Go Operator

Quick Reference Guide

Version 3.0

Also available at: https://gointegrator.com/downloads/manuals/uk

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 us 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.
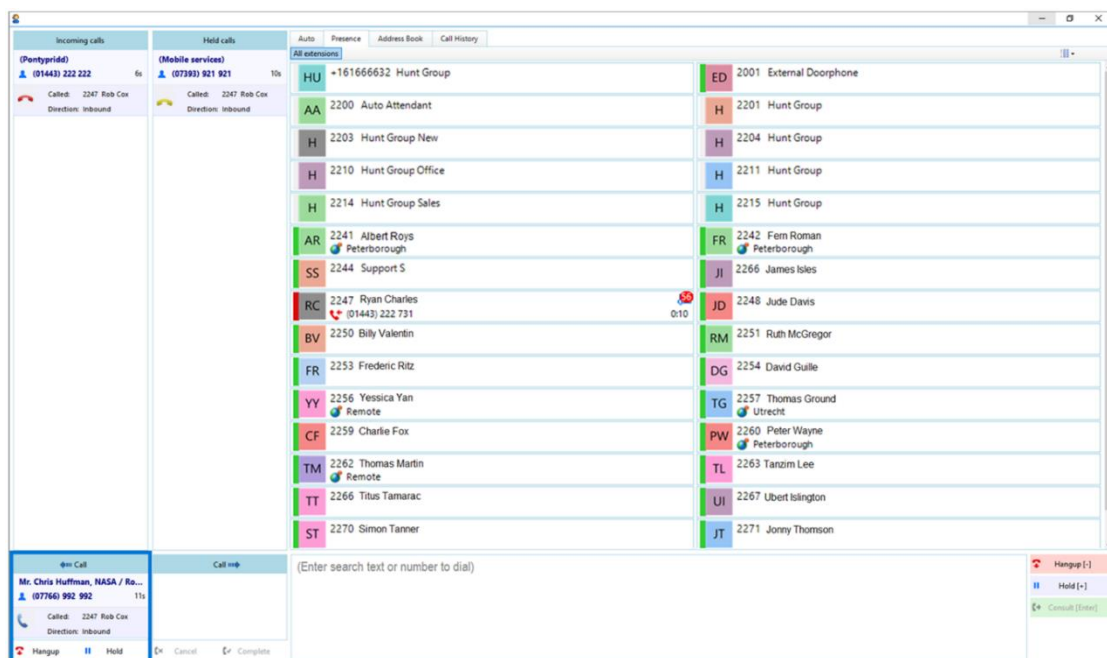
Call Handling

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 us being made.
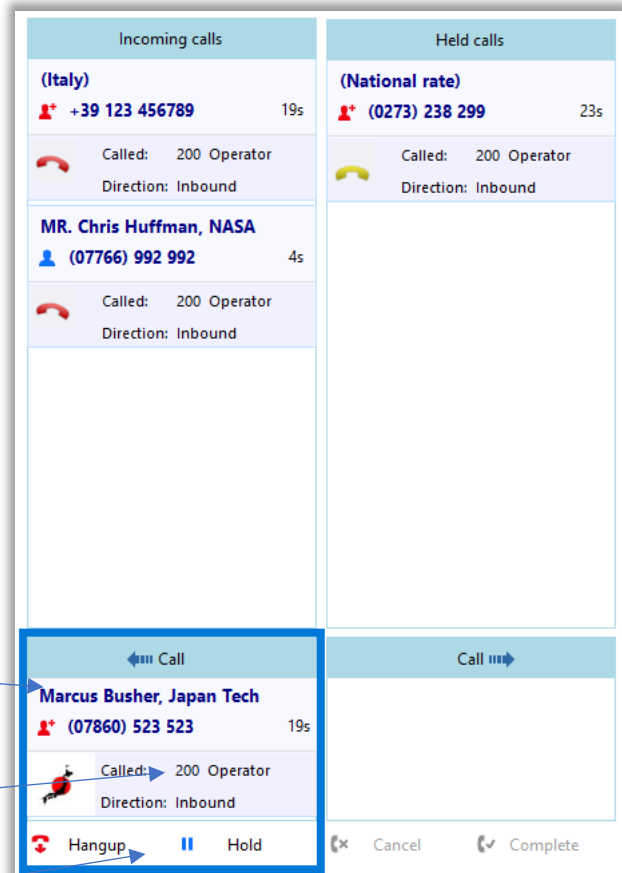
Contact information

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 having to open Go Operator.

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

Go Integrator

Application only

Numeric Keypad input functions only work when the 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

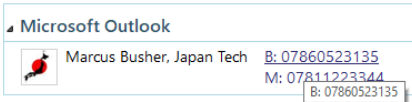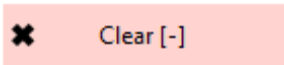Using the PC keyboard is the most efficient option method of handling high call volumes. The table below describes the actions of each keys.

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'.
PW 2222 Paul W (07860) 523 523 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. (Don't forget to set up the integration to you Directory application e.g. Outlook®, Salesforce® first)
	Clear	To Clear the text field, push 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 effective. The Auto window provides access to the relevant information of the person who is calling.

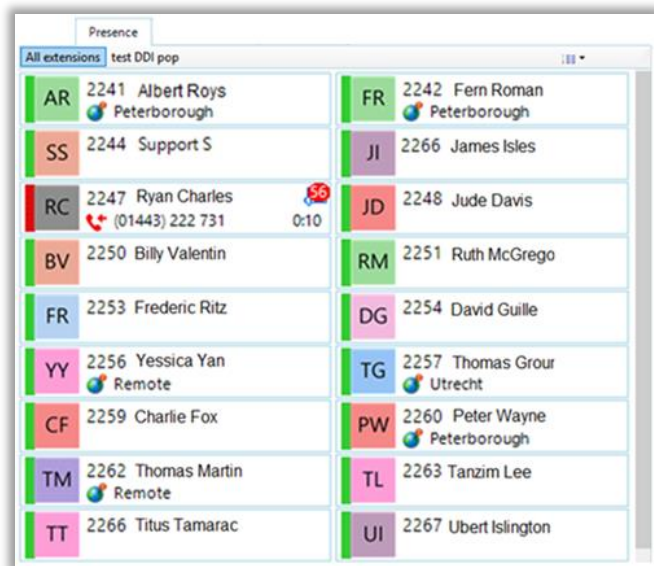When a call is connected you will be able to see two types of information.

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.
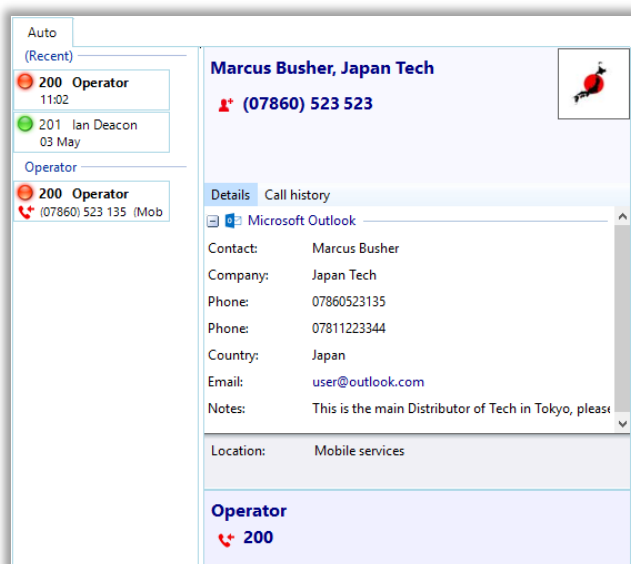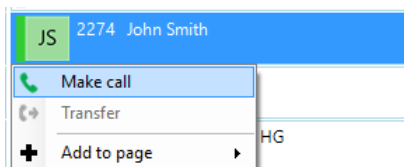
Presence

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.

If you click on one of the entries in the Presence list, then a context menu should appear. Assuming that you are not already on a call, then the menu will contain the Make call option items. By choosing this action, you can dial the extension directly.

If you had been on a call already, then the choices would have been 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.
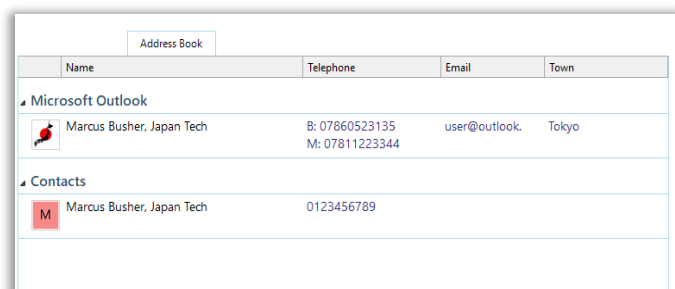
The icons' colors on the list have different meanings; solid red means that the extension is engaged on a call and flashing yellow means that there is a held call at the extension; solid grey is used for hunt groups and ACD queues.
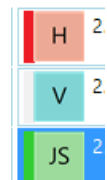
Customized extension pages can also be created by selecting extensions using 'CTRL', and 'ENTER' and the right clicking with the mouse and selecting "Add to page". The page can also be set to automatically "pop" when a pre-programmed DID/DDI is dialed.

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 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" option displays a list of your most recent inbound and outbound calls, and it 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.
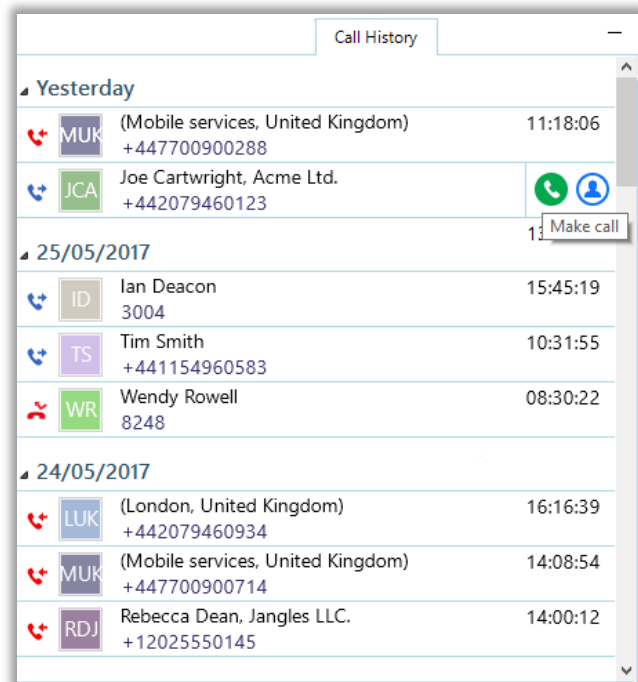
Preview Window

The Preview Window is only displayed whenever an inbound or outbound call is ringing, and the Console window is minimized.
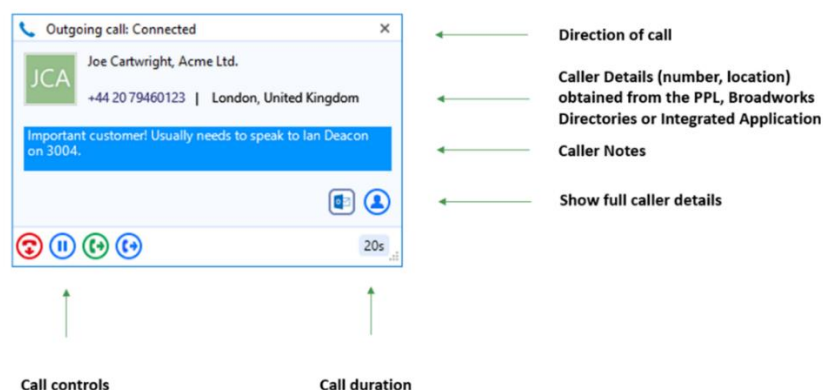
The Preview Window automatically disappears shortly after the call has connected but can be re-displayed at any time during the call by hovering over the system tray icon. It has been specifically designed to be as unobtrusive as possible, but without taking up a large proportion of your screen or obscuring the screens of other running applications.

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 makes a concurrent call to the selected extension.
	Transfer	Transfers the call immediately to the selected extension (remember to say goodbye first!)
	Show Contact	Shows the caller's full contact details, as obtained 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	Shows the caller's full contact details from the CRM or other integrated application. The icon will be that of the application (example shown here for Outlook).

Dialing Options

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

Quick Dial

In the "quick dial" entry box at the bottom of the Console, you can type the phone number and hit Enter to dial the number.

As shown here, 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. If any matches are found, the search results are displayed directly within the Address Book, and you can click a displayed number to dial it.

(Enter search text or number to dial)

	Hangup [-]
❚❚	Hold [+]
📞	Make call [Enter]
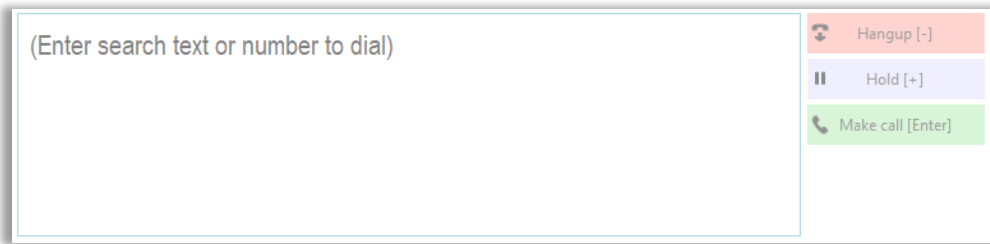
Clipboard Dialing

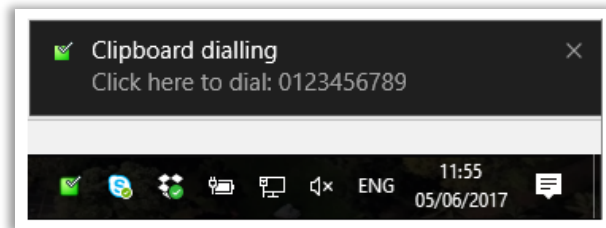If you copy into the Windows clipboard what appears to be a phone number, a discrete pop-up is automatically displayed from the system tray offering you the option to dial that number. Just click the number to dial it.

Clipboard dialling ✕
Click here to dial: 0123456789

11:55
05/06/2017

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.

Go Integrator
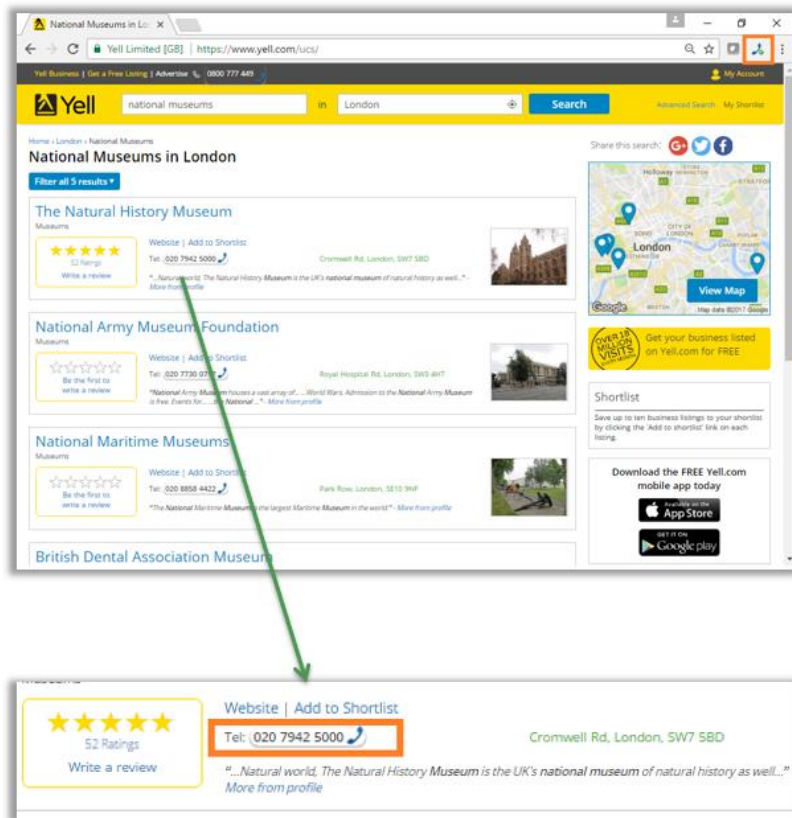
Focus Dialing

Focus dialing offers a similar click-to-dial capability within applications. Once enabled, it will automatically detect fields that contain dial-able numbers and presents a click-to-dial icon to the right of the 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.
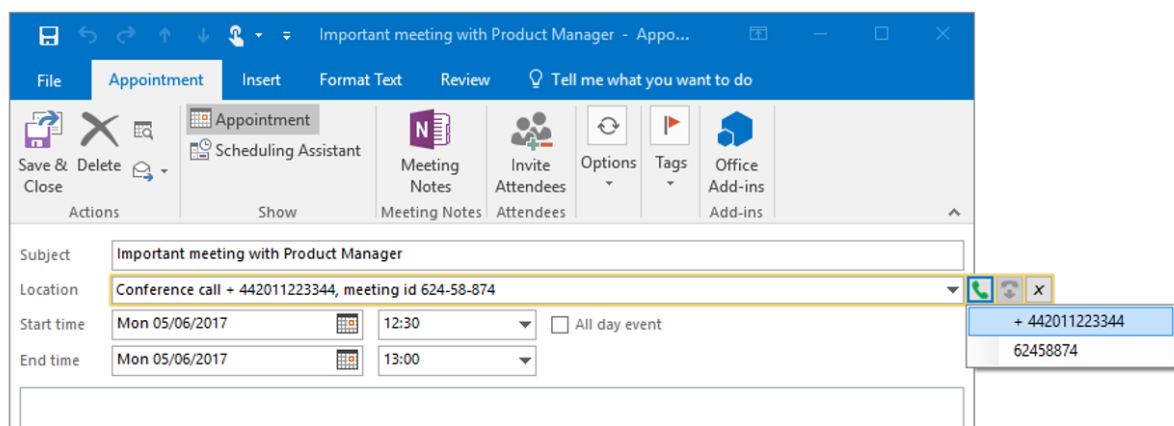
System Tray Menu

Go Operator runs in the system tray.

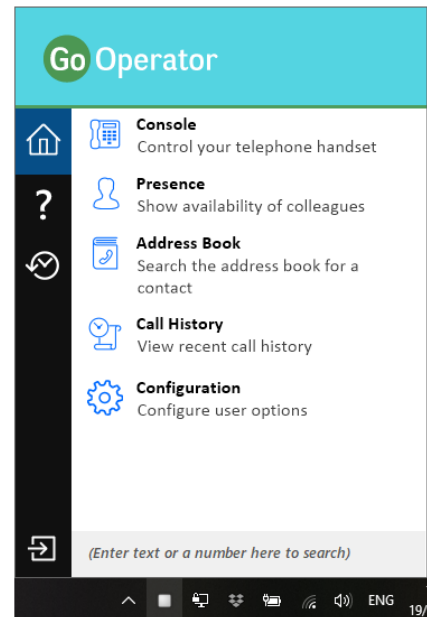The System Tray Menu is accessed by right-clicking on the Go Operator Client icon, which is a green square (or red if you're on a call or yellow if a call is on hold).

Go Operator

🏠 | Console
Control your telephone handset

? | Presence
Show availability of colleagues

🕐 | Address Book
Search the address book for a contact

Call History
View recent call history

Configuration
Configure user options

(Enter text or a number here to search)

Go Integrator

CRM Integration

Go Operator provides integration to a wide range of different CRM and Contact orientated business applications. Integration provides a range of set integration features from the list below. Up to four 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 the "(Add new)" from the Configuration page and select an Application and click Set. To get help on setting up the integration just click on the blue help circle.

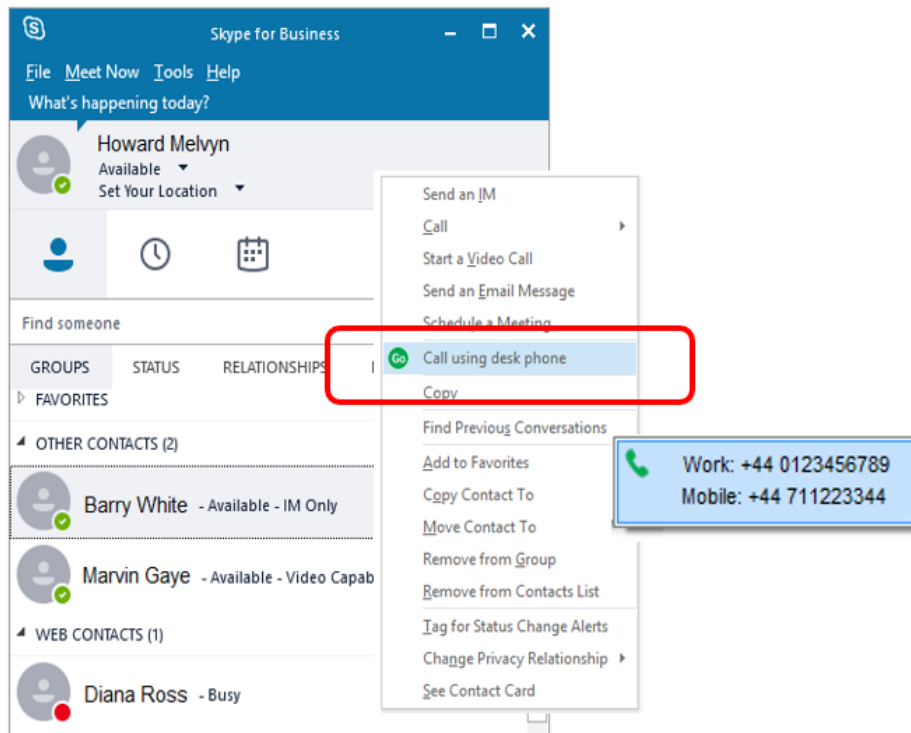Always check the Go Operator website to get the latest information on integrations.
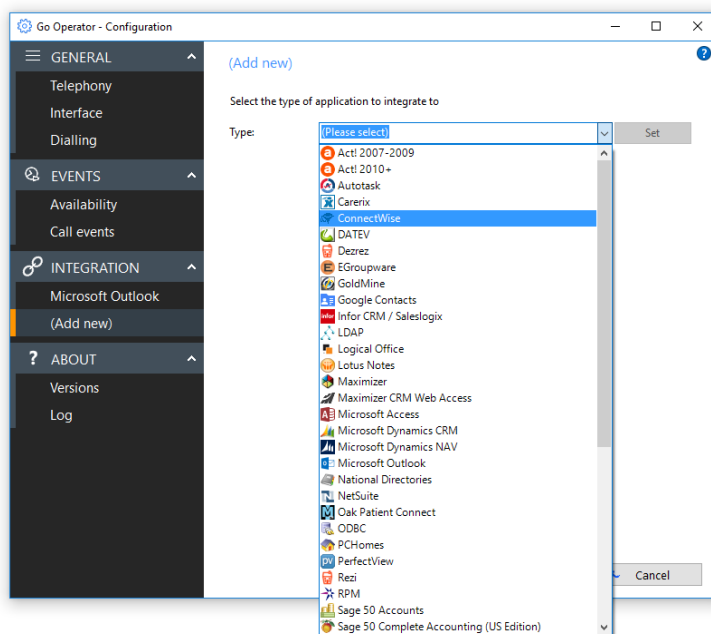
Skype for Business

Go Operator includes several features for Skype for Business.

Call using Desk phone

If the Skype for Business client is running on your PC, you can make calls on your handset directly from the Skype client, without needing to use Go Operator.

Skype Status Update

If the "Update Skype for Business state when on a call" option is enabled in your Go Operator client configuration, your Skype status will be updated to reflect your Go Operator call status – such as "in a call" when the handset is busy, or "dnd" when you have do not disturb switched on.