

# CRM Connector

## AppBar Mode

### Quick Reference Guide

Go Integrator  
Powered by MondaGo



**MOMENTUM**

v4.x+ | UC23Q4

## Introduction

This quick start guide contains useful information to help you get started with Go Integrator CRM Connector v4.x+ for Windows OS. This guide explains the AppBar mode – for System Tray mode, please refer to the separate Tray Mode guide.

## Login

Following installation, CRM Connector will request an “Access Code” which is provided by your service provider. The Access Code is used to set default parameters specific to the telephony platform and only needs to be entered once. CRM Connector can either prompt for User credentials each time the client is started or can Auto login to bypass this step. Contact your Service Provider to get the code.



## Interface

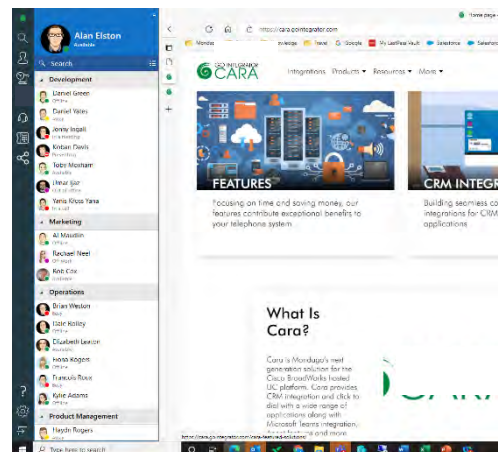
CRM Connector for has four user views in the interface: System Tray Menu, AppBar (Windows OS), Toolbar and Preview Window. The System Tray and AppBar menus provide similar functions - choose your preferred mode through “interface” settings. System Tray mode is the default setting. The Toolbar and Preview Window operate the same way in either mode.

## AppBar

In AppBar mode, the menu is always visible and docks to either the left- or right-hand side of your display. It is interactive and expands according to feature selection. Presence, Call History or Search Address Book can also be pinned to the desktop window to remain permanently visible. Your personal status icon is shown at the top of the AppBar and changes according to your extension state or availability:

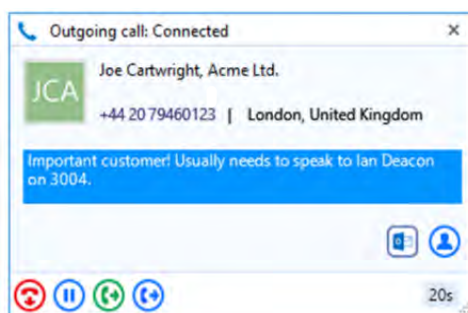


The following functions are launched from the AppBar: Presence, Search (Address Book), Calls, Call Toolbar, Availability, Configuration, Call Center (if enabled in user profile) Help and Exit.



## Preview Window

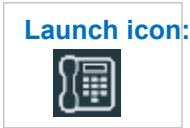
The Preview Window is displayed whenever an inbound or outbound call is presented or in progress. The window can automatically disappear after a configurable delay period once the call connects.



Designed to be as unobtrusive as possible, the Preview Window discretely appears in the corner of the display without taking focus from other applications.

Context-sensitive call handling buttons are presented along the bottom of the Preview Window. Display information includes caller/called party details, which are retrieved from the system directory or any integrated CRM business applications.

## Call Toolbar



The Call Toolbar can be docked to either the top or bottom of the screen and provides many core features including caller display, call handling buttons and, if included in the user profile, Call Center Agent features.



## Call Controls

The following call controls are available through the Call Toolbar and Preview Window:

	Answer	When a call is ringing, you can choose to answer the call by clicking the "Answer" button or deflecting it (transfer it without answering it) to another extension
	Deflect	
	Hang Up	End the call
	Hold	Pause the call - the caller will hear hold music if available
	Consult	Place the current call on hold and transfer the call to another extension
	Transfer	Blind transfer to another extension without introduction
	Show Contact	Shows the full contact details, obtained from the Broadworks directory
	Add Contact	Add the caller to the shared address book or integrated CRM business application/s
	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. Outlook, 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)

The Call Controls offered in the Preview Window and Call Toolbar are dependent on the Preferred Device selection. The below table shows call controls available for some typical devices:

	Answer	Hold	Consult xfer	Blind xfer	Hang up
<b>Deskphone (Primary)</b>	✓	✓	✓	✓	✓
<b>Softphone</b>	✓	✓	✓	✓	✓
<b>UC-One / Webex4BW</b>	✗	✓	✓	✓	✓
<b>Microsoft Teams</b>	✗	✗	✗	✓	✓

## Presence

### Launch icon:



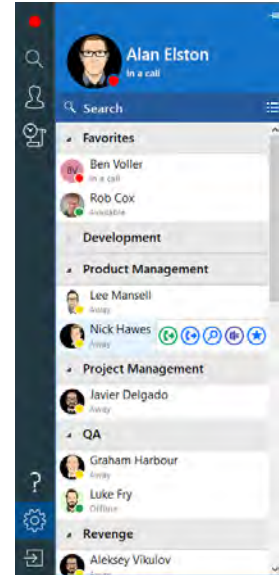
The Presence window displays co-worker's live extension status which is blended with Microsoft Teams Availability, if enabled. Key features available from Presence include:

- Call co-workers or transfer call
- Show co-worker details
- Open Microsoft Teams chat
- Add to Favorites

The Presence window will automatically populate with co-workers, sorted by department.

A personalized Favorites group can be created by searching for a co-worker and selecting the star symbol in the slide out menu that appears when hovering over the contact.

Calls can be initiated or quickly transferred to co-workers using the slide out menu bar when hovering over a contact.



## Address Book Search

### Launch icon:

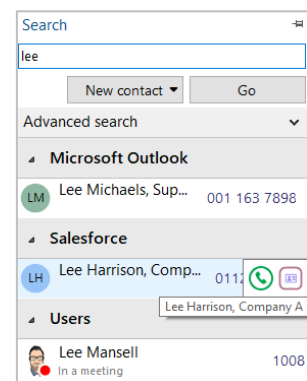


CRM Connector can search MS-Outlook, Google Contacts, and BroadWorks shared or personal directories, plus any integrated CRM business applications, depending on the user license level.

To dial the required contact, simply click on the telephone number displayed to initiate the call, or use the **Call** button from the slide out menu.

During a connected call, the slide out menu will also offer call transfer options so calls can also be quickly transferred to contacts found through the search.


Alternatively, the contact details can be opened via the slide out menu when hovering over the contact name. Just click the CRM icon to open the contact within the integrated application (example shown for Salesforce).



## Calls and Preferred Device

Launch icon:

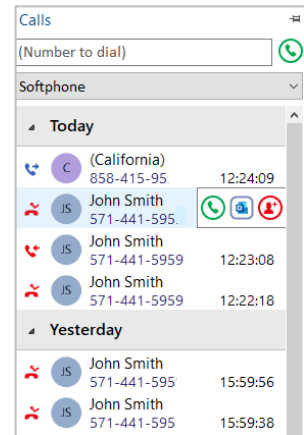


Outbound calls can be initiated quickly and easily from the Calls window – just enter the number to dial and hit Enter or click the Call button. 

Where multiple devices are available, the drop down list allows you to choose your **Preferred Device** for call handling. This will also define which call control buttons are offered based on the compatibility of the selected device.

The Calls window also displays a detailed call history including recent inbound, outbound and importantly, missed calls, ensuring a clear notification to avoid missing opportunities. Just click the telephone number displayed to initiate the call.

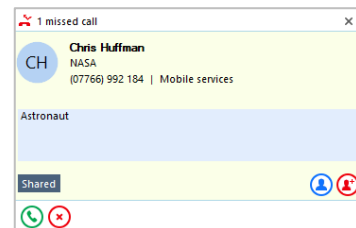
For known contacts, the contact details can be opened via the slide out menu when hovering over the contact name. Just click the icon to open the contact page within the integrated CRM business application (example shown for MS Outlook).




## Additional Features

### Missed Call Notification

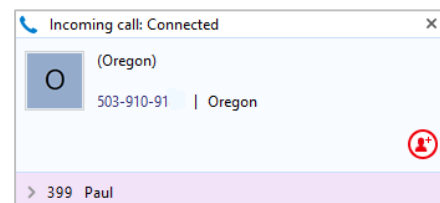
A pop-up window can appear following a missed incoming call, providing a quick call-back method to avoid missing opportunities. The notification will stay visible until an action is taken.



### Add Contact

When a telephone number is presented in the Preview Window or Call History and a contact cannot be found, the **Add Contact** icon is presented: 

Click the icon to add contact information and then save to the desired directory or integrated CRM business application. The Add Contact feature can also be used to copy the contact to other locations.

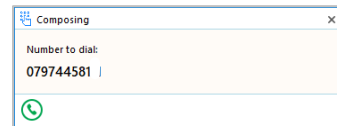


## Dialing Options

CRM Connector offers a wide range of Click-to-Dial features to accelerate the outbound calling process, both in locating the number to dial and in the actual dialing process itself. The most common dialing tools are described here:

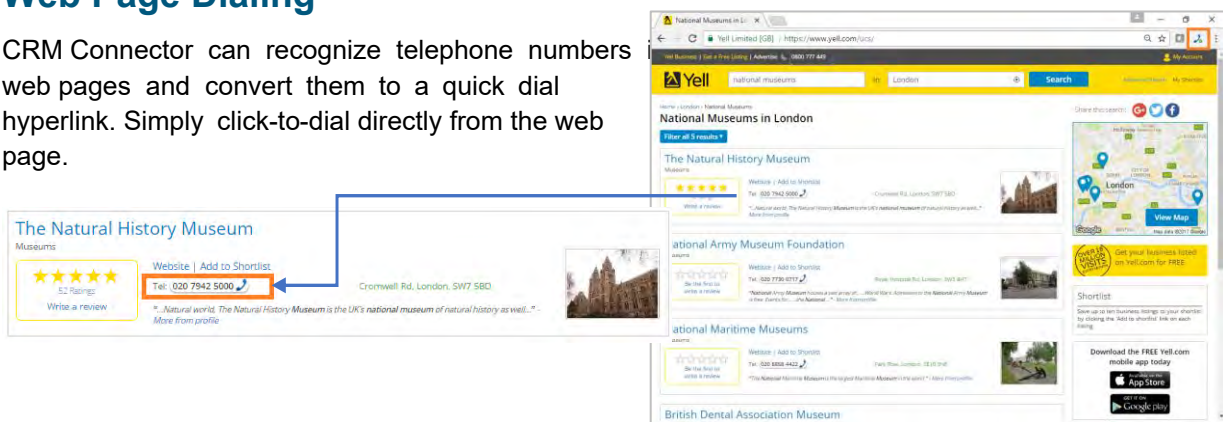
### Clipboard Dialing

Any telephone number copied into the Windows clipboard can be dialed via an automatic pop window, offering the option to dial the number. Just click the Call icon to dial.



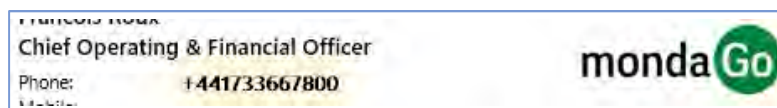
### Web Page Dialing

CRM Connector can recognize telephone numbers web pages and convert them to a quick dial hyperlink. Simply click-to-dial directly from the web page.



### Screen Read Dialing

With "Screen Read" dialing, you can click-to-dial any number on screen, even when presented as an image. Just hover the cursor over the number displayed and hold 'ctrl' and 'shift' simultaneously to turn the number into a quick dial link:



### Focus Dialing

With Focus dialing enabled, CRM Connector can automatically detect telephone number fields within other windows applications to present a click-to-dial icon to the right of the field. If the field contains more than one telephone number, a drop-down is displayed when you hover over the icon, allowing you to select which number to dial.

