MS Teams Admin

To Add the Integrator App to Teams for your Organization

This task requires Microsoft 365/Teams Administrator level access and uses PowerShell scripting to install the Integrator App within the Teams App Store the organization offers approved Apps to their users within Teams.

Once the Teams Admin completes the installation process, Go Integrator users who also use Teams can then find and install the Integrator app when they go to the Apps section in their Teams instance.

What does the PowerShell Script Do

The PowerShell scripts contains 3 commands, or cmdlet's, that do the following:

1. Connect-MicrosoftTeams
    This cmdlet will ask the Admin to sign into the Admin portal using their Microsoft Teams credentials via the standard Microsoft Teams login process. The credentials used must belong to someone who has administrator level access to the Microsoft Teams environment for the organization.

2. New-TeamsApp -DistributionMethod organization -Path C:\Temp\GoIntegratorSearchandCall-1.0.23.zip
    This cmdlet will install the Integrator app in the Teams App Store for the organization. Change the file location for the -Path parameter to be the path where you saved the zip file.

3. Disconnect-MicrosoftTeams
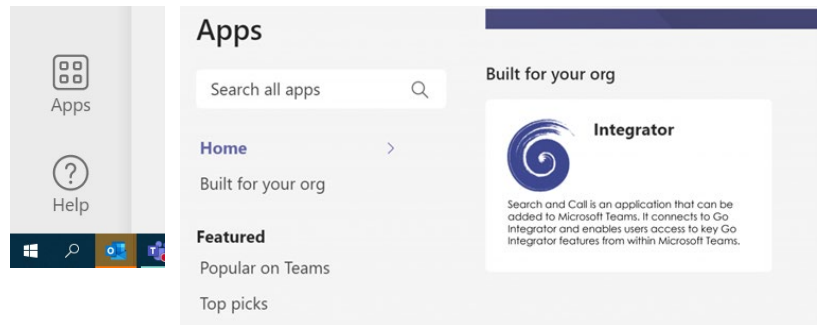   This cmdlet disconnects the user from the Microsoft Teams environment.

Use the PowerShell Script

1. Download the PowerShell script from here: **Download**

2. Download the **GoIntegratorSearchandCall** for Microsoft Teams zip file: **Download**

3. Save the provided zip file at a suitable file location that will be accessible from the PowerShell environment.

4. Save the provided PowerShell file at the same location. Ensure that the path has been changed to the correct path to the accompanying zip file.

5. Open Windows PowerShell in Administrator mode.

6. Change the File Location to the directory containing the PowerShell script and zip file.

7. Type in the first few letters of the script filename and press Tab. This should populate the full name of the script in PowerShell.

8. Press Return.

    The script will then run, presenting the user with a login screen for Microsoft Teams.

9. Enter the Admin credentials when prompted to log in.

10. Once logged in, the script will create and add the Integrator App in the tenant app store under a heading called **Built for your Org**.

MS Teams User

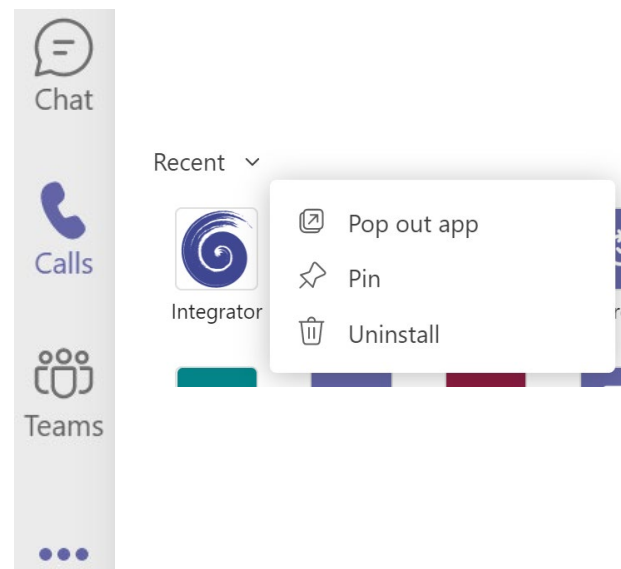### Teams User Integrator App Installation

1. Admins can instruct Teams users to click on **Apps** at the bottom of the Microsoft Teams Menu (on the left).
   Integrator for Microsoft Teams will be displayed under Built for your org - or the user may search for Integrator.

2. Click on **Integrator** to display a new screen.

3. Click on the **Add** option.
   Integrator for Microsoft Teams installs.

Pin to App Bar in Microsoft Teams

Integrator for Microsoft Teams may not immediately appear on the App Bar for the user.
Use the following steps to add it to the apps you want displayed in the Menu bar.

1. To pin the Integrator app, click on the ellipsis
   (3 dots ●●●) in the Teams Menu bar.

2. Right-Click on the **Integrator** listing under *Recent.*

3. Click on the **Pin** option.
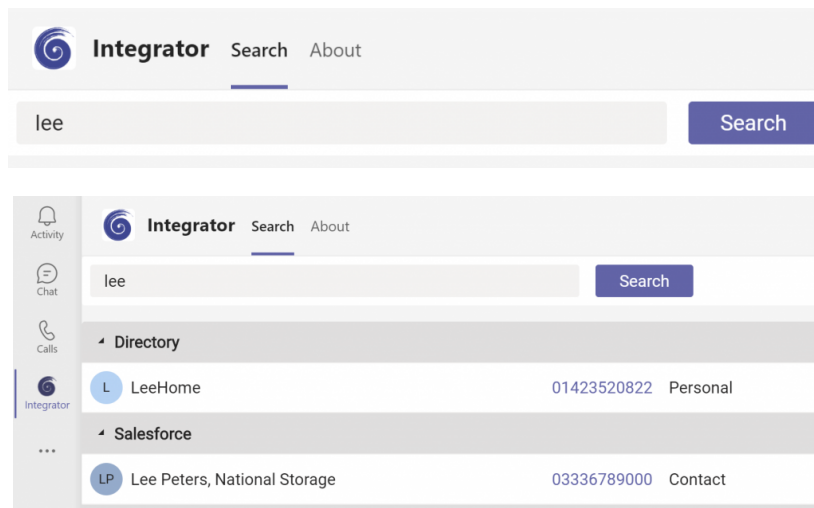
Uninstall the Integrator App from Microsoft Teams

A user can uninstall the Integrator app from their Microsoft Teams instance by right-clicking on the Integrator app and clicking on **Uninstall**.

Use the Integrator App

Note: The Go Integrator desktop client v4.6+ must be installed and running for this application to work.

Search for Contacts

While viewing the Integrator app dialog, the Teams user can use the **Search for Contacts** field to locate a contact in any connected CRM. This field will search the data for Contact name, Company name, or Telephone number
Click on the Search button to view results and select a contact.

Make a Call

To make a call from the Integrator App in Teams, click on the phone number link within the search results.
This initiates a call within the CRM Connector/Go Integrator application, using whichever device is selected as the preferred device. Subsequent Call control tasks will be carried out within the CRM Connector/Go Integrator application.