



Quick Starter Guide Tray Menu Mode

Introduction

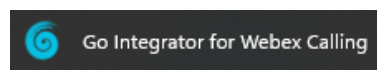
This quick starter guide contains useful information to help you get started with Go Integrator 4 Webex Calling.

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.

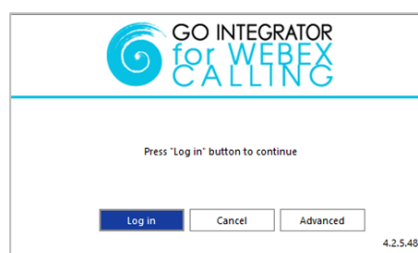
Shortcut

After installation Go Integrator is available from the start menu:



Login

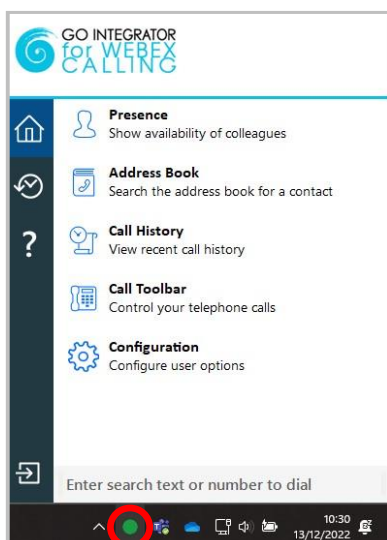
Following installation and startup, Go Integrator will require user login credentials. Click "Login" and then enter your Webex Calling user credentials.



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



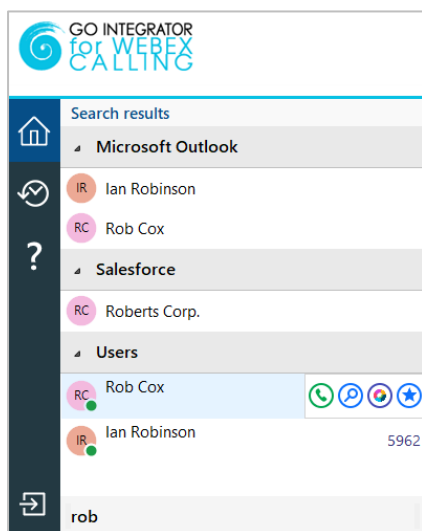
In Tray Menu mode, the menu is accessed by a right-click on the Go Integrator system tray circle icon, usually green for "Available" status. The icon changes according to your Webex Calling user state.



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.

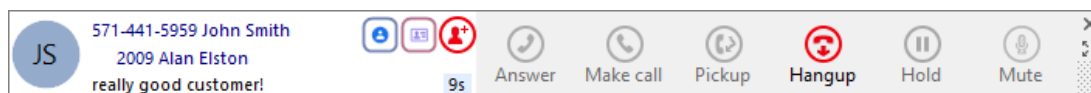
Extension status is also displayed for co-workers with the option to start a Webex chat if, enabled.

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

Call Toolbar

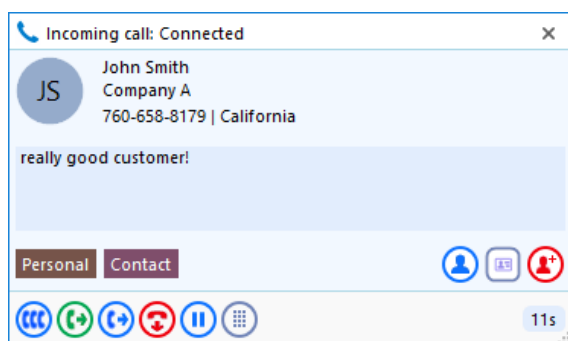
The Call Toolbar can be docked to either the top or bottom of the screen and provides many core features including caller display, call handling buttons and CRM integration action.

Launch icon:



Preview Window












The Preview Window is displayed whenever an inbound or outbound call is presented or in progress. The window can automatically disappear after a configurable delay period once the call has connected. Designed to be as unobtrusive as possible, the Preview Window discretely appears in the corner of the display without taking focus from other applications.



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.

Call Controls

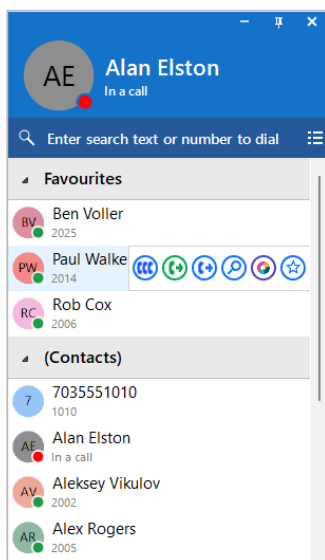
The following call controls are available through the Call Toolbar and/or the Preview Window:

	Make Call	Call Toolbar only: enter number or co-worker name to dial
	Deflect	When an incoming call is ringing, you can choose to deflect it (transfer it without answering it) to another user
	Hang Up	End the call
	Hold	Pause the call - the caller will hear hold music, if available
	Consult	Place the current call on hold and transfer the call to another user
	Transfer	Blind transfer to another user without introduction
	Conference	Preview Window only: add a co-worker to the current active call
	Show Contact	Display additional contact details, obtained from the Broadworks directory
	Add Contact	Add the caller to the shared address book or integrated CRM business application/s
	Open/Pop Contact	Open the full contact details within an integrated CRM business application. The icon shown will relate to the CRM application (e.g. Outlook, Salesforce).
	Create and Show Call Task	Creates and opens a call activity (call log) in an integrated CRM business application. The icon shown will relate to the CRM application (e.g. Salesforce)

Presence

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

Launch icon:



Key features available from Presence include:

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

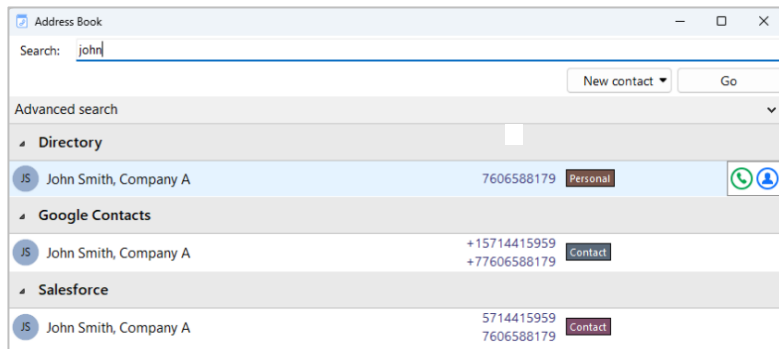
The Presence window will automatically populate with co-workers up to a maximum of 50 contacts. Above this, the window will remain empty until a name is entered in the Search bar. Matching contacts can be pinned to the window by adding to your personalized Favorites group - select the star symbol in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

Launch icon:

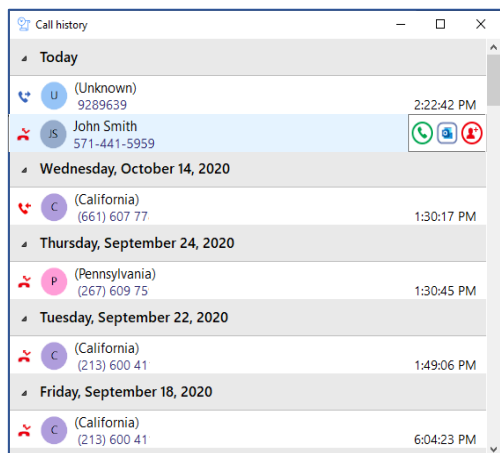


To dial the required contact, simply click on the telephone number displayed to initiate the call, or use the **Call** button from the slide out menu.

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 name. Just click the CRM or Show Contact icon to open the contact within the integrated application.

Call History



Launch icon:



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.

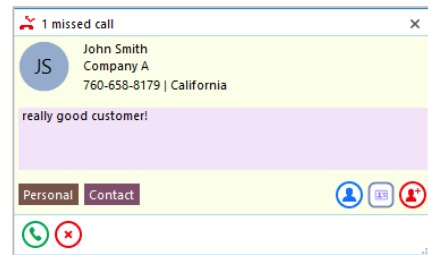
Simply click the telephone number displayed to initiate the call.

For known contacts, the contact details can be opened via the slide out menu when hovering over the contact name. Just click the icon to open the contact page within the integrated CRM business application (example shown for MS Outlook).


Additional Features

Missed Call Notification

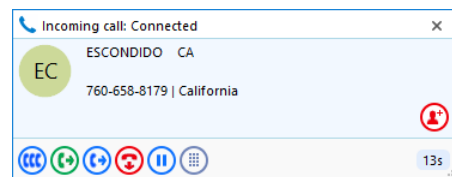
A pop-up window can appear following a missed incoming call, providing a quick call-back method to avoid missing opportunities. The notification will stay visible until an action is taken.



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.

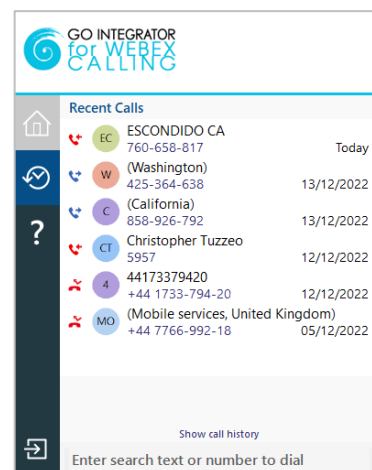


Recent Calls



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.

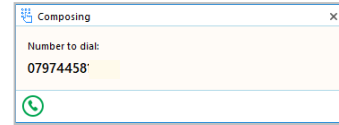


Dialing Options

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:

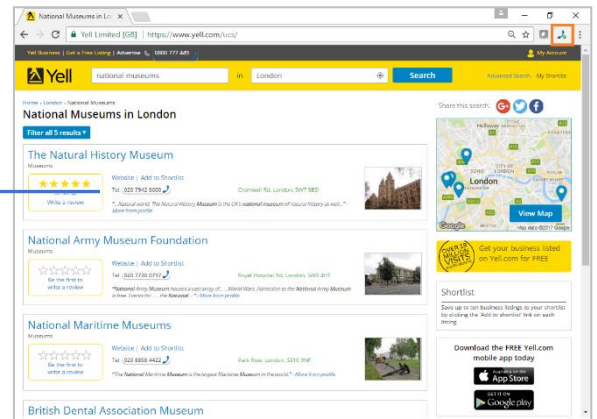
Clipboard Dialing

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.



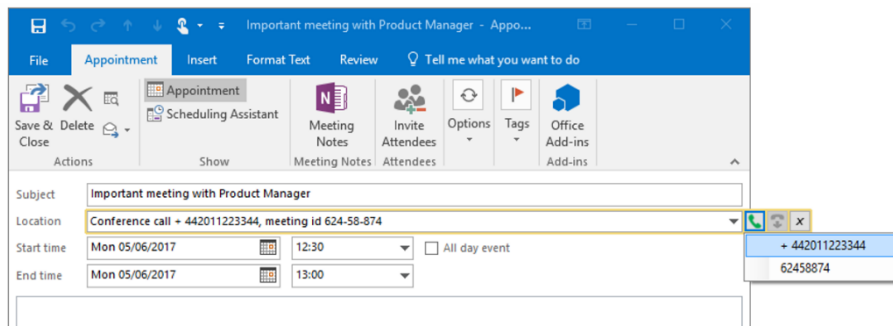
Screen Read Dialing

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.



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