BULLETIN: Go Integrator Cara

Introduction

This document provides an overview of Go Integrator Cara. If you are interested in finding out more about the product, please contact your Account Manager.

What is Go Integrator Cara

Go Integrator Cara is Mondago's next generation of desktop CTI and CRM integration product. Although it retains many of the features of Go Integrator V2 and V3 it is a separate product and should not be considered as a direct upgrade to these versions. As well as benefitting from our own product experience, it also incorporates many of the partner and customer enhancement requests we have received over the past years.

Licensing

Cara uses a three-tier licensing model Solo, Team and Unite. Each is a superset of each other with Solo being the lowest level license and Unite the highest. Features by license type are given later in the bulletin along with a V3 versus Cara feature comparison. Please contact Mondago to get license pricing details.

Key new features

Microsoft Teams integration

Cara combines a user's PBX hook status and Microsoft Teams status, creating a unique view of a user's and co-worker's presence. This enables a range of integration features with Microsoft Teams including:

- Show, Add, Pop CRM contact for call ringing / answered using Teams[##]
- Select Teams as preferred dialing device and Click to dial through Teams client[#]
- Open MS Teams chat from Cara Presence
- Show photo / avatar in Cara Presence
- Show co-workers Teams availability

[#] Require MS Teams direct routing (or similar) / Microsoft 365 Business Voice
[##] Require MS Teams direct routing (or similar)
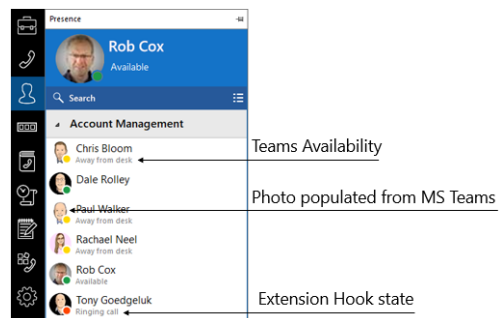
### Update Microsoft Teams Presence (beta feature*)

Cara can also update a user's MS Teams presence updating with "In a call" when a user is on BroadWorks Call.

*MS-Teams Availability feature in the Presence window uses the Microsoft Graph API. Calendar based "Out of Office" and publishing "In a call" status to Teams are Microsoft Graph API Beta features therefore these functions are subject to modification / removal.

Search and Call for Microsoft Teams (aka Teams Adapter)

Search and Call is an application that can be added to Microsoft Teams from the App Store. It connects to Go Integrator Cara and enables users access to key Cara features from within Microsoft Teams. Users of Search and Call can:

- Perform a search of contacts and display results in Microsoft Teams.
- Make a call through Cara from Microsoft Teams

October 2021

BULLETIN: Go Integrator Cara
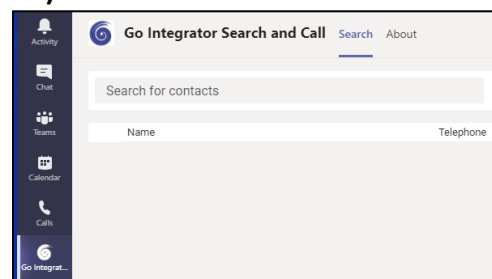
SmartBusy for Teams

Cara combines a user's PBX hook status and Microsoft Teams status, creating a unique view of a user's and co-worker's presence

SmartBusy for Teams addresses the problem of inbound PBX calls still being received if the user has a meeting scheduled in Outlook, or if they are on a Microsoft Teams Call or Conference.
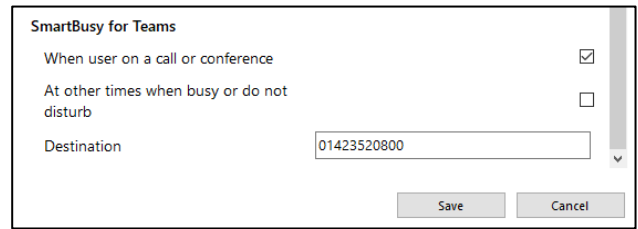
This feature enables the user to forward an incoming call via their PBX to another destination, such as alternate number or voicemail, based on their combined presence status. The feature will become active/inactive in line with changes to the users combined presence.

SmartBusy for Zoom and GoToMeeting

Detects when a user is participating in a GoToMeeting or Zoom meeting, and enables the user to forward an incoming PBX call to another destination

Install Wizard

For first time users, an initial setup screen has been introduced before the user runs the client for the 1st time. This allows a user to select which devices they will be using.

This is particularly important for Microsoft Teams users, as it allows the user to control when they go through the Teams log process in order to connect to Cara.
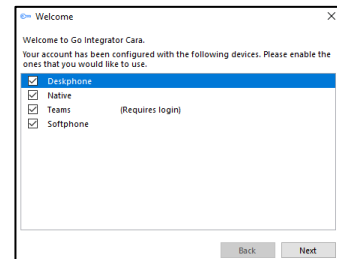
AppBar

The AppBar is a vertically aligned permanently displayed interface with quick access to key features. The user can decide to show the AppBar on the left or right-hand side of the screen or not at all, in which case, the user interface presented is more like classic V3 mode of operation (known as Tray mode).

The AppBar is interactive and expands according to user selection. The AppBar presents the following options:

Address book, Presence, Calls, Call Settings, Agent Status (see Call Centre Agent below), Toolbar, Help, Configuration, Exit.

Selecting the options from the AppBar will cause the selection to expand and render alongside the AppBar (see an example with presence to the left). The view can be locked by clicking the "drawing pin" icon.

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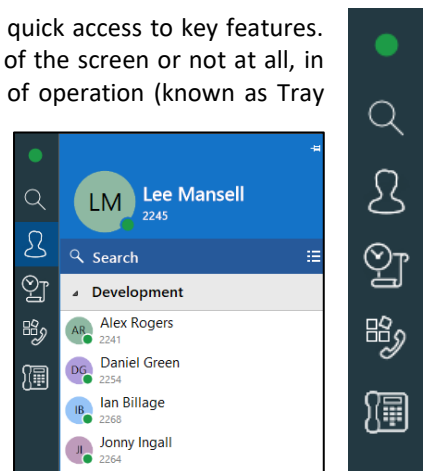
BULLETIN: Go Integrator Cara

Preferred Device with Enhanced Call Control

A major innovation enables Cara to monitor all primary and shared appearance devices associated with the user's account, allowing the user to decide which device to answer a call on or make a call from. The user can even decide to stop monitoring certain devices altogether if preferred. This is known as Preferred Device.

Preferred device can include

- UC One**
- Microsoft Teams
- Webex
- BroadWorks Anywhere Devices
- Remote Office
- Desk phones configured as shared appearances

For example, using shared appearance, a user could have multiple Deskphone's against their account, perhaps in different locations. Preferred Device would list each entry as a selectable device to make calls from, rather than ringing all of them.

Similarly, if a user has BroadWorks anywhere setup, each location would be listed as a separate device to dial from. This creates incredible flexibility for the user.
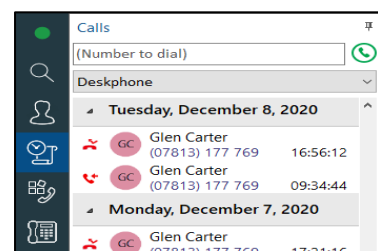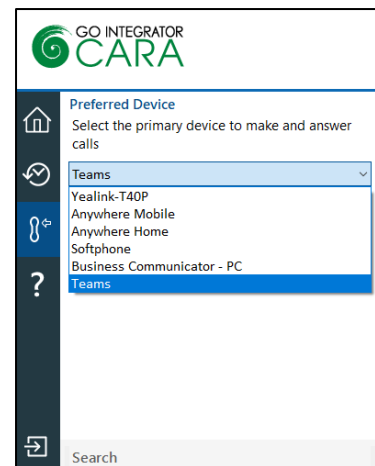
AppBar

This feature also means a call can be made from a shared appearance device without needing to select "Alert all appearances for Click-to-Dial calls".

**From this release onwards, UC One will connect to Cara via XSI instead of the desktop API. When UC One is selected as the preferred device, within Cara this results in the removal of the answer button & the addition of transfer during a call.

Adding New Leads and Contacts

Cara ships with a new CRM Integration library that allows calls from new contacts to be added to the integrated application.

If Cara is integrated to multiple applications, then the Add contact option will continue to show until the contact is added to each application, plus an existing contact in one system can be easily duplicated to another. A contact can be added from multiple locations such as the live call Preview window, Call history and Missed calls pop up.
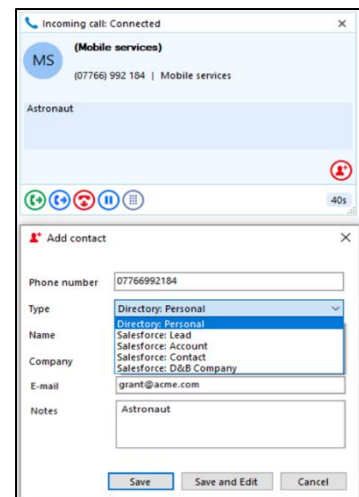
Call Events

The layout and configuration of call events has been improved plus additional options have been added. Note that Custom events in Cara requires a Team or Unite license.

Show Contact in Edit Mode

Allows you to select whether you open a caller's contact record, in view or edit mode when the "pop" contact icon in the Preview window, Call history or Address book is clicked. The example below shows it from the Address book

BULLETIN: Go Integrator Cara
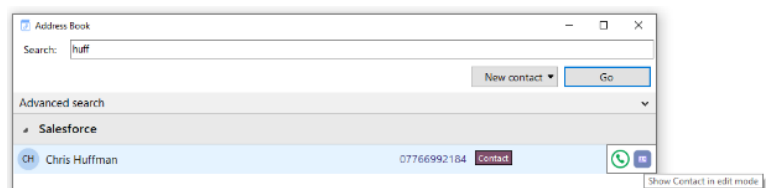
Embedded Softphone

Cara comes with a built in SIP Softphone which can be configured and enabled using a standard BroadWorks device profile.

Screen Read dialing

Cara also introduces "Screen Read" dialing (Patent Pending). Screen Read allows you to "click to dial" from any number type on the screen even those presented as an image. The example right shows it working in an email signature.
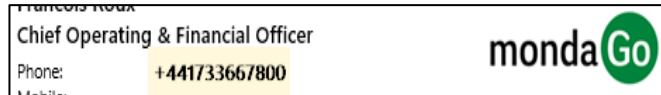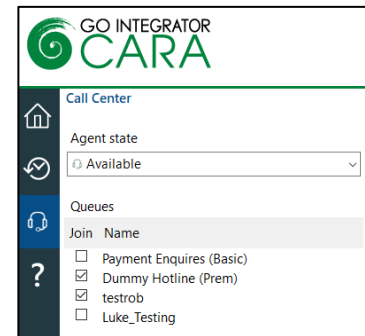

Call Centre Agent

Call center functionality has now been added to Tray mode and AppBar, which had previously only been available within Cara via the Toolbar. From these 2 display modes an agent can now

- Select their agent state, such as Available or Unavailable.

- Choose which Call Centre Queue to join.
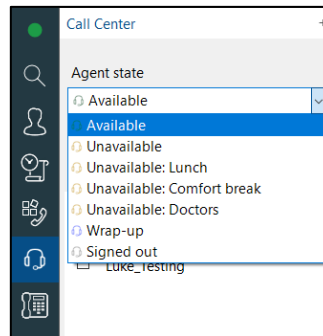
AppBar   **Tray Mode**

Dynamic Presence and large directories:

The Presence feature has been improved such that the XSI subscription to a co-worker's status and information is only undertaken the first time the co-worker is visible in the Presence window. This method has the significant advantage that loading on the XSP server is reduced and the recommended monitoring limit of 50 users in V3 can be lifted to 250 in Cara.

There is also a change to the way BroadWorks directories are downloaded, resulting in a much quicker time to connect when a user is a member of a large BroadWorks group.
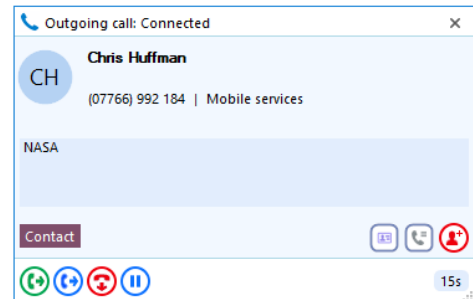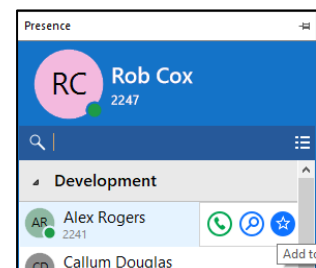

Favorites

The Presence window allows favorites to be added. This is done by selecting the star symbol in the slide out menu against a co-worker in the Presence window.

V3 CRM library support

Cara incorporates version 3 CRM integration libraries and hence can support integrations currently available with V3.
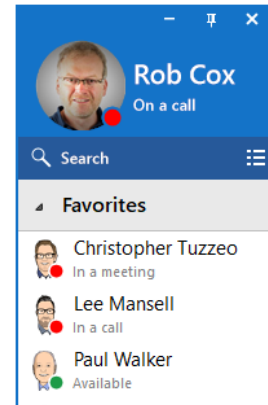
BULLETIN: Go Integrator Cara

Combined BLF and Availability
Cara combines extension status (BLF) and availability from Microsoft Teams to give a unique view of a co-worker's presence, example shown to the right.

Discovery and branding
Cara supports the use of Access Codes to allow dynamic branding. This means when the product is started for the first time the user will be required to enter a Service Provider specific access code that will cause certain baseline parameters such as server address, branding images, and proxy settings to be set. It also means these parameters can be changed without having to issue new software.

Updated Client-Side API
This is similar to the client-side API available with later versions of V3, but with an improved developer environment. The V3 and Cara APIs are not compatible.

Login screen
Rather than keeping the login credentials only accessible from the configuration menu as in V3, Cara prompts the user to login each time the client is started (unless Auto login box selected). This method is more in line with the industry standard for applications of this type.
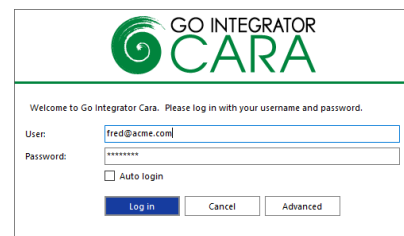
Missed Call support
A pop-up window will show on the screen when a call has been missed. Multiple options are available from this including call back, pop contact and add contact.
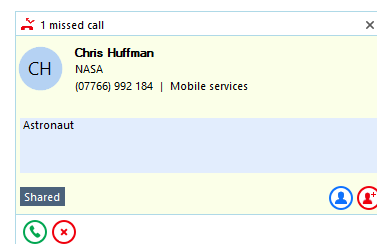
Cloud Contacts
Cara can be made available with its own online directory known as Cloud Contacts, making it easy to store a new contact as a private or shared contact (with co-workers). It is also a very effective way to duplicate contacts between the disparate contact management systems companies often have e.g. a contact record in the CRM system could be easily added to the Helpdesk system, by different users, without the need to provide each user a license for each application.

October 2021

BULLETIN: Go Integrator Cara

Summary of features

Feature	Solo	Team	Unite
Click to Dial	✔	✔	✔
Presence / BLF	✔	✔	✔
Address book	✔	✔	✔
Call history	✔	✔	✔
Recent calls	✔	✔	✔
Missed calls	✔	✔	✔
Call Control *	✔	✔	✔
Preview window	✔	✔	✔
Toolbar	✔	✔	✔
Busylight support	✔	✔	✔
App Bar	✔	✔	✔
Show contact in edit mode	✔	✔	✔
Missed Call Notifiication	✔	✔	✔
Call Settings	✔	✔	✔
MS Teams Search and Call	✔	✔	✔
MS Teams - Show, Add, Pop CRM contact for call ringing / answered using Teams#	✔	✔	✔
MS Teams - Select Teams as preferred dialing device#	✘	✔	✔
MS Teams - Open MS Teams chat from Cara Presence	✘	✔	✔
MS Teams - Show photo / avatar in Cara Presence	✘	✔	✔
MS Teams - Show peers Teams availability##	✘	✔	✔
SmartBusy - MS Teams / GoToMeeting / Zoom	✘	✔	✔
Softphone	✘	✔	✔
Preferred Device (Multi-device support)	✘	✔	✔
Events	✘	✔	✔
Client API	✘	✘	✔
Agent features	✘	✘	✔
CRM integrations (Outlook / Google Contacts)	✔	✔	✔
CRM integrations for all other applications	✘	✘	✔
Cloud Contacts**	✔	✔	✔

* Call control will vary by device type
** Database hosted by Service Provider
#Require MS Teams direct routing (or similar)
"Purple Out of Office" status use beta version of Graph API

BULLETIN: Go Integrator Cara

Key differences compared to V3

Feature	V3	Cara
Click to Dial	✓	✓
Presence / BLF	✓	✓
Address book	✓	✓
Call history	✓	✓
Recent calls	✓	✓
Missed calls	✗	✓
Call Control	✓	✓
Preview window	✓	✓
Toolbar	✓	✓
Busylight support	✓	✓
App Bar	✗	✓
Show contact in edit mode	✗	✓
Missed CallNotification	✗	✓
V3 CRM integrations (Outlook / Google Contacts)	✓	✓
CRM Plus integrations (Outlook / Google Contacts)	✗	✓
Call Settings	✓	✓
MS Teams - Go Integrator Teams Extension (Q1 2021)	✗	✓
MS Teams - Show, Add, Pop CRM contact for call ringing / answered using Teams	✗	✓
MS Teams - Select Teams as preferred dialing device	✗	✓
MS Teams - Open MS Teams chat from Cara Presence	✗	✓
MS Teams - Show photo / avatar in Cara Presence	✗	✓
MS Teams - Show peers Teams availability	✗	✓
SmartBusy - MS Teams / GoToMeeting / Zoom	✗	✓
Softphone	✓	✓
Preferred Device (Multi-device support)	✗	✓
Bluetooth mobile	✗	✓
Events	✓	✓
Client API	✓	✓
Agent features	✓	✓
V3 CRM integrations (All others)	✓	✓
CRM Plus integrations (All others)	✗	✓

	V3	Cara
Cloud Contacts*	✗	✓

* Database hosted by Service Provider

** APIs are different

     October 2021