GO INTEGRATOR
CARA

Quick Starter Guide

**Tray Menu mode (Windows client)**

Introduction

This quick starter guide contains useful information to help get started with Go Integrator Cara Windows client.

Licensing

Go Integrator Cara 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 Cara will request an "Access Code" which is provided by your service provider to set default parameters and only needs to be entered once. After successful access code entry, Go Integrator Cara is available from the start menu shortcut:
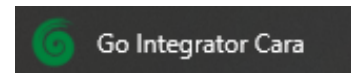
User Login

Go Integrator Cara requires User credentials to connect to the telephony platform. User credentials can be confirmed each time the client is started or can Auto login to bypass this step.

Interfaces

Cara has four main user interfaces: Tray Menu, AppBar, Call Toolbar and Preview Window. The Tray Menu and AppBar provide similar functions - 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
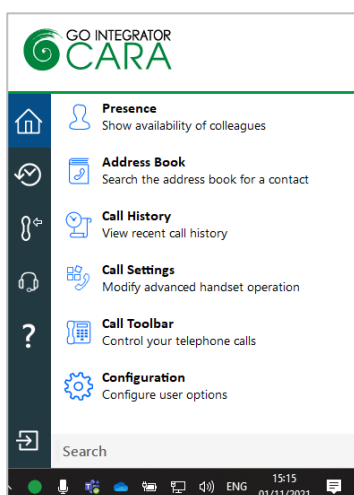
In Tray Menu mode, the menu is accessed by a right-click on the Cara system tray circle icon, usually green for "Available" status. The icon changes according to your extension state or Microsoft Teams Availability, if enabled.

The following functions are launched from the Tray menu: Presence, Address book, Call History, Call Settings, Call Toolbar, Search/Dial, Recent Calls, Preferred Device, Call Center (if enabled) Configuration, Help and Exit.

Quick Dial / Search

One of the most powerful features is the combined Search and Dial entry field at the bottom of the Tray Menu following a right-click of the system tray icon.
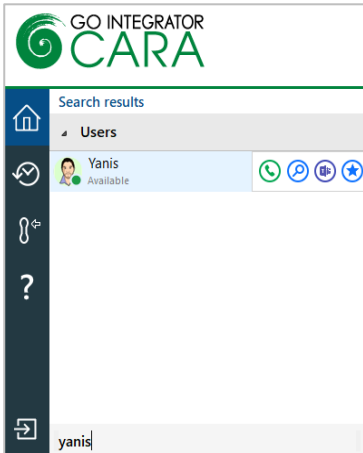
To make a call, simply type the number to dial and hit **Enter**.

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 / MS Teams Availability is also displayed for co-workers.

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, if enabled, Call Center Agent features.
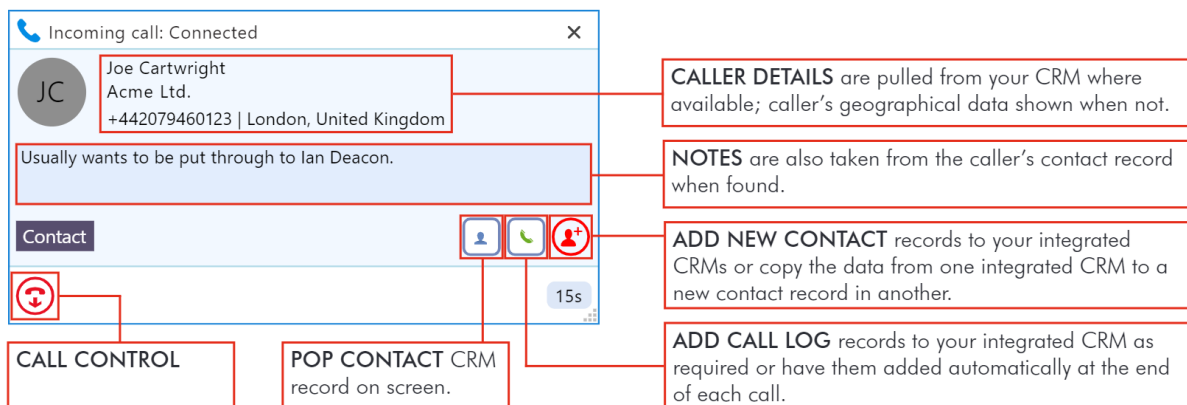
Launch icon:
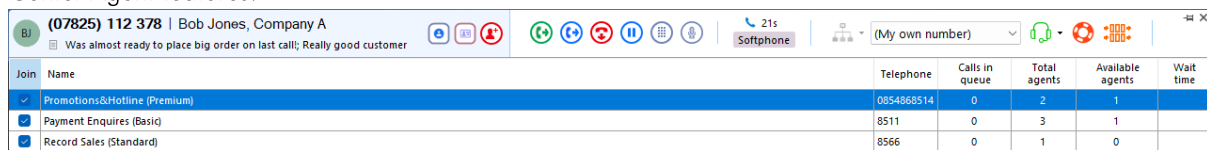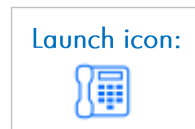
Preview Window

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 Cara system tray icon.
The Preview Window has been specifically designed to be as unobtrusive as possible, without taking up a large proportion of your screen or obscuring 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.

CALLER DETAILS are pulled from your CRM where available; caller's geographical data shown when not.

NOTES are also taken from the caller's contact record when found.

ADD NEW CONTACT records to your integrated CRMs or copy the data from one integrated CRM to a new contact record in another.

ADD CALL LOG records to your integrated CRM as required or have them added automatically at the end of each call.

CALL CONTROL

POP CONTACT CRM record on screen.

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 call 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
👤	Show Contact	Shows the full contact details, obtained from the telephone system 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)

The Call Control functionality is dependent on the preferred device selection. The call controls displayed in the Preview Window will be driven by the Preferred device selected – see table:

	Answer	Deflect	Decline	Hold	Conference	Consult transfer	Blind transfer	Hang up
Deskphone (Primary)	✓	✓	✗	✓	✓	✓	✓	✓
Cara Softphone	✓	✗	✓	✓	✓	✓	✓	✓
Deskphone (Secondary)	✗	✗	✗	✓	✓	✓	✓	✓
Webex desktop client	✗	✗	✗	✓	✓	✓	✓	✓
Teams	✗	✗	✗	✗	✗	✗	✓	✓

Preview Window Stacking

If there is more than one active call, the Preview Windows for those calls are automatically stacked to reduce the overall size of the display. Clicking on the header of any window will bring it to the front.

Presence

The Presence window displays co-worker's live extension status which is blended with Microsoft Teams Availability, if enabled.

Launch icon:

👤
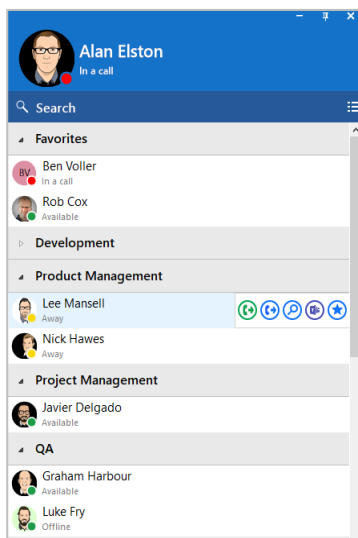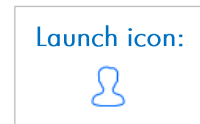
Key features available from Presence include:
- Call co-workers or transfer call
- Show co-worker details
- Open Microsoft Teams chat
- Add to Favorites

The Presence window will automatically populate with co-workers, sorted by department.

A personalized Favorites group can be created by searching for a co-worker and selecting 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

Cara can search Microsoft Outlook, Google Contacts and the telephone system shared or personal directories, plus any integrated CRM business applications, depending on the Cara user license level.

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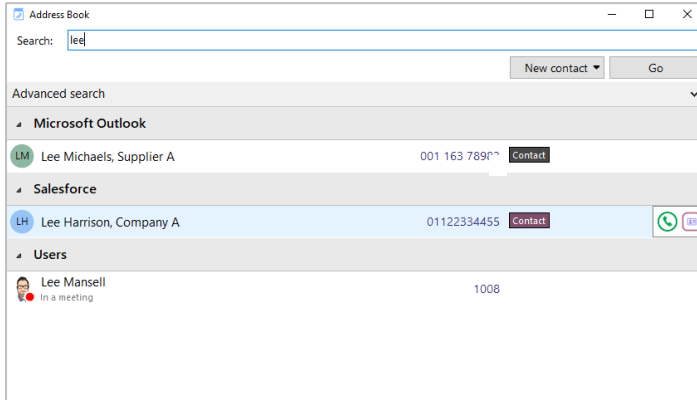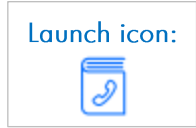
To dial the required contact, simply click on the telephone number displayed to initiate the call, or use the **Call** button from the slide out menu.

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 icon to open the contact within the integrated application (example shown for Salesforce).

Call History

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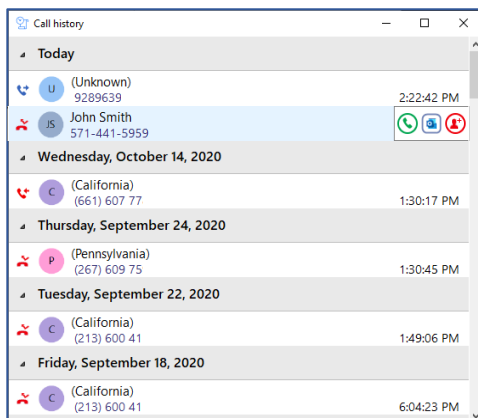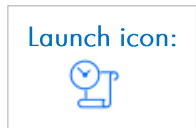
The Call History window displays a detailed call history including recent inbound, outbound and importantly, missed calls, ensuring a clear notification to avoid missing opportunities. Simply click the telephone number displayed to initiate the call.

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 Microsoft 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.
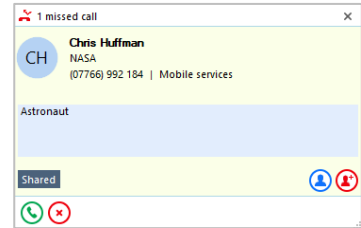
Add Contact

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. The Add Contact feature can also be used to copy the contact to other locations.
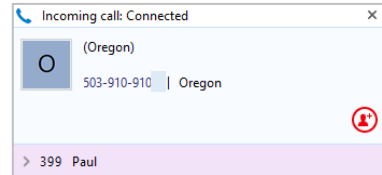
Recent Calls

The "Recent Calls" list displays a summary of the most recent calls, showing just a single entry for each contact or number listed.
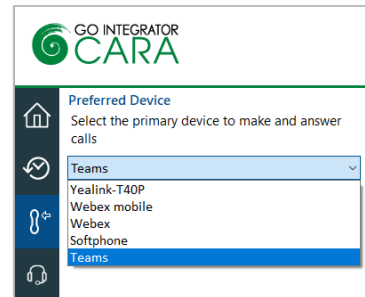
Simply click the number to make the call, or open the contact using the slide out menu.
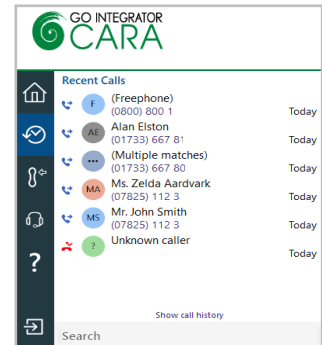
Preferred Device

Where multiple devices are available, the drop down list allows you to choose your **Preferred Device** for call handling. This will also define which call control buttons are offered based on the compatibility of the selected device.

Note: the ability to answer a call through Cara is dependent on the device type selected – for example MS Teams calls cannot be answered by Cara.

Dialing Options

Cara 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:
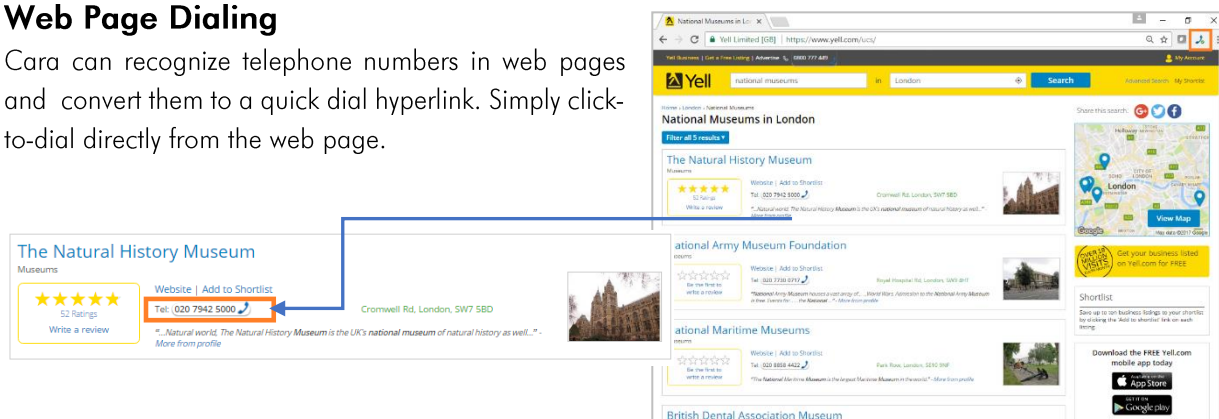
Clipboard Dialing

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.
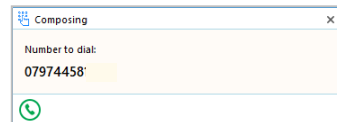
Web Page Dialing

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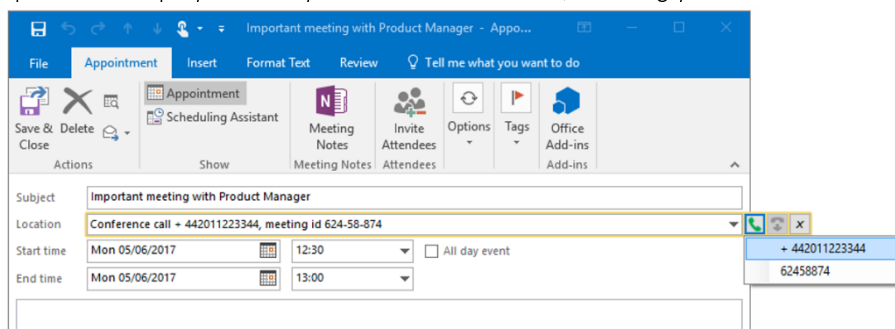

Screen Read Dialing

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

With Focus dialing enabled, Cara 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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