



Quick Reference Guide

Version 3.2

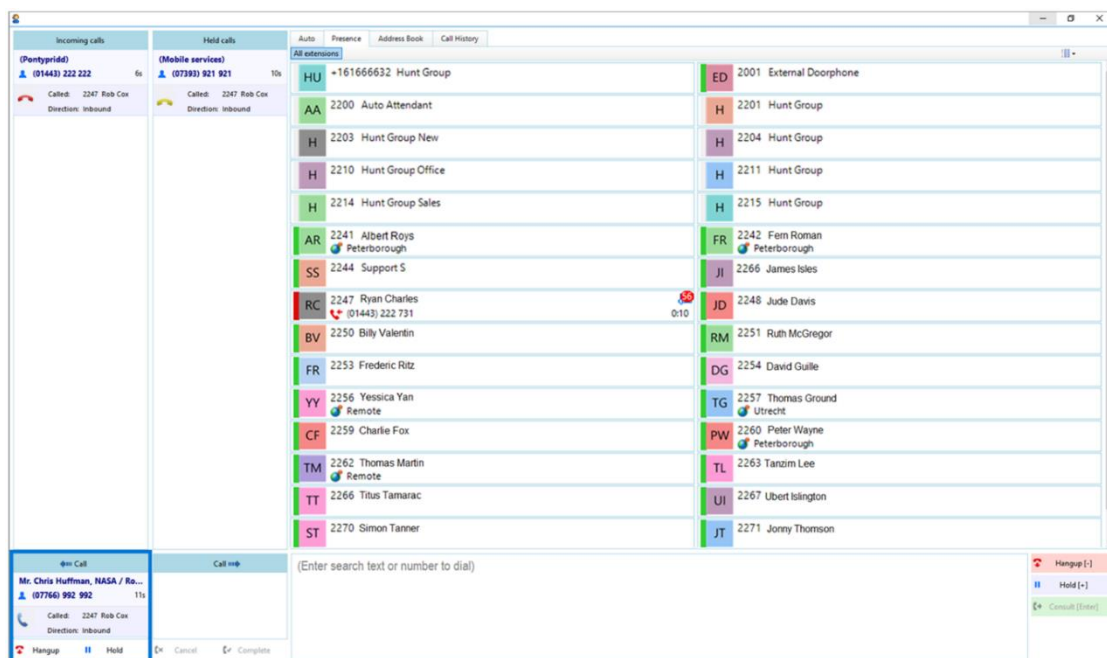
Also available at: <https://gointegrator.com/downloads/manuals/>

Introduction

This quick reference guide contains some useful information to help you get started with Go Operator.

Go Operator Console

Go Operator is a full screen PC client application designed to effectively answer and transfer a high volume of inbound calls. Go Operator includes features such as call control, directory look up, extension status, a range of dialing options and full CRM/Database integration for both directory searching, dialing and 'popping' contacts.



Call Handling

The left-hand side of the application contains the call handling interface. This area shows the calls currently ringing, on hold, in progress and/or being transferred.

Incoming call(s)

New incoming calls waiting to be answered appear here.

Held call(s)

Current held calls awaiting transfer or another action.

Call (left hand box)

The current active call.

Call (right hand box)

The second leg of the current active call when a consultative transfer is being made.

Contact information

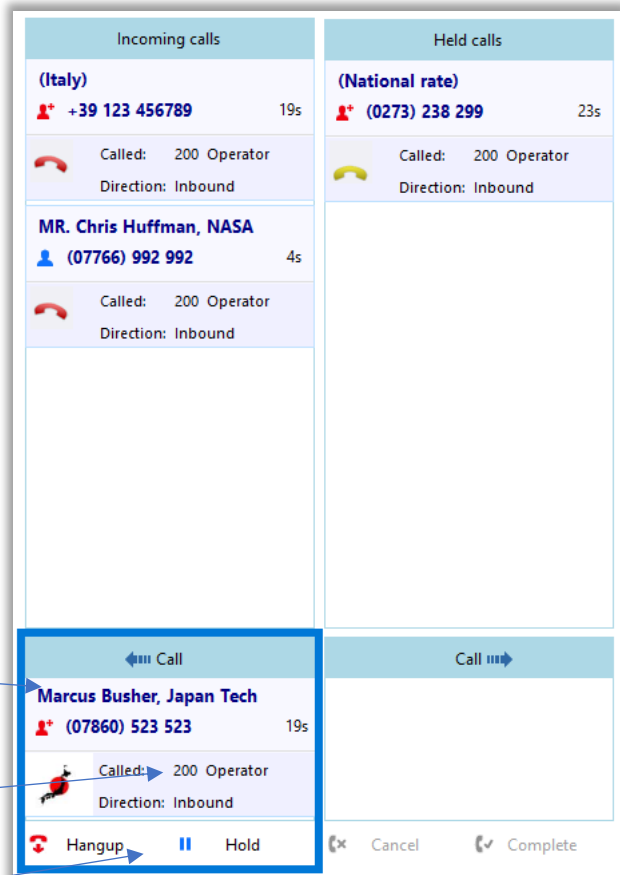
The name and telephone number of the caller or called person.

Call information

Other information about the current call.

Call actions

Use these buttons to interact with the current call.



Methods of Call Control

Go Operator is designed such that the answering and transferring of calls can be undertaken using the keyboard or mouse. In addition, it can be configured to determine when the keyboard method is active i.e. either while only in the application or also, while in another application e.g. Microsoft® Outlook, allowing a call to be handled without needing to open Go Operator.

To switch between these modes of operation please follow the steps below from the **Telephony** section of the **Configuration** menu.

Application only

Numeric Keypad input functions only work when Go Operator is the active window.

Select the method of operation of the numeric keypad

Active: Application only

Always

Numeric Keypad input functions work at all times.











Select the method of operation of the numeric keypad

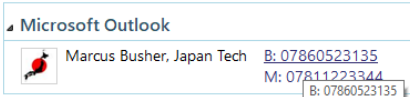
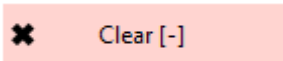
Active: Always

Using the keyboard to control calls

Using the PC keyboard is the most efficient option method of handling high call volumes. The table below describes the actions of each keys.

It is important to note that no input field needs to be selected before typing a number to dial or name to search.

 Make call [Enter]	Make a call	Type in the internal or external number you wish to call in the text field and press 'ENTER'.
 Answer [Enter]	On Ringing	To Answer an incoming call, press 'ENTER'.
 Hangup [-]  Hold [+]	Active Call	To Hang-up an active call, press the '-' (minus) key on the numeric keypad. To place an active call on Hold, press the '+' (plus) key on the numeric keypad.
 Hold [+]	Un-hold a call	Click '+' to access Held calls. The Held calls will be numbered 1, 2, 3 etc. Press '+' again to toggle between held calls, the call with number highlighted in black is activated after a few seconds and taken off hold.
 Consult [Enter]  Cancel [-]  Complete [Enter]	Consult Transfer	To initiate a Consult Transfer, type the number of the extension you wish to Consult Transfer to in the text field and press 'ENTER'. To cancel the Consult Transfer, press the '-' (minus) key. To complete a Consult Transfer press 'ENTER'.
 Consult  Transfer	Transfer from Presence Tab	Start typing the name or number of the extension you need to transfer the call to. When the extension shows, use the cursor to highlight it and the press 'ENTER' to start the consult transfer and 'ENTER' again to complete it.

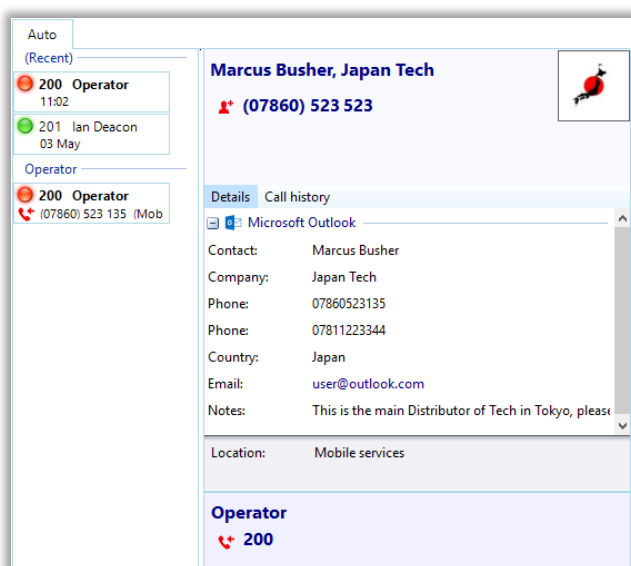
	Transfer from Address Book Tab	Once the call is answered select the Address book tab and type the name of the external contact you wish to transfer the call to. Use the up/down cursor key to scroll through the results and press 'ENTER' to start the consult transfer and 'ENTER' again to complete it. (Remember to first set up the integration to the directory application e.g. Outlook®, Salesforce®)
	Clear	To Clear the text field, press the '-' (minus) key.

Auto

The **Auto** tab is the first of four pages where you find essential and useful features to make the calling process more efficient. The Auto window provides access to the relevant information of the person who is calling.

When a call is connected you will be able to see two types of information.

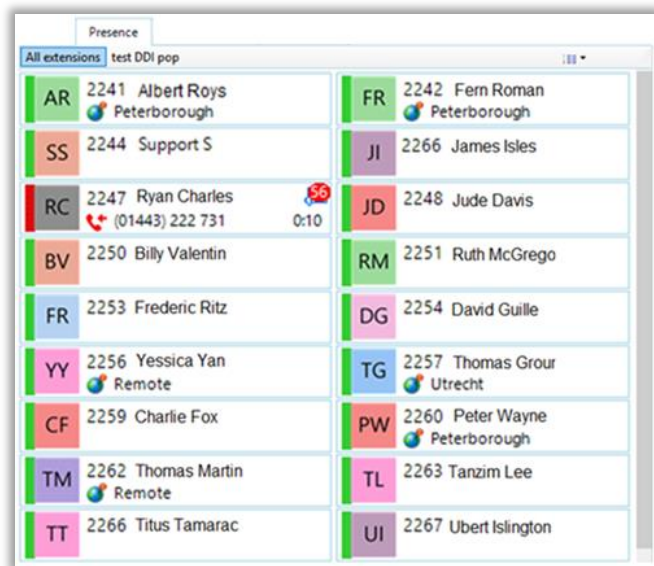
The "Auto" tab will auto-populate the "Recent" section with a list of extensions that have been assigned to the same department as the called extension. The Auto tab will also show caller preview data for any integrated CRM/DB application and a customized greeting linked to the dialed DID/DDI number.



Presence

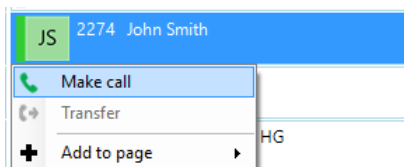
In its most basic form, the Go Operator window provides a quick way to check the extension status of your co-workers.

The content of the display can be controlled to define and limit which user extensions are displayed.



The screenshot shows a 'Presence' window with a tab labeled 'test DDI pop'. It displays a list of extensions in two columns. Each entry includes a colored icon, an extension number, a name, and a location. Some entries have additional status indicators like a red '36' or a timer '0:10'.

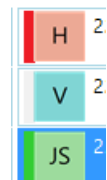
Icon	Extension	Name	Location
AR	2241	Albert Roys	Peterborough
SS	2244	Support S	
RC	2247	Ryan Charles	(01443) 222 731
BV	2250	Billy Valentin	
FR	2253	Frederic Ritz	
YY	2256	Yessica Yan	Remote
CF	2259	Charlie Fox	
TM	2262	Thomas Martin	Remote
TT	2266	Titus Tamarac	
FR	2242	Fern Roman	Peterborough
JI	2266	James Isles	
JD	2248	Jude Davis	
RM	2251	Ruth McGrego	
DG	2254	David Guille	
TG	2257	Thomas Grour	Utrecht
PW	2260	Peter Wayne	Peterborough
TL	2263	Tanzim Lee	
UI	2267	Ubert Islington	



If you click on one of the entries in the **Presence** list, a context sensitive menu appears. If you are not already on a call, the menu will offer the **Make call** option. By choosing this action, you can dial the extension directly.

If you are already on a call, then the choices would be **Consult** and **Transfer** in place of Make Call. This is appropriate because if you are already on a call, then the expectation is that you are clicking on the extension with a view to transferring the call to them. You can also start a consult transfer to a colleague by double-clicking on their extension.

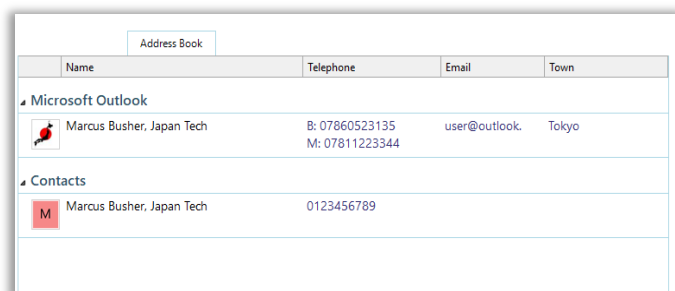
The icon colors in the list have different meanings: solid red means that the extension is engaged on a call and flashing yellow means that there is a held call at the extension; solid grey is used for hunt groups and ACD queues.



Customized extension pages can also be created by selecting extensions using 'CTRL', and 'ENTER' and the right clicking with the mouse and selecting "Add to page". The page can also be set to automatically "pop" when a pre-programmed DID/DDI is dialed.

Address Book

The **Address Book** tab is used to concurrently search all the integrated directories and then either make a call to or transfer an active call to any of the contacts (internal or external) returned by the search. It also gives the option to "pop" their contact record.



The screenshot shows an 'Address Book' window with a search results table. The table has columns for Name, Telephone, Email, and Town. It lists results from 'Microsoft Outlook' and 'Contacts'.

Name	Telephone	Email	Town
Microsoft Outlook			
Marcus Busher, Japan Tech	B: 07860523135 M: 07811223344	user@outlook.	Tokyo
Contacts			
Marcus Busher, Japan Tech	0123456789		

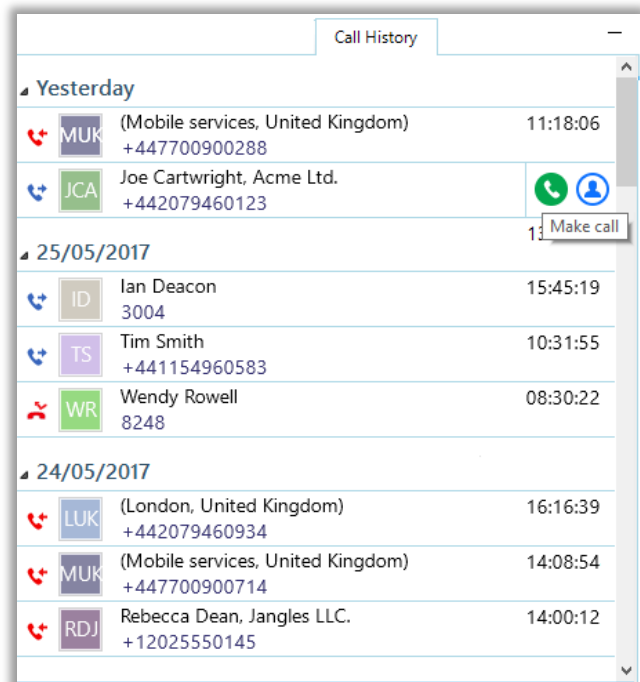
The integrated directories consist of the telephone system directories and any CRM systems that have been integrated through the configuration menu.

In this example, we're searching for contacts with a name of "Marcus", and the search has included Microsoft Outlook®.

Call History

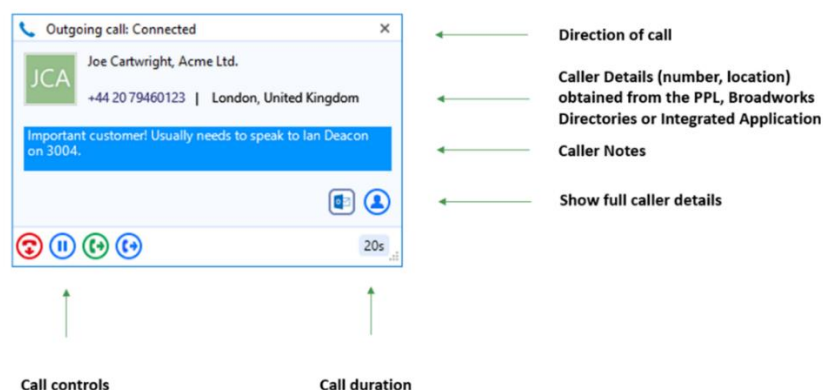
The **Call History** tab displays a list of your most recent inbound and outbound calls, and also displays any missed calls.

Any active call can be quickly transferred to a call listed in this screen. It also gives the option to "pop" their contact record.



Preview Window










The Preview Window is only displayed when an inbound or outbound call is ringing, and the Console window is minimized.



The Preview Window automatically disappears shortly after the call has connected but can be re-displayed at any time during the call by hovering over the system tray icon. The delay before hiding can be configured (default is 10 seconds). The Preview Window is specifically designed to be unobtrusive and to avoid consuming a large proportion of the screen or obscuring other windows.

Call Controls

The following call controls are available through the Preview Window.

	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	Pause the call. The caller will hear hold music if available.
	Consult	Place the current call on hold pending a transfer and make a concurrent call to the selected extension.
	Transfer	Transfer the call immediately to the selected extension (remember to say goodbye first!)
	Show Contact	Show the caller's full contact details, retrieved from the Personal Phone List (PPL)
	Add Contact	Add the caller to the Address Book and fill-in their details during the call.
	Pop Contact	Open the caller's full contact details within the CRM or other integrated application. The icon relates to the CRM application (example shown here for Outlook).

Dialing Options




Go Operator offers a wide range of click-to-dial features to accelerate the outbound calling process, both in locating the number to dial as well as the dialing process itself. The following features are described below: Quick Dial, Call History, Clipboard Dialing and Webpage Dialing.

Quick Dial

In the combined Search and Dial box at the bottom of the Console window, you can enter a telephone number you wish to dial followed by **Enter** to dial the number.

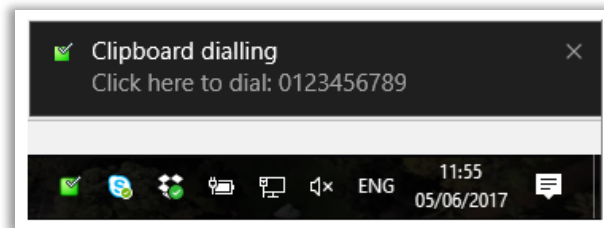
You can also type a contact's name (either full or partial) to initiate a search in the PPL, BroadWorks directories and any integrated applications. Any matches found are displayed within the Address Book tab - click the number to dial or click the name to open the contact record.

(Enter search text or number to dial)

 Hangup [-]
 Hold [+]
 Make call [Enter]

Clipboard Dialing

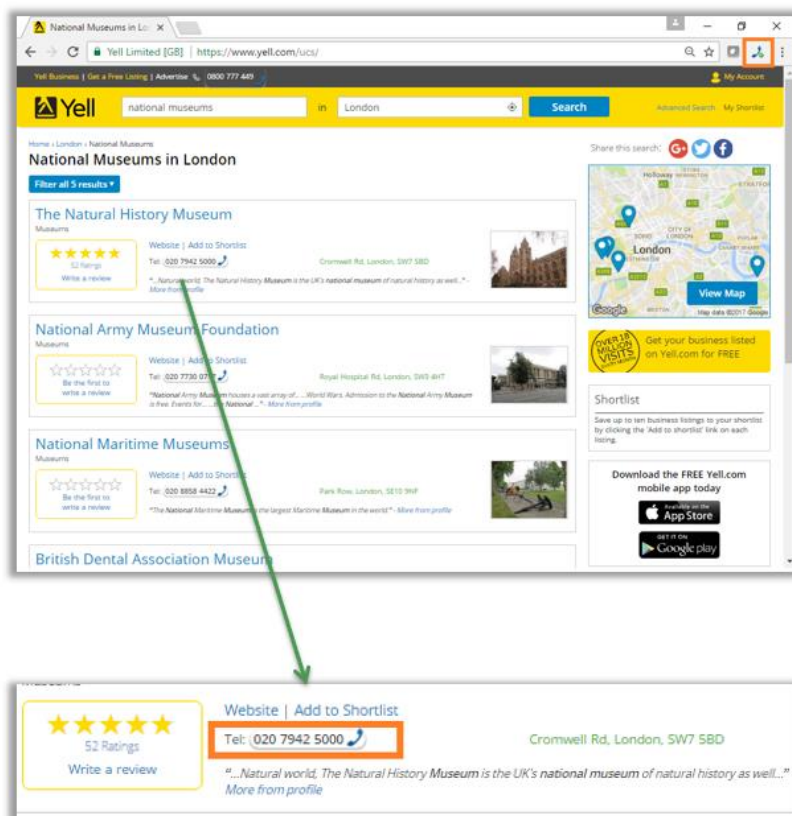
If you copy a telephone number into the Windows clipboard a discrete pop-up is displayed from the system tray offering to dial the number. Click to confirm and dial.



The minimum and maximum length of a potential number, and the possible prefix digit, can be set so that Go Operator can more accurately identify valid telephone numbers.

Web Page Dialing

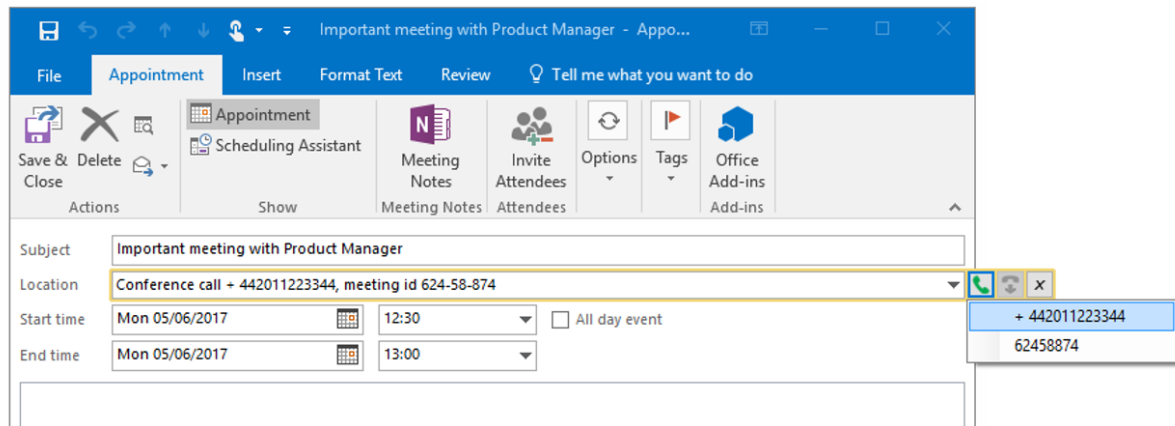
Go Operator can also recognize telephone numbers in web pages and will convert them to hyperlinks so that you can click-to-dial directly from the web page.



Focus Dialing

Focus dialing offers a similar click-to-dial capability within applications. Once enabled, it will automatically detect fields that contain dial-able numbers and present a click-to-dial icon to the right of the telephone number field.

If the field contains more than one potential telephone number, a drop-down is displayed when you hover over the icon, allowing you to select which number to dial.



System Tray Menu

Go Operator runs in the system tray.

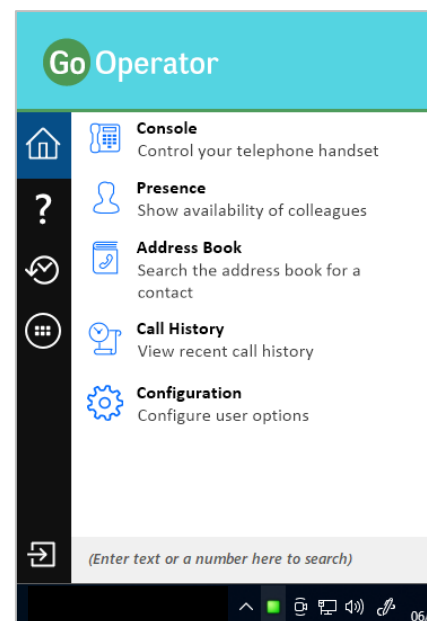
The System Tray Menu is accessed by right-clicking on the Go Operator system tray icon, which also displays the user status:

Green - Available

Red - Busy

Yellow - Call on hold

Grey - Offline



CRM Integration

Go Operator provides integration to a wide range of different CRM and Contact orientated business applications. Integration provides a range of specific integration features from the list below. Up to four integration “add-ins” can be concurrently configured.

Caller Preview

Displays the caller's name in the Call Preview window when a match is found between the caller's number and the contact information stored in the integrated application(s).

Contact Popping

Instantly open the caller's contact record in the integrated application by clicking the application's icon in the Caller Preview window.

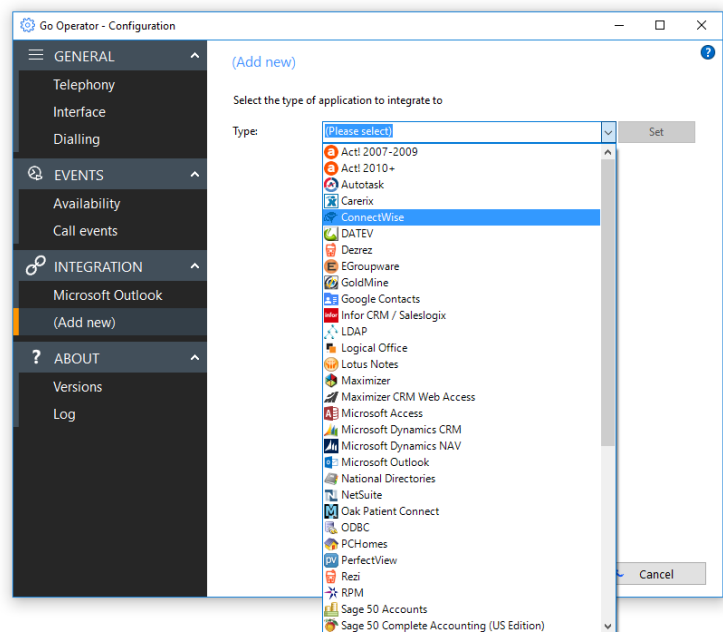
Contact Searching

Enables you to concurrently search all configured integrations and pop the contact record or click to dial from the results.

To set up an integration just select “(Add new)” from the Configuration page, select the Application from the drop down list and click **Set**. To access setup guidance for the integration, click the blue help circle within the selected CRM add-in configuration page.

Always check the Go Operator web-site to get the latest information on integrations:

<https://integrations.gointegrator.com>



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