



Setting up Click to Dial

Please follow the instructions below, if you have any problems, please don't hesitate to contact support for assistance.

1) Download Software

Visit <https://telephonesystems.cloud/help/> and download "Click to Dial / CRM Integration" for your version of operating system.

If you don't have physical phones, you will also need to ensure you have the "Desktop WebEx Software" installed too (also available on this page)

2) Install browser plugin

For Chrome use: <https://chrome.google.com/webstore/detail/telephone-number-detectio/oolkfddhhccdciiigjigaghbnlkbjki?hl=en>

3) Configure Go Integrator

Once installed, Go Integrator will run in your system tray. Right click the green square, or red if it's not connected to bring up the configuration tool.

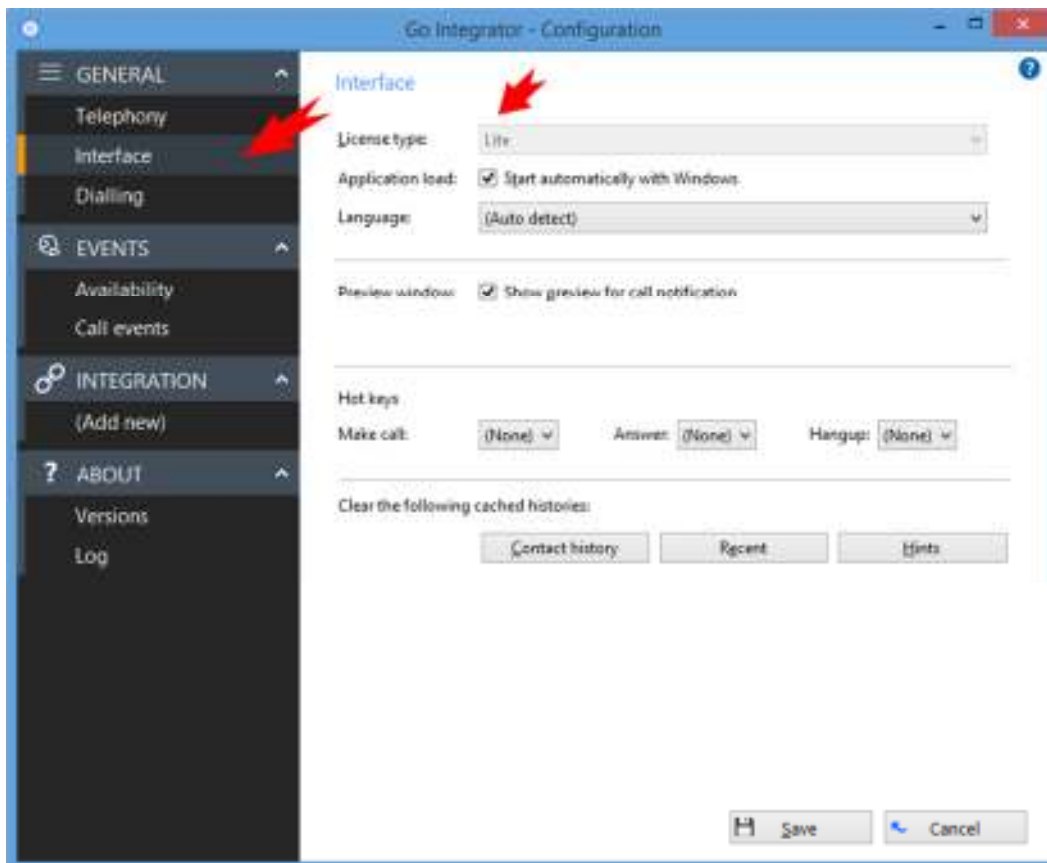


Now click on the configuration option

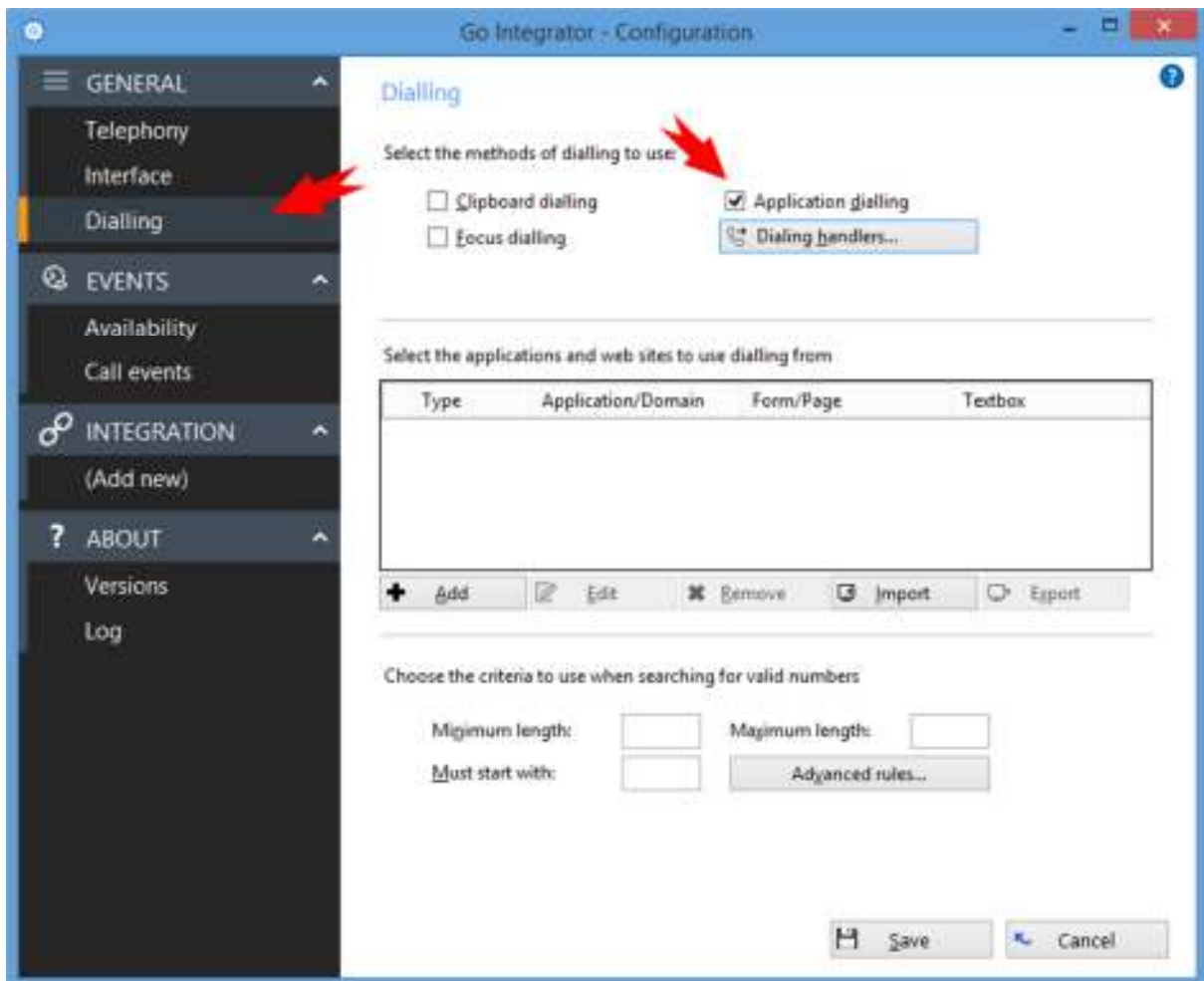


Under Telephony, enter your username and password found in your My Account Area.

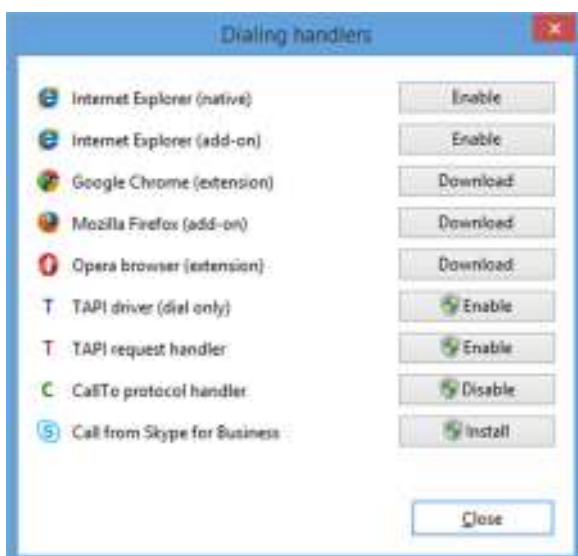
In the Interface section, the License type should be set to “Lite” (By default it is set to “Pro”). If your license type is set incorrectly, it may be fixed and you will need to reinstall the Go Integrator.



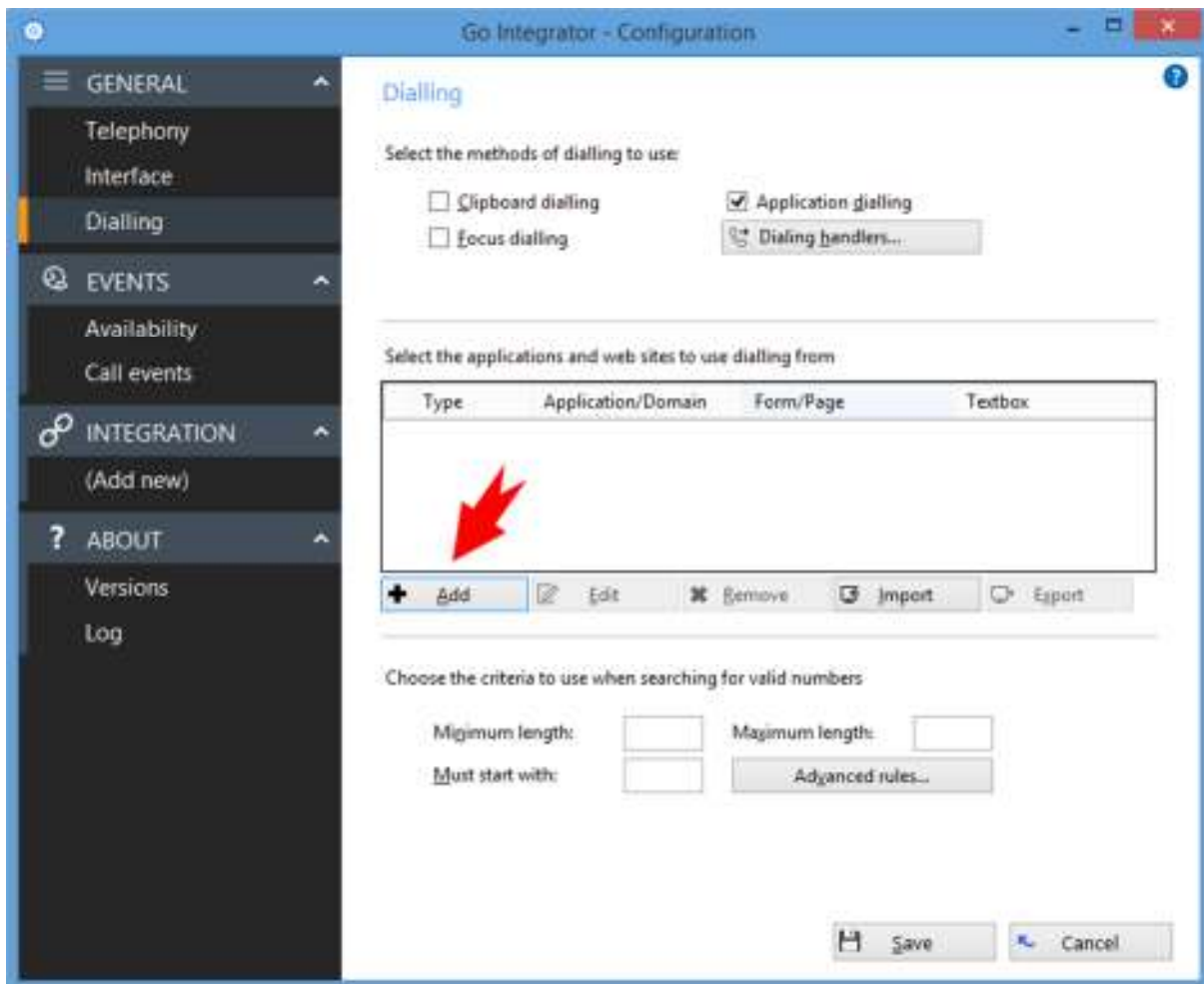
Under Dialling is where you configure how Go Integrator Lite interacts with the applications on your PC. We recommend Application Dialling. Check the box and then click the button underneath to configure Dialling handlers...



Several Dialling handlers are available to download. You will probably want to download the handlers for your browser. These are come in the form of a browser add-on/plugin which will convert phone numbers you see on a webpage into clickable buttons that will dial your phone for you.



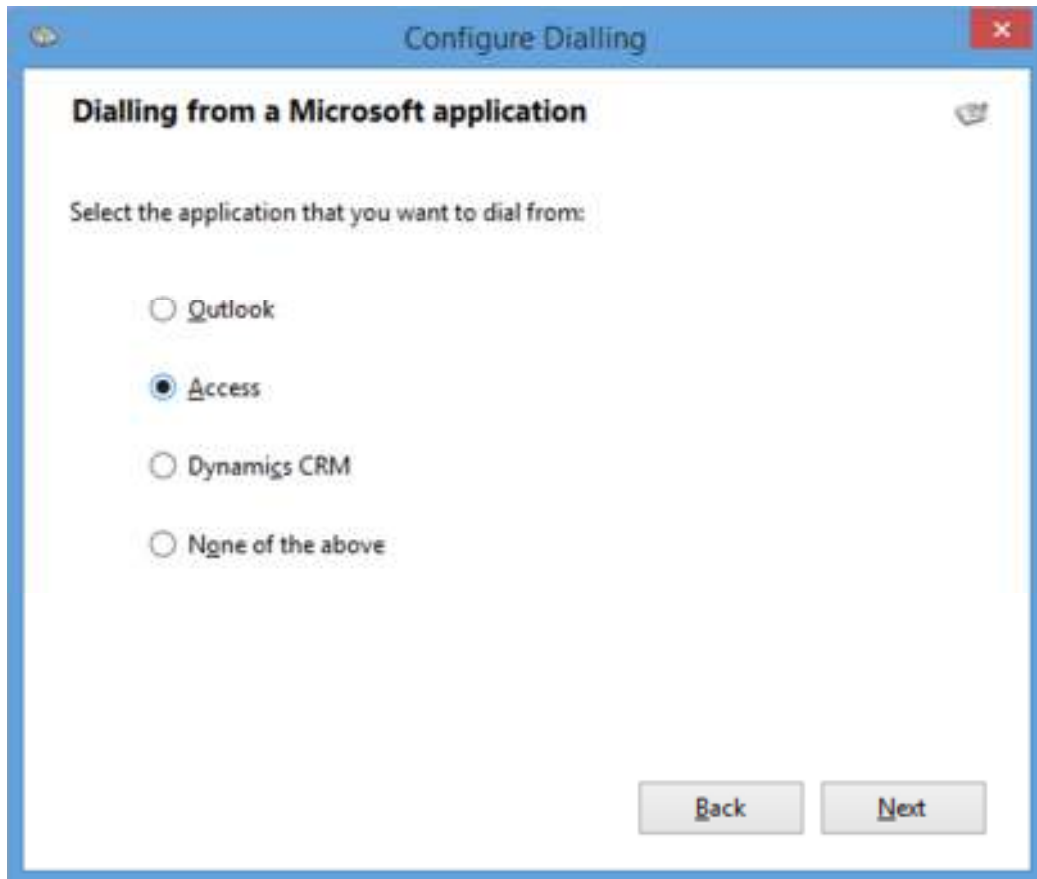
You can also add handlers for Outlook and MS Access. Click the Add button:



Select "I want to dial from a Microsoft application"



Then select the application of your choice



The image shows a Windows-style dialog box titled "Configure Dialling". Inside the dialog, there is a section titled "Dialling from a Microsoft application". Below this title, the text reads "Select the application that you want to dial from:". There are four radio button options listed: "Outlook", "Access", "Dynamics CRM", and "None of the above". The "Access" option is selected, indicated by a filled black circle. At the bottom right of the dialog, there are two buttons: "Back" and "Next".

Configure Dialling

Dialling from a Microsoft application

Select the application that you want to dial from:

- Outlook
- Access
- Dynamics CRM
- None of the above

Back Next

Turn on the plug in within your browser extensions and you will now be able to click to dial.

