

Introduction

This document provides an overview of the first release 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

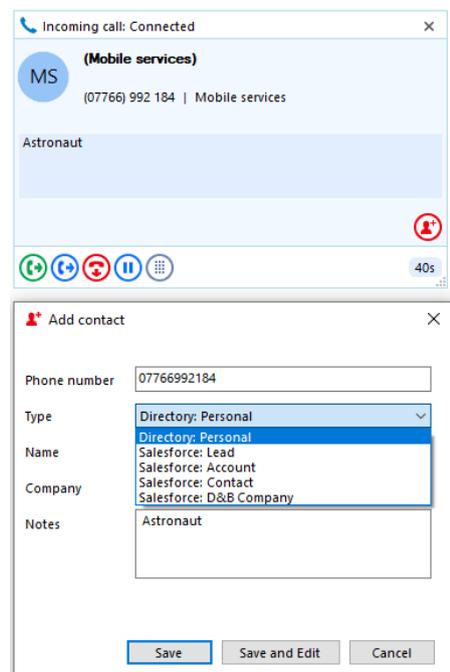
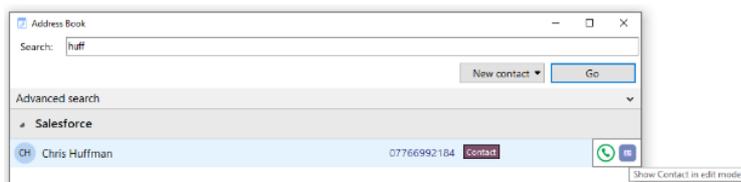
Adding New Leads and Contacts

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

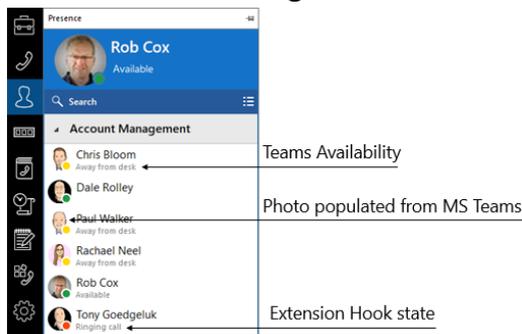
If Cara is integrated to multiple applications, then the Add contact option will continue to show until the contact is added to each application, plus an existing contact in one system can be easily duplicated to another. A contact can be added from multiple locations such as the live call Preview window,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

Prefer edit action

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



Microsoft Teams integration



Cara supports 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^{###} (beta)

[#] Require MS Teams direct routing (or similar) / Microsoft 365 Business Voice

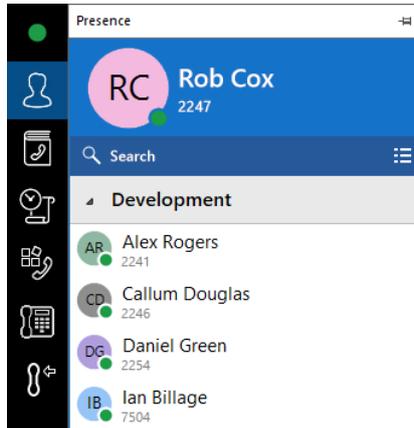
^{##} Require MS Teams direct routing (or similar)

^{###} Currently available as a customer beta feature only with limited support. Feature may change without notice.

It so also planned to add a MS Teams extension that will allow contact searching and dialing from within Teams (Q1 2021).

“AppBar”

Cara introduces an alternative user interface to the system tray menu known as the “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).



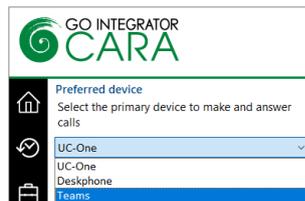
The AppBar is interactive and expands according to user selection. The AppBar presents the following options:

Presence, Address book, Call History, Call Settings, Toolbar, Preferred Device, 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.



Device control and preferred device



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. This is known as Preferred Device. The user can even decide to stop monitoring certain devices altogether if preferred. When UC-One is selected as the Preferred device Cara will automatically utilize the desktop API available with UC-One enhancing the call control experience. Preferred devices can also include your mobile phone and

Microsoft Teams.

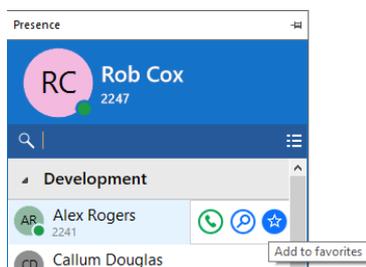
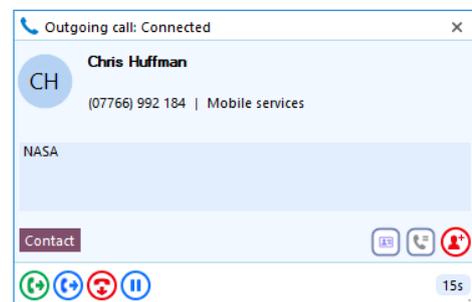
Embedded Softphone

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

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 500 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.

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 above shows it working in an email signature.

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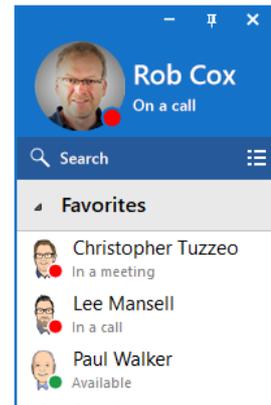


Call events

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.

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.

V3 CRM library support

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

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.

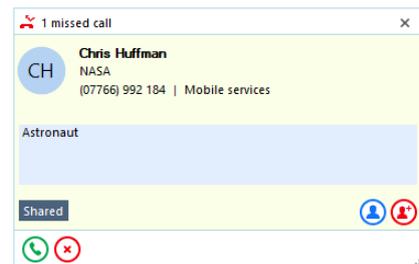


Login screen

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.

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 | ✓ | ✓ | ✓ |
| 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 ^{###} (beta) | ✗ | ✓ | ✓ |
| Softphone | ✗ | ✓ | ✓ |
| Preferred Device (Multi-device support) | ✗ | ✓ | ✓ |
| Bluetooth mobile ^{###} (beta) | ✗ | ✓ | ✓ |
| Events | ✗ | ✓ | ✓ |
| Client API ^{***} | ✗ | ✗ | ✓ |
| Toolbar Agent features | ✗ | ✗ | ✓ |
| V3 CRM integrations (All others) | ✗ | ✗ | ✓ |
| CRM Plus integrations (All others) | ✗ | ✗ | ✓ |
| Cloud Contacts ^{**} | ✓ | ✓ | ✓ |

* Call control will vary by device type

** Database hosted by Service Provider

*** APIs are different

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Require MS Teams direct routing (or similar)

Currently available as a customer beta feature only with limited support. Feature may change without notice. Teams Availability is Beta as the Microsoft API used is still in beta status

Call recording Pause / Resume features are not available with initial release of 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 | ✗ | ✓ |
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| MS Teams - Show, Add, Pop CRM contact for call ringing / answered using Teams | ✗ | ✓ |
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| MS Teams - Show photo / avatar in Cara Presence | ✗ | ✓ |
| MS Teams - Show peers Teams availability | ✗ | ✓ |
| Softphone | ✓ | ✓ |
| Preferred Device (Multi-device support) | ✗ | ✓ |
| Bluetooth mobile | ✗ | ✓ |
| Events | ✓ | ✓ |
| Client API** | ✓ | ✓ |
| Toolbar Agent features | ✓ | ✓ |
| V3 CRM integrations (All others) | ✓ | ✓ |
| CRM Plus integrations (All others) | ✗ | ✓ |
| Cloud Contacts* | ✗ | ✓ |

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