CLOUD VOICE BUSINESS PORTAL

APPLICATION USER GUIDE -CRM CONNECT (GO INTEGRATOR)

VERSION 2.0

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Contents

Introduction

The following document type describes a Cloud Voice Site or User application.

An application is used to control existing features, or provide new features to Sites or Users. An application is typically downloaded onto a local device, either a PC, Smartphone or Tablet. Applications may be inclusive of User feature packs, or may be chargeable add-ons that enable the User to fulfil or enhance this job role.

This User guide will cover off Company/Site Administration and End User Administration.

Overview

CRM Connect (Go Integrator)* is an application for Windows Desktop that integrates leading CRM Applications into the Cloud Voice service. It works in conjunction with a User's primary** phone and CRM software to enhance a User's productivity, *i.e. screen popping a CRM file based on the number calling in.*

Go Integrator is referred to as CRM Connect on the Business Portal Service Settings page. This will change to Go Integrator in a future release.

**Devices set up as shared devices to the primary device cannot be controlled.*

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Application Description – Cloud Voice CRM Connect and Lite

CRM Connect provides the Users with a desktop Computer Telephony Integration (CTI) tool that integrates some aspects of their Cloud Voice service into a CRM system.

This application supports the following features and functions:

- Automatically search CRM systems whilst your phone is ringing so you know who is calling before you answer
- Answer, hang-up, transfer or place a call on hold using your mouse
- Click-to-dial from the CRM system and web pages
- View call history, including missed calls, and return calls
- View the prescence status of other users on the Cloud Voice service

CRM Connect Lite supports all of the functionality above but will only support the following CRM systems:

- Microsoft Outlook
- Lotus Notes

Go Integrator DB supports all of the functionality above and also integrates into a number of additional CRM systems as per the list in the links below:

- Standard Integrations - https://gointegrator.com/cti.php?tab=12&item=15&lang=uk

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Hardware & Software Description

In order to install and use this application successfully, the following installation and licencing requirements should be met:

Operating System

This application needs to be deployed on a Microsoft Windows Platform

Hardware Requirements

The hardware requirements for the Microsoft Windows platform include:

- 1 GHz Pentium-class processor
- 1 GB Memory
- 500MB free hard drive space
- Operating System:
    - Windows XP Professional SP3 (Not Recommended and Unsupported)
    - Windows Server 2003 and 2008 (Not Recommended and Unsupported)
    - Windows Vista (Not Recommended and Unsupported)
    - Windows 7 (Recommended and Supported)
    - 32 bit and 64 bit versions
- SVGA display
- Keyboard and mouse
- Network adapter connected to a TCP/IP network
- IBM-PC or 100% compatible

Software Requirements

During installation of CRM Connect, as well as installing the CRM application, the following third-party software will be installed:

- Microsoft .Net 4.0

Network and Firewall Requirements

You may need to allow outbound access for the following on your firewall:

Application	Protocol	Destination	Destination Port
Application Signalling	SIP	_sip_udp.ipcomms-btwbslnws09.bt.com 147.152.35.102/29 147.152.35.110/29	UDP/TCP 5060 to 5075
Application Media	RTP	147.152.35.100/29 147.152.35.108/29	UDP16384 to 32766
Go Integrator	Proprietary	applications.yourwhc.co.uk 193.113.10.12 193.113.11.12	TCP 443
Go Integrator Downloads	HTTPS	downloads.yourwhc.co.uk 193.113.10.27 193.113.11.27	TCP 443
Go Integrator Licence Check	HTTPS	ccusage.yourwhc.co.uk 193.113.10.13 193.113.11.13	TCP 443

![Virgin Media Business logo]

Provisioning & Configuration

The CRM Connect application is an Add-On that is provided to a User already on the platform and assigned a Functional, Fixed or Mobile User licence.

Provisioning

Once CRM Connect is provisioned alongside a licence, the application download will appear in the Application section of the Business Portal as per the image below.
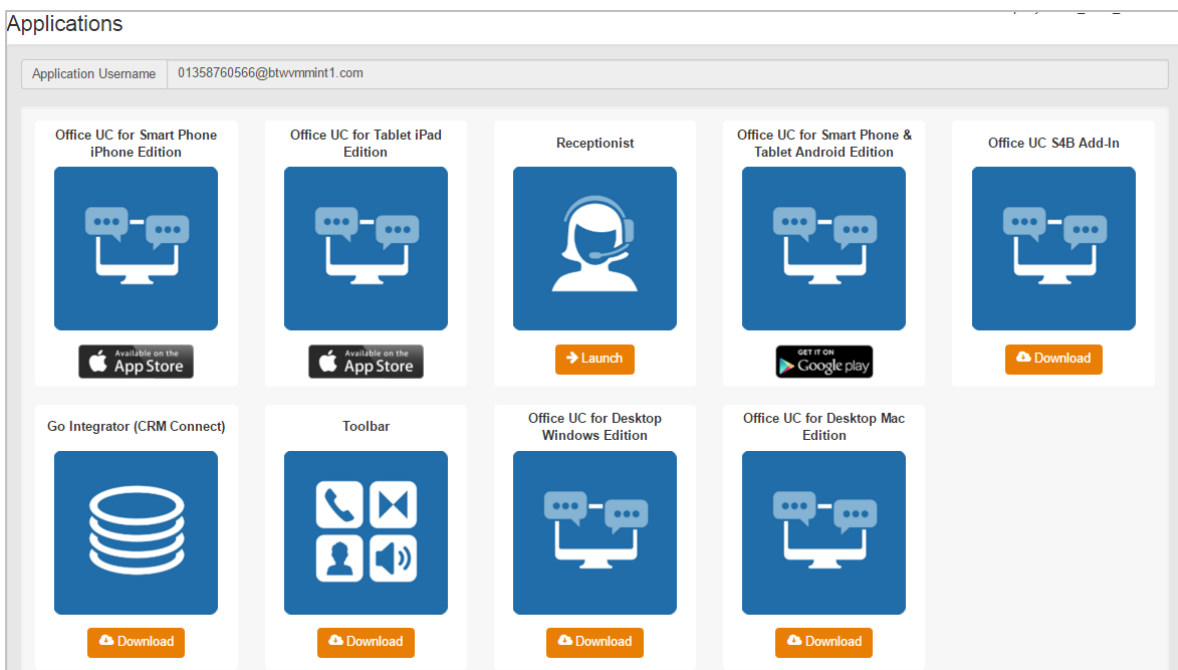
Download and Installation

Once Virgin Media Business have provisioned the Add-On and the User has received their welcome email, they can now download the application from the Business Portal.

- Login to an administrator-level user account on the Windows workstation that CRM Connect needs to be installed onto. Note: the CRM Connect file will be called Go Integrator as this is what our CRM development partner, Mondago, calls the service. Double-click the 'GoIntegrator.exe' file and then click **Run**.
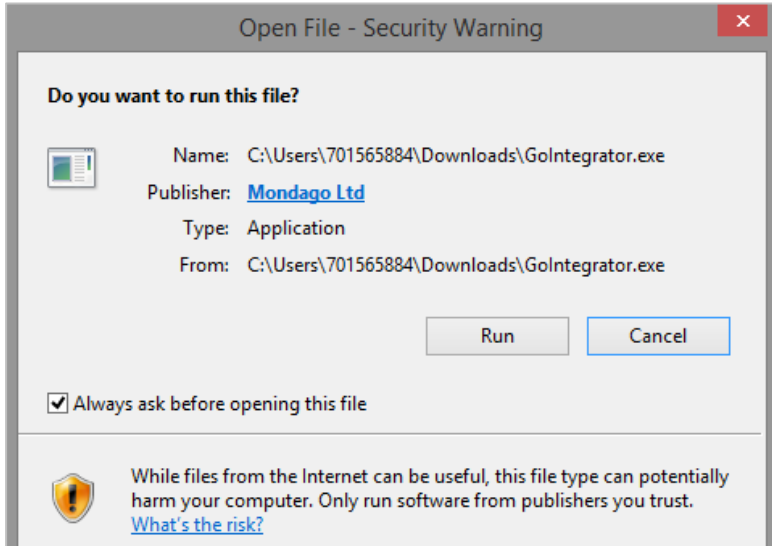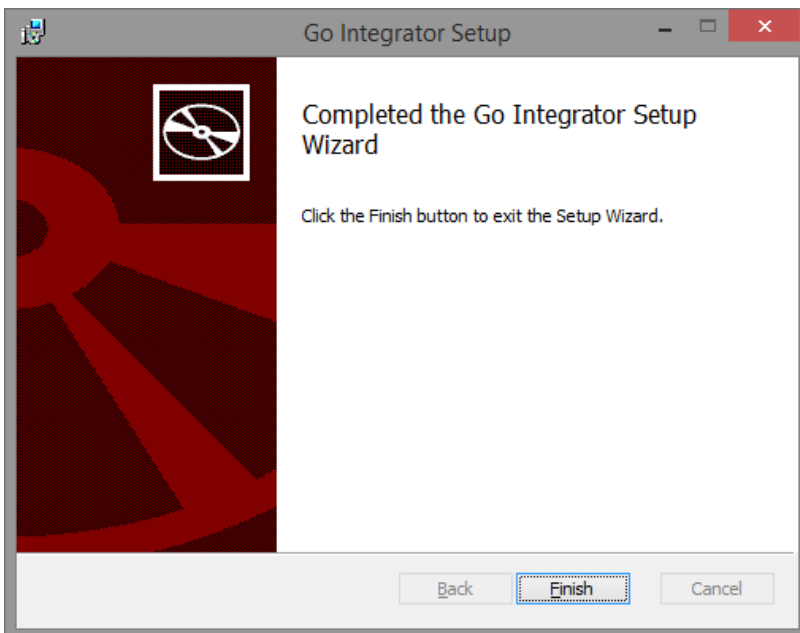

- Once the Setup screen appears click on **Next.**

- Review the Licence Agreement and then if happy to proceed, click on **I Agree.**
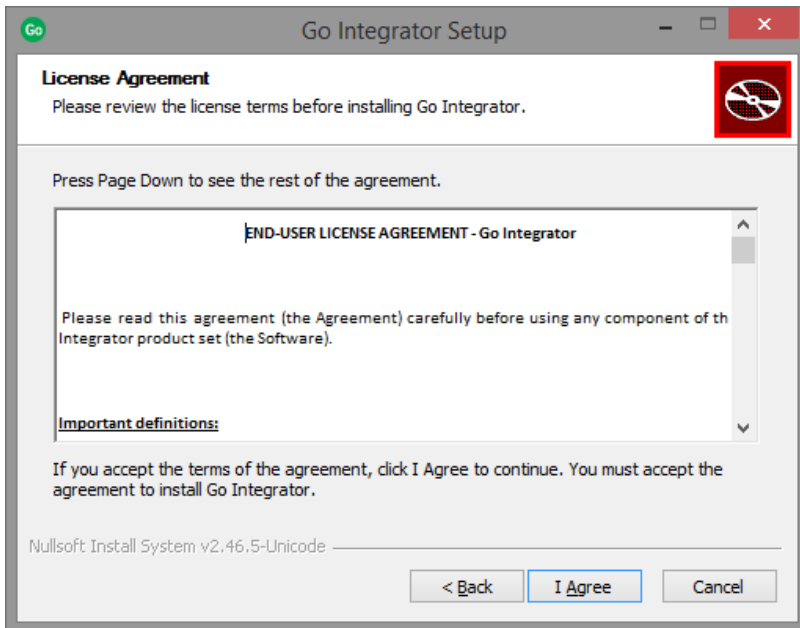
- Once CRM Connect (Go Integrator) and any third-party software have finished installing, click the **Finish** button to close the installer.

Configuration

The Welcome Email sent to End Users will guide them to navigate to the Business Portal to download the application and obtain their Username. Please note this Username is the same for all Applications, but is different to the Business Portal credentials. The Username can be seen in the Applications tab as shown below:
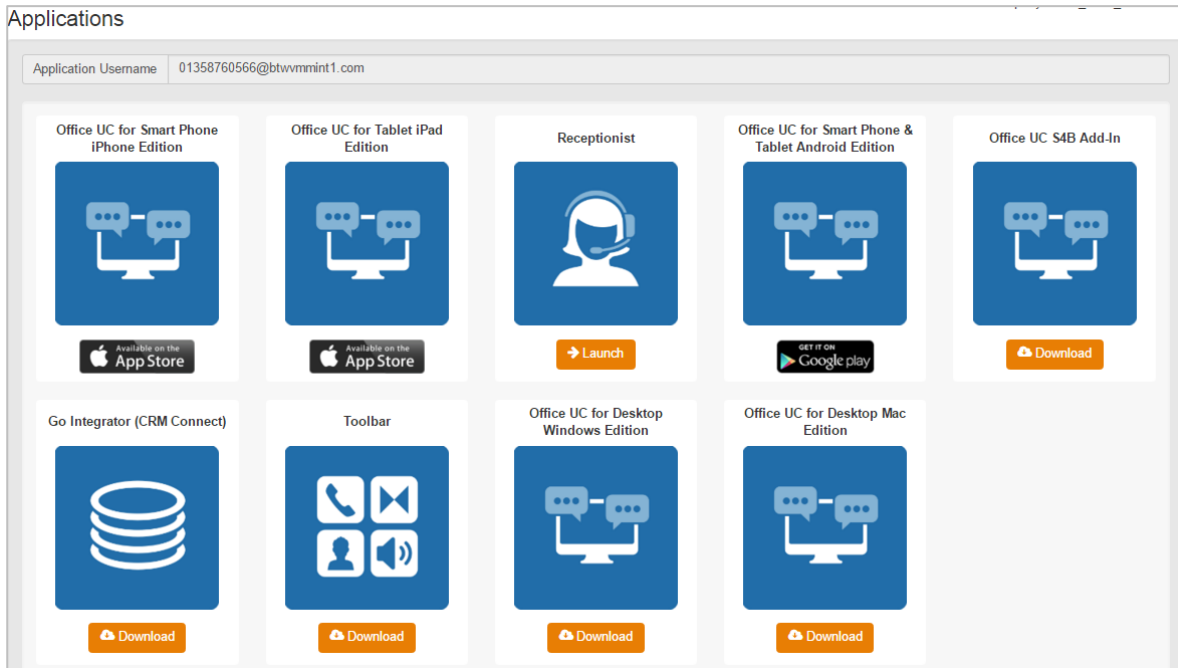
The password for all applications is not sent to the User and needs to be set in the Business Portal by navigating to **My Account**.

Select **Password to Change** box, then click on **Application,** enter password and then select **Save**.
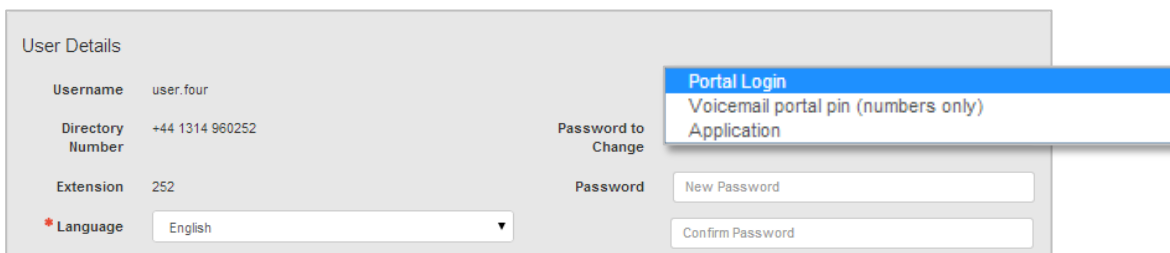
General - Telephony

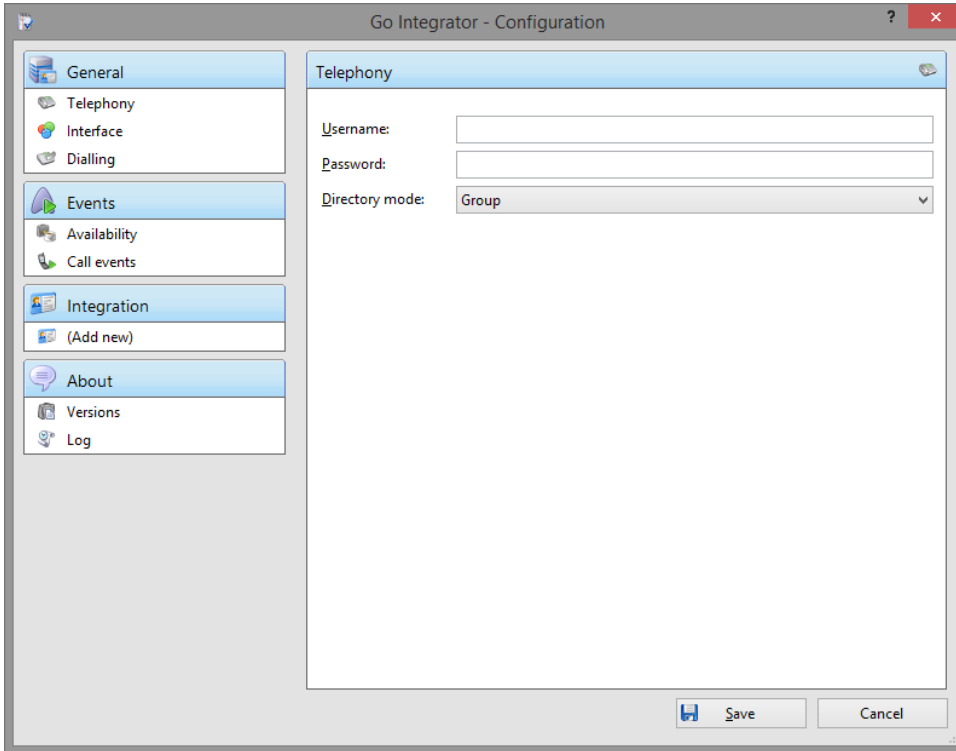Once the installation has finished, CRM Connect presents you with the Configuration screen where you need to provide your application user account information to login.

To login, follow these steps:

- Enter the username and password into the appropriate text boxes.
- Select the preferred directory mode. Selecting **Group** means that only company contacts in your Site will be visible, selecting **Enterprise** means that all contacts in your company will be visible.
- Click the **Save** button to store your settings and close the window.

General - Interface

The Interface page allows you to change settings relating to the look and feel of the software, including actions that happen when calls take place. To have the software start automatically when you logon to Windows, put a tick in the tick box. The setting will take effect next time you logon to Windows.

Language packs are available for the software to change the language of the user interface. By default, the software will attempt to select the language to use automatically, based on the language setting of your operating system. However, you can change the language used by selecting from the **Language** dropdown list. If your language is not in

the list, contact Virgin Media Business to find out when it will be available. Any changes you make to the language will take effect next time you start the software.

By default, many of the software's windows have a "skin" to make them look nice. If you find that you don't like the "skinned" windows, perhaps for accessibility reasons, you can turn them off by selecting **No skin** from the Phone window dropdown. The next time you load the software, the windows will all be standard Windows-style windows using the theme from your operating system.

The next section on the Interface page allows you to choose a sound to have your computer play when your phone is ringing and/or you have a call waiting. This can help you to identify that it is your phone that is ringing and not that of a colleague. You can also tick the box to have your computer's sound automatically muted whenever a call is in progress, which is useful if you listen to music or Internet radio while you work, giving you a more professional appearance.

The last section of the Interface page has buttons you can press to clear quickly and securely the history of contact history, recent numbers as shown in the Recent list, and which hints the software has shown you. Clearing hint history allows the software to show you the hints again.

General - Dialling

This page allows you to turn on and off dialling from all the different types of application that the software supports. As a review, the different methods of dialling are:

- **Clipboard Dialling** - Each time you copy a valid telephone number, a small bubble will appear from the tray icon that will ask you if you want to call that number.

- **Application Dialling** - Once Go Integrator Client has learned your application, you will see one of two options. Either a dial button appears on the right-hand side of a textbox, or you will have to hover with your mouse above that textbox, in which case the Dial and Hang up buttons will appear also on the right-hand side of the textbox.

- **Focus Dialling** - It will highlight any valid telephone number within a textbox that you have clicked on, based on the criteria you've set, and provide you with three options: Dial, Hung up and Dismiss buttons.

- **Dialling Handlers** – This section manages other dialling techniques including web page and TAPI dialling. Web page dialling is where the software automatically scans web pages in a range of browsers and converts anything that looks like a telephone number into a clickable hyperlink. Simply enable these against the relevant browser and, where required, download any add-ins.
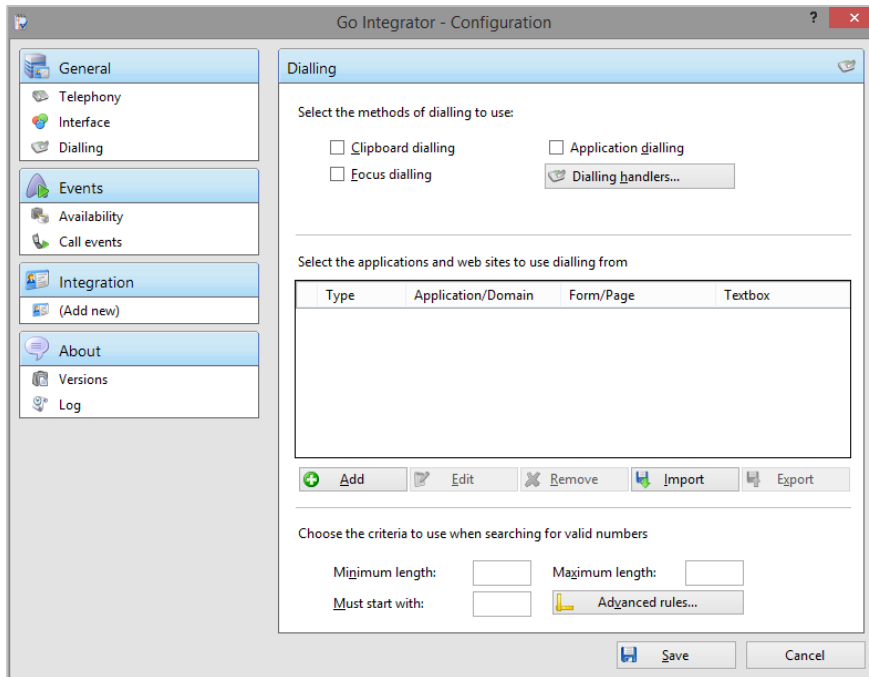
Please note that Microsoft Word and Excel dialling via SmartTags are not available in Office 2010

The last section on this page allows you to define what telephone numbers look like, to help the software to determine more accurately whether a string of numbers it sees in a webpage or on the clipboard is really a telephone number or not. You can tell the software the minimum and maximum length of telephone numbers, and anything outside the range will be disregarded as not a real telephone number. You can also specify that telephone numbers must begin with a certain string of characters.

Events – Availability and Call Events

You can make the software either show the Phone window, or pop up the contact details when certain events happen. Just select the relevant action from the relevant dropdown list: On ringing, On answer, or On outbound. You can also turn on or off the unobtrusive Preview window for all calls by ticking or clearing the box.

The software can also be configured to run one or more custom executable programs on selected events. To configure this, press the **Add** button and configure the following information:

- The Event list is used to select the event on which to run the program.
- The Program box allows you to select which executable to run. This box should be left blank to load an internet browser.
- The Parameters box allows you to either choose the "command line arguments" for the program, or in the case of a browser, the URL to load. When using a URL, make sure that you include the URI scheme (i.e. HTTP://), then you can include in the Parameters any number of values from the call. For instance, to output the caller's telephone number, you can include %Call\CallerContact\Tel%. To use the telephone number of the remote party, as opposed to the caller, who may be the local user, you can use the syntax %Call\Contact\Tel%, or you can use %Call\Contact\DisplayTel% to get the formatted number.

Finally, to help testing, you can use the word Message Box in the Program entry, if you want to show a message box with the translated Parameter output.

Integration – Add new

Please see the appropriate CRM Connect (Go Integrator) Integration Guides for information on how to integrate with the chosen CRM software. As these update regularly, you will need to ask Virgin Media Business for the latest copy of the CRM software guides.

Once you have downloaded the Integration guide from Virgin Media Business, click the **Add new** item, select the type of CRM Integration from the dropdown list, and click **Set**. The first time you enter this screen you may have to wait a few seconds as the software scans to find out which integrations are available. You then need to follow the steps in the integration guides to complete the set up.
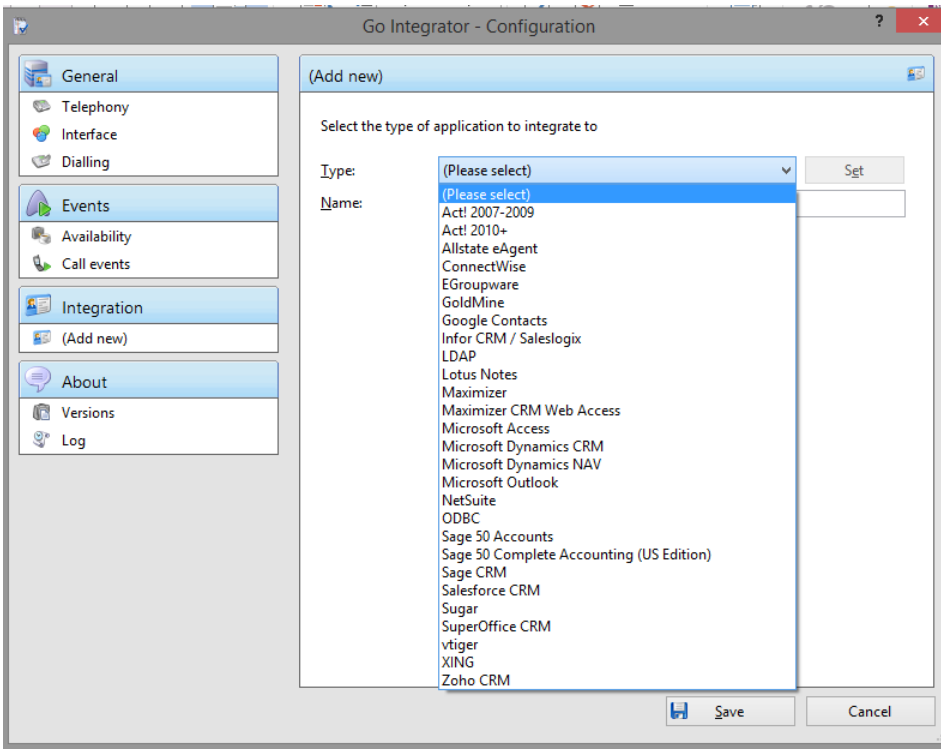
To modify an existing integration that you have set up, click its name in the list. You can also click its name and then click **Delete** if you no longer want integration to that CRM software.

For applications like Outlook, the software attempts to find and use default settings that will just work for you, so you won't need to do anything more. For more complicated integrations, the software will do as much as it can for you, but you may need to help it by entering your password, for example, or telling it where the CRM software files are, etc.

The Integration test area allows you to test the settings you have entered by entering a telephone number and seeing if the software can find it. If the number is found, you can click the **Show contact** button to make sure that "popping" works. When you are done, click **Save**. The new integration will be available immediately.

Operating the Feature

In addition to this guide, there are individual Quick Reference Guides for each of the CRM Connect (Go Integrator) applications that can be used for guidance on how to get the best out of the integration. These are downloaded from Mondago's website. However, please be aware that the Cloud Voice variant is slightly different from the vanilla application, which these guides refer to. Please also be aware of the following differences when consulting these guides;

- Call Logs – taken from the Call Logs displayed on the Business Portal and Toolbar
- Call Director – Diversion inbit and Call Control are not enabled from with this feature

Feature Interaction

CRM Connect integrates with a whole host of calling features, all of which are covered in the relevant section headings below.

Start using CRM Connect

Where Is It?

CRM Connect is designed to be discreet. Always running and providing useful information as you need it, yet at the same time not annoying and interfering when you're trying to work. So, most of the time, CRM Connect sits silently in your tray menu, waiting for you to click on it or waiting for calls to be made or received.
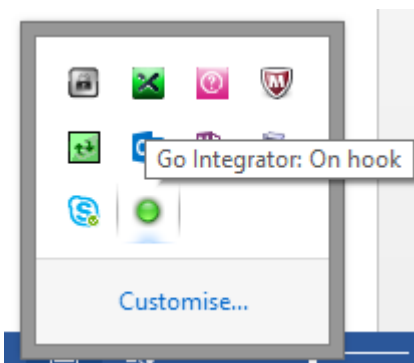
If you right-click on the CRM Connect (Go Integrator) icon, which is a green circle (or red if you're on a call), the tray menu should appear.

Tray Menu

The tray menu is accessed by right-clicking on the Go Integrator Client icon which is a green circle (or red if you're on a call or yellow if a call is on hold).

Note: In Windows 7 and above, some tray icons become hidden and expressly have to be shown. These settings are stored in the "Notification Area Icons" part of the Windows Control Panel.

The following items appear in the menu tray:
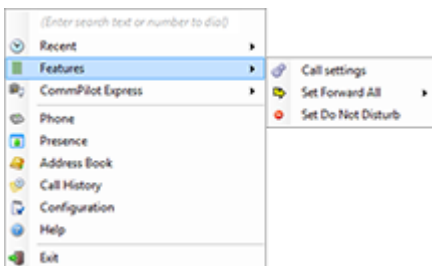
- **Quick dial box** - Type the number to dial or enter the name to find contact details.

- **Recent menu** - Quickly see recently dialled numbers, and click to redial them.

- **Features menu** - The Features menu provides you with options to control the behaviour of your phone. The options available from this menu are:

  - **Call settings** - This allows you to configure your preferred settings for call forwarding, Call Director, Remote Office, DND/hide number, and CommPilot Express (In Office, Out Of Office, Busy and Unavailable).

  - **Set Forward All** - This allows you to enter a number that will be called when someone calls your extension. Please remember that your phone will not ring when this is set.

- **Set Do Not Disturb**: This allows you to set your phone so that a caller will hear the busy tone when they call your extension.

- **CommPilot Express menu -** The CommPilot option allows you to quickly select your preferred CommPilot Express profile. These can also be linked to your Microsoft Outlook calendar so that the status of your Microsoft Outlook calendar will set your CommPilot Express profile. To link these you must set your Appointment setting in your Microsoft Outlook integration to "(Default)". Your Microsoft Outlook calendar availability will match to your CommPilot Express profiles as follows:

CommPilot Express	Microsoft Outlook calendar availability
Available: In Office	Free
Busy	Busy
Busy	Tentative
Available: Out of Office	Working elsewhere

Please note CommPilot state will only change for users who have a Fixed or Mobile User pack.

- **Phone menu –** Opens up the phone window, enabling you to make calls.

- **Presence menu** – Opens up the prescence window and allows you to monitor the presence status of your contacts. To monitor contacts you first need to add contacts into the monitor list.

- **Address Book menu** – Opens up a directory menu and allows you to search directory contacts and/or any contacts you have added.

- **Call History menu** – Opens up the call history menu to show you any calls you have made, recevied or missed.

- **Configuration menu** – Contains options to change your user experience, and configure CRM packages to integrate with the application.

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Features Menu

The features menu allows you to configure some of your Cloud Voice settings directly from the application. Any feature changes will synchronise with the Cloud Voice platform and make the changes appear in the Business Portal and vice-a-versa.

Call Forwarding

Please refer to the Cloud Voice User Features guide for a full detailed description on how this feature works.

Within this page you can configure the following Cloud Voice features.

- Call Forward Always – *referred to as 'Forward immediate' in the client*
- Call Forward Busy – *referred to as 'Forward when busy' in the client*
- Call Forward No Answer – *referred to as 'Forward on no answer' in the client*
- Call Forward Unreachable – *referred to as 'Forward when unreachable' in the client*

To configure:

- Enter a forwarding number into one or more of the boxes
- Enter a numerical number into the **Number of rings** box to determine when this feature will kick-in
- Click on **Ok** to save the settings

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Call Director

Please refer to the Cloud Voice User Features guide for a full detailed description on how this feature works.
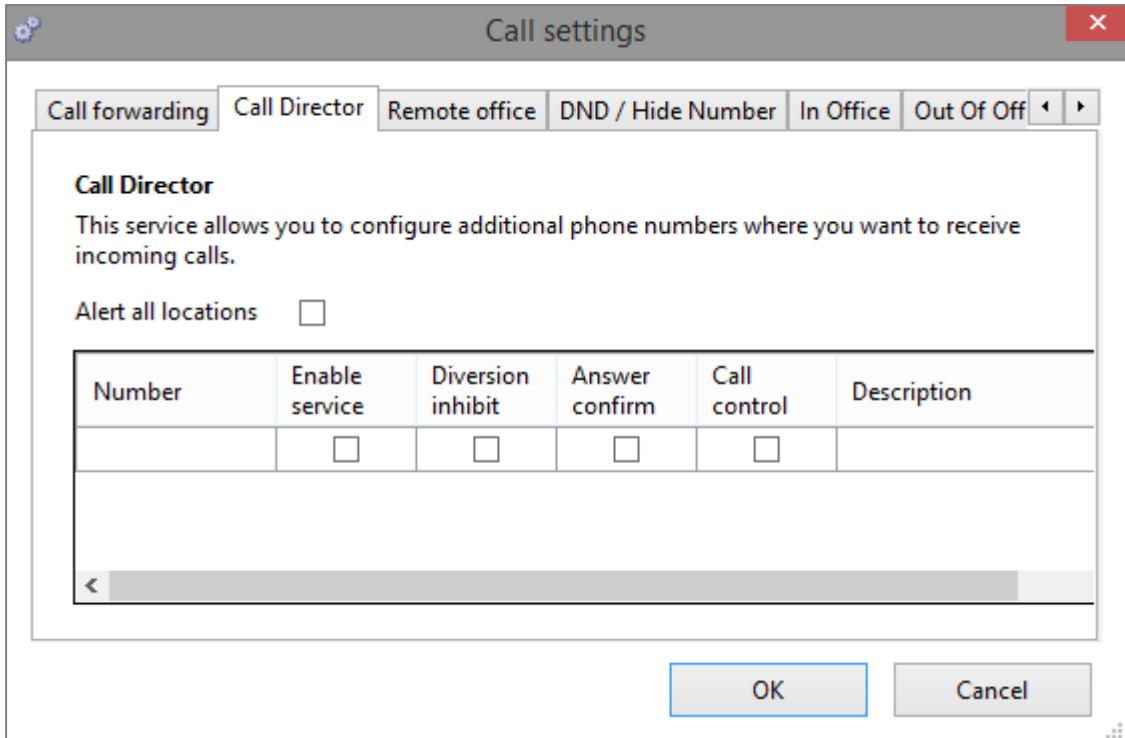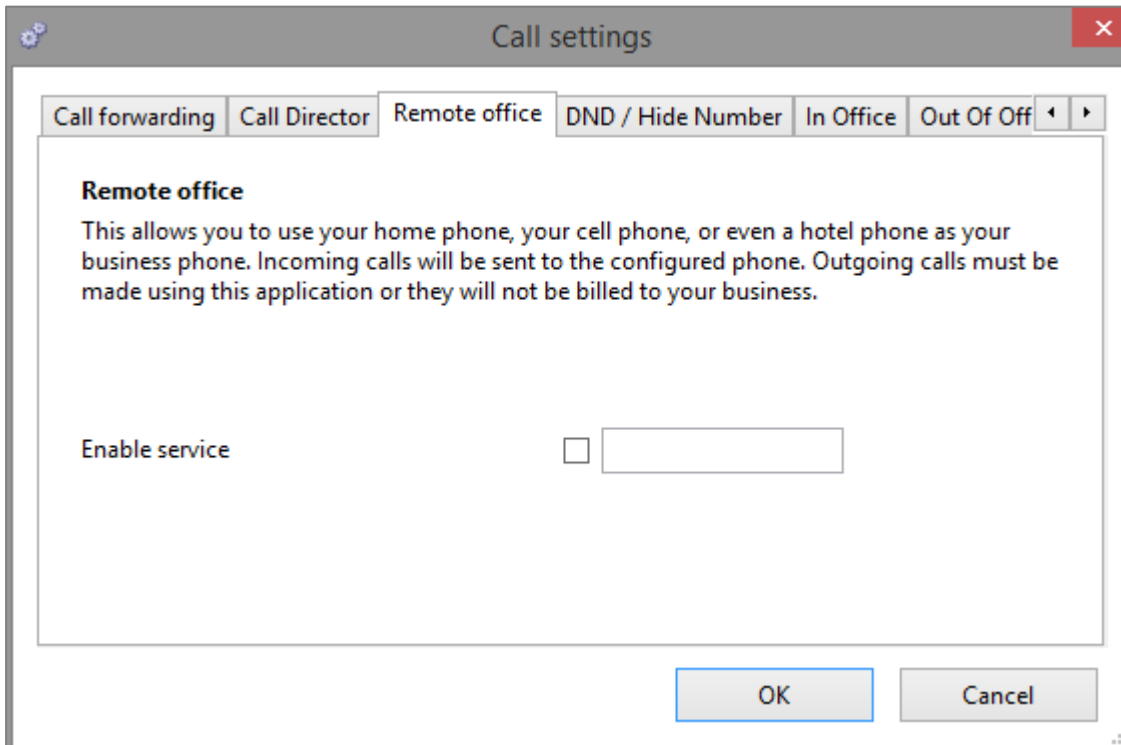

To configure*:

- Enter a telephone number into the **Number** box for where you want incoming calls to additionally ring
- Click on **Enable service** to turn the feature on
- Enter an optional **Description** to describe the rule
- Click on **Alert all locations** to alert click-to-dial calls
- Click on **Ok** to save the settings

Please do not configure any setting that appears in the application but is not mentioned here as these are unsupported.

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Remote Office

Please refer to the Cloud Voice User Features guide for a full detailed description on how this feature works.
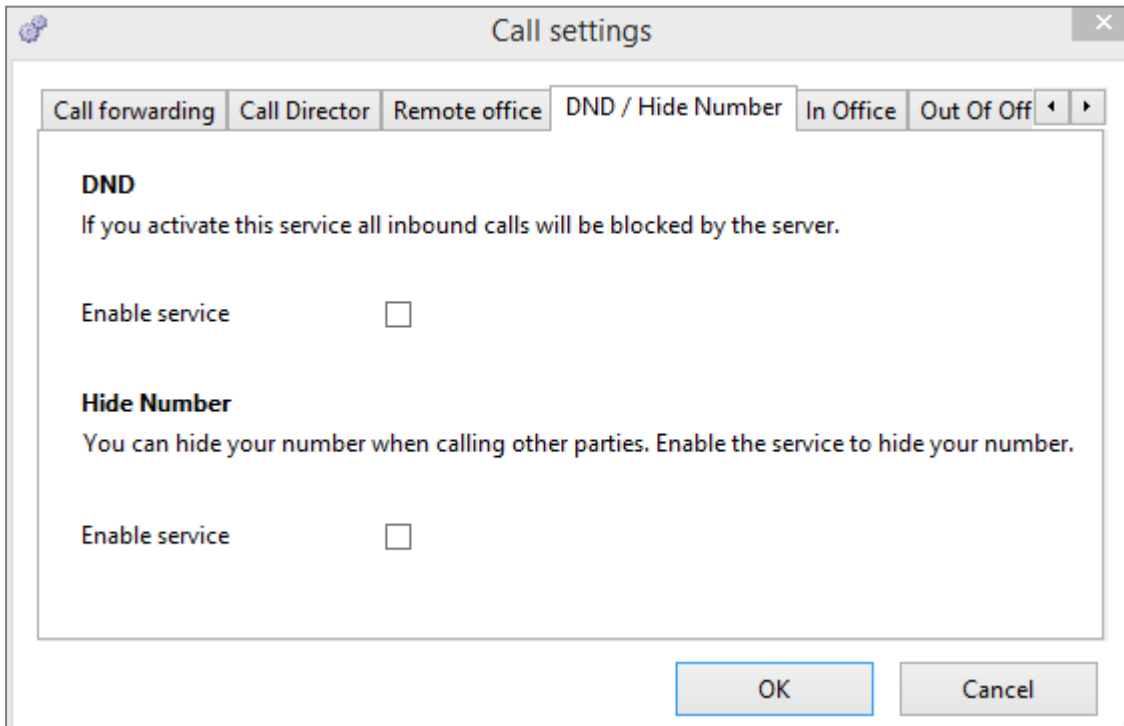

To configure:

- Enter a telephone number into the **Enable service** box for where you want incoming calls to additionally ring
- Click on **Enable service** to turn the feature on
- Click on **Ok** to save the settings

DND/Hide Number

Please refer to the Cloud Voice User Features guide for a full detailed description on how this feature works.

To configure Do Not Disturb (DND):

- Click on **Enable service** to turn the feature on and block incoming calls
- Click on **Ok** to save the settings

To configure Hide Number:

- Click on **Enable service** to turn the feature on and hide your outbound number
- Click on **Ok** to save the settings

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In Office – CommPilot Express

Please refer to the Cloud Voice User Features guide for a full detailed description on how this feature works.
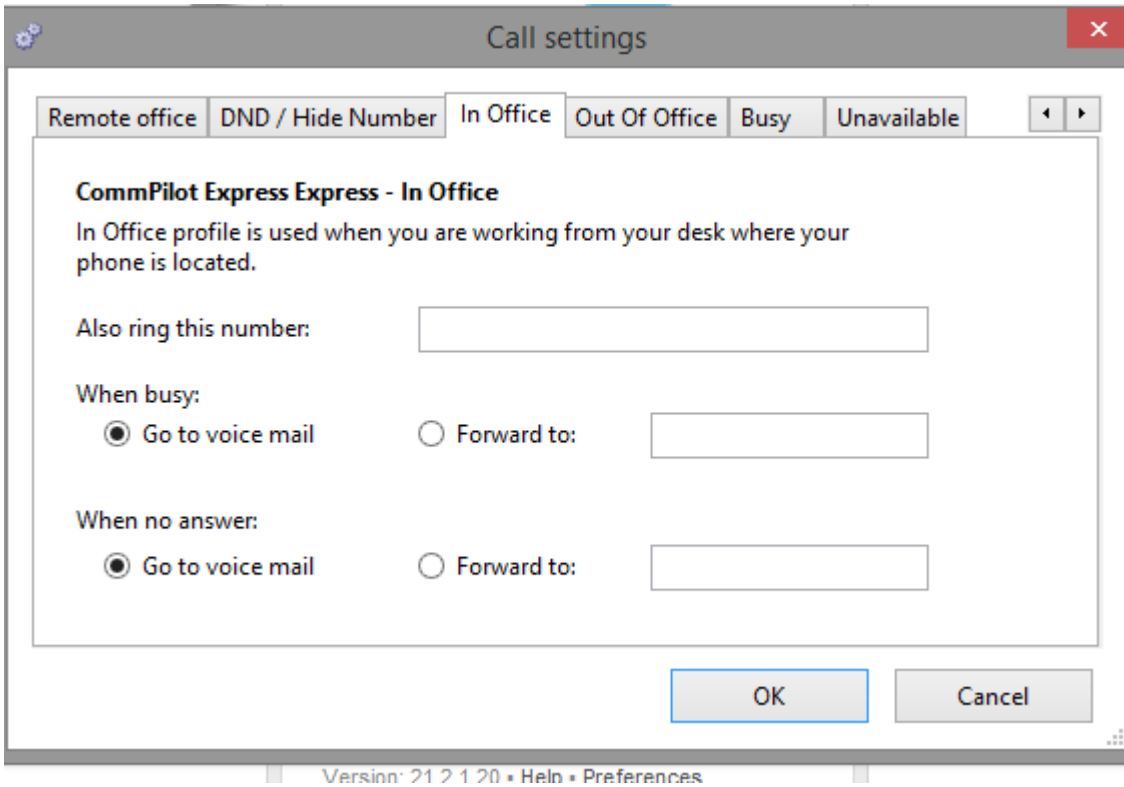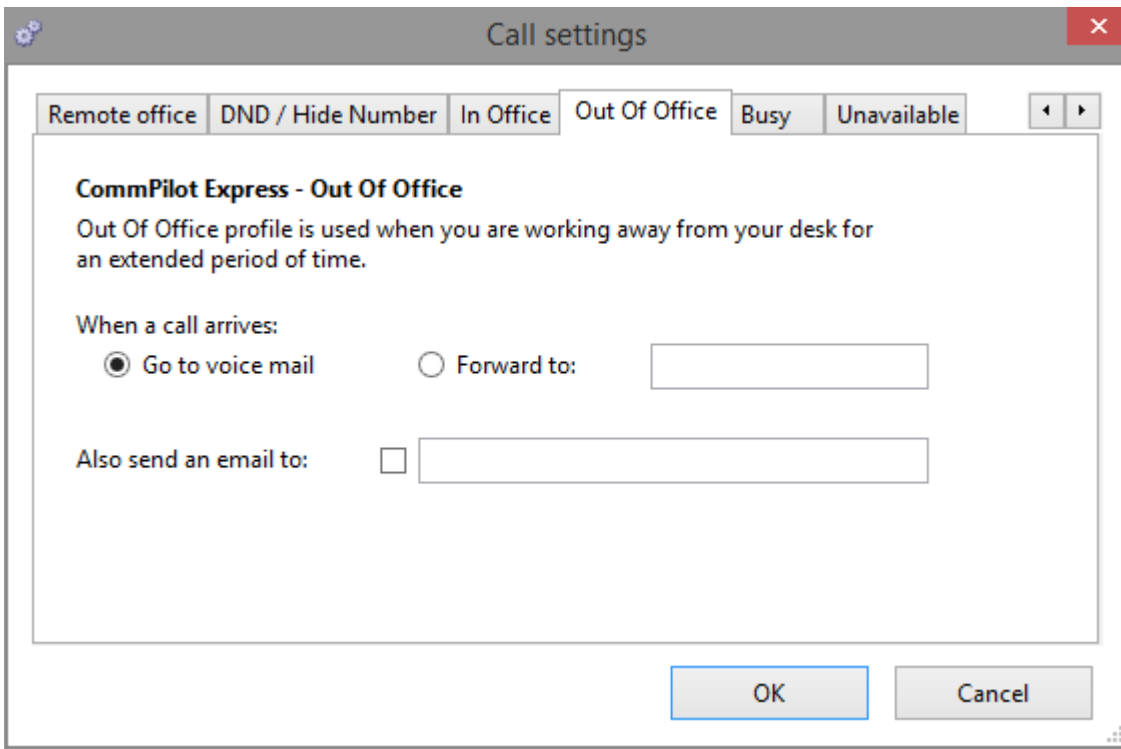

To configure an In Office Behaviour:

- Optionally enter a second number so that incoming calls also ring this device
- Busy calls by default will go to Voicemail unless you type a number into the **Forward** to box and click this radio button
- Unanswered calls by default will go to Voicemail unless you type a number into the **Forward** to box and click this radio button
- Click on **Ok** to save the settings

Out of Office – CommPilot Express

Please refer to the Cloud Voice User Features guide for a full detailed description on how this feature works.


To configure an Out of Office Behaviour:

- By default all calls will go to Voicemail unless you type a number into the **Forward** to box and click this radio button
- Optionally you can enter an email address into the **Also send an email** to box to use the **Call Notify** feature
- Click on **Ok** to save the settings

Busy – CommPilot Express

Please refer to the Cloud Voice User Features guide for a full detailed description on how this feature works.
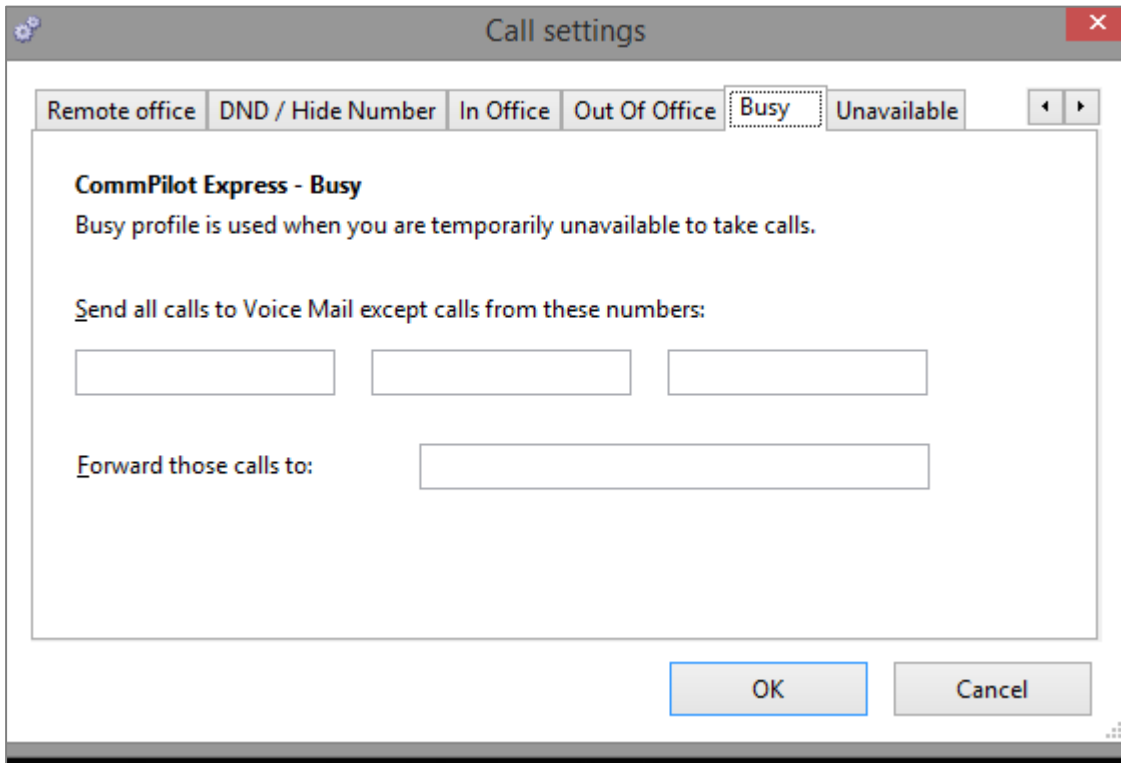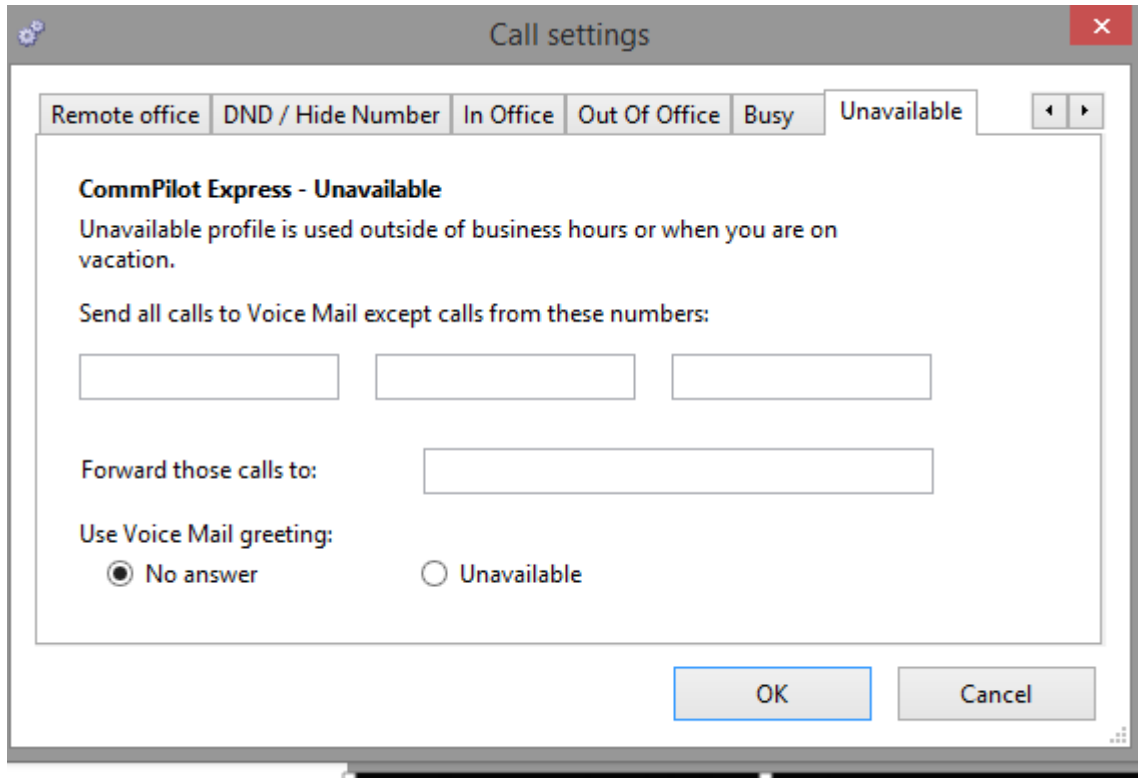

To configure a Busy Behaviour:

- When selected, this feature will send all calls to Voicemail except the ones you enter into the 3 available boxes
- For the 3 that you enter, decide where to send those calls by entering a forwarding destination
- Click on **Ok** to save the settings

Unavailable – CommPilot Express

Please refer to the Cloud Voice User Features guide for a full detailed description on how this feature works.


To configure an Unavailable Behaviour:

- When selected, this feature will send all calls to Voicemail except the ones you enter into the 3 available boxes
- For the 3 that you enter, decide where to send those calls by entering a forwarding destination
- Click on **Ok** to save the settings

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Phone Menu

The most obvious place to start is the Phone window (pictured below). Click on that option in the tray menu, or in future you can simply double-click on the tray icon and the window will be shown. Let's have a look at the main parts of the Phone window:
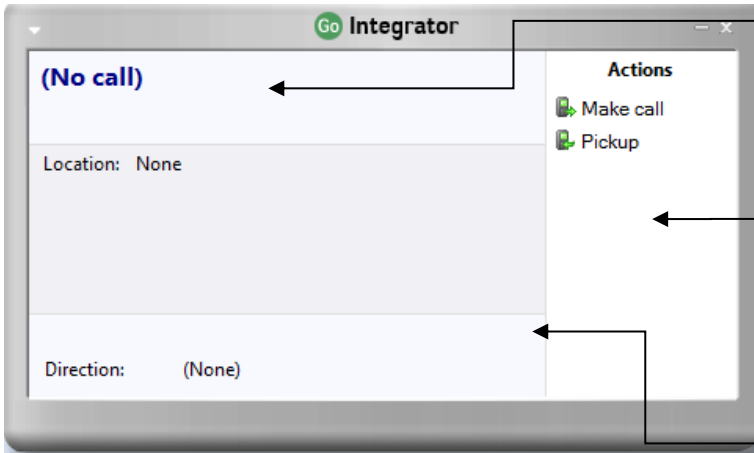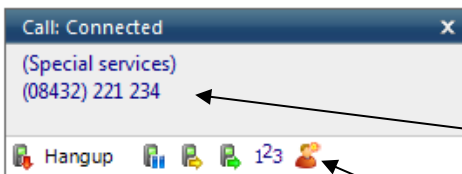

Contact information: The name and telephone number of the remote person.

Actions: Use these buttons to interact with the current call and contact.

Call information: Other information about the current call.

At the start, you're likely to use the Phone window if you want to control calls or show contacts. After you've used the software for a while, though, you'll probably prefer to use the Preview window as it can be more convenient and less intrusive.

Make a call in to your extension again and the Preview window should appear. It contains much of the information from the main Phone window, but in a much more compact format. Plus it will disappear shortly after a call connects. Let's review the main parts of the window:

Close button: Use this to make the Preview window disappear more immediately.

Contact information: The telephone number and name of the other party.

Call control actions: Use these to interact with the call. Using some of these will display the main Phone window.

Like the Phone window, the actions at the bottom of the Preview window adapt to the state of the call. The example picture shows the actions that are available when a connected

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call is in progress. To conserve space, the text is only shown for the first two actions. The rest are depicted by their icons only.

Please note that if you also have a Toolbar then the Toolbar preview window may double up with the CRM Connect (Go Integrator) preview window. You can configure the appropriate notifications for either application.

Making Calls

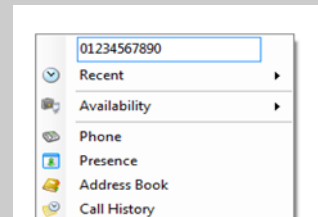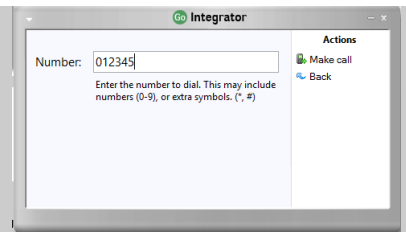When you make calls, where do you get the numbers from? Let's look at some possibilities:
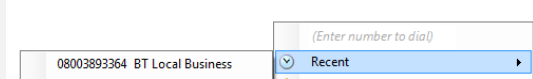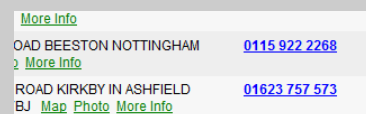
From a piece of paper	If this is the case, then you should think about storing the person's name in your CRM System and then next time, you can find them more easily and dial the number using CRM Connect. Alternatively, you could right click on the CRM Connect (Go Integrator) tray icon and then enter the number in the text box at the top. You can even use the backspace key if you type it wrong. Or, if you happen to have the Phone window open, then just start typing a number on your keyboard. CRM Connect will understand that you want to make a call and switch to the "Make call" screen. Press the **Enter** key when you've finished typing, to make the call.
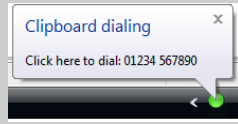
|	
Someone you spoke to recently	If you spoke to them using the phone that CRM Connect is connected to then the call should be in your call history. At the main menu, press the **call history** button and you will get a list of your calls in reverse date order. If you see the caller in this list, then click on their telephone number to make a call to them directly from this screen. Alternatively, if the person was one of the last ten people that you spoke to, then they will be in your "Recent" list. You can get to the Recent list from either the CRM Connect (Go Integrator) tray icon or from the Make call screen. Note that these Recent numbers are stored on your PC not on the server.
From a web page	You can configure CRM Connect to search your web pages (Internet Explorer only) for telephone numbers to dial. It won't find all of them, unfortunately, but it is good at phone directory searches because it is optimised to understand this kind of page. To turn this functionality on, you need to go to the Configuration main menu option and then go into Dialling settings. Here you can turn on "Web Page Dialling". When on, this will allow you to click-to-dial recognised telephone numbers directly from Internet Explorer.
From your CRM Software	Please see the CRM Connect (Go Integrator) Integration Guide on the Mondago Website for your chosen CRM application for how to configure and dial from your CRM system.
From another application	**Clipboard dialling** can be turned on in the Configuration >> General >> Dialling settings page. When on, CRM Connect will keep an eye on the clipboard and if you copy something to it that looks like a telephone number, then a bubble will appear from the tray icon that asks you if you want to call the number. When using this method of dialling, you may want to help CRM Connect know what a valid number is by entering a minimum and maximum length and possibly a prefix that numbers must start with. This can be done in the Dialling settings page.

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Call Control

Let's take a moment to review the items on the Call screen in the Phone window:
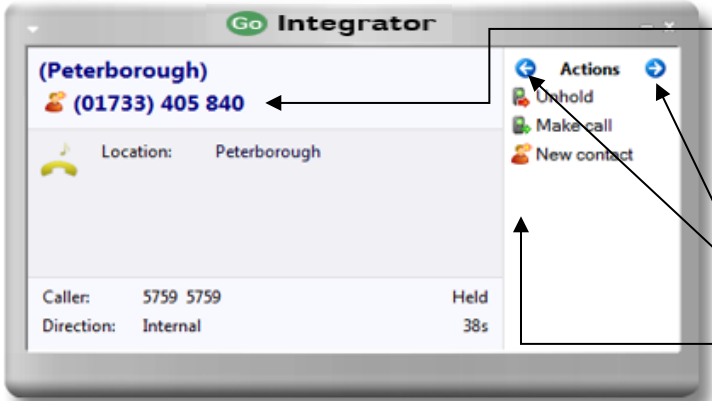
Contact information: The name and telephone number of the remote person.

Page left/right: Use these to switch between calls when you have more than one call in progress.

Call actions: Use these buttons to interact with the current call.

**Call information:** Other information about the current call.

As you can see, the Phone window allows you to interact with the current call in a number of ways. One of the most common ways is to click on the **New contact** or **Edit contact** button to apply a name to the person you are speaking to. This is covered in a later section, *Address books*.

It is also common to use this screen to perform a transfer of the current call to another extension or user. To do this you must be Connected to the call (as opposed to it being on Hold or Ringing). When you are Connected, then the Actions list looks like the above example. To transfer a call you do NOT press the **Hold** button. The Hold button has a different purpose -, more about this later. Instead you either press the **Consult** or **Transfer** button. You choose the button according to whether you want to speak to the other person (Consult) or not (Transfer).

You are then presented with a screen like the Make call screen, but with the word Consult or Transfer at the top. Your call is not on hold at this stage, but when you are ready, type the number to transfer to, or choose one of the dialling options, and if you are Consulting then the original call will be put on Hold pending transfer - the "pending transfer" bit is important. If you are transferring then the call will be put straight through.

More call control

We've seen what you can do with a connected call. Can you interact with other calls? Yes, when a call is ringing, you can choose to answer the call or Deflect it (transfer it without answering it) to another extension. Deflecting a call is done in a manner similar to transferring calls. Click the **Deflect** button, type a number to deflect the call to, and click **Deflect** again.
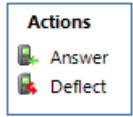
Deflecting calls is available for when the call is to be passed elsewhere, eg if you are already on the phone and someone else phones you, then you can use Deflect productively to move the call to a colleague who can tell the caller to wait for you to become available.

You can also put calls on hold. Depending on your telephone system configuration, this means that the other person should hear music. When you are ready to talk to them again, use the Unhold **button. Remember, the Hold button is not for transferring calls. It is purely to pause the call. If you want to transfer a call that is on hold, then you will have to take the call off hold first.**

Presence Menu

In its most basic form, the Presence window provides a quick way to check the availability of your co-workers. The Presence window is accessible from the tray menu.

By default the following screen will appear and no contacts will be shown. To monitor presence contacts you will need to search for these and then add them to the list.
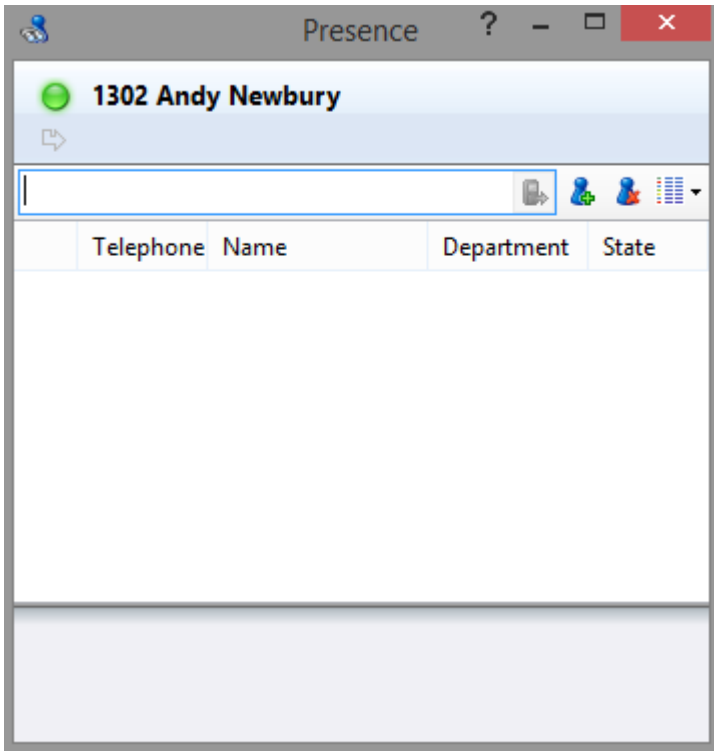
Windows 8 and above users can dock the Presence screen to the right hand side of their primary monitor. This is controlled by setting the desired width of the Presence window when "normalised" and then clicking the "maximise" button. When other applications are maximised they will fill the screen up to the left edge of the Presence window.

From the presence menu you can see the following:
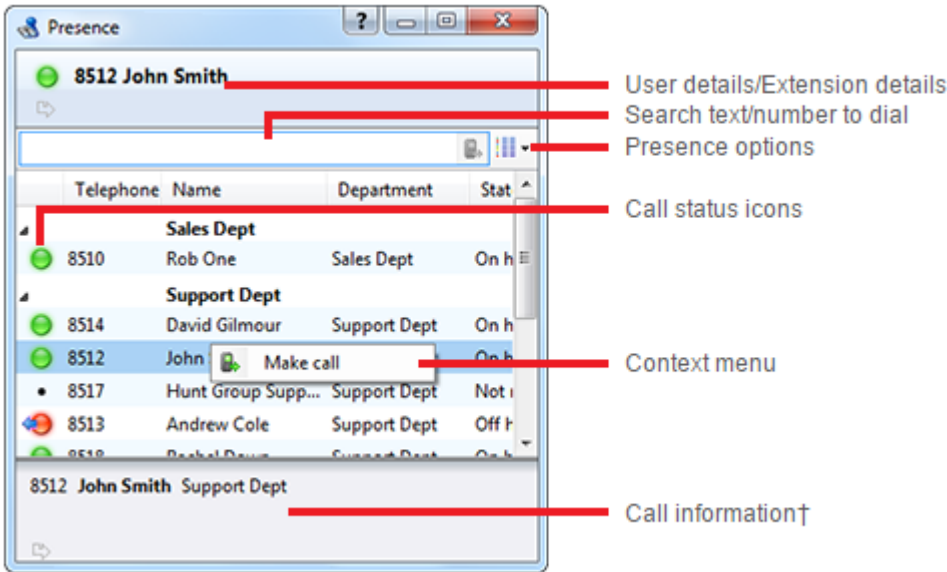
- **User details/Extension details**: The current call status is indicated here by the icon.

- **Search text/number to dial**: To filter the list of users/extensions, text can be typed into this box and the list will update to only show items containing that text.

- **Call status icons**: These icons indicate the current call status of each user/extension.
  - Available
  - Busy
  - Offline
  - Held
  - Do Not Disturb

Go Integrator has plug and play compatibility with Busylight/Busy Lamp Field so everyone in the office can see whether a colleague is available for a conversation, busy on the phone, or simply does not want to be disturbed.

Go Integrator	Busylight Colour
Available (not on a call)	Green

| Held	Fast flashing yellow (250ms)
Busy (on a call/online meeting)	Red
Ringing	Flashing red (500ms)

- **Presence options**: If you want to personalise your Presence window to include just the contacts that you need, then you can do this using these options. The other styles that you can choose, instead of Extensions is Custom. The user list is for hotdesk oriented sites. These are sites where staff move around and so the list is oriented toward who is available and where they are, rather than which extension is available.

- **Context menu**: If you right-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 should contain the Make Call item. By choosing this action, you can dial the extension directly.
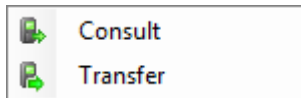
  If you had been on a call already, then the choices would have been Consult and Transfer in place of Make Call. This is appropriate because, if you are already on a call, then the expectation is that you are clicking on the extension with a view to transferring the call to them.

  If you see an extension that is flashing red then it means that the extension has a call ringing at it. Right-click on the extension and the context menu will include an option to pickup the ringing call.

- **Call information†**: Other information about the current call.
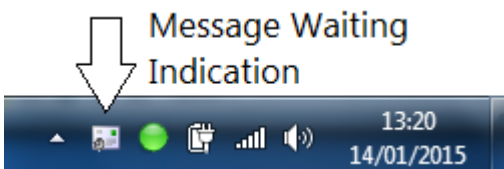
- **Message waiting indication**: Provides visual indication in the PC system tray when an unread voicemail message has been left on the voicemail system.

BUSINESS (Virgin Media logo)

Address Books, Contacts and Call History

You can configure the Directory mode to decide which address book you want to show from the Contact Directories built on the Business Portal. This can be configured by navigating to Configuration> General>Telephony. The default set-up is "Enterprise".

Telephony	
Username:	01358760566@btwvmmint1.com
Password:	●●●●●●●●
Directory mode:	Enterprise
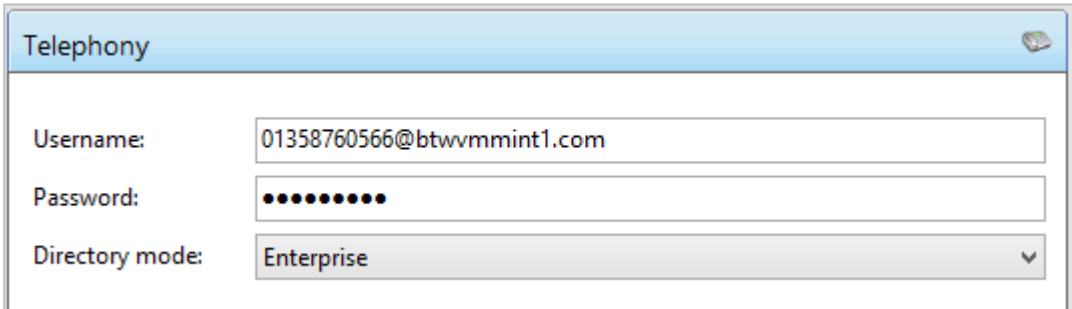
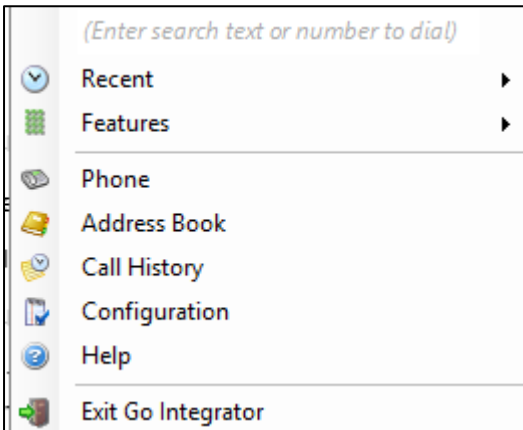When set in Enterprise or Auto detect mode, it will provide phone numbers for the following:

- All Users in your Company
- All extra numbers added to the Personal Directory in the Business Portal
- All extra numbers you have added to CRM Connect (Go Integrator) (not recommended)
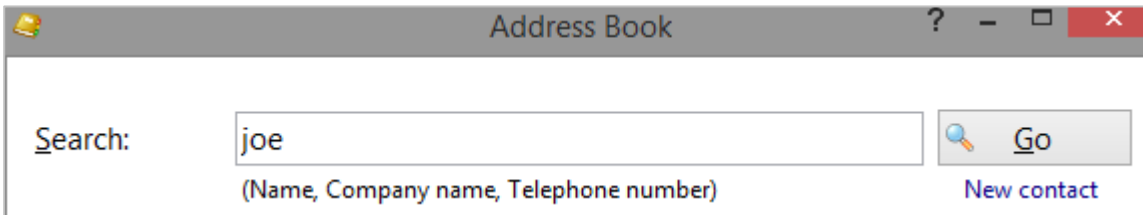
If you set the mode to Group, you will see:

- All Users in your Site
- All extra numbers added to the Group Directory in the Business Portal
- All extra numbers added to the Personal Directory in the Business Portal
- All extra numbers you have added to CRM Connect (Go Integrator) (not recommended)

Adding Contacts

The Address book window is accessed from the Address book item on the main menu or tray menu icon.

(Enter search text or number to dial)
- Recent ▶
- Features ▶
- Phone
- Address Book
- Call History
- Configuration
- Help
- Exit Go Integrator

At the top of the window, press the **New Contact** button.

This will present you with a blank Contact window. Enter a name and phone number in the relevant boxes. When you've finished press the **Save** button.
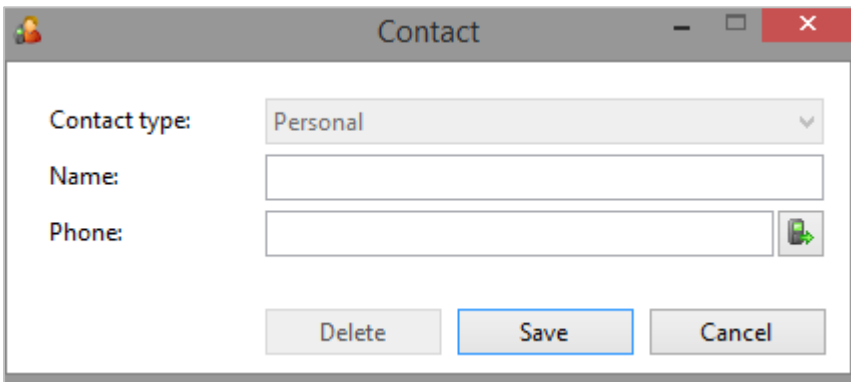
Please note that we do not recommend doing this because it does not synchronise with the Business Portal contacts and therefore create contacts using the Business Portal contact list creation.

![Virgin Media Business logo]

Searching Contacts

To search for a contact, simply type in the Name, Company name, or Telephone number and select **Go.** This will search all available contacts from the Business Portal as well as personal contacts you may have added.
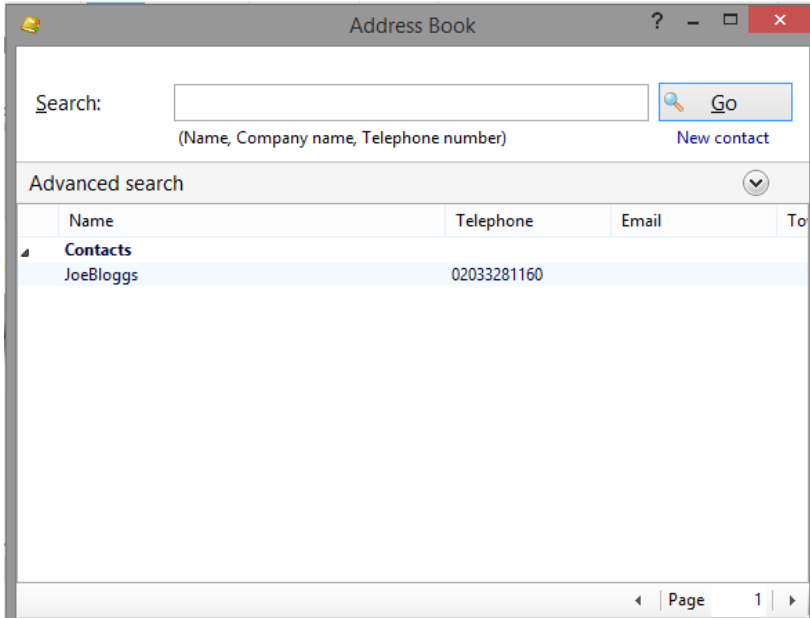
If you get too many results back, you may want to consider restricting your search further by using the Advanced search section. Names and telephone numbers are searched using the original Search box, but in the Advanced section you can filter by address fields such as town or postal code (Where) or other fields (What) as well.

Press the **Search** button and after a short delay you'll be presented with a list of results. From this screen you can click on the telephone number of a contact to dial them, or click on their name to edit or view their contact details. Please note that you can only edit contacts you have added manually, and not network contacts.

Storing contact details when on a call

If you've made or received an external call using the Phone window, you've probably noticed that when the application doesn't know who the other party is, then it will show a town or location name instead. It does this in an effort to be helpful, but you can add a name to the contact for future use.

Press the **New contact** button on the right-hand side of the screen. You can then store the caller's details for future use.

Call History

The Call History window is accessed from the Call History item on the Main menu, or from the tray icon menu. As well as reviewing recent activity, you can dial someone from here by clicking on their telephone number, and you can access their contact record here by clicking on their name (we saw this in the above section). It's good practice to store the names of people when you speak to them, especially if you're likely to speak to them again.
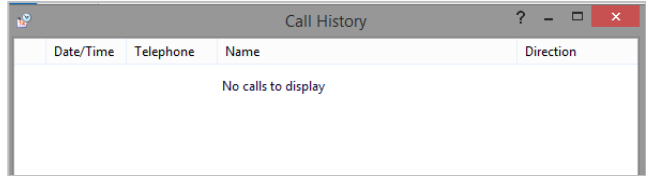
Also, to aid readability, you can hide and show individual days from your history by pressing the **expand/collapse** button to the left of the date, which will then show the last 20 calls of each type.

Adding contact details from the Call History window

You may find it easier to add a contact's name and other details after the call has ended.

To do this, go into your Call History and click on where the name would appear (it will be a location name in brackets instead).
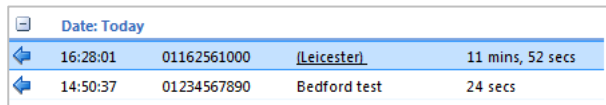
When you do this, the Create contact window will appear like before and you can edit and save the details.

- -

Troubleshooting

Installation

The Installation Wizard should report back information on anything that is stopping successful installation, such as Administrator privileges, Anti-Virus, other open applications etc. Please ensure that the minimum requirements are met, that the installation package is saved and run with local Administrator privileges for successful installation. Virgin Media Business cannot assist with the installation process. If there is a critical bug preventing installation please raise a Support Ticket with Virgin Media Business

Running CRM Connect

CRM Connect should be run with local Administrator privileges. Please see the log within the Configuration panel for information on troubleshooting any issues. Virgin Media Business cannot assist with any local issues affecting the running of the application. If there is a critical bug preventing the application from running please raise a Support Ticket, attaching a copy of the Log and any screenshots to assist.

Login Process

CRM Connect requires a User to enter the correct Username and Password and have a current CRM Connect Add-On Feature Package applied. If the Username and/or Password are incorrect or the User does not have the required Add-On then "Go Integrator: Missing" will be displayed when hovering over the application icon in the system tray as shown below:
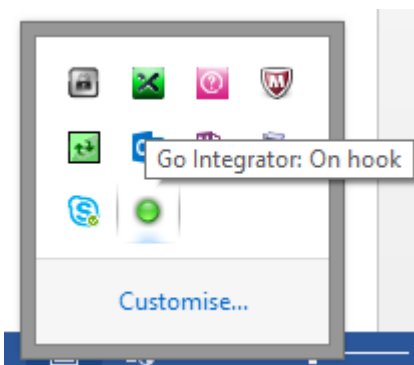
The icon should be green (or red when on an active call) if the User is successfully logged in. If this is not the case please check the Username, Password and Add-On Feature Package on the Business Portal match that has been entered into the application.

BUSINESS

Thanks for your business – we're looking forward to working with you. If you have any questions, we'd love to hear from you. Please call our Customer Services team on 0800 052 0800.

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