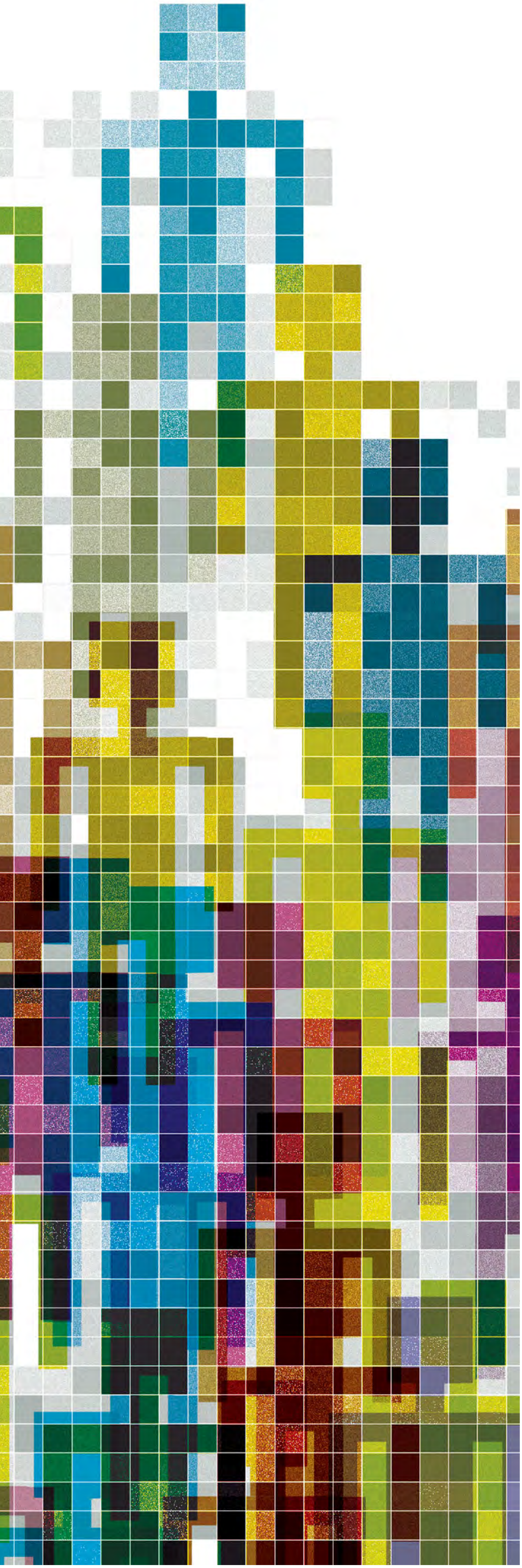


CRM Connector

System Tray Mode

Quick Reference Guide

Go Integrator
Powered by MondaGo

MOMENTUM

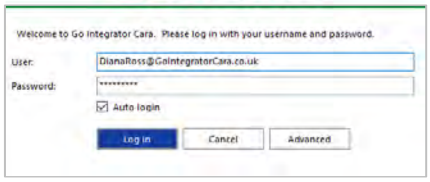
v4.x | UC23Q4

Introduction

This quick start guide contains useful information to help you begin working with CRM Connector. This guide explains the Tray Mode – for AppBar mode, please refer to the separate AppBar Mode guide.

Login

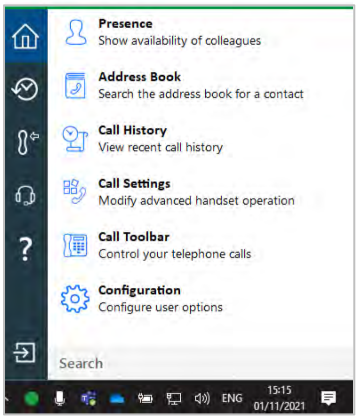
Following installation, CRM Connector will request an "Access Code" which is provided by your service provider. The Access Code is used to set default parameters specific to the telephony platform and only needs to be entered once. The App can either prompt for User credentials each time the client is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



Interfaces

CRM Connector has four user interfaces: System Tray Menu, AppBar, 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.

System Tray Menu

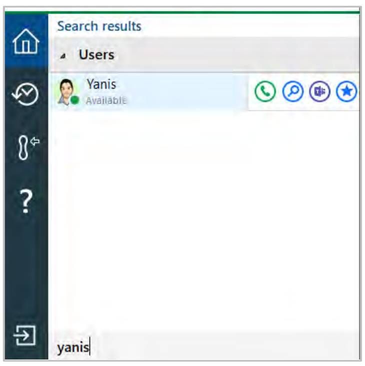


In System Tray mode, the Menu is accessed by a right-click on the CRM Connector system tray circle icon, usually green for "Available" status. The icon changes according to your extension state or Microsoft Teams Availability.

The following functions are launched from the Tray menu: Presence, Address book, Call History, Call Settings, Call Toolbar, Search/ Dial, Recent Calls, Preferred Device, Availability, Call Center (if enabled in user profile) Configuration, Help and Exit.

Quick Dial / Search

One of the most powerful features is the combined search and dial entry field at the bottom of the Tray Menu following a right-click of the system tray icon.



To make a call, simply type the number to dial and hit **Enter**.

Alternatively, type a contact name (either full or partial) to initiate a search of any system directories or integrated CRM business applications.

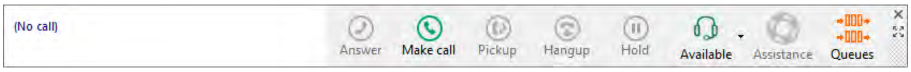
The search results are displayed directly within the Tray menu window – simply click the number to dial, or open the contact using the slide out menu.

Extension status / MS Teams Availability is also displayed for co-workers. For additional dialing methods, refer to the Dialing Options section below.

Call Toolbar

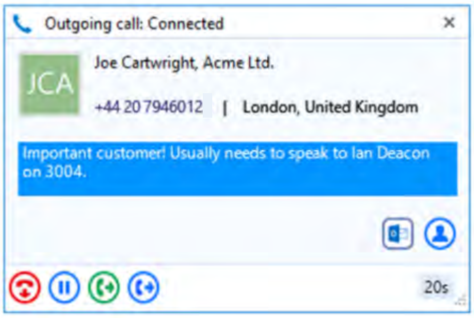
Launch icon:

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, and Call Center Agent features.



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 configuratble delay period once the call



has connected. 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 Controls

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

	Answer	When a call is ringing, you can choose to answer the call by clicking the "Answer" button
	Deflect	When a call rings, you can choose to to Deflect it (transfer it without answering it) to another extension
	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 caller to a shared address book or integrated CRM application/s
	Open/Pop Contact	Open full contact details within an integrated CRM application. The icon shown will relate to the CRM application (e.g. Outlook, Salesforce).
	Create and Show Call Task	Creates / opens a call activity (call log) in an integrated CRM 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
Deskphone (Primary)	✓	✓	✓	✓	✓
Softphone	✓	✓	✓	✓	✓
Webex4BW	✗	✓	✓	✓	✓
Microsoft Teams	✗	✗	✗	✓	✓

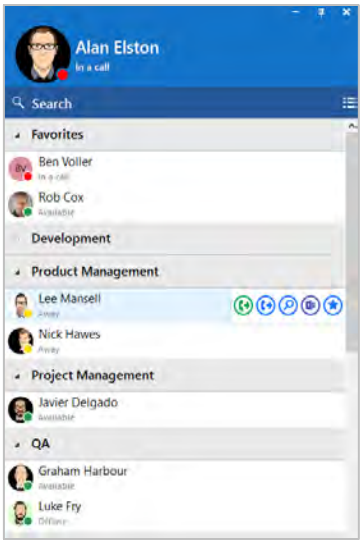
Presence

The Presence window displays co-worker's live extension status which is blended with Microsoft Teams Availability, if enabled.

Launch icon:

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.

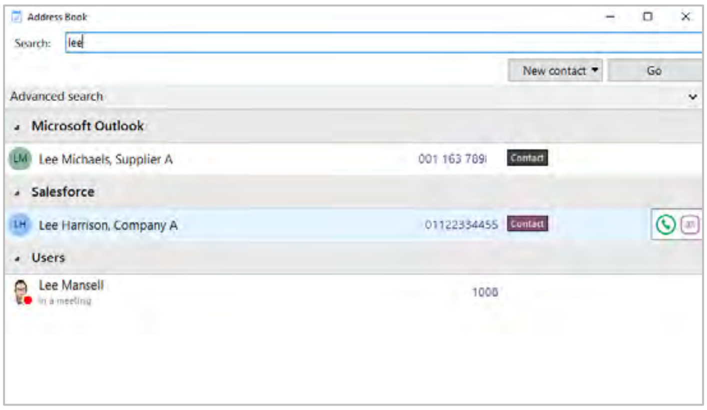
A personalized Favorites group can be created by searching for a co-worker and selecting the star symbol in the slide out menu that appears when hovering over the contact.

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.



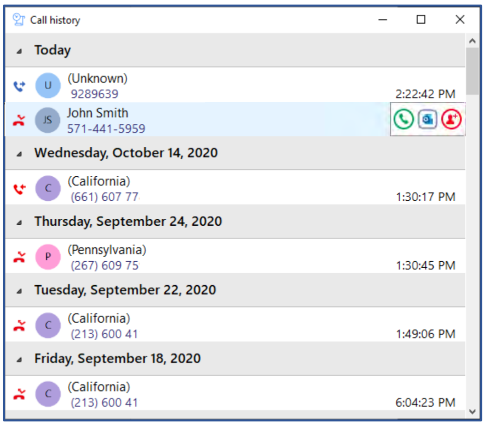
To dial the required contact, simply click on the telephone number displayed to initiate the call, or use the **Call** button from the slide out menu.

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 address book.

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).

Call History

Launch icon: The Call History window displays a detailed call history including recent inbound, outbound and importantly, missed calls, ensuring a clear notification to avoid missing opportunities. Simply click the telephone number displayed to initiate the call.

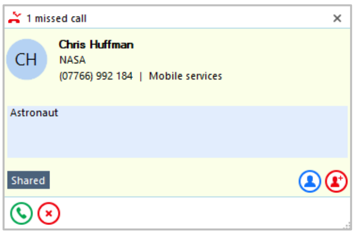


For known contacts, the contact details can be opened via the slide out menu when hovering over the contact name. Just click the icon to open the contact page within the integrated CRM business application (example shown for MS Outlook).

Additional Features

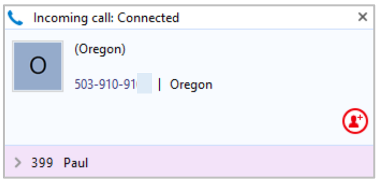
Missed Call Notification

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

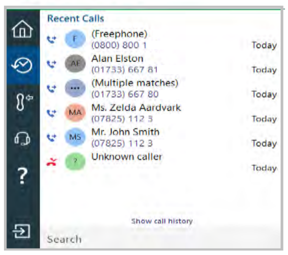
When a telephone number is presented in the Preview Window, Call History or Recent Calls list and a contact cannot be found, the **Add Contact** icon is presented:
Click the icon to add contact information and then save to the desired directory or integrated CRM business application. The Add Contact feature can also be used to copy the contact to other locations.



Recent Calls

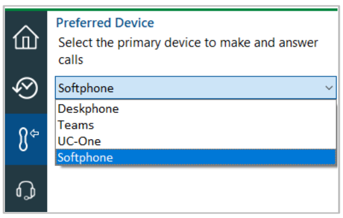
The Recent Calls list displays a summary of the most recent calls, showing just a single entry for each contact or number listed.

Simply click the number to make the call, or open the contact using the slide out menu.



Preferred Device

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.



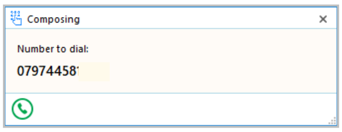
Note: the ability to answer a call through GoIntegrator is dependent on the device type selected – for example MS Teams calls cannot be answered by GoIntegrator.

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:

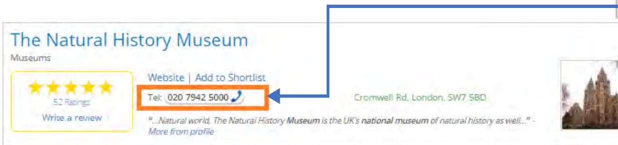
Clipboard Dialing

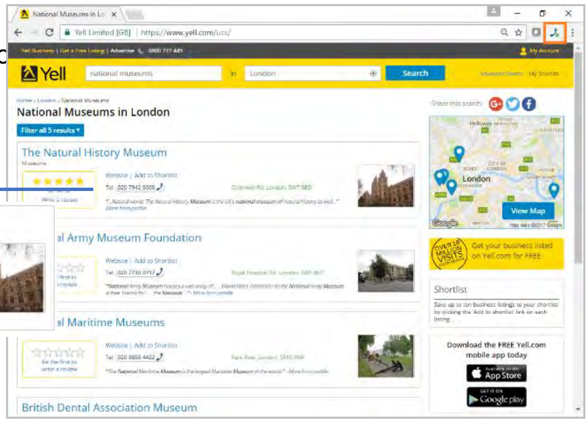
Any telephone number copied into the Windows clipboard can be dialed via an automatic pop window, offering the option to dial the number. Just click the Call icon to dial.



Web Page Dialing

CRM Connector can recognize telephone numbers on 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.