



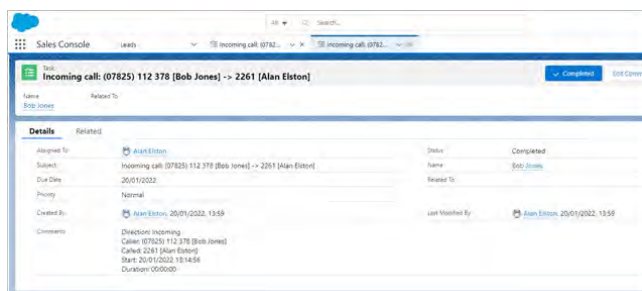
Contact open in Salesforce "standard" mode



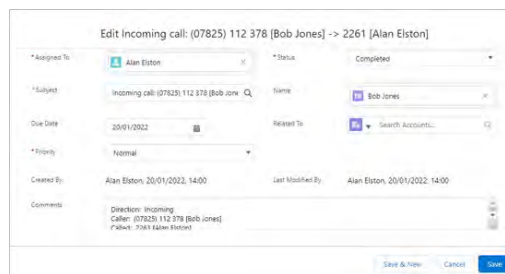
Contact open in Salesforce "edit" mode



Call Activity log open in Salesforce "standard" mode

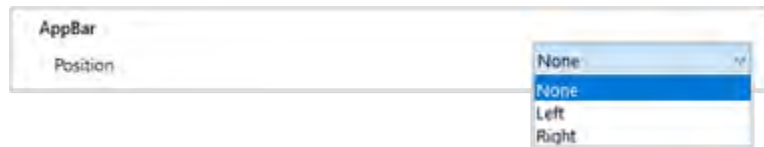


Call activity open in Salesforce "edit" mode:



AppBar

Select which side of the screen to dock the AppBar, or disable AppBar to use Tray Menu mode (default).



Public Image Service

Enable if using the Gravatar public image service:



Hot Keys

Assign keystroke combinations to Make call, Answer and Hang up:



Note: All hotkey combinations require CTRL, SHIFT or CTRL+SHIFT to be included

Application load

Enable automatic start up with Windows:



Localization

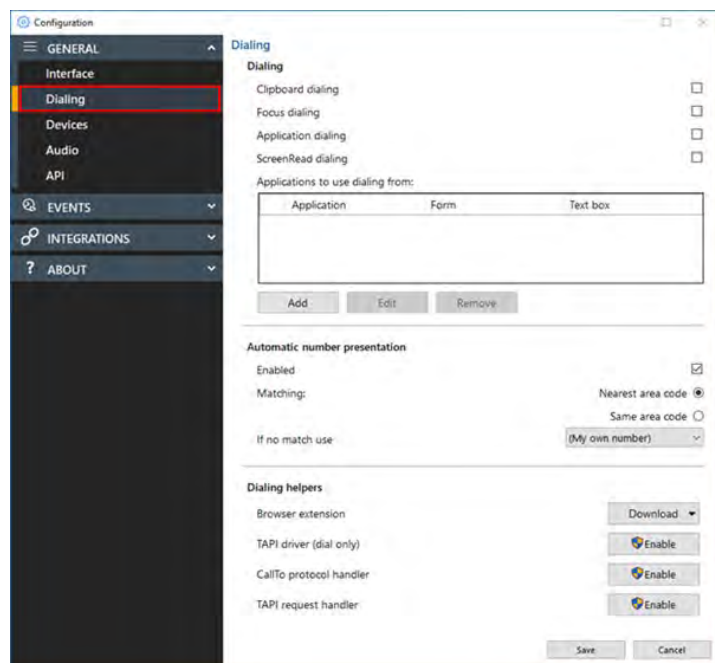
Set language and formatting options to the appropriate locale:



Note: By default, the software automatically selects the localization of the PC.

Configuration > Dialing

Manage outbound calling methods and outbound number presentation:



Dialing

Select the preferred method(s) for making outbound calls:



Note: Different dialing methods are offered for varying application types. Not all applications will support all dialing types.

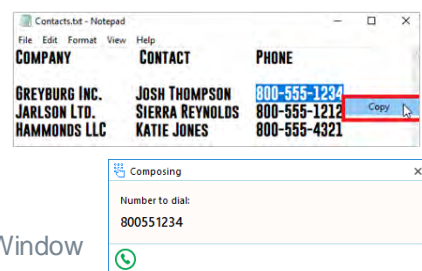
Clipboard Dialing

Enables quick dialing by selecting telephone numbers and copying, either by key sequence or mouse click.

After the number is copied to the clipboard, a dial prompt notification appears in the corner of the screen.

Click the call button to initiate the outgoing call:

The pop-up prompt appears in the same location as the Preview Window – drag to a different corner to change where the notification appears

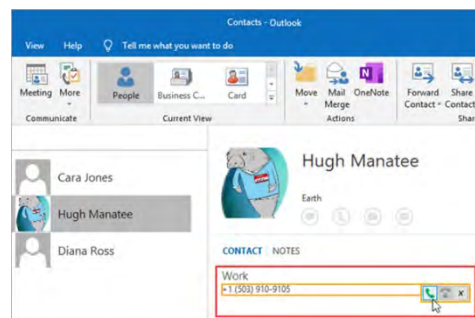


Focus Dialing

Presents a dial icon within compatible applications for any field in focus containing a telephone number:

Click the dial icon to initiate the outgoing call 

Note: The field must first be selected or in "focus" for the dial icon to appear and the telephone number must be in a valid format



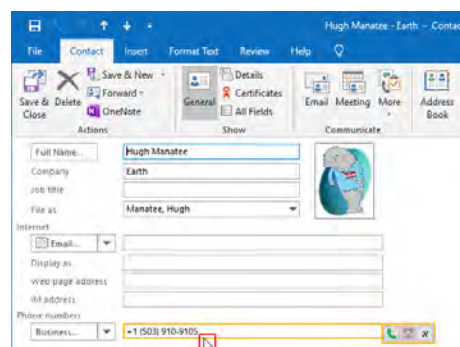
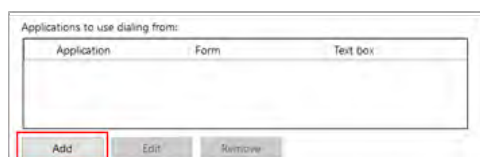
Application Dialing

Presents a dial icon within compatible applications by hovering the cursor over a valid telephone number.

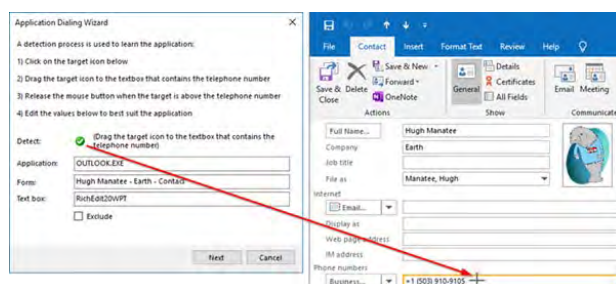
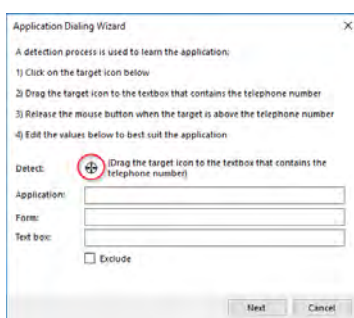
Click the dial icon to initiate the outgoing call 

Note: Application dialing requires configuration using the Application Dialing Wizard, as follows.

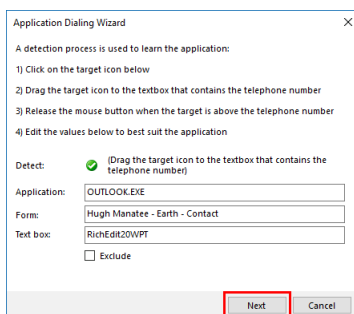
Select "Add" to open the Application Dialing Wizard.



With the desired application open, drag the target to the appropriate field

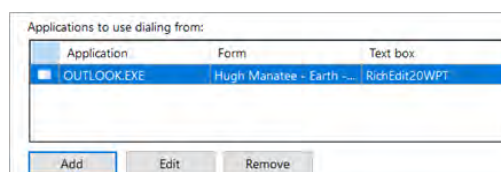


With the target on the telephone number field, the application details and green check will appear



Select "Next", and then "Save"

Applications configured using the dialing wizard are displayed in the dialing menu.



ScreenRead dialing

Enables any valid telephone number, detected through image analysis, to be dialed:



Move the cursor over the telephone number you wish to dial and hold CTRL-SHIFT. The orange detection box appears and attempts to detect a valid telephone number. If the number is successfully detected, the telephone number will be converted to a Click-to-dial field – just click to initiate the outgoing call.

Note: Telephone numbers are not always detectable within images due to font style, alignment, or image clarity.

Automatic Number Presentation

Defines which pre-configured telephone numbers or area code to present on outgoing calls:



Select "Nearest area code" or "Same area code".

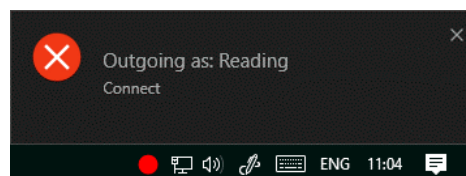
Select a number from the drop-down list if no match is found.

Note: Requires Call Center Premium DNIS features enabled in the Telephone system and pre-configured telephone numbers for the users/organization.

Number Matching

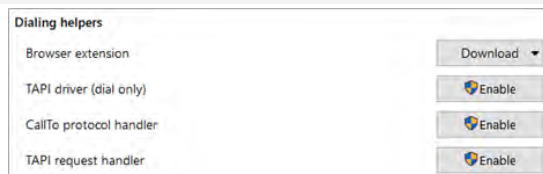
Nearest area code: Uses nearest geographical area code configured in the Telephone system "Call Center DNIS number."

Same area code: Uses exact match of dialed number and Telephone system "Call Center DNIS number."



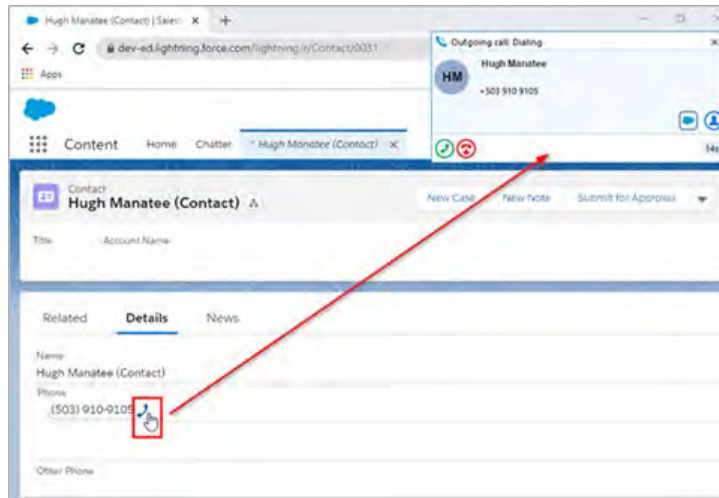
Dialing Helpers

Select a Browser extension or enable traditional telephony dialing interfaces.

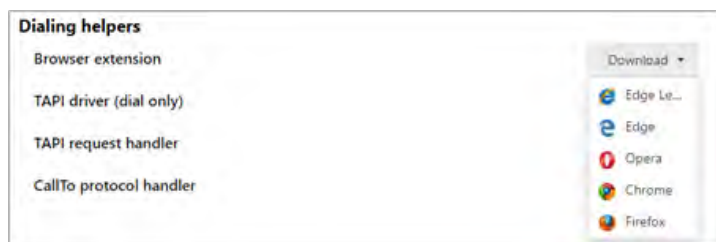


Browser Extension

Web dialing enables Click to Dial of detected telephone numbers directly from a web browser:



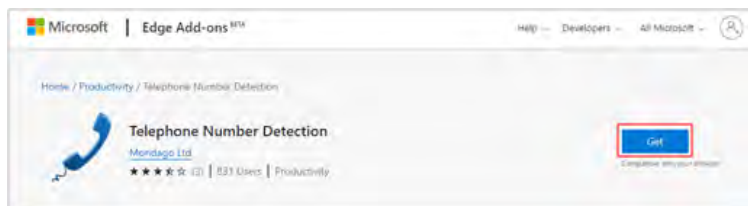
Select a web browser extension to install from the drop-down list:



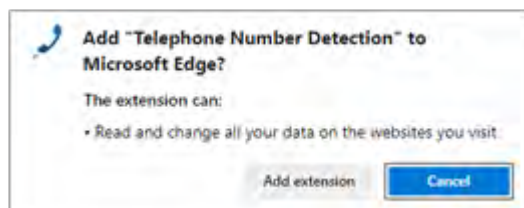
Edge

Select Edge from the list of Dialing helpers in partnerCRM configuration. The default Windows browser will open from this action. It is recommended to set Edge as the default Windows browser.

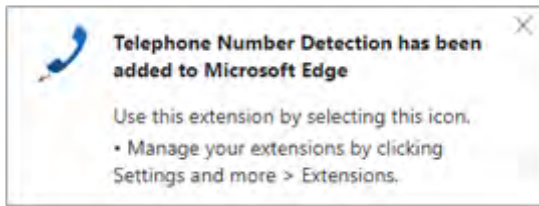
Select "Get"



Select "Add extension"



A confirmation will appear:



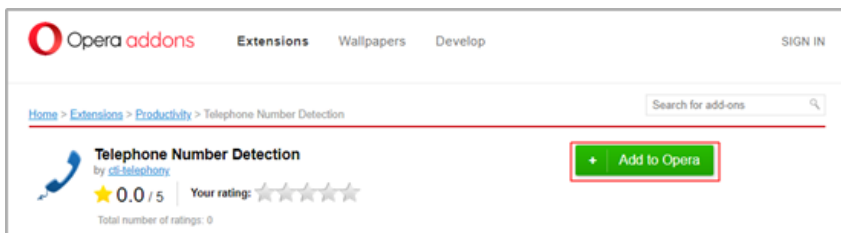
The extension is enabled by default (green) and can be disabled by selecting it (red):



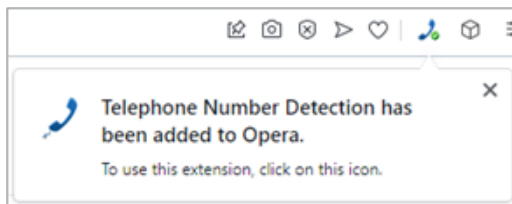
Opera

Select Opera from the list of Dialing helpers in partnerCRM configuration. The default Windows browser will open from this action. It is recommended to set Opera as the default Windows browser.

Select "Add to Opera":



A confirmation displays:



The extension is enabled by default (green):



and can be disabled by selecting it (red)



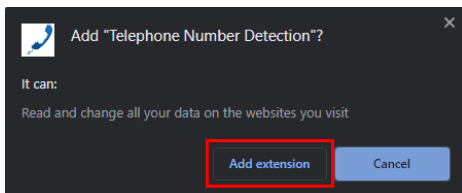
Chrome

Select Chrome from the list of Dialing helpers in partnerCRM configuration. The default Windows browser will open from this action. It is recommended to set Chrome as the default Windows browser.

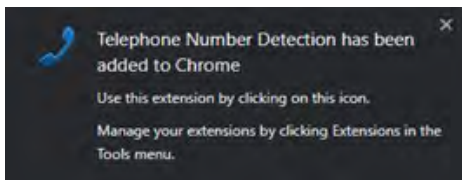
Select "Add to Chrome":



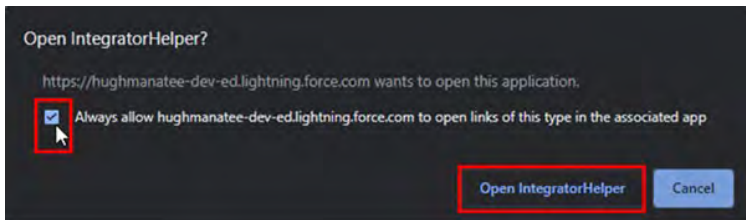
Select "Add extension":



A confirmation will appear:



Select "Always allow" upon initial use to remember these settings:



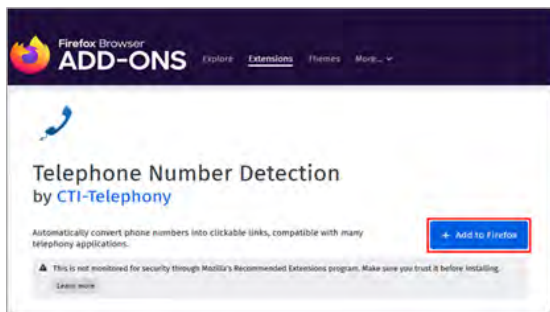
The extension is enabled by default (green) can be disabled by selecting it (red)



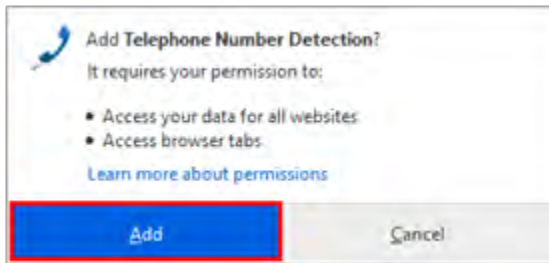
Firefox

Select Firefox from the list of Dialing helpers in partnerCRM configuration. The default Windows browser will open from this action. It is recommended to set Firefox as the default Windows browser.

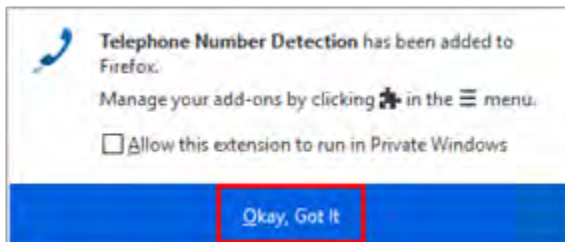
Select "Add to Firefox":



Select "Add":



Select "Okay, Got it" to confirm:



The extension is enabled by default (green):



The extension can be disabled by selecting it (red):

Traditional Telephony Drivers

Enable TAPI driver (dial only), "CallTo" protocol handler, or TAPI request handler:

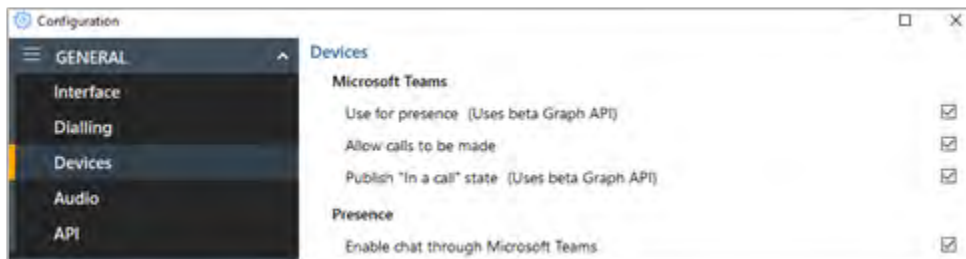
Note: Refer to the manual of your TAPI-enabled application to configure dialing.

Configuration > Devices

A Microsoft 365 Administrator can enable the permissions for Microsoft Teams integration features by clicking this link:

<https://login.microsoftonline.com/>

Manage Microsoft Teams integration and telephony device endpoints:



Microsoft Teams

Enable Microsoft Teams integration features.

Microsoft Teams	
Use for presence (Uses beta Graph API)	<input checked="" type="checkbox"/>
Allow calls to be made	<input checked="" type="checkbox"/>
Publish "In a call" state (Uses beta Graph API)	<input checked="" type="checkbox"/>

Teams Availability in Presence

To view the status of co-workers Microsoft Teams Availability in the Presence window, enable "Use for presence"

Use for presence (Uses beta Graph API)	<input checked="" type="checkbox"/>
--	-------------------------------------

If beta features have been enabled in your access code "Uses beta Graph API" will be displayed – this refers to the Microsoft Outlook Calendar based "Out of Office" status only. All other Teams availability states are released.

Allow Calls To Be Made From Teams

Enables calls to be placed through Microsoft Teams, provided there is a direct routing capability enabled within the Teams user account.

Allow calls to be made	<input checked="" type="checkbox"/>
------------------------	-------------------------------------

When "Teams" is selected as the Preferred Device, any telephone number to be dialed by Go Integrator | CRM Connector is passed to Microsoft Teams to complete the call:

Would you like to call this number?	
+44 1753 667500	
Cancel	Call

Publish "In a call" State To Teams

If beta features have been enabled in your access code, this beta Graph API feature will be displayed. This function enables Go Integrator | CRM Connector to change the Teams availability status to "In a call" when the user is on an active telephone call through the Telephone system.

Publish "In a call" state (Uses beta Graph API)	<input checked="" type="checkbox"/>
---	-------------------------------------

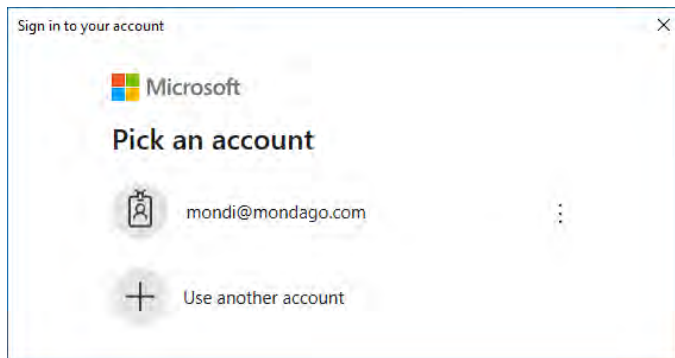
Enable chat through Teams

Select to enable the option to open Teams chat conversations directly from the Go Integrator | CRM Connector presence window

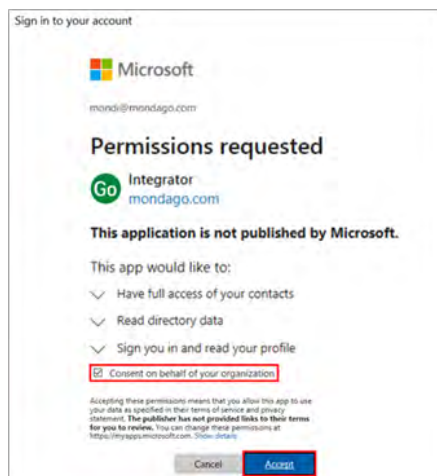
Enable chat through Microsoft Teams	<input checked="" type="checkbox"/>
-------------------------------------	-------------------------------------

Note: To enable the Teams integration features, the following setup must be performed by the Global Administrator. Business or school user accounts are required-Personal accounts are not supported.

Login with your Microsoft account using the App Registration window:



Review and authorize the permissions window:



Note: "Consent on behalf of your organization" must be selected.

Global Administrators may view the full list of permissions for "Integrator" at:

<https://myapplications.microsoft.com/>

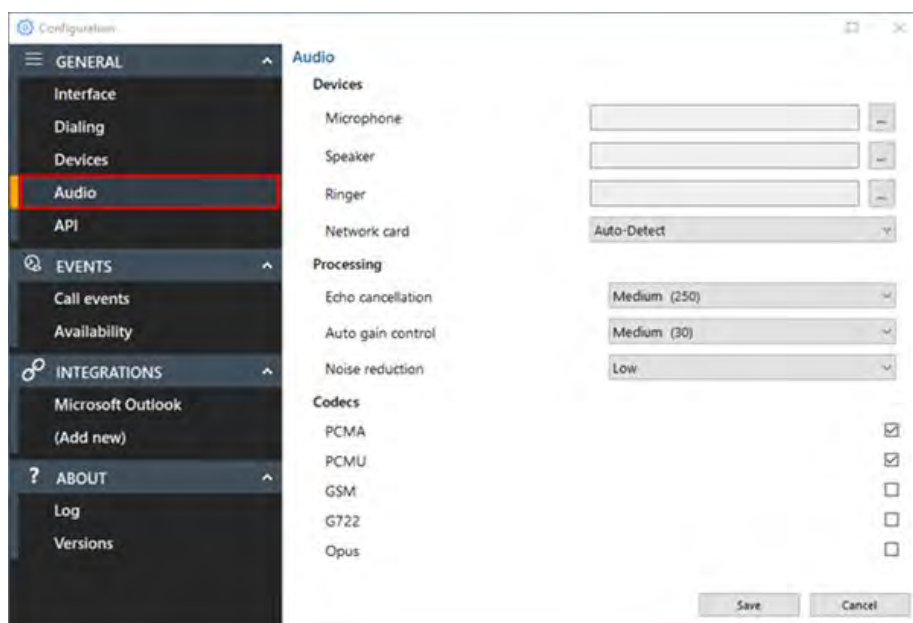
<https://aad.portal.azure.com/>.

Device Endpoints

Displays all available devices associated with the user profile which can be renamed, enabled, or disabled as required:

Name	Identity	Type
<input checked="" type="checkbox"/> Webex	SharedCallAppearance:...	Webex
<input checked="" type="checkbox"/> Yealink-T40P	Primary	Deskphone
<input checked="" type="checkbox"/> Anywhere - Mobile	BroadworksAnywhere:...	Anywhere
<input checked="" type="checkbox"/> Softphone	AlanElstonSP@thevoic...	Softphone

Configuration > Audio



Devices

Select the primary microphone, speaker, ringer and network card:

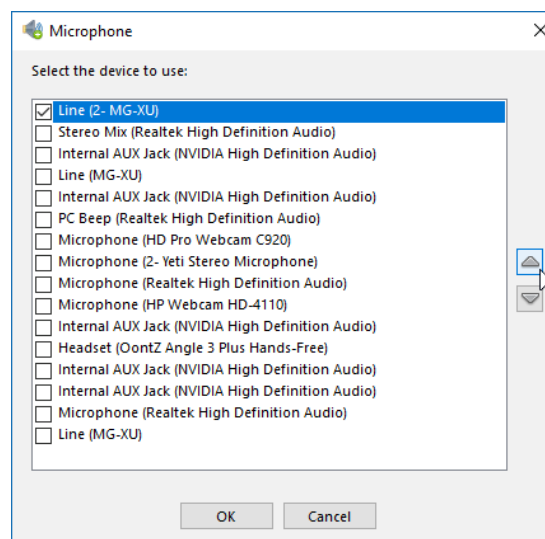


For each device, click the selection button:



Then tick the box against the preferred audio device from the list of available audio devices found.

Click OK to confirm the selection.



Processing

Make adjustments to Echo cancellation, Auto gain control and Noise reduction:

Echo cancellation	Medium (250)
Auto gain control	Medium (30)
Noise reduction	Low

Note: Please refer to IT support before modifying these settings.

Codecs

Select the audio codec(s) appropriate to the platform in use:

Codecs	
PCMA	<input checked="" type="checkbox"/>
PCMU	<input checked="" type="checkbox"/>
GSM	<input type="checkbox"/>
G722	<input type="checkbox"/>
Opus	<input type="checkbox"/>

Note: Please refer to IT support before modifying these settings.

Configuration > API

Local Http(s) listener(s) for API connections from other software applications, enabled by default.

Local Http(s) listener	
Enabled	<input checked="" type="checkbox"/>
Secure sockets	<input type="checkbox"/> Enable
Registered applications	
Name	

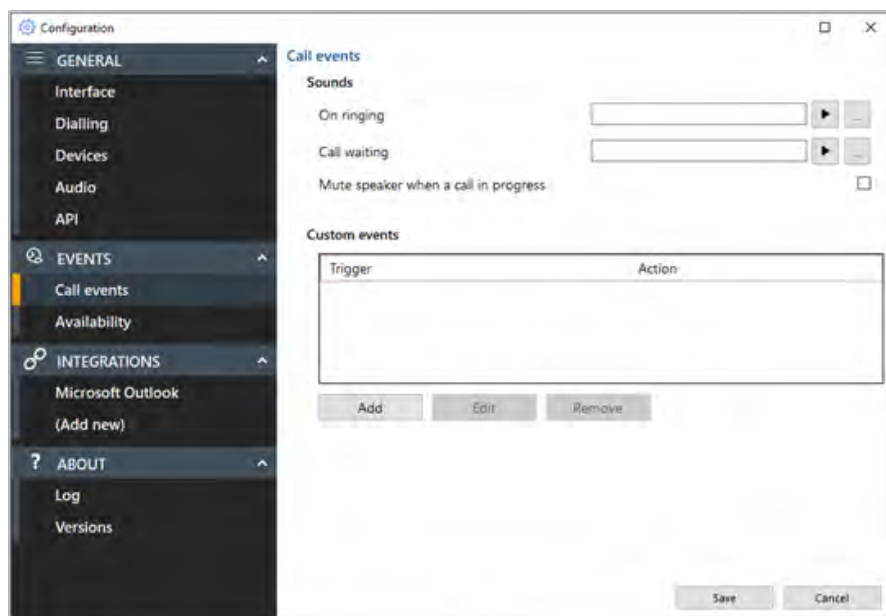
Toggle "Secure sockets" as enabled or disabled.

Registered applications appear below:

Registered applications	
Name	
Mondi Test Connection	

Configuration > Call Events

Call Events allows configuration relating to actions taken when a call or device changes state, e.g. when a new incoming call is presented to the Go Integrator | CRM Connector user's extension.





Sounds

Incoming call ringing or call waiting can be notified by sound files played through the computer speakers. This can help to uniquely identify which user in an office environment is being presented with a call for either supervisor monitoring or for users that are not deskbound.



Note: Only audio files in WAV format are supported. A sound file for each state is included within the client by default and can be selected by the user: "ringing.wav" and "waiting.wav".

 **ringing.wav**

 **waiting.wav**

The computer sound can be automatically muted whenever a call is in progress - useful for users that work with background music, internet radio etc. to give a more professional response when incoming calls are answered.



Custom Events

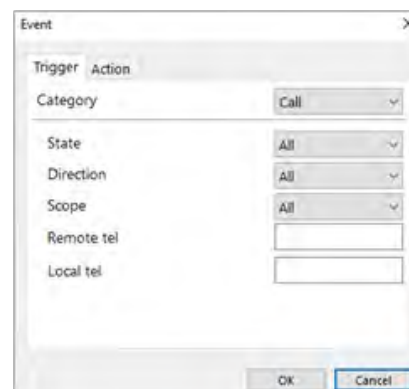
Customer Events offers more detailed configuration of actions to apply when a call or device changes state.



Actions available include opening a program or web page for example when a new incoming call is received.

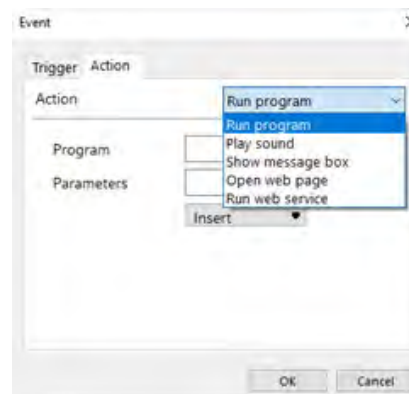
Available Triggers

- Category: Call or Device
- State: Ringing, Connected, Completed, Missed or All
- Direction: Inbound, outbound or both
- Scope: Internal calls, external calls or both
- Remote tel: An external telephone number or prefix code that will trigger this event
- Local tel: An internal telephone number or prefix code that will trigger this event



Available Actions

- Run program: Specify a program to run and insert relevant parameters
- Play sound: Specify a unique sound to play when this action is triggered
- Show Message Box: Present the message box including relevant parameters
- Open Web Page: Open the specified URL and insert relevant parameters
- Run Web Service: Run the specified endpoint and insert relevant parameters



For the "Play Sound" action, only a valid .wav audio sound file can be selected.

For all other actions, call or device parameters can be inserted to pass event information to the selected "Program", "Web Page" or "Web service".

For sample testing, the "Show Message Box" Action can be selected and the parameter output displayed to check the values that will be presented for the action.

Available "Call" information parameters

Id
Start
State
Duration
Direction
Remote tel
Remote name
Local tel
Local name

Available Device event parameters

Name
Internal tel
External tel
Hook state
Dnd state

For the "Program" action, the Parameters box also allows "command line arguments" for the program to be inserted before the event information is included from the drop down parameter lists.

For the "Web Page" action, always include the URI scheme (i.e. http://). Any command line arguments can be inserted before the event information is included from the drop down parameter lists.

For the "Web Service" action, enter the required Endpoint URL to receive the call event data.

Click the "Save" button to store any new/edited information or click the "Cancel" button to discard any new/edited information.

Custom Events Setup Guide

Custom events can be used to pass call information from the Go Integrator | CRM Connector Client to other software using command line parameters under customer specified conditions. For example, a custom event could create a new call record in a database that automatically includes the incoming caller's telephone number when the call is answered/connected

Command Line Parameters

"Command line" refers to the "Command Line Interface" (CLI), a method of giving instructions to a computer by typing commands one line at a time to perform specific tasks like starting an application. In very basic terms, a "parameter" is simply a definition of something e.g. name = Joe or telephone = 6329603210.

A "command line parameter" is a control parameter that is used by a program to give it specific instructions when started.

Another type of command line parameter called a "switch" can be used to start the associated program in a certain mode or affect it in some other way e.g. '-editmode' or '/AddNewContact'.

Note that the structure of command line controls can vary between programs. For example, some apps' parameters start with a hyphen character (-) like "-Phone" but other apps use a forward slash (/) instead like "/Phone" etc. Regardless of the program syntax the principle is generally the same.

In addition to the command line parameter, call event information can be included and acted upon by the external Program, Web Page or Web Service.

To use the telephone number of the remote party, as opposed to another extension transferring the call insert the "Call > Remote tel" entry from the drop down list: the item syntax is {Call.RemoteTel}

Here's an example of a typical command line instruction that could be manually entered:

- C:\Program Files\YourCRM\YourCRM.exe /AddNewContact /Phone={Call.RemoteTel}
 - C:\Program Files\YourCRM\YourCRM.exe
 - This section is the full filepath to the program to be started. Without any command line or event information included, the program would start normally.
 - /AddNewContact
 - This section is a switch-type command line parameter that causes the program to automatically add a new contact record when started.
 - /Phone={Call.RemoteTel}
 - This section is a command line parameter that passes information to the application which in this case is a telephone number.

With the above example, Go Integrator | CRM Connector will open "YourCRM.exe" which will then create a new contact record and insert the external telephone number into the "Phone" field.

You can find the call information names and descriptions in the "Passable Call Information" section below.

Passable Call Information

The call information that can be passed to external programs or web pages are listed below

Description	Parameter Variable
Call Events	
External telephone number of the calling/called party	{Call.RemoteTel}
Date and time of call start	{Call.Start}
Current call state: Dialback, Dialing, Ringing, Connected, Held, Terminated etc.	{Call.State}
Duration of the last call in hh:mm:ss.ms format (can only be used for events at the end of a call - "Completed" state trigger)	{Call.Duration}
Reports "Incoming" or "Outgoing"	{Call.Direction}
Call type: "Mobile Services" etc	{Call.RemoteName}
Internal extension number	{Call.LocalTel}
Internal extension name	{Call.LocalName}
The unique ID of the call	{Call.Id}
Device Events	
Full device username	{Device.OwnerContact.Name}
User Internal device extension number	{Device.OwnerContact.InternalTel}
User External DDI number	{Device.OwnerContact.ExternalTel}
Off Hook, Held etc	{Device.Hookstate}
DND status at current call state: ON / OFF	{Device.DndState}

The call event information must always be enclosed in "{" signs to properly identify the variable, otherwise the information will not be passed correctly. When Go Integrator | CRM Connector runs the custom event, the call information is inserted into the parameter in place of the parameter variable e.g. if the external caller's telephone number is 06329603210 then telephone = {Call.RemoteCall} becomes telephone = 06329603210.

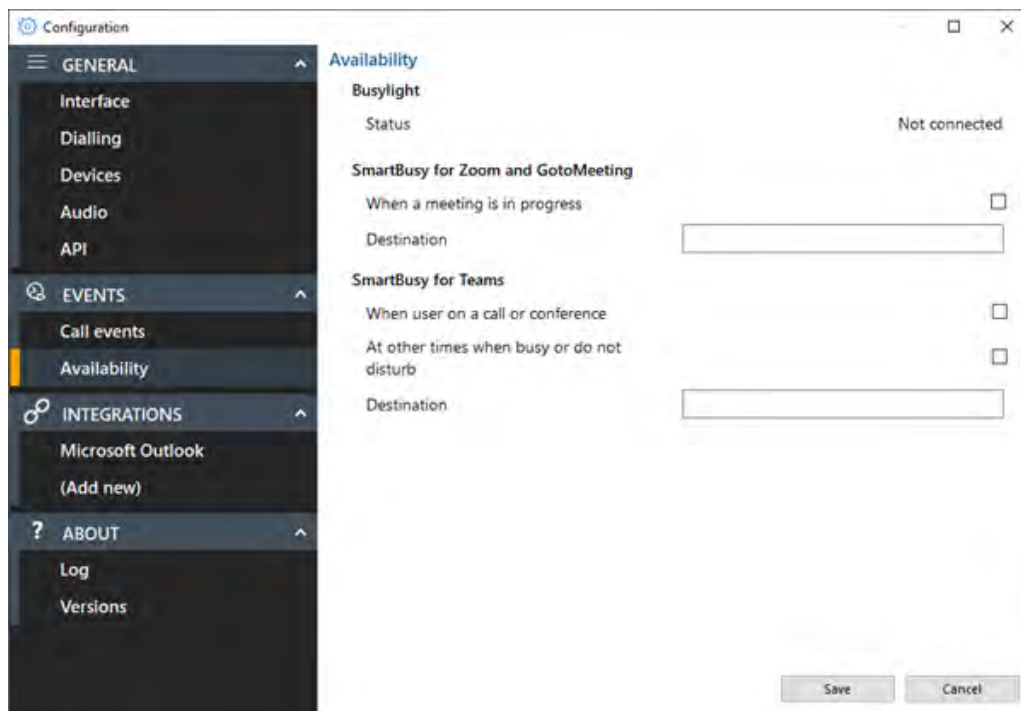
Making Changes

If any changes to a configured custom event are required, highlight the entry in the Custom Events list and click "Edit" to display the event configuration.

If the "Action" needs to be changed, the custom event must be deleted and created again. To delete a custom event, highlight it in the list, click "Remove" and then "Save".

Configuration > Availability

Manage Telephone availability related settings:



Busylight

Plug and play compatibility with Kuando Busylight.



Color indicators

Go Integrator CRM Connector	External LED Color
Available (not on a call)	Green
Held	Fast flashing yellow (250ms)
Busy (on a call/online meeting)	Red
Ringing	Flashing red (500ms)
Do Not Disturb / Forward	Blue
Voice Mail	Slow flashing magenta (1000ms)

Smart Busy

Go Integrator | CRM Connector is able to dynamically change the Telephone system extension forwarding settings in reaction to online meeting status or Microsoft Teams Busy/DND status.

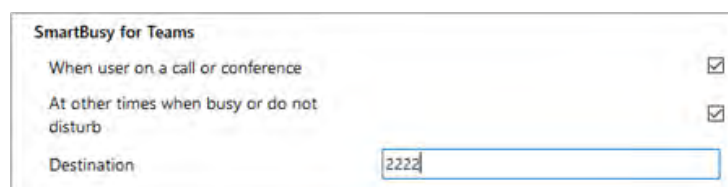
Zoom and GoToMeeting

When the Go Integrator | CRM Connector user is in either a Zoom meeting or GoToMeeting the Telephone system extension "Forwarding always" setting is enabled to redirect incoming calls to the configured telephone number, e.g. a group or voicemail



Microsoft Teams

When the Go Integrator | CRM Connector user is in a Microsoft Teams meeting or is Busy or set to "Do Not Disturb" the Telephone system extension "Forwarding always" setting is enabled to redirect incoming calls to the configured telephone number.



Configuration > Integrations

Integrations connect a CRM or application with the Telephone system. Incoming or outgoing telephone numbers are matched to any contact records in a CRM to present contact information including contact name, company or account name and additional notes.

Go Integrator | CRM Connector Solo and Team users can integrate with Google Contacts and Outlook Contacts.

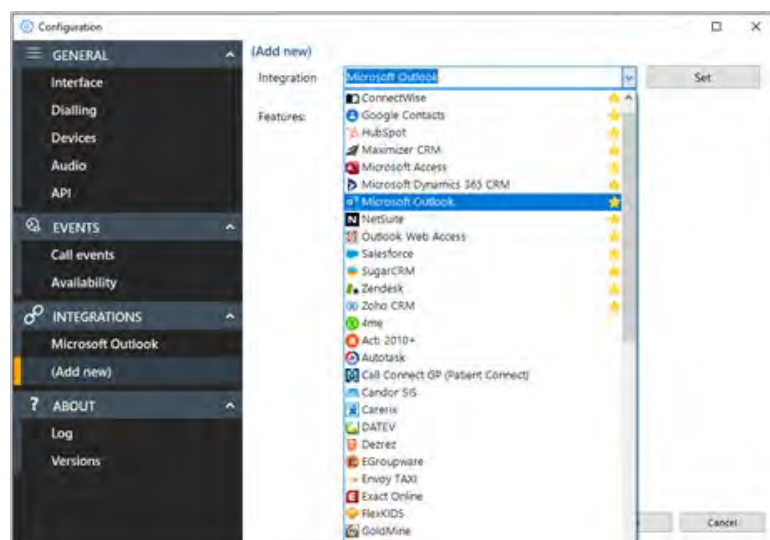
Go Integrator | CRM Connector Unite users can integrate with a larger list of business CRM applications and address books.

The integration provides address book searching, incoming call preview information, manual and automatic contact popping and in some cases, activity logging.

Setup CRM Integration

Select "(Add new)" to integrate with a business CRM application or address book.

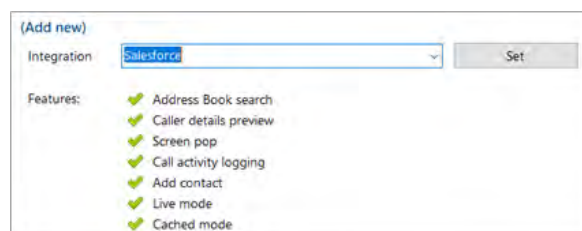
Integrations marked with a star include the option to "Add Contact" information directly into the address book from the Preview Window, Call Toolbar or Call History (including the Recent Calls list).



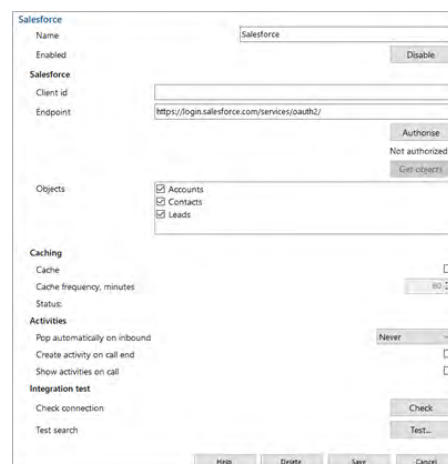
Note: Only "Standard" integrations are displayed in the list.

Other applications or "Controlled" integrations require an unlock code and/or alternate SLA levels and assistance to implement. Please contact support for assistance.

Choose the desired application from the list and select "Set" to view the list of Features that the selected integration can support (example shown for Salesforce CRM):

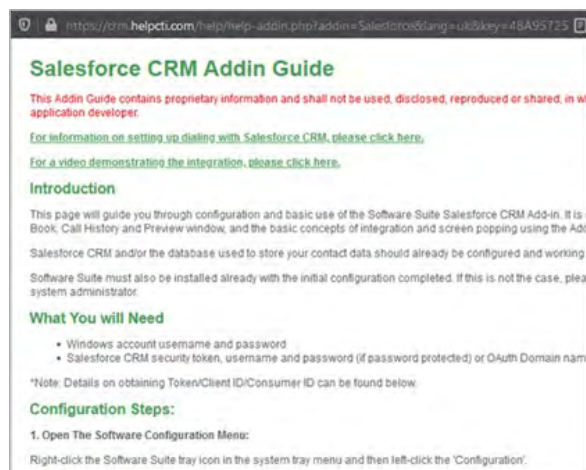


Click "Save" to continue to the setup screen for the selected integration. The configuration form varies with the selected integration (example shown for Salesforce CRM):



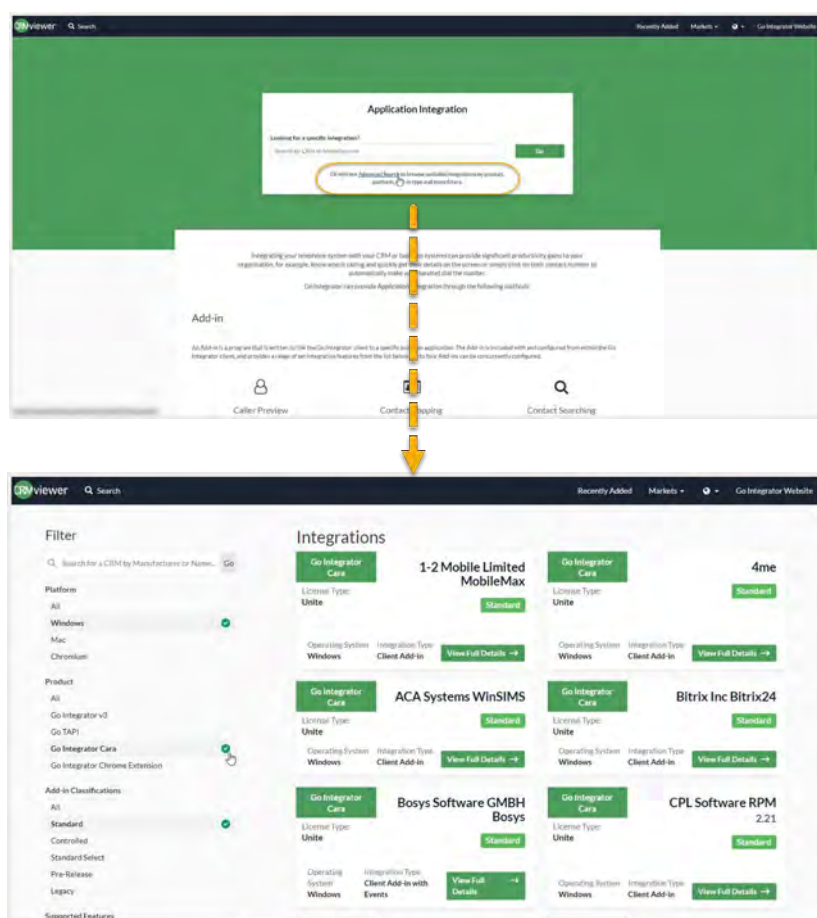
Help

Detailed step-by-step guidance is provided online for each "Standard" integration - click "Help" to open the Integration guide within Go Integrator | CRM Connector to learn more (example shown for Salesforce CRM):



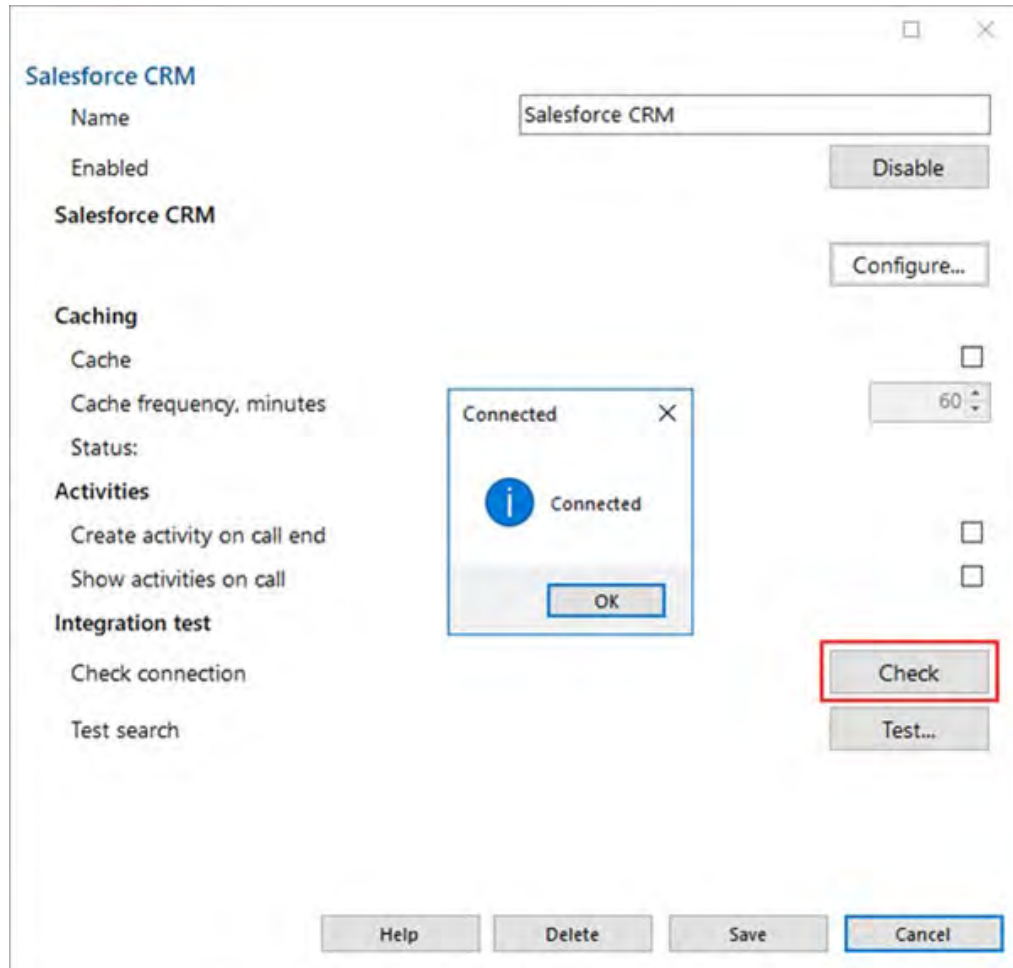
Integration Information

[Click here to review application integration options on the developer's website.](#)



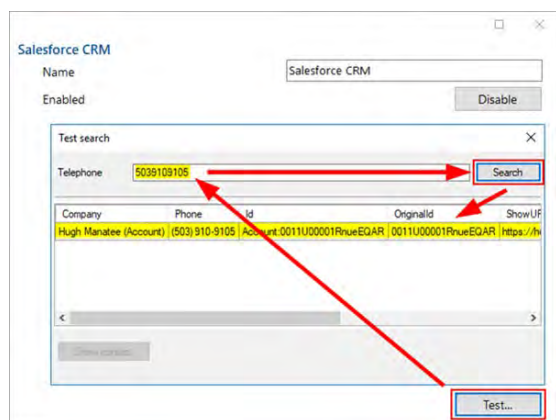
Check

After completing the integration setup, check the connection status of the integration to confirm a connection can be made:



Test

Test search by selecting "Test", enter the contact number, then select Search:



Note: Test search may be unavailable with certain CRMs or applications.

After completing the configuration, select "Save" to finalize the integration.

Select "Disable" to temporarily disable the integration.

Select "Delete" to completely remove the integration, if required.

Options

Additional options are available, depending on the specific integration selected:

Caching

If the application allows it, the contact database can be downloaded and cached to accelerate contact searches for matching telephone numbers.

The frequency of downloading the data can be configured between 1 – 100 minutes.



The Status shows when the last download occurred and how many records were downloaded.

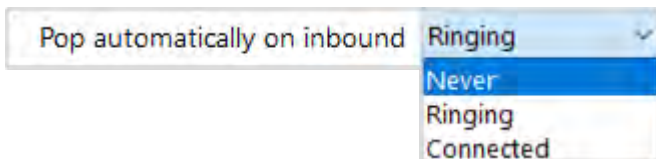
Activities

Additional actions can be applied to the integration.



Automatic Popping

Any integration can individually be configured to automatically pop matching contact entries on incoming calls, either during ringing (as soon as the call is presented) or when connected (after answering the call).



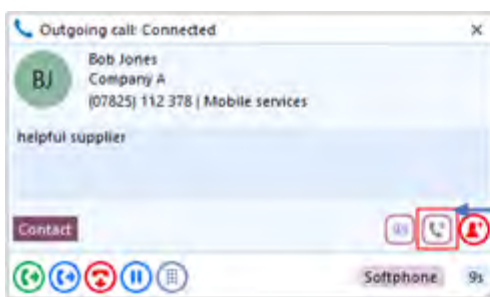
Manual contact popping is still available to other integrations. For example, if only 1 out of 4 configured integrations is set to pop automatically, contacts found in any of the other 3 integrations can be manually opened using the associated icon.

Call Activity Logging

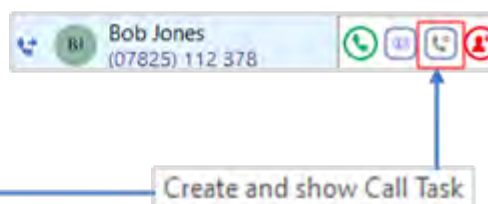
For compatible integrations, call activity events can be written directly into the business CRM application transaction logs either manually by a button press, or automatically at the end of a call.



From Preview Window:

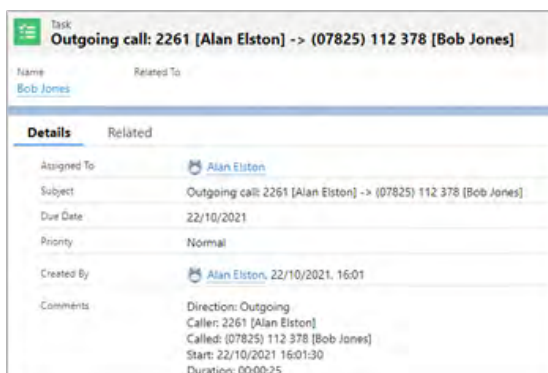


From Call History / Recent Calls:



Create and show Call Task

Example activity log to Salesforce:



Configuration > Log

The Log section contains important details about the client, user, and software configuration:

The screenshot shows the 'Log' section of the configuration window. It includes a sidebar with navigation options: GENERAL, EVENTS, INTEGRATIONS, and ABOUT. The 'Log' section is currently selected. The main content area displays the following information:

- Identity:**
 - Name: Alan Elston
 - Department: Sales
 - Extension: 2261
 - Direct number: +441753667811
 - Email: alan.elston@mondago.com
- Devices:**

Name	State	Features
XSI (http)	On hook	Telephony, Peer, CallHistory, ProfileSettings, Agent
LuOne	On hook	Telephony
SIP	On hook	Telephony, Peer, Audio, Video, Network
Microsoft Teams	Not ready	Telephony, Peer
- Customer feedback:**

Send anonymous statistics to help improve product development ☐
- Licensing:**

License packs: Go Integrator Units, go integrator db

License detail: Api, Bluetooth, Cloud Contacts, Conference, CRM integration, Features, Login, Photos, Presence, ScreenRead dialing, SmartBusy, DeviceActive, DeviceMobile, DeviceSoftphone, DeviceTeams, Toolbar, Call center, Agent Availability, Outgoing Number, Call Outcome, CRM activities, CRM new contact, CRM advanced features, Custom events, Others calls
- Policies:**

Policy detail: Forward immediate, Do Not Disturb, Call center, Agent Availability
- Logs:**

Application logs

At the bottom of the window are 'Save' and 'Cancel' buttons.

Identity

Displays current users Name, Department, Extension number, Direct Dial Number and Email address. Note: Depending on initial setup, not all user information will be displayed

Devices

Displays information about connected telephony devices.

Devices		
Name	State	Features
XSI (http)	On hook	Telephony, Peer, CallHistory, ProfileSettings, Agent
SIP	On hook	Telephony, Peer, Audio, Video, Network
Microsoft Teams	Not ready	Telephony, Peer

Customer Feedback

Send data into the software development team to help improve the product evolution

The screenshot shows a checkbox labeled 'Customer feedback' with the text 'Send anonymous statistics to help improve product development' and a checked checkbox icon.

Licensing

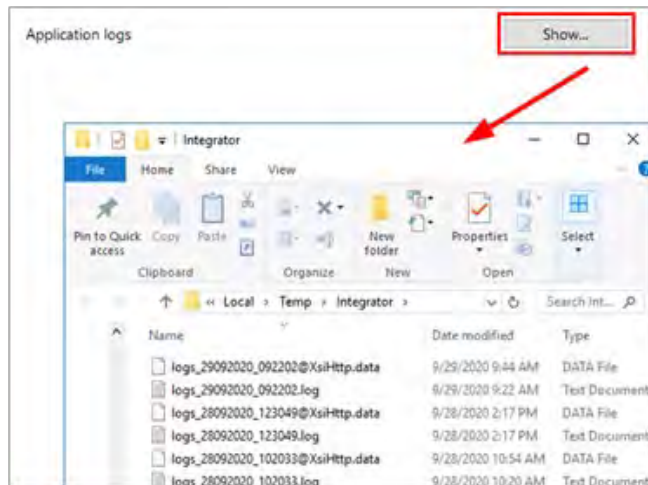
Displays the licensing detail and included features of both the Telephone system and Go Integrator user profile

Policies

Displays the policy details and enabled features of the Telephone system user profile

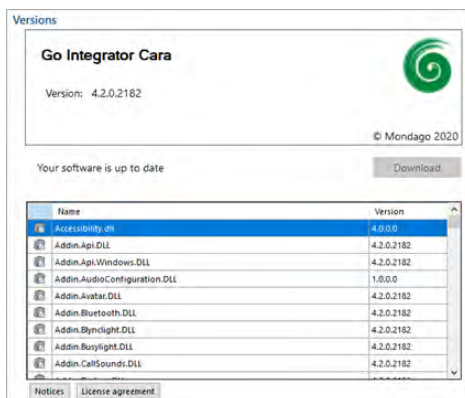
Logs

Select "Show" to open the application log file location for support escalations and issue resolution:



Configuration > Versions

Contains application specific version details, Notices, and EULA information:



Download

Download link if a later software version is available and update permissions are enabled

Notices

Detailed technical information of each component

License Agreement

Full End User License agreement detail.

Microsoft Teams Integrations

The integration features that a Teams Admin can make available to CRM Connector UNITE or TEAM users within Microsoft Teams via the Teams Integrator App include:

- Search and Call Integrator Teams Adaptor
- Show, Add, Pop CRM contact for incoming call
- Teams as preferred dialing device
- Open Microsoft Teams chat from Presence window
- Show Teams avatar image in Presence window
- Show co-worker Teams Availability status in Presence window
- Publish "In a call" state to Microsoft Teams (Beta feature)
- Smart Busy for Microsoft Teams busy/DND/meeting state

Teams Admins and Users:

Please reference the **CRM Connector Go Integrator Teams App v4.7x Quick Reference Guide**

Teams Integrator App

Once set up for use by your organization's Teams Admin, the Integrator (Search and Call) app for Microsoft Teams can be found in the Apps section for installation and use by any licensed TEAM or UNITE Go Integrator v4.x+ PC Desktop application user who also uses Teams. Once installed (in Teams) and related settings are defined in the desktop Go Integrator Configuration section, the Integrator app in Teams will also offer the Go Integrator CRM Address Book search functionality from within your Teams environment, allowing users to click to dial from within Teams.

Note: The TEAM or UNITE Go Integrator v4.7x+ PC desktop software must be active and connected alongside Teams for full functionality of the Teams App add-on.

