



## **Quick Starter Guide**

**Tray Menu Mode**

## Introduction

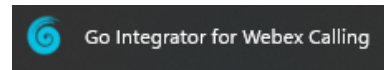
This guide contains useful information to help you get started with Go Integrator for Webex Calling.

## Licensing

Go Integrator must be licensed before it can be used. User licenses are either assigned in advance by your provider or registered by the user at first login using a provider supplied License Key code.

## Shortcut

After installation Go Integrator is available from the start menu:



## Login

Following installation and startup, Go Integrator will require user login credentials. Click “Login” and then enter your Webex Calling user credentials.

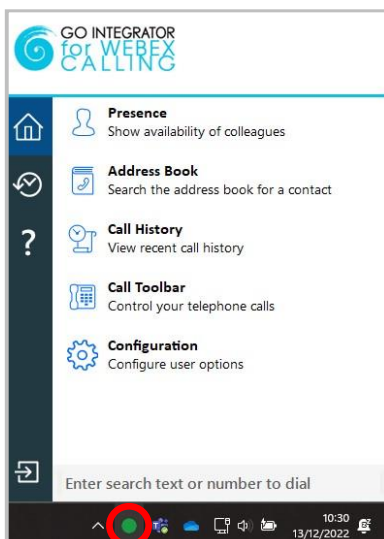


## Interfaces

Go Integrator has four user interfaces: Tray Menu, AppBar, Call Toolbar and Preview Window. The Tray Menu and AppBar modes provide similar functionality - choose your preferred mode through “interface” settings. Tray Menu mode is the default setting. The Call Toolbar and Preview Window operate the same way in either mode.

This guide explains the Tray Menu mode – for AppBar mode, please refer to the separate AppBar mode guide.

## Tray Menu



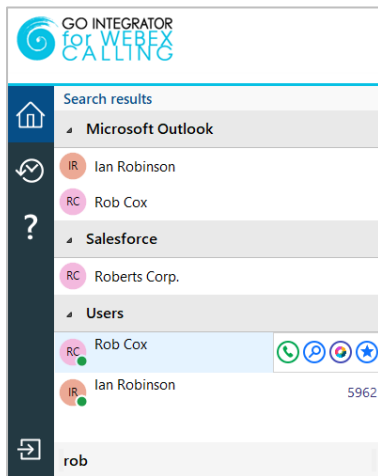
In Tray Menu mode, the menu is accessed by a right-click on the Go Integrator system tray circle icon, usually green for “Available” status. The icon changes according to your Webex Calling user state.



The following functions are launched from the Tray menu: Presence, Address book, Call History, Call Toolbar, Configuration, Recent Calls, Help and Exit. The Search or Dial field is automatically selected after right-clicking the system tray icon.

## Quick Dial / Search

One of the most powerful features is the combined Search or Dial entry field at the bottom of the Tray Menu following a right-click of the system tray icon.



To make a call, simply type the number to dial and hit **Enter**.

Alternatively, type a contact name (either full or partial) to initiate a search of any system directories or integrated CRM business applications.

The search results are displayed directly within the Tray menu window – simply click the number to dial or open the contact using the slide out menu.

Extension status is also displayed for co-workers with the option to start a Webex chat, if enabled.

For additional dialing methods, refer to the Dialing Options section below.

## Call Toolbar

The Call Toolbar can be docked to either the top or bottom of the screen and provides many core features including caller display, call handling buttons and CRM integration action.

Launch icon:



## Preview Window

The Preview Window is displayed whenever an inbound or outbound call is active and automatically hides after the call has connected (the hide delay time of the Preview Window can be altered in Configuration). It can be re-displayed at any time during the call by hovering over the system tray icon.

Context-sensitive call handling buttons are presented along the bottom of the Preview Window. Display information includes caller/called party details, which are retrieved from the system directory or any integrated CRM business applications.

**CALLER DETAILS** are retrieved from your CRM address books. Regional location can also be displayed.

**NOTES** are also retrieved from the caller's contact record, if available.

**ADD CONTACT** records to your CRM address books or copy data from one CRM to another.

**POP CONTACT** in the CRM application for further details

**CREATE CALL LOG** into the CRM contact record to show conversation history. Can also be automated.

**CALL CONTROL**

**SEND CALLBACK EMAIL** with caller details included

**DISPLAY ADDITIONAL** information from other CRM data

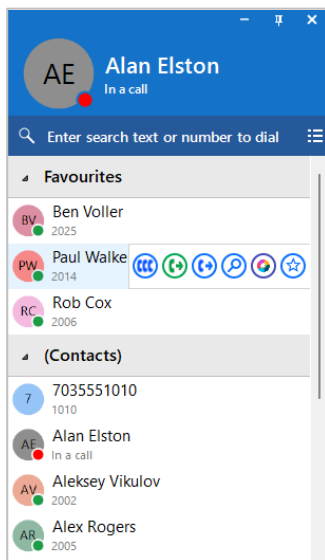
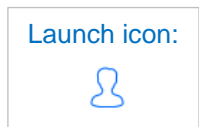
## Call Controls

The following call controls are available through the Preview Window and Call Toolbar:

	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 / Decline	End the current call / Decline the current incoming call (Softphone only)
	Hold	Pause the call - the caller will hear hold music if available
	Conference	Call another party to join into a conference with a current connected party
	Consult	Place the current call on hold and transfer the call to another extension
	Transfer	Blind transfer to another extension without introduction
	Send DTMF Digits	Send DTMF during connected call
	Callback Email	Open email client to send email with connected call details included automatically
	Contact	Contact details, retrieved from the telephone system directory
	Add Contact	Add the caller to the shared address book or integrated CRM business application/s
	Contact	Contact details, retrieved from an integrated CRM directory – the icon relates to the specific CRM and contact type retrieved
	Contact Options	Select from available actions: - Show Contact: open the full contact details within the integrated address book - Create and Show Call Task: write a call log entry into the integrated CRM and open ready for further editing - Show related data: Display additional information from other integrated CRM contact and activity data

## Presence

The Presence window displays a list of co-workers including live Webex Calling extension status for active users.



Key features available from Presence include:

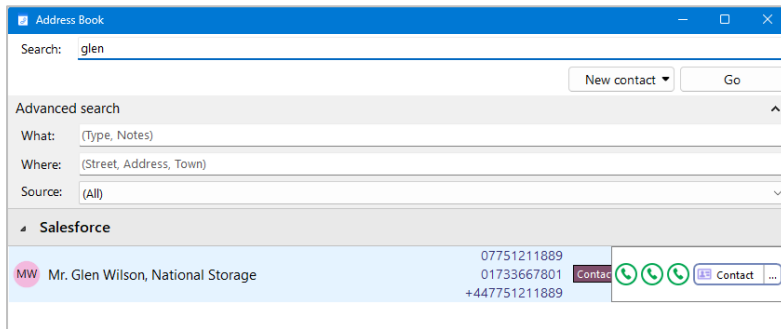
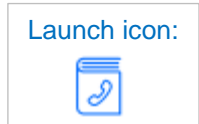
- Call co-workers or transfer call
- Show co-worker details
- Open Webex chat
- Send Callback Email
- Add to Favorites

The Presence window will automatically populate with co-workers up to a maximum of 50 contacts. Above this, the window will remain empty until a name is entered in the Search bar. Matching contacts can be pinned to the window by adding to your personalized Favorites group - select the star symbol in the slide out menu that appears when hovering over the contact

Calls can be initiated or quickly transferred to co-workers using the slide out menu bar when hovering over a contact.

## Address Book Search


Go Integrator can search any integrated CRM business applications plus the Webex Calling Directories and MyContacts lists.



To dial the required contact, simply click on the telephone number displayed to initiate the call or use the **Call** button from the slide out menu:

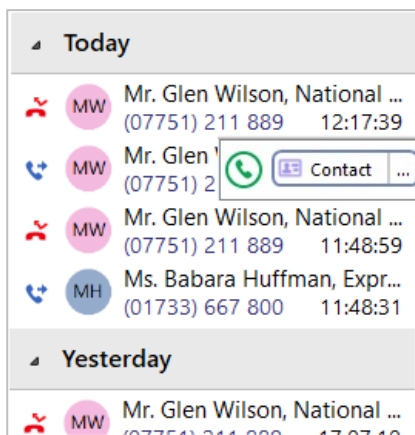
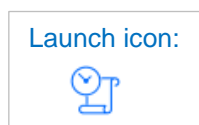


During a connected call, the slide out menu will also offer call transfer options so calls can also be quickly transferred to contacts found through the address book.


Alternatively, the contact details can be opened via the slide out menu when hovering over the contact. Click the  icon to view the available actions for the integrated application.

For any compatible CRM configured, the New Contact selection will also allow creation of new contacts directly into the CRM address book.

## Call History



The Call History window displays a detailed call history including recent inbound, outbound and importantly, missed calls, ensuring a clear notification to avoid missing opportunities. Simply click the telephone number displayed to initiate the call.

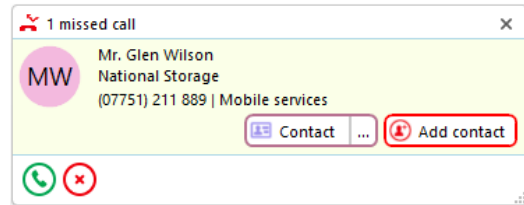
For known contacts, the contact details can be opened via the slide out menu when hovering over the contact. Click the  icon to view the available actions for the integrated application.

## Additional Features

### Missed Call Notification

A pop-up window can appear following a missed incoming call, providing a quick call-back method to avoid missing opportunities.

The notification will stay visible until an action is taken.

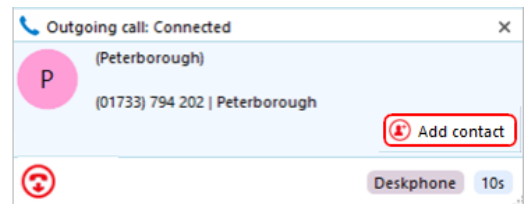


### Add Contact

When a telephone number is presented in the Preview Window, Call History or Recent Calls list and a contact cannot be found, the **Add Contact** icon is presented:

Click the icon to add contact information and then save to the desired directory or integrated CRM business application.

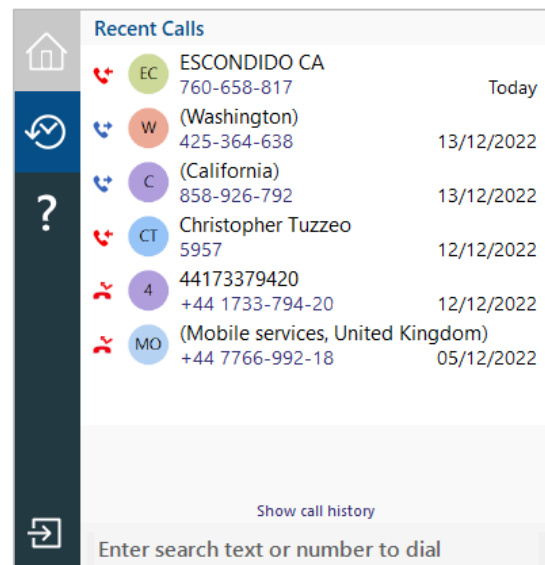
Add Contact can also be used to copy the contact to other locations.



### Recent Calls

The "Recent Calls" list displays a summary of the most recent calls, showing just a single entry for each contact or number listed.

Simply click the number to make the call or open the contact using the slide out menu.



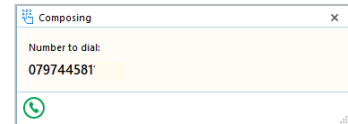
# Quick starter guide: Go Integrator for Webex Calling

## Dialing Options

Go Integrator offers a wide range of Click-to-Dial features to accelerate the outbound calling process, both in locating the number to dial and in the actual dialing process itself. The most common dialing tools are described here:

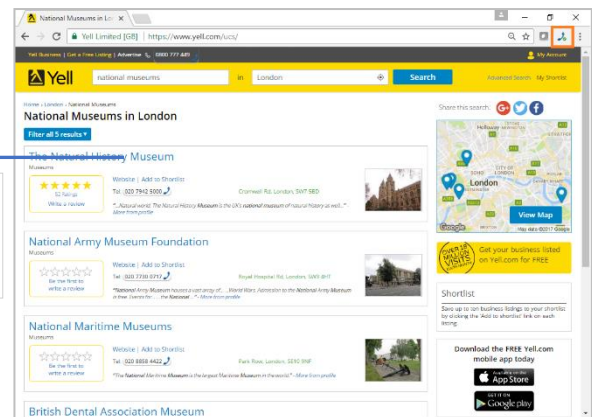
### Clipboard Dialing

Any telephone number copied into the Windows clipboard can be dialed via an automatic pop window, offering the option to dial the number. Just click the Call icon to dial.



### Web Page Dialing

Go Integrator can recognize telephone numbers in web pages and convert them to a quick dial hyperlink. Simply click-to-dial directly from the web page.



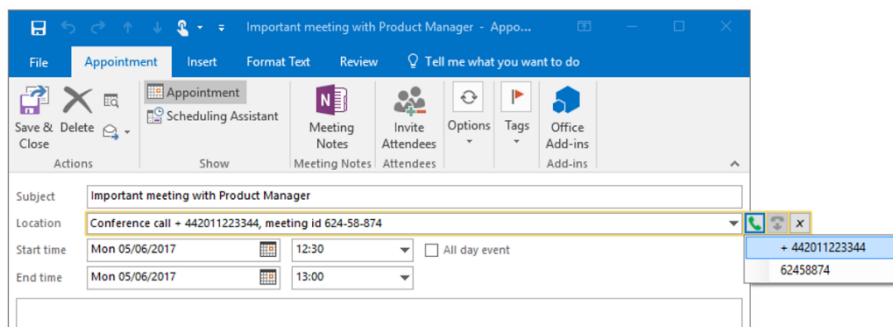
### Screen Read Dialing

With "Screen Read" dialing, you can click-to-dial any number on screen, even when presented as an image. Just hover the cursor over the number displayed and hold **CTRL** and **SHIFT** simultaneously to turn the number into a quick dial link:



### Focus Dialing

Go Integrator can automatically detect telephone number fields within other windows applications to present a click-to-dial icon to the right of the field. If the field contains more than one telephone number, a drop-down is displayed when you hover over the icon, allowing you to select which number to dial.



END OF DOCUMENT