

Go Integrator CRM Connector **for MAC** *User Guide*

Go Integrator
Powered by MondaGo



MOMENTUM

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Installation

Introduction

The Go Integrator Mac software is supplied as an Internet download. It is a self-contained installer that contains the files needed to install a copy of Go Integrator for Mac.

Before You Start

Before you commence installation and setup, please check you have the following:

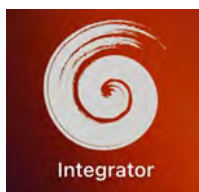
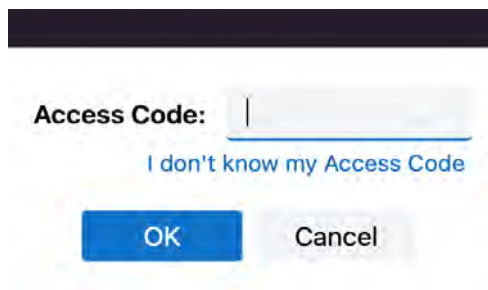
A suitable computer for installation of the client software that meets the minimum requirements:

- **Supported Operating Systems:** macOS Version 12: Monterey
 - **Minimum Hardware Requirements:** Mac with Intel Processor or Apple Silicon M Chip
- | | | |
|---|------------|---------------------------|
| SVGA Display | 2GB Memory | 1GB free Hard Drive space |
| Network Adapter connected to a TCP/IP Network | | Keyboard and Mouse |

Access Code

A license and a valid Access Code with user login credentials for Go Integrator CRM Connector for Mac must be supplied by your Service Provider.

After completing the software installation process and depending upon the software configuration, Go Integrator CRM Connector for Mac may present the Access Code input window on first launch. 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 for Mac client and may have been entered during installation, in which case this window will not appear, and user Login will display.



A shortcut is also placed in Launchpad.

Welcome and Login

At the User login window, enter a valid username and password, as supplied by your service provider, and click the "Log in" button:

Selecting "Auto login" will skip the user login page on subsequent start-up of the Go Integrator CRM Connector software client.

Select "Advanced" for more connection options.

Advanced Options

Access Code Reset

To modify the Access Code, click the refresh icon and enter the new Access Code.

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

Options

Select "Use proxy" and "Ignore invalid certificates" only if required and instructed to by your service provider:

Tray Menu

When Go Integrator CRM Connector for Mac is running, a colored circle icon will be displayed in the Menu Bar.

The icon color represents the current user status: e.g., green for ready or available status.

To open the client and access tools and settings, click on the Go Integrator icon within the Menu Bar.

Icon Definitions:



Home: Return to main Tray mode menu



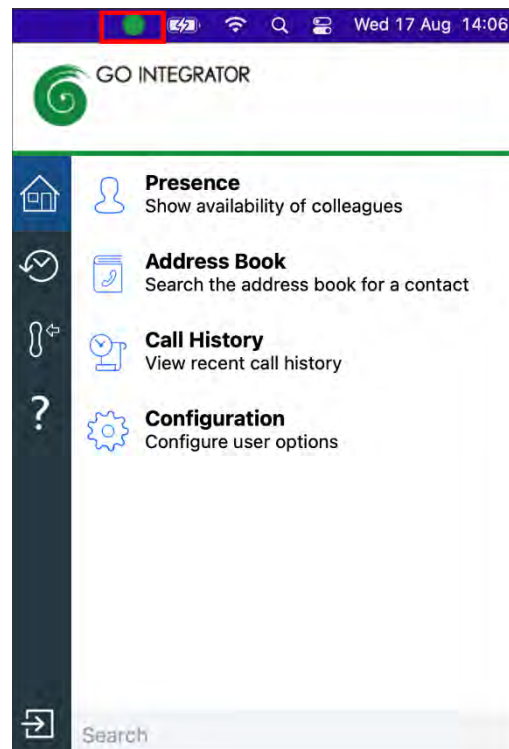
Recent calls: Summarized call history



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



Help: Search and open relevant topics in online help



Icon Status Indicator

The Go Integrator icon color displayed represents the status of your user extension combined with your Microsoft Teams availability, if Microsoft Teams integration is enabled and active:



Green: User is ready/available



Red: User is busy (flashing indicates ringing)



Amber: User is away (flashing indicates current call on hold)



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 offers call control and additional actions such as open contact data or write to activity log, depending on user, device, and integration configuration:

The Preview window is hidden after 10 seconds by default (this can be changed in Configuration > Interface). Hover the mouse over the Go Integrator 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. Drag the Preview window by the header and drop into the desired quadrant:



*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	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/Resume	Pause/Resume 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
	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
	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) and also the type of entry: Contact, Account or Lead.
		
		
	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)
		

NOTE: The hold button is **not** utilized for transferring calls.

Answer and Deflect

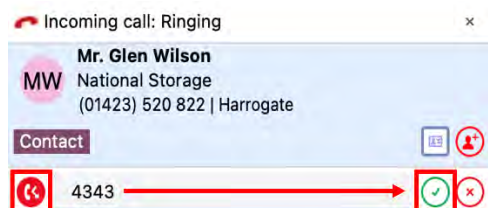
An incoming call can be answered or deflected, depending on the device type in use.




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 number entry box appears.




Enter the extension or external telephone number to deflect the call to and then click: 

To deflect the call or to cancel the deflection click: 


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 telephone system).


Click the "Play" button to retrieve the held call: 

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

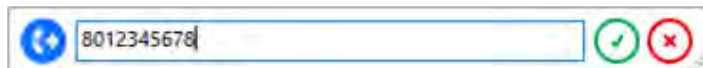
Transfer

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:



A screenshot of a dial entry box containing the number 8012345678. To the left of the box is a blue circular icon with a white telephone handset. To the right of the box are two circular icons: a green one with a white checkmark and a red one with a white 'X'.

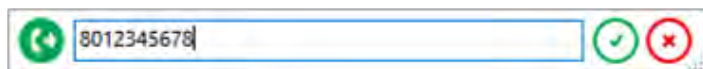
Click the "confirm" button to transfer the call to the target recipient: 

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:



A screenshot of a dial entry box containing the number 8012345678. To the left of the box is a green circular icon with a white telephone handset. To the right of the box are two circular icons: a green one with a white checkmark and a red one with a white 'X'.


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 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).



A screenshot of a call preview window. At the top, there are two tabs: "Outgoing call: HeldXfer" and "Outgoing call: Dialling". The "Dialling" tab is active. Below the tabs, the contact information for "Mr. Glen Wilson" is displayed, including a pink circular icon with "MW", the name "Mr. Glen Wilson", and the address "National Storage (01423) 520 822 | Harrogate". Below the contact information is a "Contact" button. At the bottom of the window, there are two circular icons: a green one with a white checkmark and a red one with a white 'X'. To the right of these icons, the text "Yealink-T40P 6s" is displayed.

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

The Preview window appears for both inbound and outbound calls.

Initially the call status will be "Dialing".

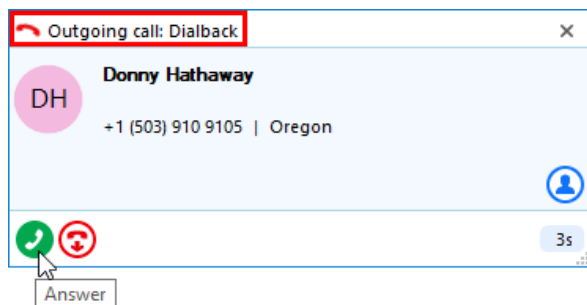


The other information and icons displayed will depend on whether the telephone number is already found within any address books or integrated CRM applications and which device is used to make the outgoing call.

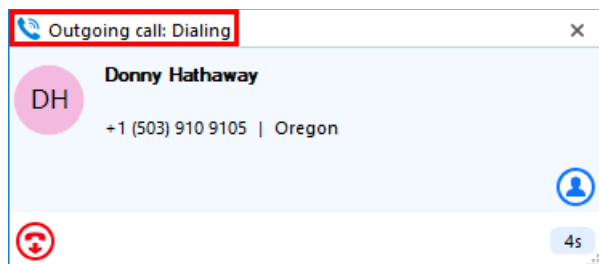
Once answered and "Connected", the Preview window will offer call handling buttons, dependent on the device used to make the outgoing call.



With some device types, the outgoing call may need an initial "Dialback" to be answered first before the external call is attempted:



Click "Answer" from the "Dialback" prompt to allow the outgoing call to the external party:



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.



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.

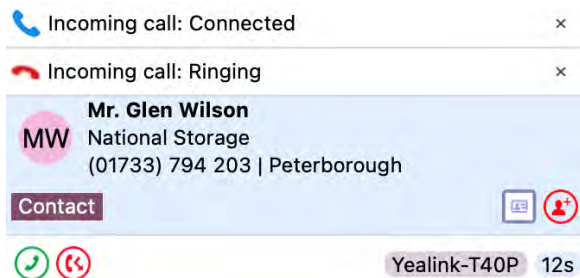
Entry not found in any address book

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:



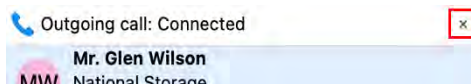
Clicking on the window header will bring an inactive Preview window to the front and into view:

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

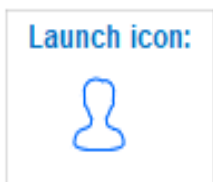
Close Window

Select "x" to close the Preview window:

NOTE: Closing the Preview window does not end the call

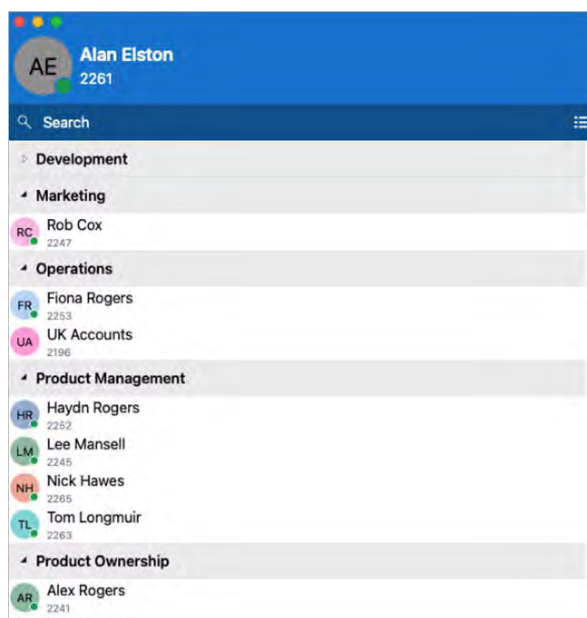


Presence

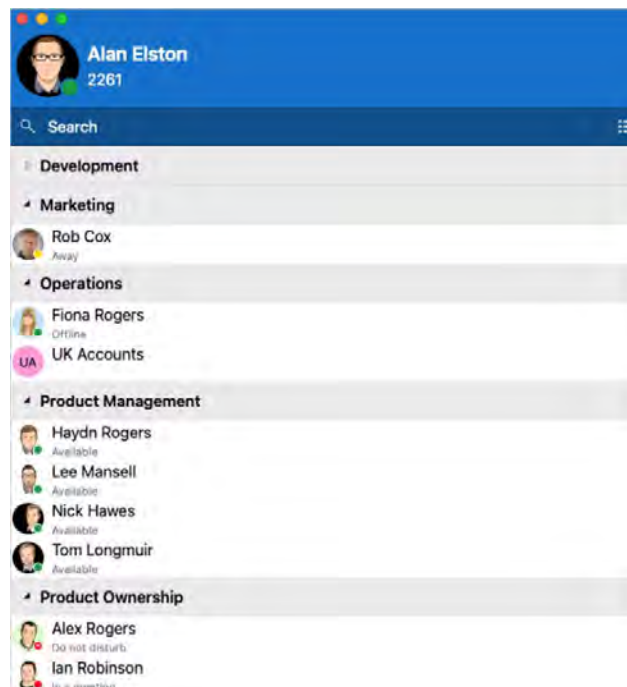


The Presence window provides a quick way to check the availability of your co-workers via their Telephone system extension status (BLF-Busy Lamp Field). Or, if enabled, via a blended combination of Telephone system extension status and Microsoft Teams Availability status.

Presence with Telephone system BLF

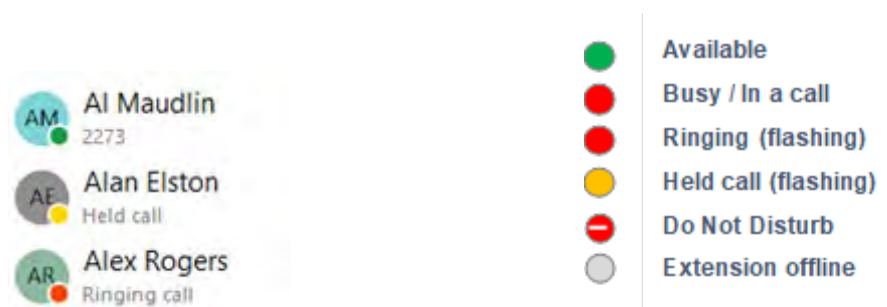


Presence with Teams Availability



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 for Mac **TEAM** and **UNITE** users, co-worker availability is displayed as a combination of Telephone system extension status and Microsoft Teams user Availability status, indicated by a mixture of icon color and status text:

NOTE: An active call via the Telephone system extension will take precedence over Teams Availability status.



*"Out of Office" state is a beta Microsoft Graph API feature and will only be available if enabled in your access code.

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 will display items 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:

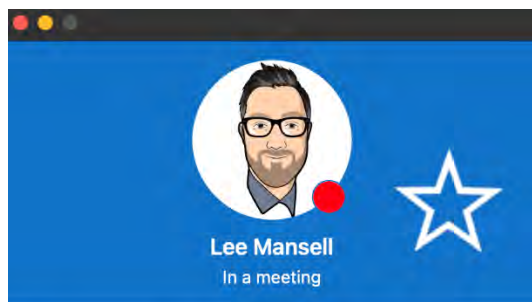


Slide Out Menu








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



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



Name	Lee Mansell
Phone	2245 
Ddi	+441733667812 
Department	Product Management
Email	lee.mansell@mondago.com 
IM Address	lee.mansell@mondago.com

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

Address Book Search

Launch icon:

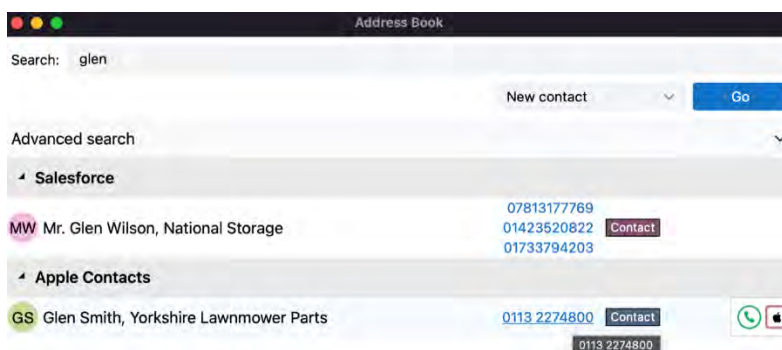


The Address Book window opens as a separate search window.

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

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).



Show Contact



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

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

Directory: Personal

Name: Glen Wilson

Company: National Storage

Telephone: 01423 520822

Buttons: Delete, Save, Cancel

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.

If the contact is found in Cloud Contacts, a Go Integrator window is displayed with action buttons and the option to Edit/Save or Delete is also presented.

Cloud Contacts: Personal

JS

Name: John Smith

Company: Best Supplier

Contact type:

Phone 1: +441122334455

Phone 2:

Phone 3:

Email: john@bestsupplier.org

Address: 1 Business Park

Town: York

Postal code: YO11AA

Country: UK

Website: www.bestsupplier.org

Notes: best supplier!

Buttons: Delete, Save, Cancel

Dial the selected telephone number:

Open default email client to send email:

Open default web browser to visit web page:

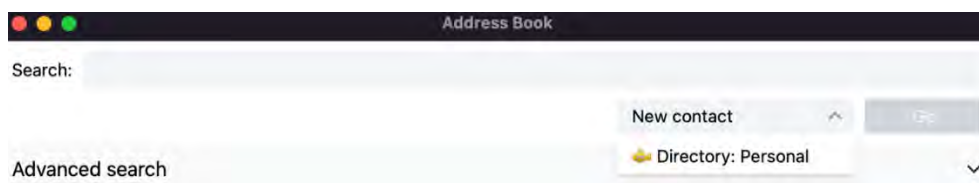
Advanced Search

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:

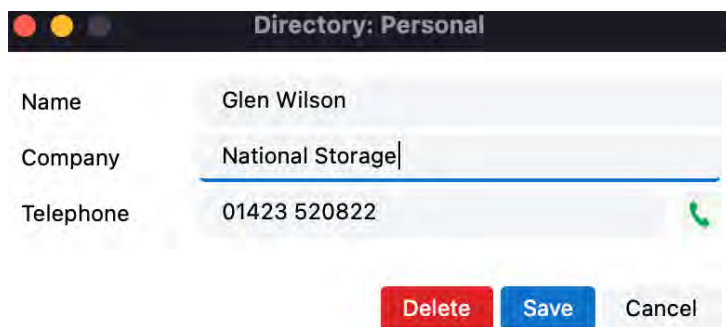


New Contact

Select "New contact" to add a new entry to the Personal Phone List (PPL) or Cloud Contacts depending on which directory is selected:



Fill in the contact details and select "Save":



Quick Dial / Search

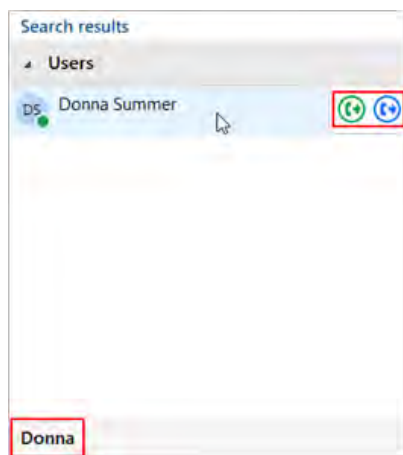
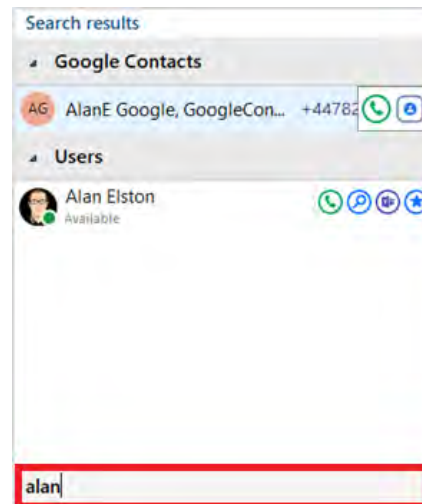
In any menu window (other than Help) the "Search" bar can be used to look for a contact name within any integrated address book.

Type any quantity of characters to look for a contact name: either first, middle or last name can be searched.

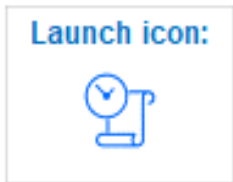
Any matching contact will be displayed – simply click the number to dial, or hover over the contact and use the slide out toolbar to open the contact within the integrated CRM application.

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 Search and Dial tool can be used to transfer the call to a contact:



Call History



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)

Today		
	C (California) 858-415-959	12:24:09
	JS John Smith 571-441-5959	
	JS John Smith 571-441-5959	12:23:08
	JS John Smith 571-441-5959	12:22:18
Yesterday		
	JS John Smith 571-441-5959	15:59:56
	JS John Smith 571-441-5959	15:59:38
	JS John Smith 571-441-5959	14:55:05
	JS John Smith 571-441-5959	14:50:14

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



Consult Transfer



Blind Transfer



Show Contact (icon reflects CRM source)



Add call activity (if available)



Add Contact (if available)

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:

Phone number: 01733794203

Type: Directory: Personal

Name: Directory: Personal

Company: Salesforce: Account

Number type: Telephone

E-mail:

Notes:

Buttons: Save, Save and Edit, Cancel

Entry found in all address books except PPL:

Phone number: 01733794203

Type: Directory: Personal

Name: Directory: Personal

Company:

Number type: Telephone

E-mail: example@email.com

Notes:

Buttons: Save, Save and Edit, Cancel

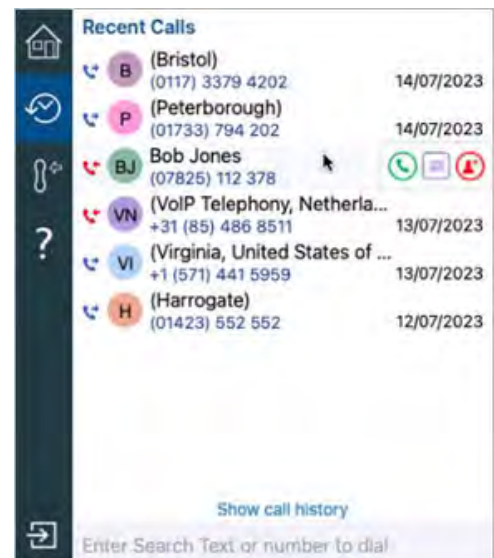
Select which integrated address book "Type" to add the contact into and either "Save" or "Save and Edit" to also open the contact within the selected address book. The stored details are then used to add to the next selected address book "Type" to quickly duplicate the contact record into multiple locations.

Recent Calls



The Recent Calls list displays a summarized list of recent calls, reduced to show only one entry per contact, regardless of how many calls were made to or received from the contact.

Click the displayed number to dial, or hover over the contact and use the slide out toolbar to open the contact within the integrated CRM or to add the number to a directory or integrated CRM contact list.



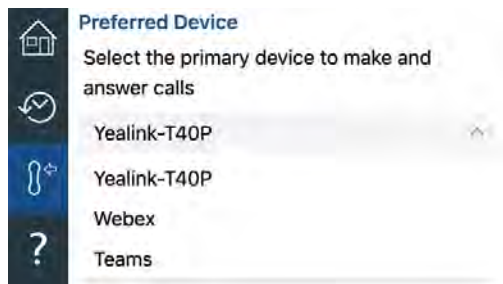
Preferred Device

Launch icon:



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.

The Preferred Device icon offers a drop-down menu selection from the devices available.



Help

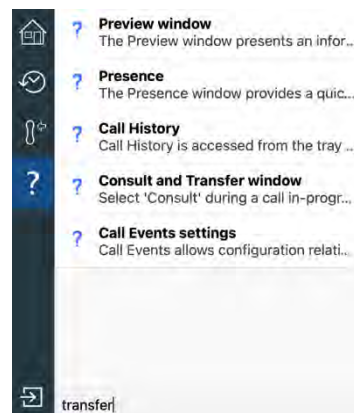
Launch icon:



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:

- Address Book**
The Address book window is accesse...
- Contact Record**
The Contact Record window contains ...
- Call History**
Call History is accessed from the tray ...
- Consult and Transfer window**
Select 'Consult' during a call in-progr...

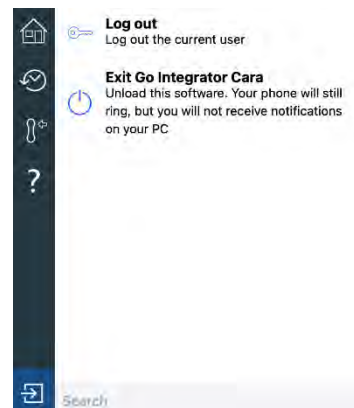


Exit / Session

Launch icon:



Use the Exit / Session button to log out completely OR - Exit and close Go Integrator.



Microsoft Teams Integration

The integration features available with Microsoft Teams include:

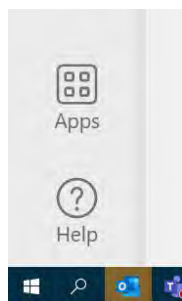
- Search and Call Teams Adaptor
- Show, Add, Pop CRM contact for incoming call
- Teams as preferred dialing device
- Open Microsoft Teams chat from Presence window
- Show Teams avatar image in Presence window
- Show co-worker Teams Availability status in Presence window
- Publish "In a call" state to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

Integrator Search and Call (Teams Adaptor app)

The Integrator Search and Call app for Microsoft Teams can be installed and used by any Go Integrator CRM Connector for Mac user. Once installed, the Integrator Search and Call app will offer the Go Integrator CRM Connector for Mac Address Book search functionality from within Teams and will allow users to click to dial from within Teams.

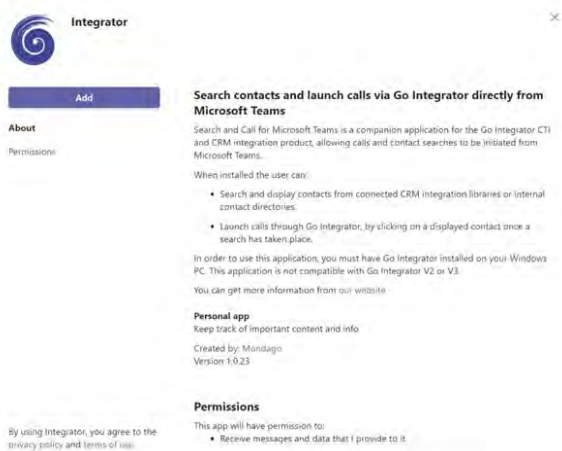
NOTE: The Go Integrator CRM Connector for Mac software must be installed on the Mac, active, and connected to use the Teams Integrator Search and Call app features and functionality.

Teams User App Install: Integrator Search and Call



NOTE: Your organization's Teams Admin must install this App in your Teams Instance in order for you to install it. Contact your organization's Microsoft 365/Teams Administrator with questions or for assistance.

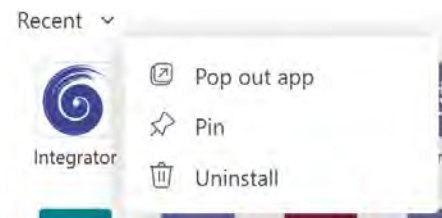
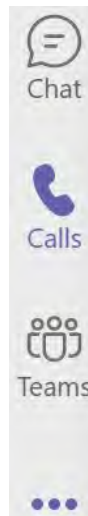
1. Download the Integrator Search and Call for Microsoft Teams file and store it locally
2. Click on "Apps" at the bottom of the Microsoft Teams Menu.
3. Click "Manage your apps" at the bottom.
4. Click "Upload a custom app", and then "Upload and Custom app". This displays a file menu where you can select Integrator Search and Call for Microsoft Teams from the location it was saved in and click Open.
5. A new search will appear, click add.



Pinning to App Bar in Microsoft Teams

Search and Call for Microsoft Teams may not immediately appear on the App Bar

1. To pin the app, click on the 3 dots which will bring up a sub menu
2. Right Click on Integrator Search and Call, and click "Pin"



Uninstall from Microsoft Teams

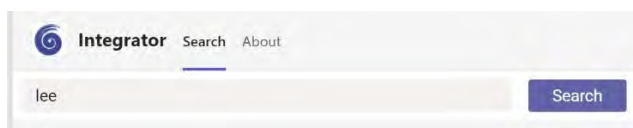
To uninstall Integrator Search and Call for Microsoft Teams, right click on the Integrator pin and click **uninstall**.

Use Integrator Search and Call in Microsoft Teams

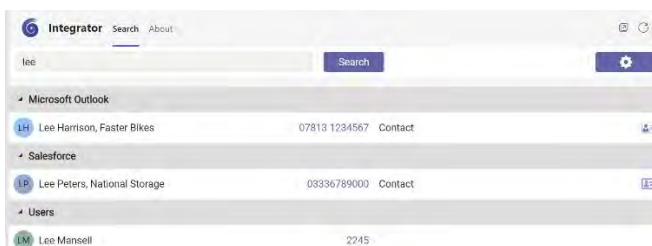
Go Integrator client should be installed and running for Integrator Search and Call for Microsoft Teams to work.

Search for Contacts

- To access Integrator Search and Call for Microsoft Teams, click on the Pin labeled 'Integrator' on the App Bar.

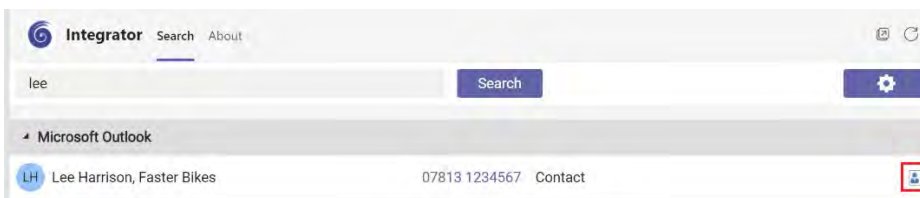


- A user can search for a contact using a contact name, company name or telephone number. This is done by typing one of these either fully or partially in the search for contacts field and pressing search.
- Results will be displayed from any connected CRM and internal directories.



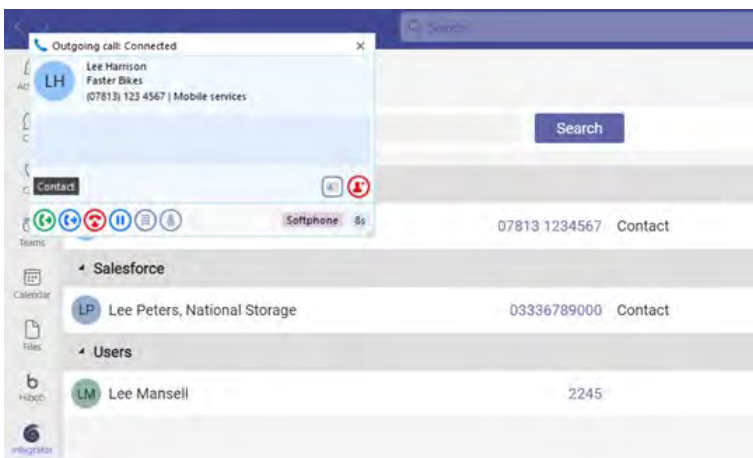
Display Contact

- By clicking on the icon to the right of the displayed contact name, a user can pop the contact record from their CRM.



Make a Call

- To make a call, click on the phone number from the search results. This will initiate a call within Go Integrator, using whichever device is selected as the preferred device. Subsequent call control will be carried out using Go Integrator.



Access Go Integrator Settings

Clicking on the settings icon on the top right of the Teams display, will display the settings page from Go Integrator.

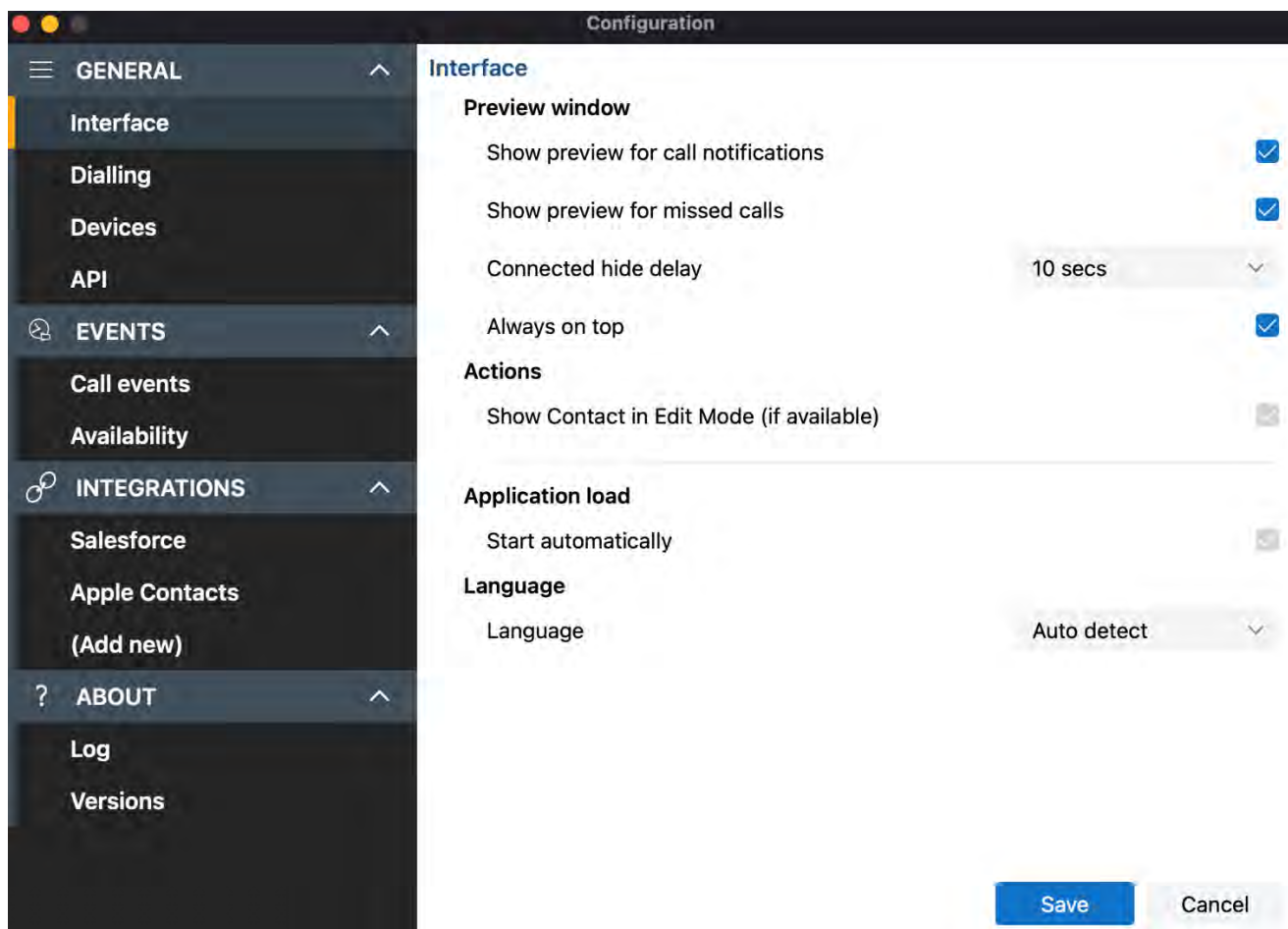


Configuration



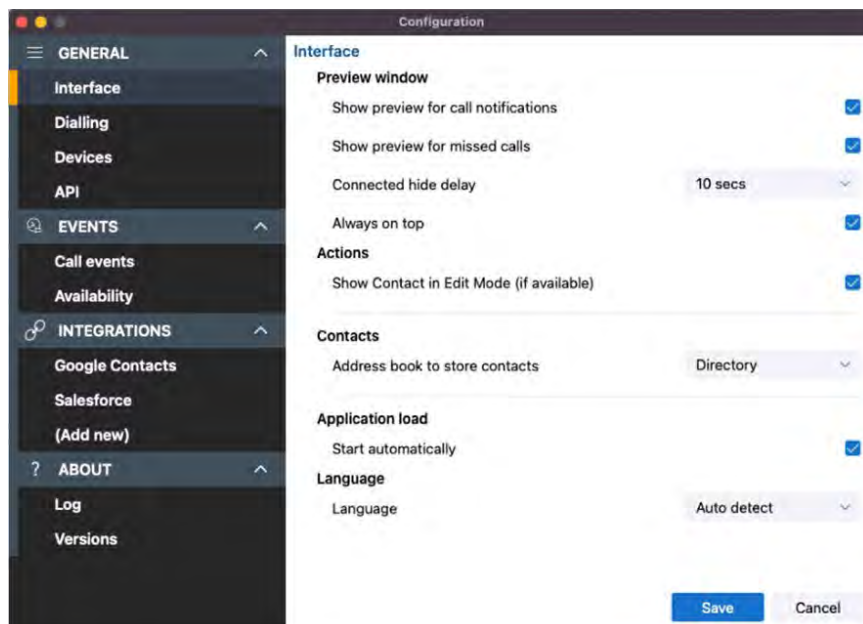
User defined settings are available within "Configuration" and are grouped into relevant areas: General, Events and Integrations with support information available via the "About" section.

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.



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 Menu Bar 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.

Contacts

Select the general address book type to use:

Directory: Standard address book for shared and personal contacts

Cloud Contacts: Web based address book for shared and personal contacts.

Actions

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

Actions

Show Contact in Edit Mode (if available)



Application Load

Enable automatic start up:

Application load

Start automatically



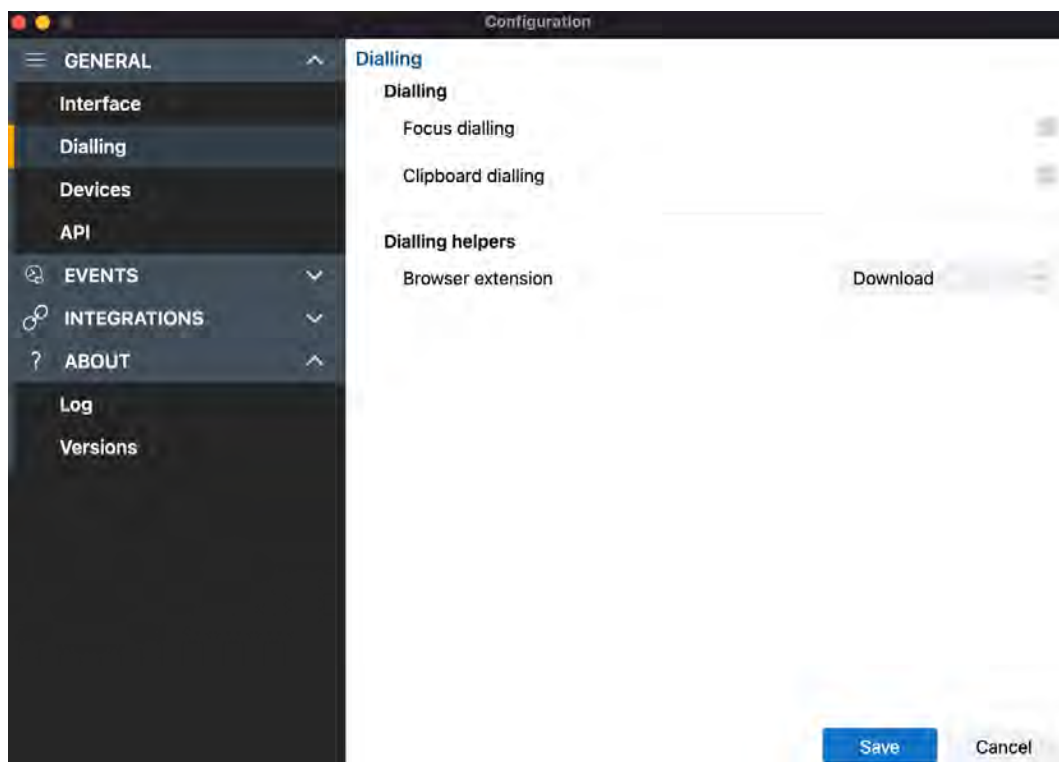
Localization

Set language and formatting options to the appropriate locale:

NOTE: By default, the software automatically selects the localization of the Mac.

Configuration > Dialing

Manage outbound calling methods:



Dialing

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

Dialing

Dialing

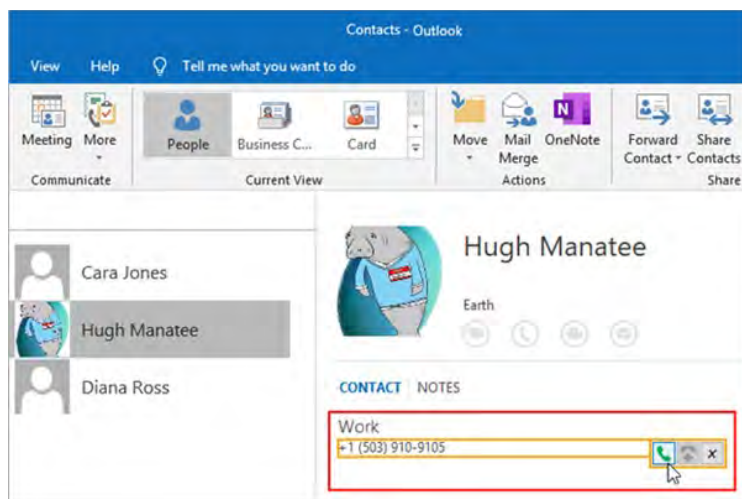
Focus dialing

Clipboard dialing

NOTE: Different dialing methods are offered so that dialing is possible across a variety of application types. Not all applications will support all dialing types.

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: 

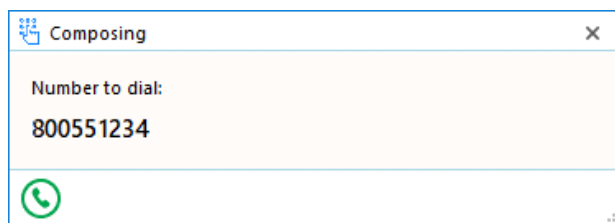
NOTE: The field must first be selected or in "focus" for the dial icon to appear and the telephone number must be in a valid format

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.

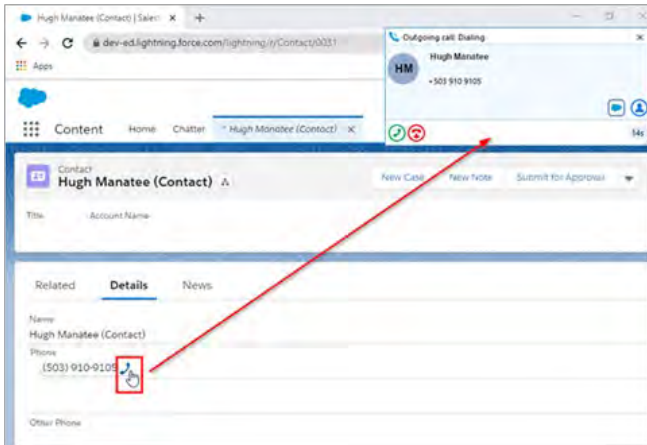


Click the call button to initiate the outgoing call: 

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

Browser Extension

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



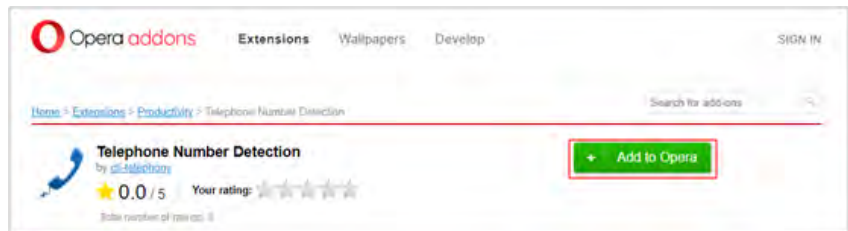
Select a web browser extension to install from the drop-down list:



Opera

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

Select "Add to Opera":

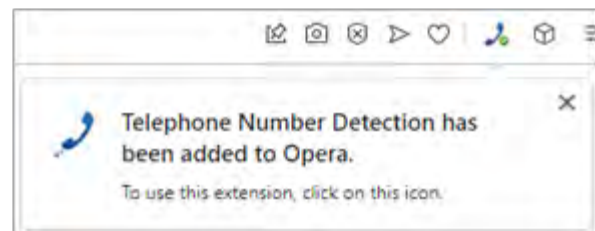


A confirmation will appear:

The extension is enabled by default (green):



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



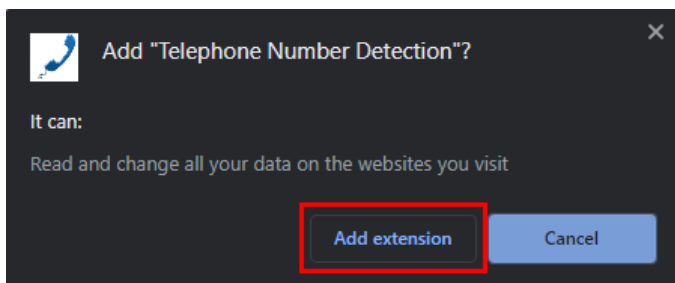
Chrome

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

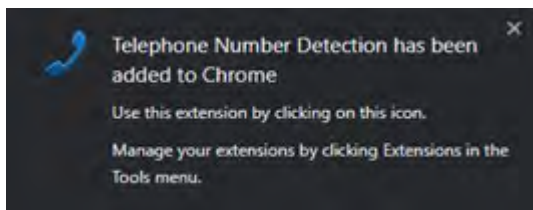
Select "Add to Chrome":



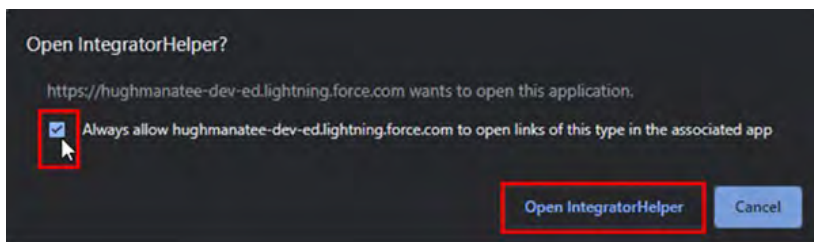
Select "Add extension":



A confirmation will appear:



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



The extension is enabled by default (green):



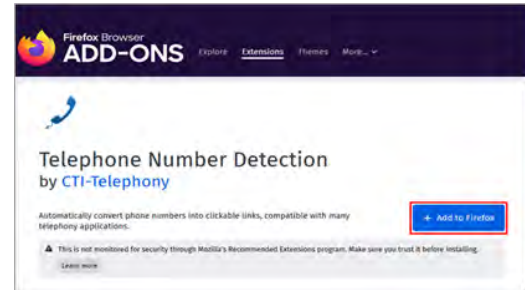
The extension can be disabled by selecting it (red):



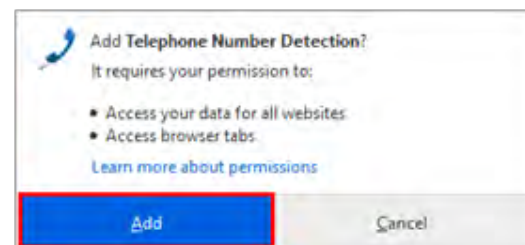
Firefox

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

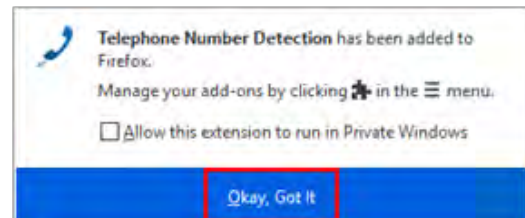
Select "Add to Firefox":



Select "Add":



Select "Okay, Got It" to confirm:



The extension is enabled by default (green):

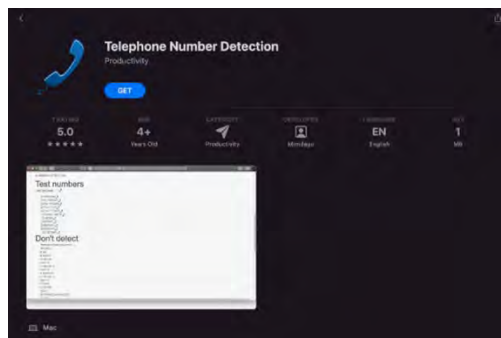


The extension can be disabled by selecting it (red):

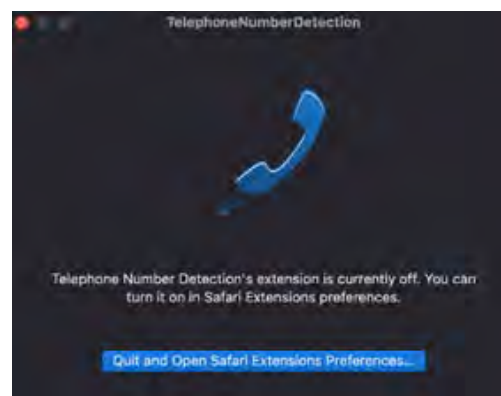


Safari

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




The webpage will direct you to the AppStore. Click "Get"




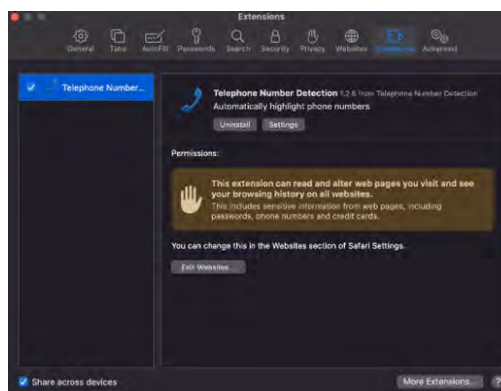
Once installed, click Open and this screen will appear.

If Telephone Number Detection is off, click on the clue box which will take you to the following screen:

Click the tick box next to telephone number detection to enable.

The extension is enabled by default (green): 

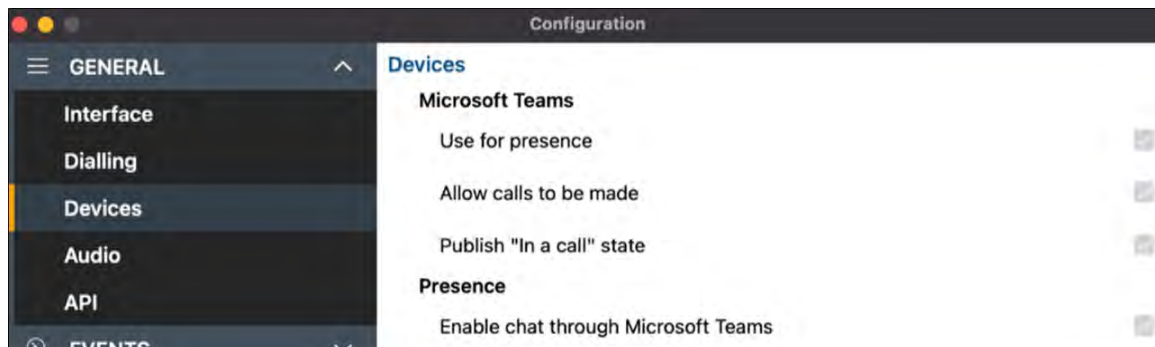
The extension can be disabled by selecting it (red): 



Configuration > Devices

A Microsoft 365 Administrator can enable the permissions for Microsoft Teams integration features.

Manage Microsoft Teams integration and telephony device endpoints:



Microsoft Teams

Enable Microsoft Teams integration features:



Teams Availability in Presence

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



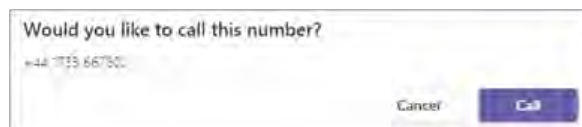
This refers to the Microsoft Outlook Calendar based "Out of Office" status only. All other Teams availability states are released.

Allow Calls to be Made

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



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



Publish "In a call" state to Teams

This function enables Go Integrator CRM Connector for Mac to change the Teams availability status to "In a call" when the user is on an active telephone call through the Telephone system.



NOTE: User presence changes in Microsoft Teams client can sometimes take a few minutes to update since the Teams client uses poll mode to refresh the Availability status from other sources.

Presence

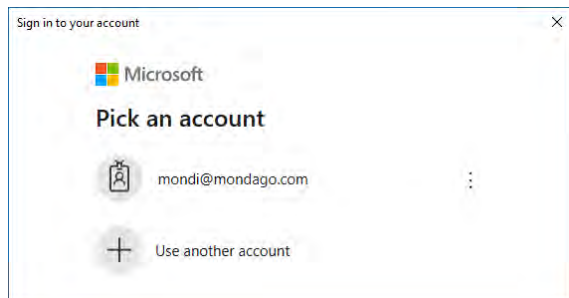
Enable Chat through Teams

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

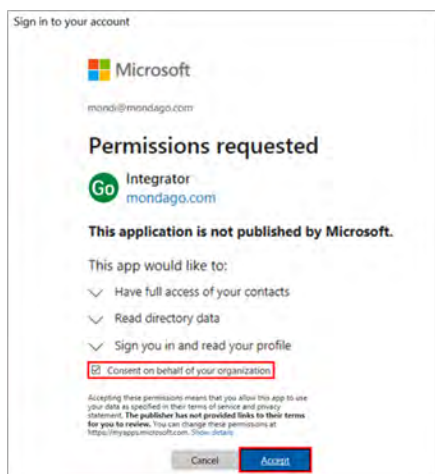


NOTE: To enable the Teams integration features, the following setup must be performed by the Global Administrator. Business or school user accounts are required-personal accounts are not supported.

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.

Device Endpoints

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

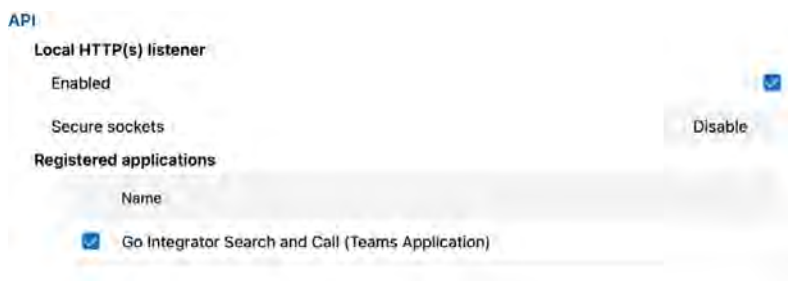
Device endpoints

	Name	Identity	Type
<input checked="" type="checkbox"/>	Webex	SharedCallAppearance:LeeMa...	Webex
<input checked="" type="checkbox"/>	Yealink-T40P	Primary	Deskphone
<input checked="" type="checkbox"/>	Teams	Teams	Teams

Configuration > API

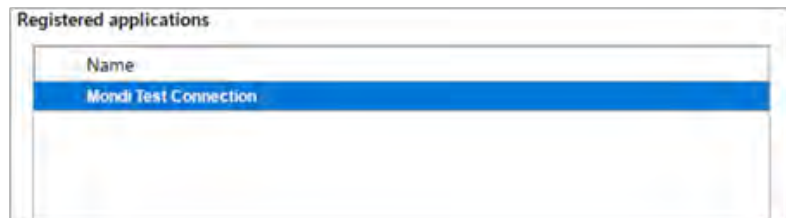
Access to Go Integrator clients API is only available with the UNITE user license level.

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



Toggle "Secure sockets" as enable or disable.

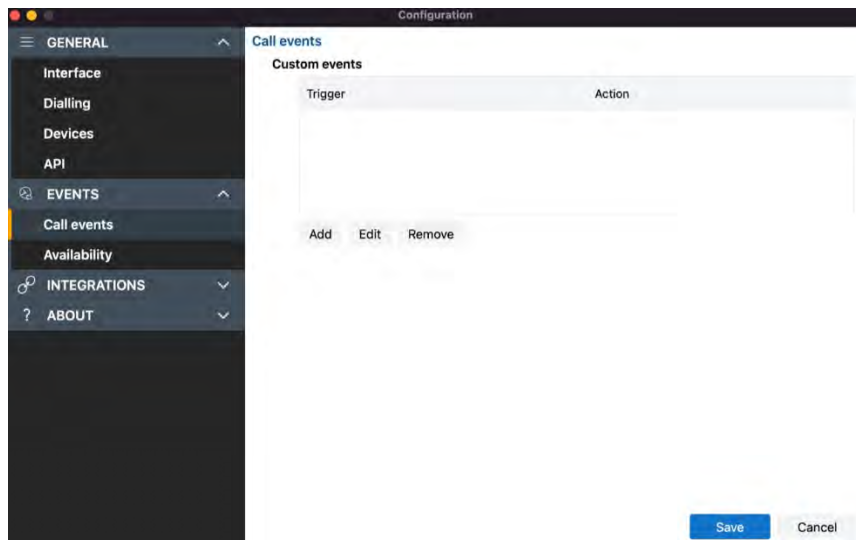
Registered applications appear below:



Configuration > Call Events

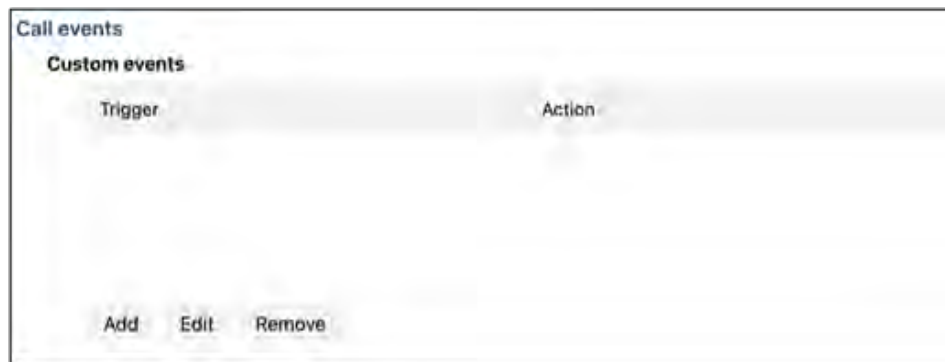
Custom Events are only available at Go Integrator TEAM and UNITE license levels.

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 for Mac user's extension.



Custom Events

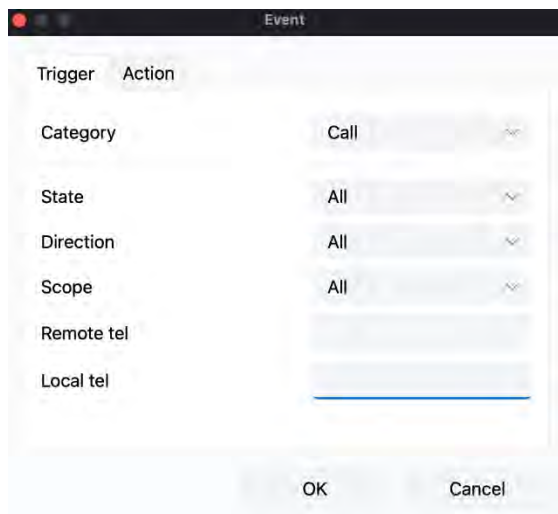
Customer Events offers more detailed configuration of actions to apply when a call or device changes state.



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

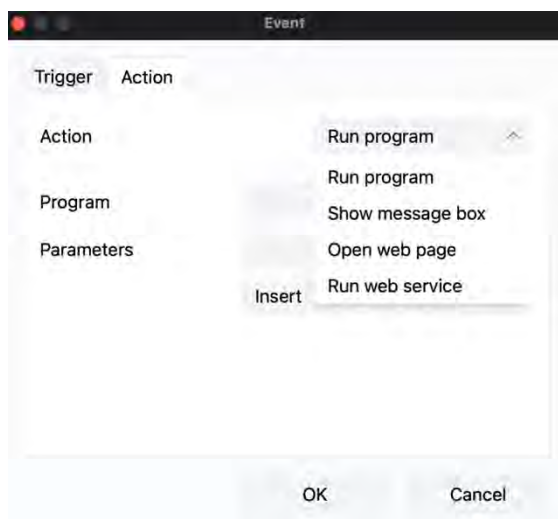
"Triggers" available:

- 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



Actions available:

- 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.

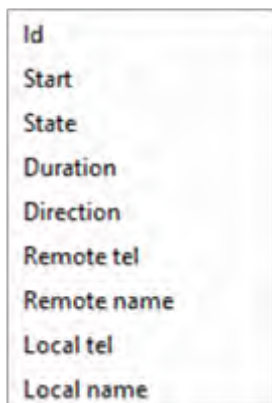


For the "Play Sound" action, only a valid .wav audio sound file can be selected.

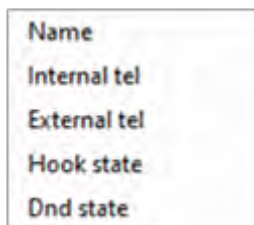
For all other actions, call or device parameters can be inserted to pass event information to the selected "Program", "Web Page" or "Web service".

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.

The "Call" information parameters



The "Device" event parameters available are:



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 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 is an example of a typical command line instruction that could be manually entered:

<ul style="list-style-type: none"> • C:\Program Files\YourCRM\YourCRM.exe /AddNewContact /Phone={Call.RemoteTel}
<ul style="list-style-type: none"> ○ C:\Program Files\YourCRM\YourCRM.exe
<ul style="list-style-type: none"> ▪ 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.
<ul style="list-style-type: none"> ○ /AddNewContact
<ul style="list-style-type: none"> ▪ This section is a switch-type command line parameter that causes the program to automatically add a new contact record when started.
<ul style="list-style-type: none"> ○ /Phone={Call.RemoteTel}
<ul style="list-style-type: none"> ▪ 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 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.ns 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 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.

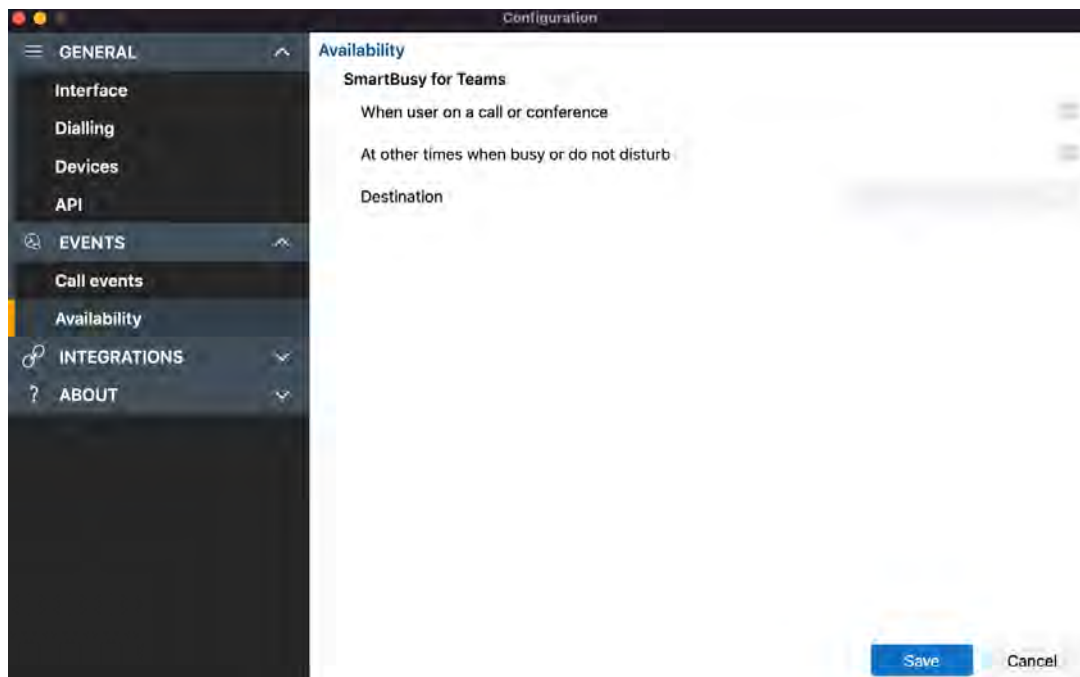
Making Changes

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:



Smart Busy

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

Microsoft Teams

When the Go Integrator CRM Connector for Mac 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

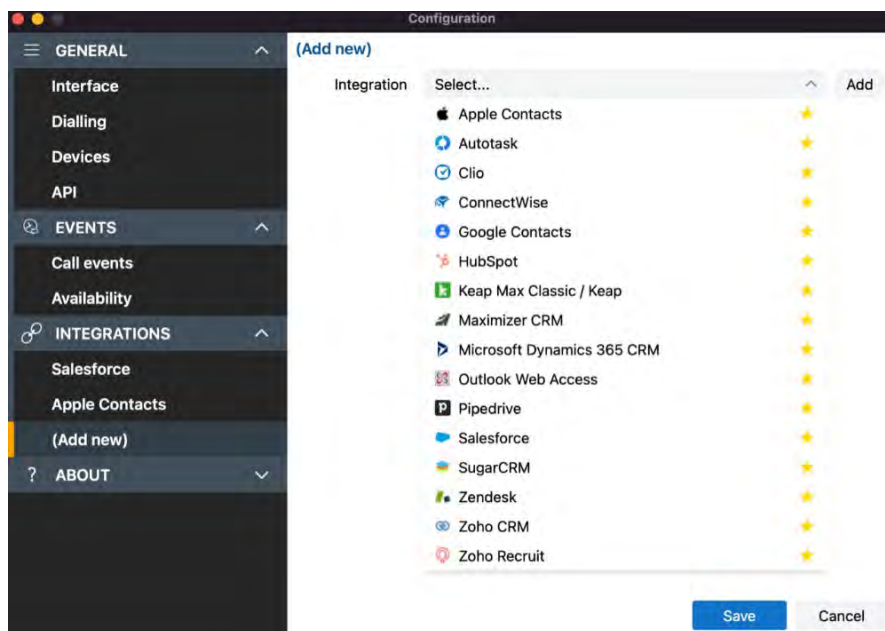
Integrations connect a CRM or application with the Telephone system. Incoming or outgoing telephone numbers are matched to any contact records in a CRM to present contact information including contact name, company or account name and additional notes.

Go Integrator CRM Connector for Mac Solo and Team users can integrate with Apple Contacts, Google Contacts and Outlook Contacts. Go Integrator CRM Connector for Mac Unite users can integrate with a large list of various business CRM applications and address books.

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

Setup CRM Integration

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



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

Other applications or "Controlled" integrations require an unlock code. Please contact support for assistance.

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):

Salesforce

Name: Disable

Enabled:

Salesforce

Client id:

Endpoint: Authorise

Not authorized

Get objects

Objects

Accounts

Contacts

Leads

Caching

Cache:

Cache frequency, minutes: ...

Status:

Activities

Pop automatically on inbound: ...

Create activity on call end:

Show activities on call:

Integration test

Check connection: Check

Test search: Test...

Help Delete Save Cancel

Help

Detailed step-by-step guidance is provided online for each "Standard" integration - click "Help" to open the Integration guide (example shown for Salesforce CRM):

https://crm.helpcti.com/help/help-addin.php?addin=Salesforce&lang=uk&key=48A95725

Salesforce CRM Addin Guide

This Addin Guide contains proprietary information and shall not be used, disclosed, reproduced or shared, in whole or in part, without the written permission of the application developer.

[For information on setting up dialing with Salesforce CRM, please click here.](#)

[For a video demonstration of the integration, please click here.](#)

Introduction

This page will guide you through configuration and basic use of the Software Suite Salesforce CRM Add-in. It is a guide to the Book, Call History and Preview window, and the basic concepts of integration and screen popping using the Add-in.

Salesforce CRM and/or the database used to store your contact data should already be configured and working.

Software Suite must also be installed already with the initial configuration completed. If this is not the case, please contact your system administrator.

What You will Need

- Windows account username and password
- Salesforce CRM security token, username and password (if password protected) or OAuth Domain name

*Note: Details on obtaining Token/Client ID/Consumer ID can be found below.

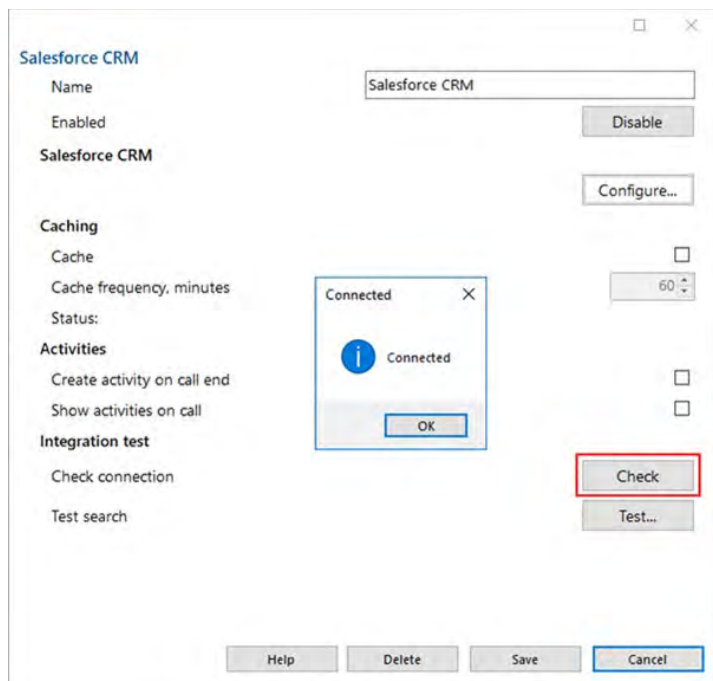
Configuration Steps:

1. Open The Software Configuration Menu:

Right-click the Software Suite tray icon in the system tray menu and then left-click the 'Configuration'.

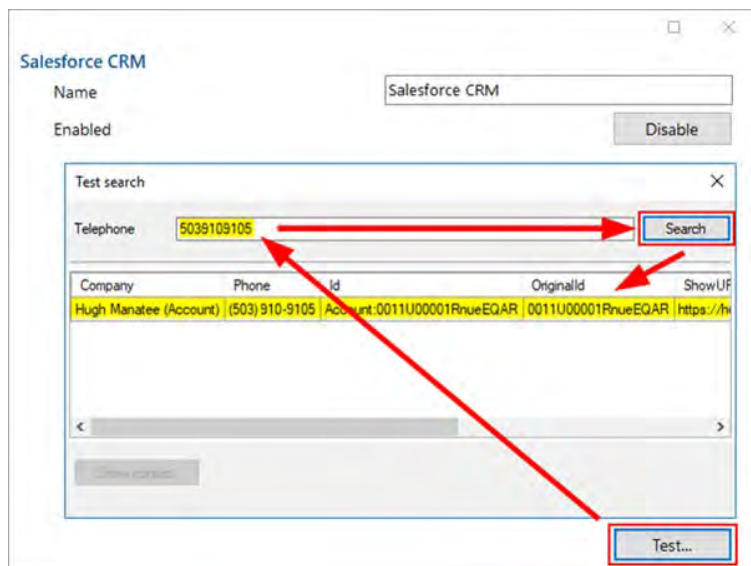
Check

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.

Caching

Cache

Cache frequency, minutes

Status: Last cache: 21/10/2021 17:17:36 (total records: 2)

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

Activities

Additional actions can be applied to the integration.

Activities

Pop automatically on inbound

Create activity on call end

Show activities on call

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).

Pop automatically on inbound

- Never
- Ringing
- Connected

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.

Create activity on call end	<input checked="" type="checkbox"/>
Show activities on call	<input checked="" type="checkbox"/>

From Preview Window:

From Call History / Recent Calls:

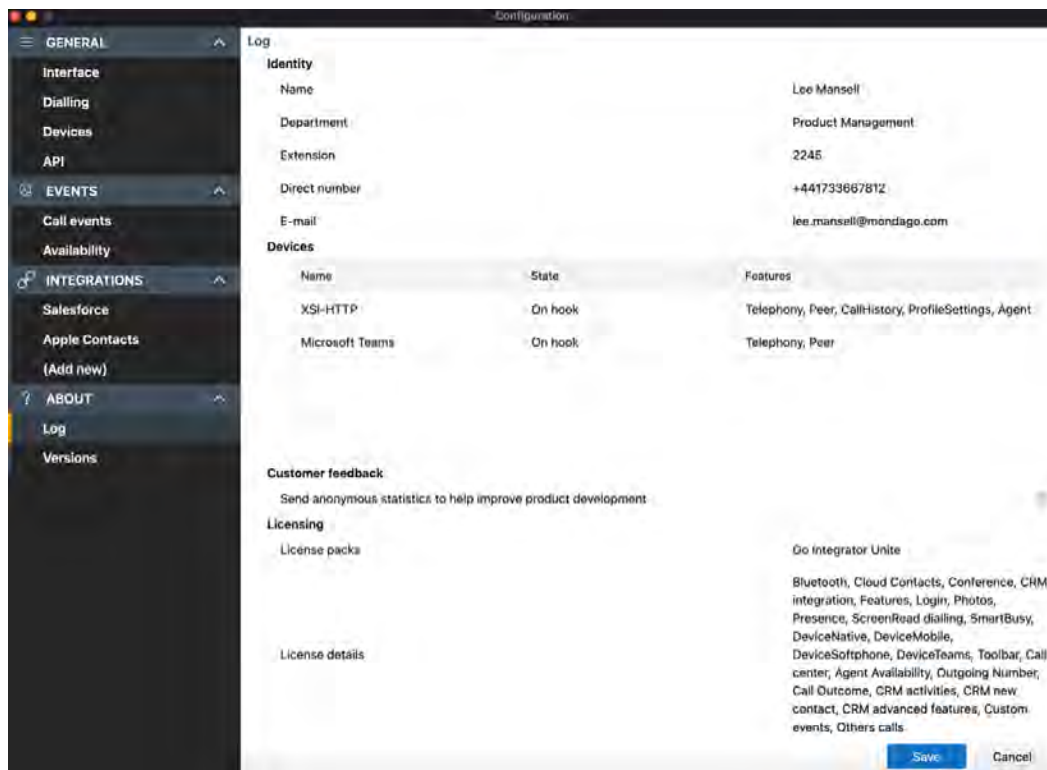


Example activity log to Salesforce:

Task	
Outgoing call: 2261 [Alan Elston] -> (07825) 112 378 [Bob Jones]	
Name	Related To
Bob Jones	
Details	Related
Assigned To	Alan Elston
Subject	Outgoing call: 2261 [Alan Elston] -> (07825) 112 378 [Bob Jones]
Due Date	22/10/2021
Priority	Normal
Created By	Alan Elston, 22/10/2021, 16:01
Comments	Direction: Outgoing Caller: 2261 [Alan Elston] Called: (07825) 112 378 [Bob Jones] Start: 22/10/2021 16:01:30 Duration: 00:00:25

Configuration > Log

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



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
Microsoft Teams	On hook	Telephony, Peer

Customer Feedback

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

Customer feedback

Send anonymous statistics to help improve product development



Licensing

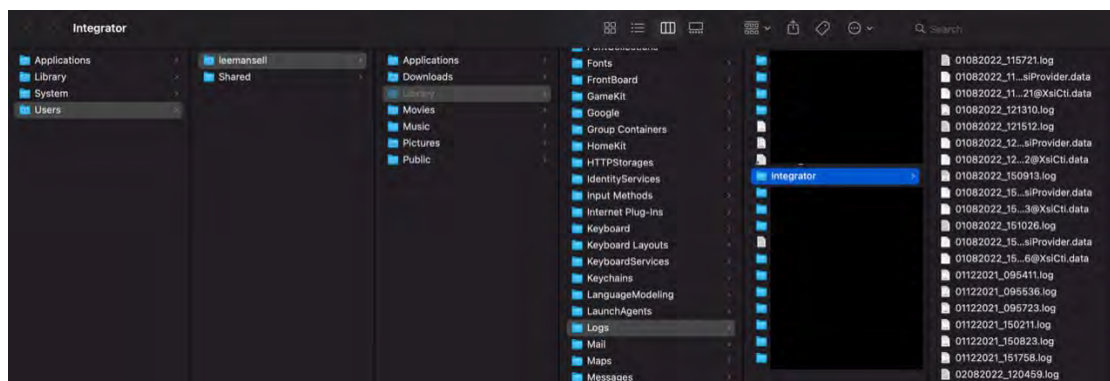
Displays the licensing detail and included features of both the Telephone system and Go Integrator CRM Connector for Mac user profile.

Policies

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

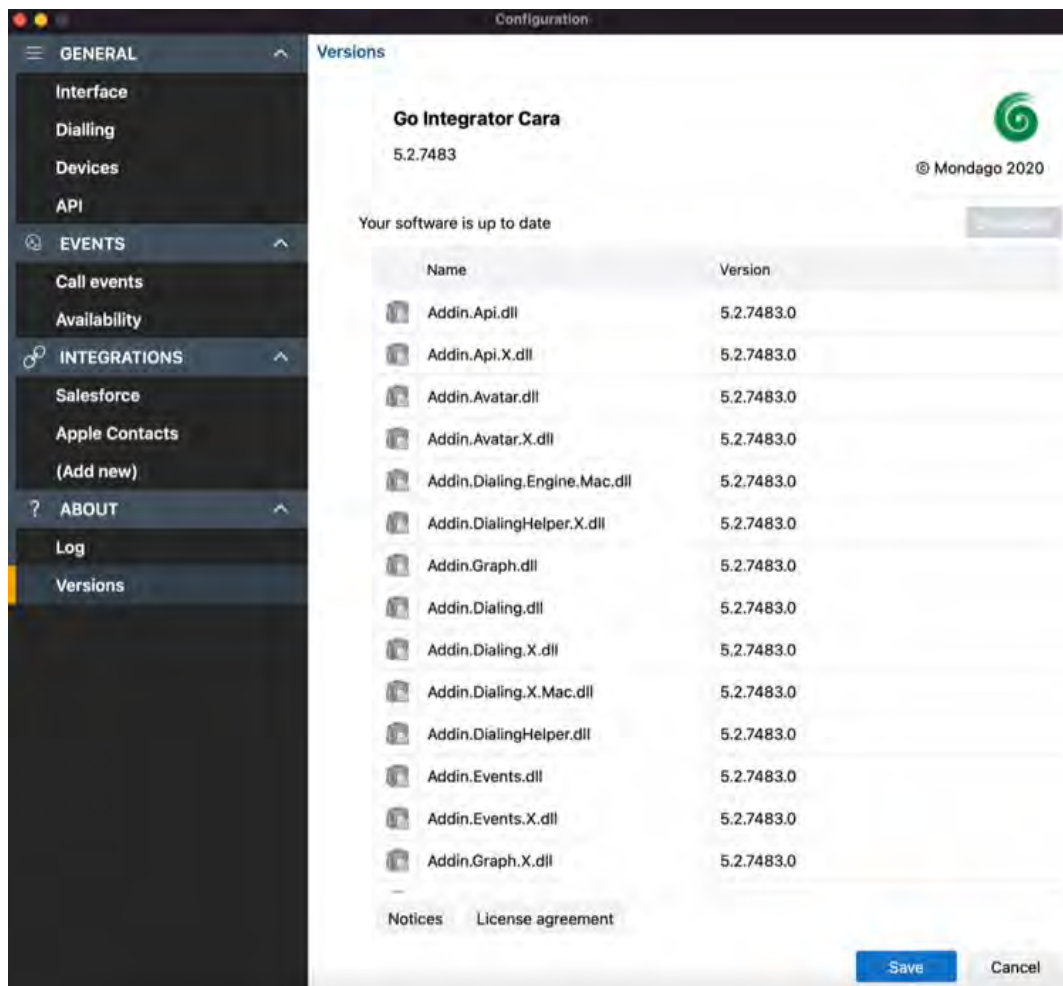
Logs

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:



Go Integrator Cara
5.2.7483
© Mondago 2020

Your software is up to date

Name	Version
Addin.Api.dll	5.2.7483.0
Addin.Api.X.dll	5.2.7483.0
Addin.Avatar.dll	5.2.7483.0
Addin.Avatar.X.dll	5.2.7483.0
Addin.Dialing.Engine.Mac.dll	5.2.7483.0
Addin.DialingHelper.X.dll	5.2.7483.0
Addin.Graph.dll	5.2.7483.0
Addin.Dialing.dll	5.2.7483.0
Addin.Dialing.X.dll	5.2.7483.0
Addin.Dialing.X.Mac.dll	5.2.7483.0
Addin.DialingHelper.dll	5.2.7483.0
Addin.Events.dll	5.2.7483.0
Addin.Events.X.dll	5.2.7483.0
Addin.Graph.X.dll	5.2.7483.0

Notices License agreement

Save Cancel

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