




Go Integrator CE

Quick Reference Guide

Version 1.1
Q1 2022



Introduction

Go Integrator Chrome Extension (GI-CE) is an extension for Google Chrome browser providing the similar feature set as Go Integrator. GI-CE is designed for users who predominantly work in a browser environment on a PC, Mac, or Chromebook.

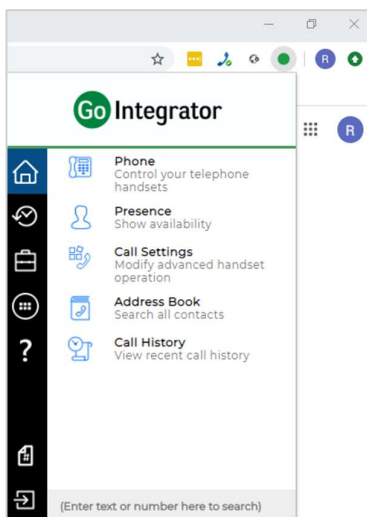
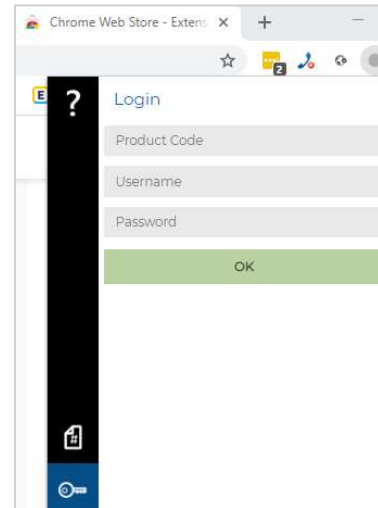
This quick reference guide contains some useful information to help you get started with GI-CE.

Installing and connecting

GI-CE is a lightweight installation available from the chrome web store (<https://chrome.google.com>). The extension is titled **“CRM Integrator for hosted telephony.”** Download extension directly from the chrome web store to the user’s extensions bar.



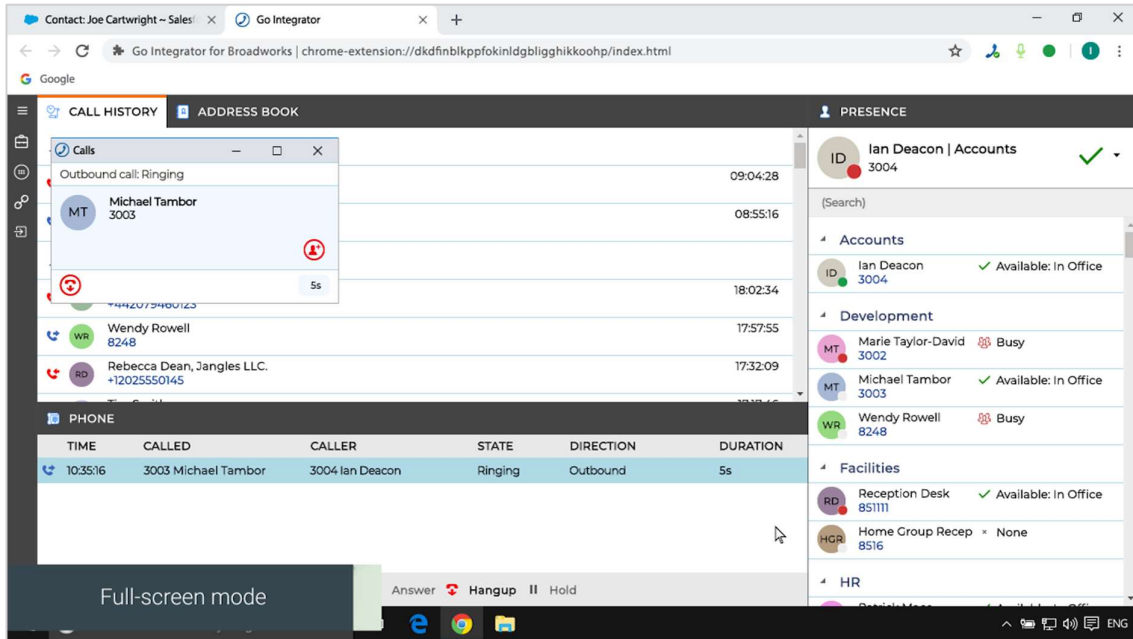
After installing, it will appear as grey circle in the Chrome menu. This means that the user is not connected. To connect GI-CE “left-click” the circle and enter Product Code and BroadWorks username and password (note: these are the same credentials you would enter UC-One). The Product Code is specific to the BroadWorks instance you are connecting to and will be provided by your supplier.



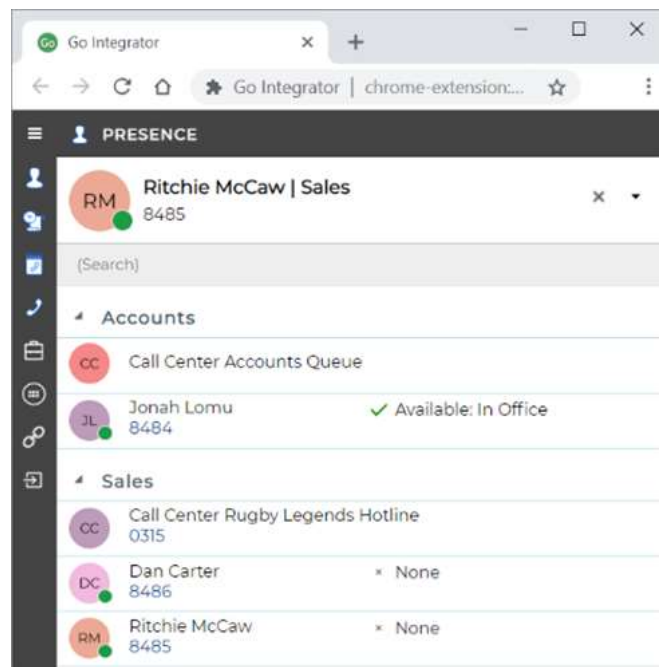
On successful entry of credentials, the icon in Chrome menu will turn green and main GI-CE menu will open.

Modes of use

GI-CE can be used in Full-screen mode and Compact mode. When using GI-CE with browser applications (e.g. Salesforce) it may be more common to use it in **“Full screen mode.”** To switch to GI-CE from another browser tab, simply click on the GI-CE icon in the browser toolbar and select the feature you want (e.g. Presence). This will take you directly to the feature field in a new browser tab.

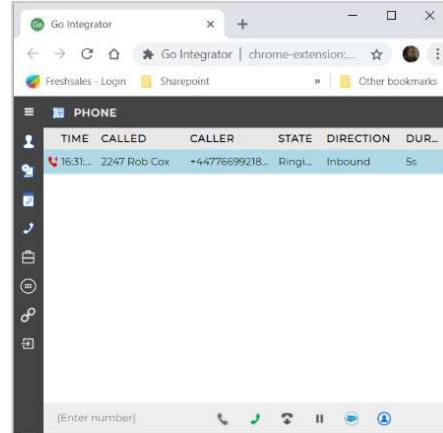


“Compact mode” allows the window to “float” on the desktop making it readily accessible at all times. While in full-screen mode, minimize just the GI-CE screen. Slide in each side of the browser with left-click of mouse. Once the GI-CE browser window is 1/3 of the normal screen width size, it will automatically default to just Presence Window screen. Making it particularly effective when left on a secondary monitor.



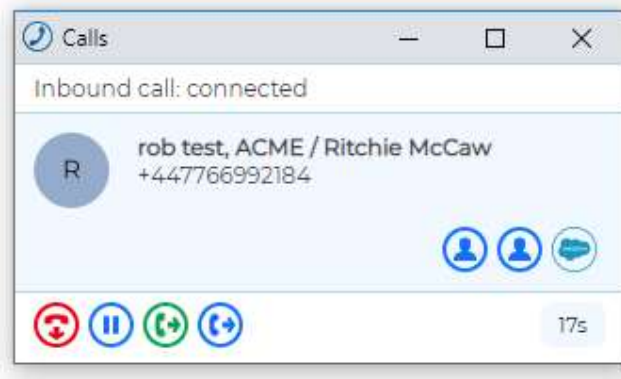
Answering a Call

Answer a call by using the Phone Window or Preview Window. There are two forms of the Preview Window (1) the version that display when GI-CE is the active browser tab or (2) the version that shows when either another browser tab is in focus or the browser is minimized. This is also known as the “Calls” window.



Preview Window Inside Browser

Phone Window

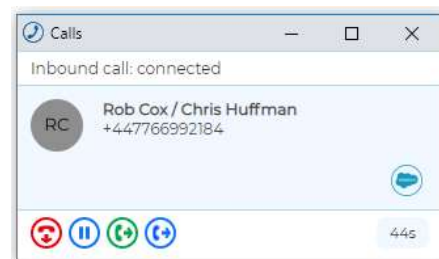
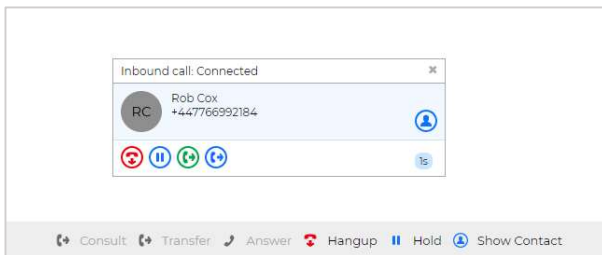


The calls window will appear whenever you receive a new call and your browser is not maximised- it will even appear if your browser window is minimised!

Calls Window

Call Control

Once answered, full call control is available from the Phone Window or Preview Windows.



Click-to-dial

GI-CE automatically detects dialable numbers on webpage and provides a dial icon.

North America

For inquiries please contact us via the below contact details.

Phone:

+1 (602) 562-8000 (option 3)

Presence

The Presence feature of GI-CE uses a dynamic monitoring technique, so the hook status is only updated when displayed. The user will be able to check status of a colleague's extension in the Presence window. BLF circle indicates DND and Forwarding (when set). The user will be able to call and transfer calls to colleagues straight from the Presence window.

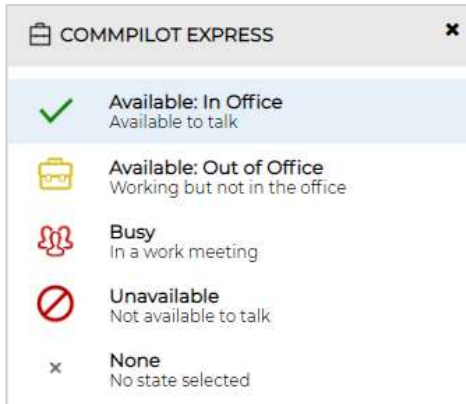
*monitoring extensions limit at one-time is 500 users with version 1.1.

The screenshot shows a 'PRESENCE' window with a search bar and a list of colleagues. The list is organized into two main categories: 'Account Management' and 'Customer Services'. Each entry includes a circular icon with initials, the name, extension number, and status. Some entries have a green checkmark indicating 'Available: In Office', while others have a red 'x' indicating 'None'. There are also icons for call and transfer actions next to some entries.

Category	Initials	Name	Extension	Status	Actions
Account Management	JD	Joseph Dell Product Management	2248	Available	Call, Transfer
Account Management	CC	Call Center Sales	405		
Account Management	NH	Neil Hocks	265	Available: In Office	
Account Management	PW	Peter Walker	260	Available: In Office	
Account Management	SS	Simon Simons	275		Call, Transfer
Account Management	TG	Timothy Grid	257	Available: In Office	
Customer Services	CC	Call Center Installations	402		
Customer Services	CF	Charly Freidz	259	Available: In Office	
Customer Services	KA	Karen Arjen	269	None	
Customer Services	AR	Andrew Rogers	241	Available: In Office	
Customer Services	CD	Caroline Douglas	246		
Customer Services	DG	Daniel Guerra	254		
Customer Services	JH	Jean Harris	114		

Integration features

GI-CE provides the same Caller Preview, Contact Popping and Address book searching as the desktop client. The user still has access of setting of CommPilot Express, DND and Call Forward.



Configuring CRM Integration

CRM integrations can be configured by “clicking” on Integrations tab on the left-hand menu bar.



More help

For more help go to <https://gointegrator.com/help?version=3.1&lang=uk&item=1166>