



Quick Starter Guide

AppBar mode (Windows client)

Introduction

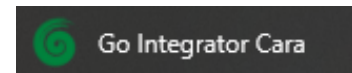
This quick starter guide contains useful information to help get started with Go Integrator Cara Windows client.

Licensing

Go Integrator Cara must be licensed before it can be used. User licenses are either assigned in advance by your provider, or registered by the user at first login using a provider supplied License Key code.

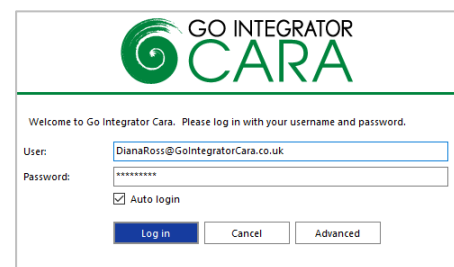
Shortcut

After installation Go Integrator Cara will request an "Access Code" which is provided by your service provider to set default parameters and only needs to be entered once. After successful access code entry, Go Integrator Cara is available from the start menu shortcut:



Login

Go Integrator Cara requires User credentials to connect to the telephony platform. User credentials can be confirmed each time the client is started or can Auto login to bypass this step.



The login window displays the Go Integrator Cara logo and a welcome message. It includes fields for 'User:' (containing 'DianaRoss@GoIntegratorCara.co.uk') and 'Password:' (masked with asterisks). There is a checkbox for 'Auto login' and three buttons: 'Log in', 'Cancel', and 'Advanced'.

Interfaces

Cara has four main user interfaces: Tray Menu, AppBar, Call Toolbar and Preview Window. The Tray Menu and AppBar provide similar functions - choose your preferred mode through "interface" settings. Tray Menu mode is the default setting. The Call Toolbar and Preview Window operate the same way in either mode. This guide explains the AppBar mode – for Tray Menu mode, please refer to the separate Tray Menu guide.

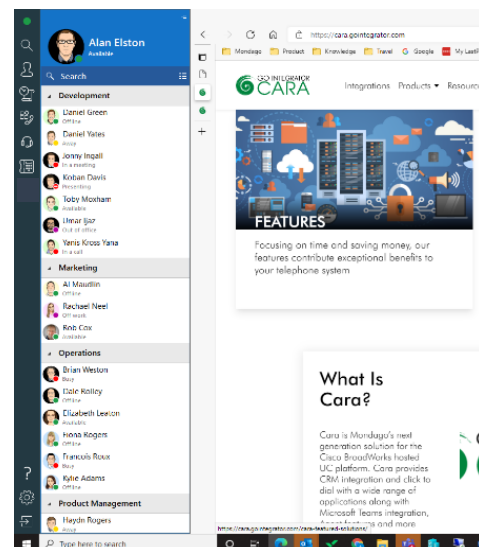
AppBar

In AppBar mode, the menu is always visible and docks to either the left or right edge of the primary desktop. It is interactive and expands according to the feature selected. The expanded window can also be pinned to remain permanently visible.

Your personal status icon is shown at the top of the AppBar and changes according to your extension state or Microsoft Teams Availability, if enabled:



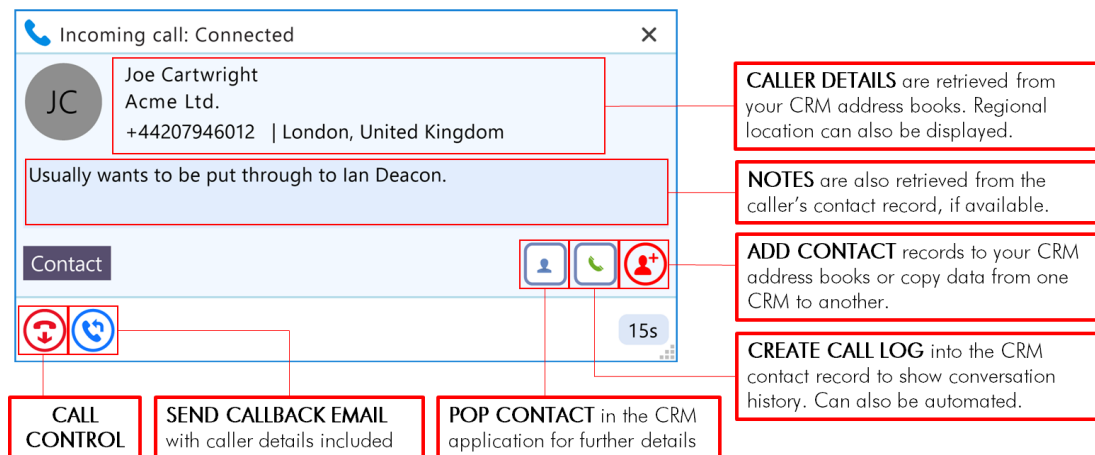
The following functions are launched from the AppBar: Presence, Search, Calls, Make Call (including Preferred Device), Call Toolbar, Call Settings, Call Center (if enabled), Configuration, Help and Exit.



Preview Window

The Preview Window is displayed whenever an inbound or outbound call is active and automatically hides after the call has connected (the hide delay time of the Preview Window can be altered in Configuration). It can be re-displayed at any time during the call by hovering over the Cara system tray icon.

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.



The screenshot shows the Preview Window for an incoming call. The window title is "Incoming call: Connected". The caller's details are displayed: "Joe Cartwright", "Acme Ltd.", and "+44207946012 | London, United Kingdom". A note below the details says "Usually wants to be put through to Ian Deacon." Below the note is a "Contact" button. At the bottom of the window are four call control buttons: "CALL CONTROL", "SEND CALLBACK EMAIL", "POP CONTACT", and "CREATE CALL LOG". Red boxes and lines highlight these buttons and their corresponding descriptions in the adjacent text blocks.

CALLER DETAILS are retrieved from your CRM address books. Regional location can also be displayed.

NOTES are also retrieved from the caller's contact record, if available.

ADD CONTACT records to your CRM address books or copy data from one CRM to another.

CREATE CALL LOG into the CRM contact record to show conversation history. Can also be automated.













CALL CONTROL

SEND CALLBACK EMAIL with caller details included

POP CONTACT in the CRM application for further details

Call Controls

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

	Answer	When a call is ringing, you can choose to answer the call by clicking the "Answer" button
	Deflect	or deflecting it (transfer it without answering it) to another extension
	Hang Up / Decline	End the current call / Decline the current incoming call (Softphone only)
	Hold	Pause the call - the caller will hear hold music if available
	Conference	Call another party to join into a conference call with a current connected party
	Consult	Place the current call on hold and transfer the call to another extension
	Transfer	Blind transfer to another extension without introduction
	Send Callback Email	Open email client to send email with connected call details included automatically
	Show Contact	Shows the full contact details, obtained from the telephone system 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 Control functionality is dependent on the preferred device selection. The call controls displayed in the Preview Window will be driven by the Preferred device selected – see table in "Make Calls" section below.

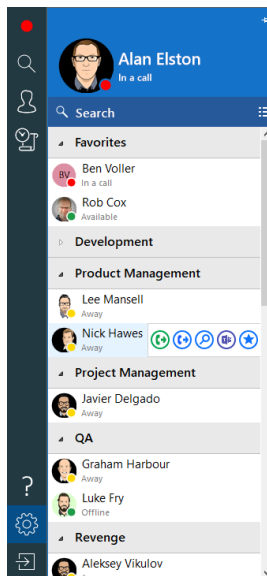
Preview Window Stacking

If there is more than one active call, the Preview Windows for those calls are automatically stacked to reduce the overall size of the display. Clicking on the header of any window will bring it to the front.

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
- Send Callback Email
- Add to Favorites

Depending on the size of your organization, the Presence window will automatically populate with co-workers, sorted by department.

The contact list can be arranged by group or location if preferred, or as a single list of contacts arranged by name or number as required.

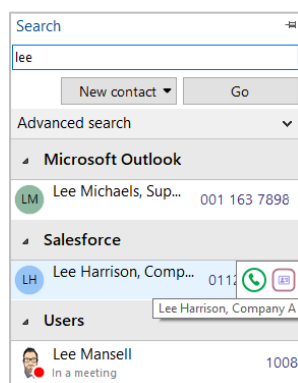
A personalized Favorites group can be created by searching for a co-worker and selecting the star symbol in the slide out menu that appears when hovering over the contact.


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

Search

Cara can search Microsoft Outlook, Google Contacts and telephone system shared or personal directories, plus any integrated CRM business applications, depending on the Cara user license level.

Launch icon:



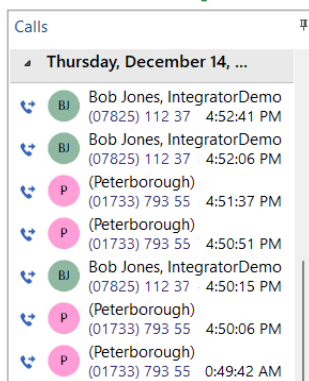
To dial the required contact, simply click on the telephone number displayed to initiate the call, or use the **Call** button from the slide out menu: 

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).

For any compatible CRM configured, the New Contact selection will also allow creation of new contacts directly into the CRM address book.

Call History



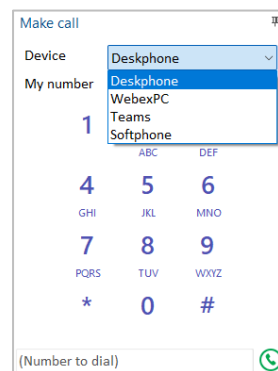
The Calls window displays a detailed call history including recent inbound, outbound and importantly, missed calls, ensuring a clear notification to avoid missing opportunities. Just click the telephone number displayed to initiate the call.


Launch icon:



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 Microsoft Outlook).

Make Call



To make a call using the built in Dialpad, click the Make Call icon, simply enter the Number to Dial and hit **Enter** or click the **Call** button: 

Launch icon:



Where multiple devices are available, the drop down list allows you to choose your **Preferred Device** for call handling.

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

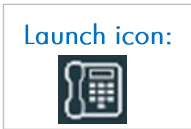
Preferred Device Call Control:

	Answer	Deflect	Decline	Hold	Conference	Consult transfer	Blind transfer	Hang up
Deskphone (Primary)	✓	✓	✗	✓	✓	✓	✓	✓
Cara Softphone	✓	✗	✓	✓	✓	✓	✓	✓
Deskphone (Secondary)*	✗	✗	✗	✓	✓	✓	✓	✓
Webex desktop client*	✗	✗	✗	✓	✓	✓	✓	✓
Teams	✗	✗	✗	✗	✗	✗	✓	✓

*also depends on telephone platform configuration

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 enabled, Call Center Agent features.



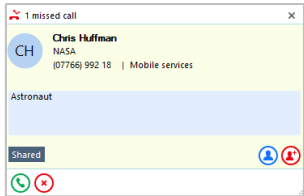
(07825) 112 37 Bob Jones, Company A		21s		(My own number)	
Was almost ready to place big order on last call; Really good customer		Softphone			
Join	Name	Telephone	Calls in queue	Total agents	Available agents
<input checked="" type="checkbox"/>	Promotions&Hotline (Premium)	0854868514	0	2	1
<input checked="" type="checkbox"/>	Payment Enquires (Basic)	8511	0	3	1
<input checked="" type="checkbox"/>	Record Sales (Standard)	8566	0	1	0

Call Controls available via the Call Toolbar are identical to the Preview Window (see table above).

Additional Features

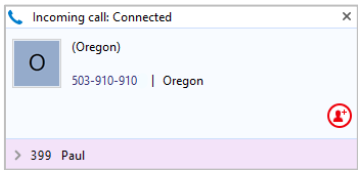
Missed Call Notification

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:



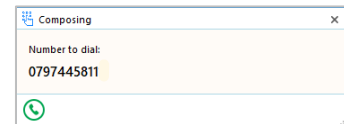
Click the icon to add contact information and then save to the desired directory or integrated CRM business application. The Add Contact feature can also be used to copy the contact to other locations.

Dialing Options

Cara 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:

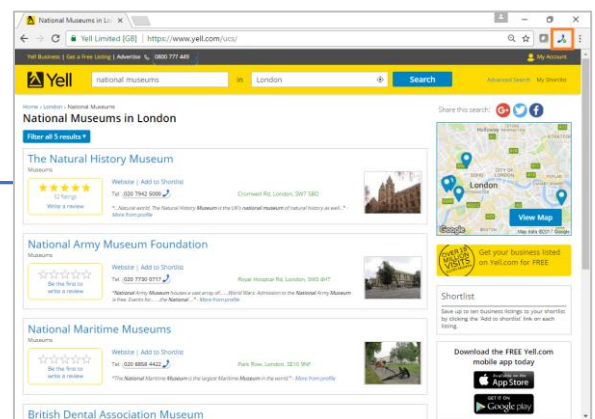
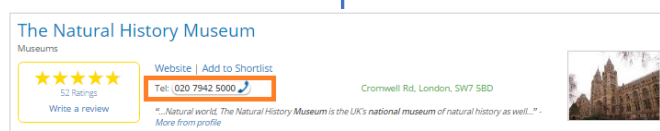
Clipboard Dialing

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

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



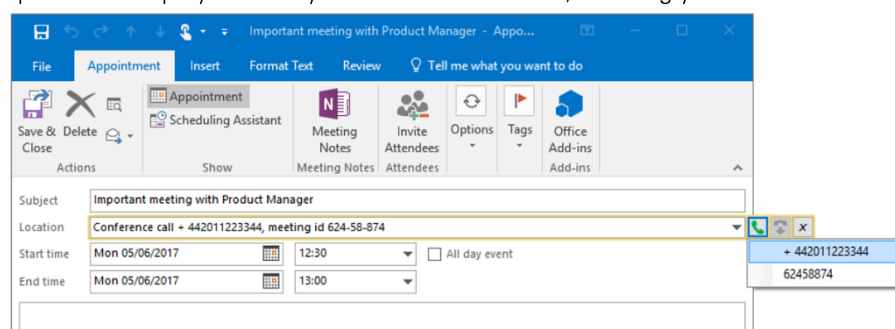
Screen Read Dialing

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, Cara 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.



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